

# SYSPRO SRS AND CRYSTAL REPORTS DEVELOPMENT

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## Matt Cecil

I enjoy increasing the Customer's benefit and experience with their ERP System by improving business process thru-put, reporting meaningful metrics, and increasing efficiency through training. When the Customer has the information they need and delivered in a timely manner, whether they are the Customer

Service Rep or the CEO, the business can prosper.

My background has always been in manufacturing, as a skilled laborer, then IT administrator in the manufacturing environment, to SYSPRO administration. With the Customer's experience as my main focus, my strengths are user support, simplifying tasks for greater thru-put, custom report writing, and training. Experienced in LAN administration and Syspro ERP System administration since 2000. Primary focus in manufacturing, with experience in machinery, food, and electronics.

I regularly supply management and the end user with reports to show productivity and other business metrics.

## SYSPRO ERP System

- ▶ Registered SYSPRO Service Provider
- ▶ 15 years of SYSPRO ERP experience
- ▶ Supporting over 90 SYSPRO customers

## Custom Report and Document Development

- ▶ Development of custom Reports in Crystal Reports/Syspro SRS.
- ▶ Development of SQL Views to aid in reporting.
- ▶ Querying SYSPRO data using MS Access for reporting.
- ▶ Creation of standard and custom document templates. Combining multiple Word templates into one SRS document template.
- ▶ Developed over 250 custom SRS/Crystal reports.
- ▶ Developed over 100 SRS document templates.
- ▶ Develop reporting schedules to email or export reports through SRS report scheduler.
- ▶ SYSPRO SRS/Crystal Reports training.
- ▶ Optimizing SRS reports for export into Excel.

## Report and Document Types:

### Sales

- ▶ Annual Sales Reports in Dollars and/or Units
- ▶ Master Sales report (with budgets and graph)
- ▶ Sales by Month (with graph)
- ▶ Profitability reports
- ▶ YTD Billing Summary
- ▶ Inventory Sales Analysis

### Sales Orders

- ▶ Back Order / Back Log reports
- ▶ Delivery Performance report
- ▶ Order Acknowledgements
- ▶ Sales Order Projection report
- ▶ Commercial Invoices
- ▶ Daily and Weekly Shipping reports
- ▶ Bill of Ladings
- ▶ Design Request Forms
- ▶ Pro Forma documents

### Inventory

- ▶ Inventory Catalogue (includes product images)
- ▶ Inventory Inspection documents
- ▶ Inventory Allocations reports
- ▶ Available Inventory report
- ▶ Negative Inventory report
- ▶ Inventory Cleanup reports
- ▶ Slow Moving / Obsolete Inventory reports

### Production

- ▶ WIP Jobs report (w/Drilldown into Operations detail)
- ▶ Bill of Materials Analysis (Parent item w/out Structure and/or Cost. Components w/out Lead Time, Cost, Safety Stock, etc.)
- ▶ Work Orders w/attached Inspection Sheet
- ▶ Work Orders w/attached Design Sheet
- ▶ Production Shipped Exception report
- ▶ Job vs Bill of Material Cost report
- ▶ Work Order documents
- ▶ Labor Efficiency reports
- ▶ Work Order reports

### Purchasing

- ▶ Purchasing Lead Time Analysis
- ▶ Supplier Performance reports
- ▶ A/P Checks (CRR, RRC, RCR)

### Others

- ▶ Executive Overview report (combines data from AP, AR, Sales Backlog, and Delivery Performance)
- ▶ G/L Trial Balance to Excel (splits the comments field into individual columns)
- ▶ Labels: Customer Addresses, etc.; Production labels/tags
- ▶ Freight Expense Accrual report
- ▶ Freight Logs
- ▶ Positive Payment export

*Just to name a few...*

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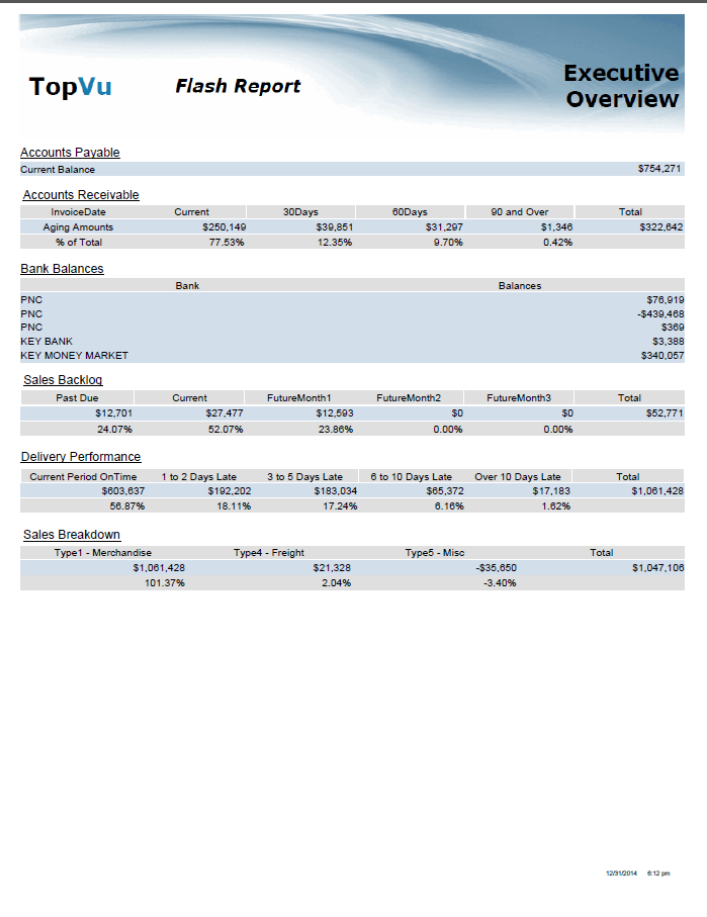
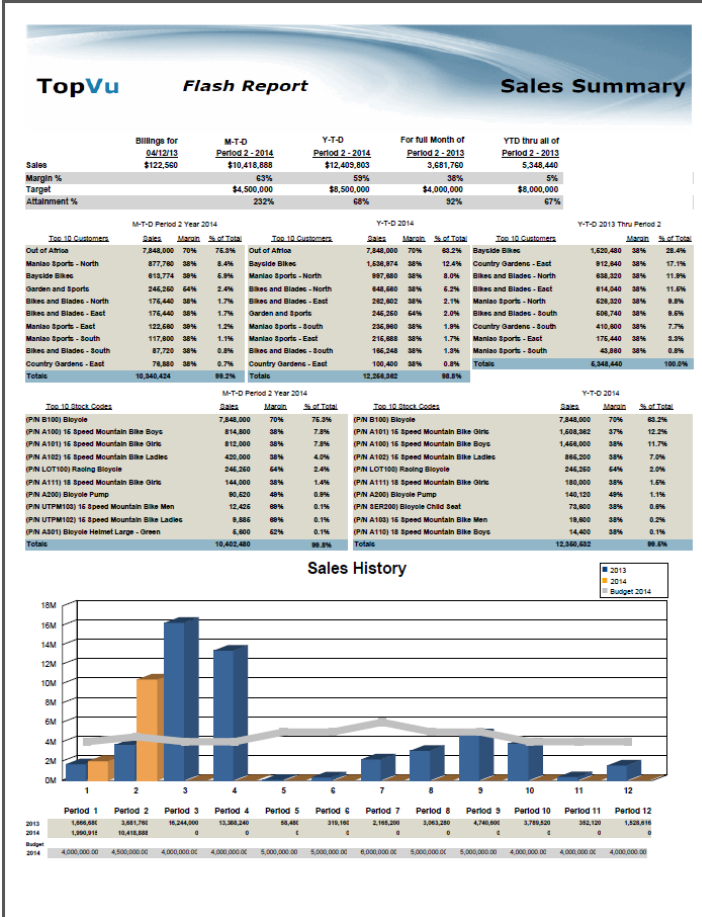
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## Report Examples

The Sales Summary report is an excellent way to view current and historic Sales data. Sales are shown by Customer and Stockcode. This report can be automatically emailed to Sales staff nightly.

The Executive Overview report can be populated with any or all business critical metrics. This report can be added to the main Syspro screen and refreshed every 5 seconds, or emailed on a schedule.



The G/L Trial Balance with Details report can parse out any needed data from the G/L Transaction Comments. This report is designed to be exported to Excel and Comments data becomes sortable/searchable columns. Descriptions and other data can be added, making this an extremely useful report.

**G/L Trial Balance with Details**

GLCode	Description	Type	Period	Year	Source	Journal	IniDate	Reference	Adjusted	Comments	Journal	Register	Bank	Bank Name	Supplier	Supplier Name	Customer	Customer Name	StockCode	StockCode	EntryValue	
00-1010	First United Bank	Asset	2	2012	AP	6	04/26/11	FB-000001			1	FB	First United Bank	0000001	Bicycles Unlimited	0000001	Bayside Bikes				-4,025,000.00	
00-1010	First United Bank	Asset	2	2012	AR	9	04/29/11	7589		Br-10 Area N Payment	1										519,200.00	
00-2000	Payables - H/O	Liabilities	1	2013	AP	2	03/25/12	D/Lines		Inv:IDS001-10	1				0000010	International Data Services					-536.15	
00-2000	Payables - H/O	Liabilities	2	2013	AP	10	04/25/12	FB-000044		Chq:000044 Inv:IDS001-10	2	FB	First United Bank	0000010	International Data Services							536.15
00-2010	GRN Suspense	Liabilities	1	2014	IN	6	03/26/13	000000219		Wh:SP Receipt	3							PC205	Green Paint for Fence		-1,000.00	
00-2010	GRN Suspense	Liabilities	1	2014	IN	6	03/26/13	000000219		Wh:SP Receipt	3							PC209	White Paint for Fence		-1,000.00	
00-2010	GRN Suspense	Liabilities	1	2014	IN	6	03/26/13	000000219		Wh:SP Receipt	3							PC206	Thinners		-170.00	
00-5600	Inv. Cost Adjustments - Spec	Expenses	5	2013	IN	45	07/01/12	121		Wh:SP Cost change	18							PC100	Comfort Frame Light - Blue		0.00	
00-5800	Purchase Price Variance	Expenses	1	2012	AP	1	03/29/11			Inv:AU9987	2				0000002	Accessories Unlimited					-1,335.02	
00-6280	Travel Expenses - H/O	Expenses	1	2014	AP	64	04/09/13	Travel ex		Inv:SA 5678	9				0000092	Sail Away Travel Agency					1,500.00	
01-1500	Warehouse Control - RM	Asset	11	2013	IN	88	01/28/13	Grp. 77													6,750.00	
01-1510	Work in Progress Control	Asset	11	2013	IN	88	01/26/13	00000140		Wh:FS Issue	52							B1213	Adhesive for Rubber		3,600.00	
01-1510	Work in Progress Control	Asset	12	2013	IN	99	02/27/13			Wh:FG Receipt	65							B100	Bicycle		-726,914.89	
01-2000	Payables - Manuf.	Liabilities	5	2013	AP	42	07/30/12			Inv:10098	12				0000016	Splash Paints					-2,170.00	
01-2010	GRN Suspense - Manuf.	Liabilities	11	2013	AP	84	01/27/13			Inv:10155	24				0000016	Splash Paints					120,000.00	
01-4510	Discount Taken - Manuf.	Revenue	9	2013	AP	70	11/25/12	FB-000075		Chq:000075 Inv:10091	9	FB	First United Bank	0000018	Steel Supplies						-91.20	
01-5500	Freight Costs - Manuf.	Expenses	2	2014	AP	43	04/08/13	Freight c		Inv:5904	6				0000009	Door to Door Freight Services					500.00	
01-5600	Inv. Cost Adjustments - Manuf.	Expenses	2	2014	IN	66	04/09/13			Wh:FG Cost change	75							LOT100	Racing Bicycle		-1,950.00	
10-1540	Inventory in Transit - North	Asset	2	2014	IN	44	04/08/13	N 0000001		Wh:N Transfer	56							A100	15 Speed Mountain Bike Boys		35,000.00	
10-4000	Merchandise Sales - North	Revenue	1	2012	SA	3	03/18/11	Invoice		Inv:100293 Br:10	1				0000001	Bayside Bikes					-12,400.00	
10-5000	Cost of Sales Merch. - North	Expenses	1	2012	SA	3	03/18/11	Invoice		Inv:100288 Br:10	1				0000001	Bayside Bikes			A200	Bicycle Pump		5,948.04