


# Announcing

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iSDM.4 Solution Pack 2 &  
iSDM Mobility Module V1 for  
iPhone and Android

- ▶ **New Data Interface Application options (API)**
  - ▶ **Reporting Enhancements**
  - ▶ **General Productivity Enhancements**
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- A decorative graphic in the bottom right corner consisting of overlapping geometric shapes in shades of blue, green, and white.

## Table of Contents

Introduction	3
iSDM Mobility Module V1 for iPhone and Android	4
New Data Interface Application options (API)	5
PRODUCT DATA	5
CUSTOMER	5
SUPPLIER	5
CONSTANTS	5
Reporting Enhancements	5
Option to export five selected reports in the Excel XLSX file format	5
Graphical User Interface Enhancements	6
Attachments Available with Products & Customers	6
General Productivity Enhancements	7
Streamlined SDM User Creation	7
New Work Syntax Spool (WRKSPLD) Command	7
Email Address format validation	7
Display Constant Changes	7
End of Day / End of Month	8
Automated Execution of Custom Commands	8
Reorganize History Files	8
Sales Order Processing	8
Work with Orders & Work With Orders - Enhanced	8
Extended Number of Payment Methods	8
Prevent New Customer Orders from Being Created Process Enhancement	8
User Group Control of Selling Products with \$0.00 Base Price	8
Multiple Order Invoicing: Scan Orders	8
Enhancement to Email Invoice Option	8
Purchase Order Processing	9
Reship/Direct Purchase Order Exception Reports	9
Temporary Replenishment Order Maintenance	9
Product	9
Inventory Transformation	9
Product Master Change Log Report	9
Accounts Receivable	10
A/R Restricted Access to Company by User Group	10
Aged Trial Balance Report Using Currency Exchange Calculation	10
Customer Master Change Log Report	10
General/Ledger	10
G/L Interface – Inventory Constant (1.1.30)	10
Enhanced G/L Detail Transactions Inquiry	10

# Introduction

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As promised with the release of **iSDM.4**, the SDM team has been executing an enhanced development strategy. Once customers have upgraded to **iSDM.4**, they can take advantage of a continuous stream of enhancements to that platform over the coming years. The first such “Solution Pack”, **iSDM.4 Solution Pack 1**, was made available in 2018. The second solution Pack, **iSDM.4 Solution Pack 2**, is now available to be integrated to your Syntax iSDM.4 applications.

The SDM team has also been hard at work on Mobility Solutions and we are proud to announce the **iSDM Mobility Module V1 for iPhone and Android** along with a Statement of Direction for future enhancements.

While Solution Pack 2 provides a variety of functional and technical enhancements across the application, the primary focus of this release has been on productivity and security improvements.

We also welcome and encourage suggestions from the SDM customer community for enhancements you would like to see in future iSDM Solution Packs. Be sure to provide as detailed descriptions as possible to make sure we understand your requests.

Please feel free to reach out to us if you have any questions about the content of Solution Pack 2 or the implementation process.

If you have not yet upgraded to **iSDM.4**, please see the following reference material in addition to this document:

<https://www.syntax.com/resource/isdm-4-built-to-make-business-better/>

You can also view the recorded announcement webinar at:

<https://www.syntax.com/resource/isdm-4-webinar/>

If you have not taken advantage of **iSDM.4 Solution Pack 1** yet, an overview of the content is available here:

<https://www.syntax.com/wp-content/uploads/2019/11/iSDM4-Solution-Pack-1-English.pdf>

## iSDM Mobility Module V1 for iPhone and Android

Syntax is pleased to announce new applications for iPhone and Android devices. Compatible with the iSDM.4 software versions, the first release offers functionality found in the Customer Service Inquiries for Stock, including such features as:

- ▶ **Product Quantities**
- ▶ **Product Price**
- ▶ **Due In/Due Out**
- ▶ **Costs**

The applications are designed to be robust and secure, taking advantage of networking protocols and the end user access controls in iSDM. Search capabilities also include **Bar Code Scanning** for product lookup.

This first release also includes a **Purchase Order Approval by Email** capability, working in conjunction with the P/O Approval feature in the iSDM Purchasing Module. You must be licensed to Purchasing for this feature to function.

This new module, available by subscription, has been priced to be affordable so that it can be deployed to all employees who can benefit from access to the information it provides.

### Statement of Direction:

Syntax intends to add additional Customer Service Inquiry features, such as Accounts Receivable, Customer Purchase History, Outstanding Orders and Customer Orders to future versions at no additional cost to active subscribers of the iSDM Mobility Module. As with the first release, only users that you authorize will be allowed into each inquiry.

The image displays three screenshots of the SYNTAX mobile application interface, each showing a different screen for a product: 'ADAPTOR' at 'ACME LOCATION'.

**Quantities Screen:** Shows stock levels for 'ADAPTOR' at 'ACME LOCATION'. The UOM is 'EACH CASE 6 STATUS'. The data is as follows:

ON-HAND:	26
ALLOCATED:	10
BACK ORDER:	57
AVAILABLE:	-41
BOOKED:	0
ON ORDER:	405
NET AVAILABLE:	364
INTER-DEPOT:	-6

**Pricing Screen:** Shows pricing information for 'ADAPTOR' at 'ACME LOCATION'. The UOM is 'EA CASE 6 FACTOR 1.00000'. The data is as follows:

QTIIES	PRICE
RG-Regular	20.9900
1	12.00 18.8900
2	
3	
4	

**Due Out Screen:** Shows due out information for 'ADAPTOR' at 'ACME LOCATION'. The data is as follows:

ON-HAND:	26
ALLOCATED:	10
BACK ORDER:	57
AVAILABLE:	-41
BOOKED:	0
ON ORDER:	405
NET AVAILABLE:	364

Below the Due Out summary is a table of orders:

TR	Orders	T	Req Dt	Ord	Alc
C/O	5353783-01H A	020720	1	0	
C/O	5353783-01H A	020720	2	0	
C/O	5353784-01P A		1	0	
C/O	5353785-01P A		1	0	
C/O	5353785-01P A		2	0	
C/O	5353786-01P A		1	0	
C/O	5353787-01P A		1	1	

## New Data Interface Application options (API)

New Upload / Download options have been added to the Data Interface Application in the following areas:

### Product Data

- ▶ Product Notes File
- ▶ Product Title/ Description
- ▶ Customer Product Number
- ▶ Sales Price Agreement
- ▶ Purchase Price agreements

### Customer

- ▶ Customer Name & Address
- ▶ Customer General
- ▶ Customer Credit
- ▶ Customer Company
- ▶ Customer Division

### Supplier

- ▶ Supplier Name & Address
- ▶ Supplier General
- ▶ Supplier Credit
- ▶ Supplier Company
- ▶ Supplier Division

### Constants

- ▶ G/L Interface – Inventory
- ▶ G/L Interface – Purchasing
- ▶ Customer Class Forms Control
- ▶ Customer Forms Control

## Reporting Enhancements

### Option to export five selected reports in the Excel XLSX file format

- ▶ Stock Status
- ▶ A/R Aged Trial Balance
- ▶ Physical Count Comparison to Perpetual Inventory
- ▶ Outstanding Sales Orders by Customer
- ▶ Outstanding Purchase Orders

# Graphical User Interface Enhancements

## Attachments Available with Products & Customers

A new feature allows the attachment of (create/manage) external Documents, such as pictures, documentation, notes, etc., to specific products or customers in their respective Maintenance applications.

*Note: You can access the documents only with the iSDM Graphical User Interface.*

**SYNTAX** **PRODUCT MAINTENANCE** **COMBMK-35-H0535**

**PRODUCT DATA**

PRODUCT TYPE (F/S/C/M)  **FINISHED GOOD**

PRODUCT GROUP  **GROUP 01** PRICE CLASS  **CLASS 01**

PRODUCT SUBGROUP  **SUBGROUP 0102** PRICE SUBCLASS  **SUBCLASS 0101**

FRENCH DESCRIPTION

ENGLISH DESCRIPTION

KEYWORD

MENS CLASS  SEASONAL PRODUCT  RTI  PAR CODE  SEQ NUMBER

Links to saved documents

**SYNTAX**

HTML File

Upload /ARCHIVEW4/ATTACHMENT/PRODUCT/COMBMK\_35\_H0535/

Files to upload:  No file chosen

[Adaptor Kit Description.docx](#)

[Adaptor Kit image.jpg](#)

**SYNTAX** CUST NO 1261 **CUSTOMER MAINTENANCE** SYNTAX MONTREAL

**NAME & ADDRESS**

Customer Type  **SOLD TO**

Customer Name

Address 1

Address 2

Address 3

Postal Code  or Zip Code  -

County/City  Province/State  **QC** QUEBEC

Country  **CA** CANADA

Name / City

Keyword 1-

2-

SYNTAX MONTREAL

## General Productivity Enhancements

### Streamlined SDM User Creation

After defining the SDM User Group, a new consolidated tool will allow the creation of the following AS400 information:

- ▶ Create User Identification constant (SDM option 1.7.2)
- ▶ Create the Application Manager information (SDM)
- ▶ Create User Profile (iSeries)
- ▶ Create the Directory Entry (iSeries)

A new menu will also layout the options involved for the creation of a new user.

```

27 AUG 20          Work with Syntax Users          7:15:32
The Work with Syntax Users will provide an simple way to Add, Modifyand Delete Syntax Users

The following will be done when adding a new user (F6=Add)
If necessary, the User Code and User Group must be created prior to setting up the new user
The User Identification constant will be created. (Option 1.7.2)
The Application Manager entries will be added.
The User can optionally be set up in the Financial application providing the user has rights to the Z031 task.
Providing the user is authorized to creating AS/400 profiles, the next 2 entries will also be created
AS/400 User Profile, and Directory Entry which is required for emailing.

Removing a user (Option 4)
Delete the User Identification and the Application Manager Entries
De-activate the User in the Financial Application

Deleting a user will (Option 9)
Delete the User Identification, Application Manager entries and AS/400 profile
De-activate the User in the Financial Application

Allow/Disallow Work with Syntax Users (Option 1)
If not allowed to use Work with Syntax users, will allow
If allowed to use Work with Syntax users, will Disallow

In order for a User to be authorized to Creating/Deleting AS/400 profiles,
they must have *SECADM special authorities defined on their AS/400 profile
F3=Exit

```

```

18 AUG 20          Work with Syntax Users          7:21:18
USER              
Type Options, press Enter
2=Change 4=Remove 9=Delete 1=Allow/Disallow Work with Syntax Users

SDM      L Grp Cd  Appl Manager   Fin AS400 Sts  Last  Work  User
          Appl Menu                                     Signon  User  Name
-----
 E0755  E 002 CG  E14  MASTRE   *YES *NO          *YES
 E0804  E 001 AD  E14  MASTRE   *YES *YES *ENAB 200818 *YES Sylvain Chevrier
 RENTAL  E 001 AD                                     *NO  *NO          *NO

```

### New Work Syntax Spool (WRKSPLD) Command

The new “Work Syntax Spool” tool will display how a report was distributed within SDM. Options will support display, copy a report to print or send it through email, observing the security rules already defined for the user requesting the operation.

### Email Address format validation

The email address format will be validated on all options that allow a report to be sent to a specific email address. (ex. Invoice Reprint, Purchase Order Reprint, Physical Inventory report ...)

### Display Constant Changes

A new menu is added to provide the data from all constant changes (logs) in a more human readable format.

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## End of Day / End of Month

### Automated Execution of Custom Commands

The iSDM “End of Day” and “End of Month” procedures will now be able to execute customer in house developed custom processes (i.e. Queries, SQL, Call AS400 programs...). A new constant will let you define the processes to execute and when to execute them (i.e. beginning or end of procedure).

### Reorganize History Files

A new parameter has been added to the selection of the month end operations to include the reorganization of history files.

## Sales Order Processing

### Work with Orders & Work With Orders - Enhanced

A new feature has been added to show who is working on the order you are trying to get access to, and for how long.

### Extended Number of Payment Methods

The number of Cash Sale payment methods have been increased from 8 to 99 in the cash sales window to accommodate the numerous payment types which have and continue to emerge. The sequence in which they should be displayed will also be controlled through the Payment Method Constant.

### Prevent New Customer Orders from Being Created Process Enhancement

The “Accept Orders” parameter found on the “Customer Maintenance” program has a new value that will prevent new orders to be entered while allowing existing ones to be shipped.

### User Group Control of Selling Products with \$0.00 Base Price

The ability to sell a product for \$0.00 will now be controlled by user group.

### Multiple Order Invoicing: Scan Orders

A new toggle key will allow users to switch from the Full Entry screen (Order Number, B/L number, Freight Amt and Ship Via) to the new Scan Mode Entry screen prompting for multiple Order numbers only.

### Enhancement to Email Invoice Option

When emailing invoices with ‘Invoice Reprint’ or through Customer Service Inquiry, The address had to be re-entered for each document. Now the email address will be kept until the user exits the option to avoid repetitive address input, unless the user decides to change it.



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## Purchase Order Processing

### Reship/Direct Purchase Order Exception Reports

The “Received Not Invoiced to Customers” report (7.22.11) will now include the “Select Previously Listed Discrepancies” option to report on Purchase Order Discrepancies, which have already appeared on the discrepancies report.

### Temporary Replenishment Order Maintenance

A new toggle key (F11) was added to view additional information.

- ▶ Supplier Number and Name/City
- ▶ Customer Number and Customer Order Number for direct ship customer order.

## Product

### Inventory Transformation

Increase the number of transformation lines from 10 to 50 per transaction.

### Product Master Change Log Report

The new Product Master Change Log Audit report will allow the user to request a report based on the following options:

- ▶ Company
- ▶ Division
- ▶ Product Number From/To range
- ▶ Change Date From/To range
- ▶ Change Log Code
  - ▶ ‘N’ – Creation
  - ▶ ‘C’ – Change
  - ▶ ‘D’ – Deletion
  - ▶ ‘ ’ – Leave blank to select All
- ▶ Export to Excel

## Accounts Receivable

### A/R Restricted Access to Company by User Group

All A/R programs will now check if the operator's user group is permitted access to the selected company.

### Aged Trial Balance Report Using Currency Exchange Calculation

A currency option will be available, providing the choice of how the currency rate should be handled on the report:

- ▶ Use today's exchange rate from the constant ARCR "A/R CURRENCY CONTROL"
- ▶ Use the Open Item transaction exchange rate

### Customer Master Change Log Report

The new Customer Master Change Log Audit report will allow the user to request a report based on the following options:

- ▶ Company
- ▶ Division
- ▶ Customer Number From/To range
- ▶ Change Date From/To range
- ▶ Change Log Code
  - ▶ 'N' – Select only New customers created
  - ▶ 'C' – Select only customers that were changed
  - ▶ 'D' – Select only customers that were deleted
  - ▶ ' ' – Leave blank to select All
- ▶ Export to Excel

## General/Ledger

### G/L Interface – Inventory Constant (1.1.30)

The system will now support a blank location code in this constant. It means that there will be no need to replicate the G/L – Inventory information for every location. By setting the location field to blank, the system will consider the same information to every location. You only define once the "G/L Acct No (ACTUAL COST)", the "Itemize Journalize (I/J)" and the "G/L Acct No (STD COST)" for all locations.

### Enhanced G/L Detail Transactions Inquiry

Journalized amounts posted to the general ledger may contain a large number of transactions. A new toggle key now brings two different views to facilitate analysis of these transactions:

- ▶ Display the transaction Location and Sequence number
- ▶ Display the Company and Division information

# About Syntax



## Leading the Industry

Since 1972, Syntax has been providing comprehensive technology solutions to businesses of all sizes with thousands of customers trusting Syntax with their IT services and ERP needs. Today, Syntax is a leading Managed Cloud Provider for Mission Critical Enterprise Applications. Syntax has undisputed strength to implement and manage ERP deployments (Oracle, SAP) in a secure, resilient, private, public or hybrid cloud.

With strong technical and functional consulting services, and world class monitoring & automation, Syntax serves corporations across a diverse range of industries and markets. Syntax has offices worldwide, and partners with Oracle, SAP, AWS, Microsoft, IBM, HPE, and other global technology leaders.

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