



Version 6.1

## Using SYSPRO with Microsoft Office

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Simplifying your Success

## Introducing SYSPRO

The most integrated,  
uncomplicated  
and effortless business  
software solution  
for small and medium  
enterprises

SYSPRO is an internationally-recognized, leading provider of enterprise business solutions. Formed in 1978, SYSPRO was one of the first software vendors to develop an Enterprise Resource Planning (ERP) solution. Today, SYSPRO is a global business solutions vendor, represented on six continents and by more than 1500 channel and support partners. Over 14,500 licensed companies across a broad spectrum of industries in more than 60 countries trust SYSPRO as the platform on which to manage their business processes.

Customer focus is a core component of SYSPRO's corporate culture and is one of the key reasons why SYSPRO maintains a strong leadership position in the enterprise application market. By focusing on people and building lasting relationships with customers and partners, SYSPRO consistently excels at guiding customers through all aspects of their implementation and ongoing usage. The aim is to deliver world-class software that gives customers the control, insight and agility they need for a competitive advantage in a global economy. As such, SYSPRO provides a unique combination of robust, scalable technologies that ensure minimal risk and a high return on investment.

SYSPRO is continually developing remarkable software that simplifies operational effectiveness and keeps customers in control of their businesses. Our vision is focused on meeting customer needs today and in the future.





## Introducing SYSPRO with Microsoft Office®

SYSPRO is a powerful and sophisticated business application that is used by many people to help run their companies. Combine this with Microsoft Office, the de facto standard for desktop product software, and you have a great way to manage and disseminate information across the enterprise.

In this document we explore various ways in which you can use a combination of Microsoft Office and SYSPRO to deliver information. This document focuses on integration methods that are built into SYSPRO and require no programming or development skills. More personalized integration can be achieved through the use of SYSPRO's development platforms such as e.net Solutions and VBScripting techniques.

There are two distinct ways in which you can integrate to Microsoft® products:

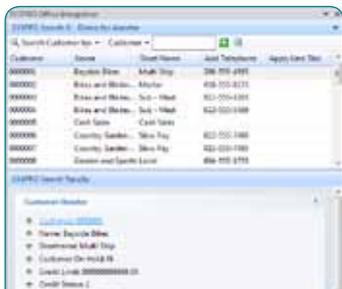
- If you are in a Microsoft Office product you can query information from SYSPRO
- If you are in SYSPRO you can share information with a Microsoft Office product

In either case, the information that is made available is protected by SYSPRO's own security rules, which means that you can protect sensitive data from being accessed.

## Querying SYSPRO information using Microsoft Word® and Excel®

SYSPRO enables business data to be available to you while you are working in Microsoft Office products such as Word and Excel. Using SYSPRO Office Integration (SOI) anyone in the enterprise, regardless of whether SYSPRO is installed on the client machine, can access information directly and securely from the SYSPRO database within a Microsoft Office product such as Word or Excel. Furthermore, once the information has been displayed it can be inserted directly into the current document either as simple text or as a table.

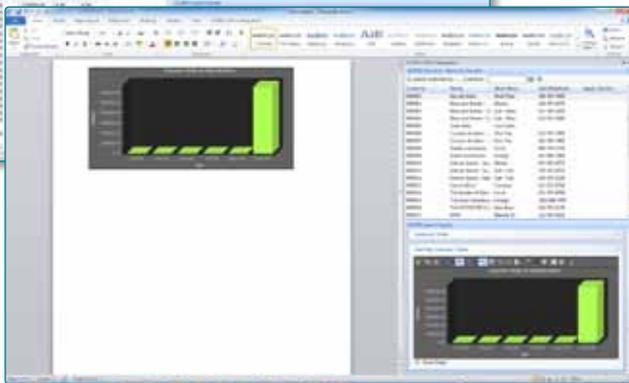
- SYSPRO Office Integration supports the following versions of Microsoft Office:
  - 2003
  - 2007
  - 2010
- The search function as well as the search results are fully customizable



SYSPRO Office Integration uses secure web services to communicate between Office and SYSPRO's database, which means that you can work with an Office product at home using an Internet connection and still have access to the SYSPRO data.



Because of the built-in security, use of secure web services and free licensing, SOI can be easily and effectively deployed at your customer and supplier sites. This means that your customers and suppliers can have access to YOUR data perhaps to view their outstanding sales orders or jobs, or stock levels.



As an example, you could write a letter to a customer requesting payment of overdue invoices, and show these invoices in your document, as indicated in the picture below.

# Sharing data with Microsoft Office Applications

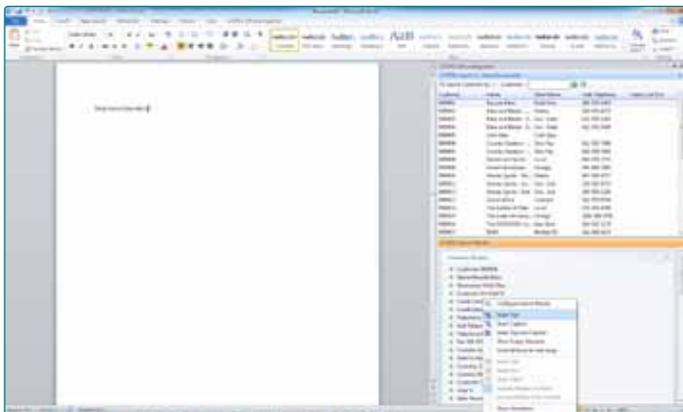
## Linking SYSPRO's multimedia objects to Office documents

SYSPRO includes the capability of linking multimedia objects to any key field (such as stock codes, suppliers, customers, and so on). A multimedia object can be a Word document, Excel spreadsheet or just about any object you like. You can access the linked objects or documents wherever you can query key fields.



## Integration to Microsoft Word

All stationery documents, including invoices, order documents and statements, can be printed in a variety of ways, including using Word as the print mechanism.



# Integration

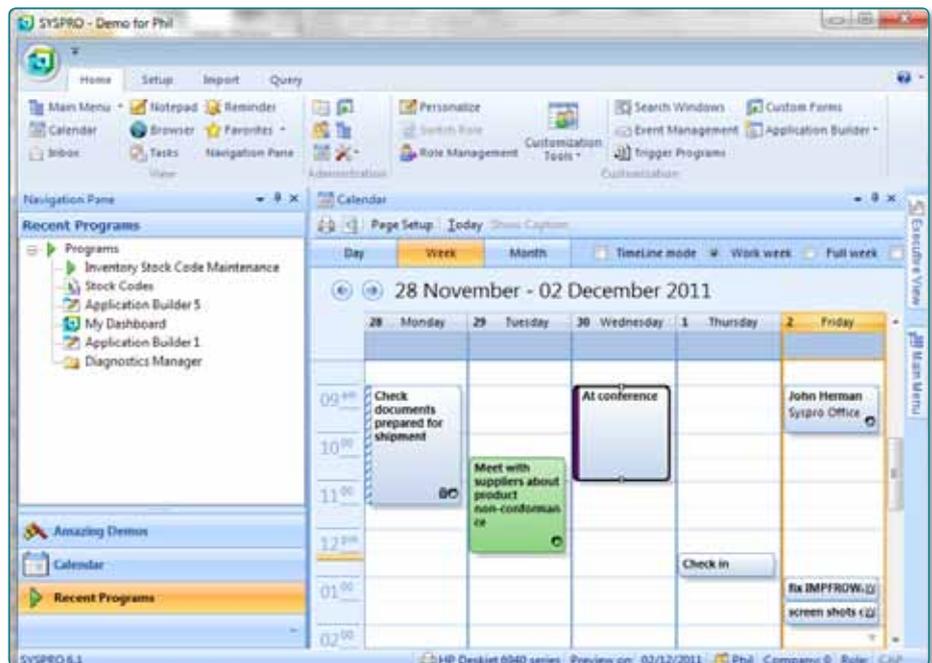
## Integration to Outlook's to-do list

SYSPRO incorporates a to-do list to remind you of tasks to complete. For example, at month-end you can define a series of tasks that must be completed sequentially. These tasks can be inserted as reminders into Outlook's to-do list.



## Using Outlook as a data provider to the SYSPRO Calendar

SYSPRO includes a built-in Calendar that has similar functionality to that found in Microsoft Outlook. You can add and modify appointments and set up reminders just as you can do in Outlook. Any changes made to SYSPRO's calendar are automatically reflected in Outlook and vice versa. This has the benefit of not having to switch between applications to see your appointments as all events are shown in SYSPRO.

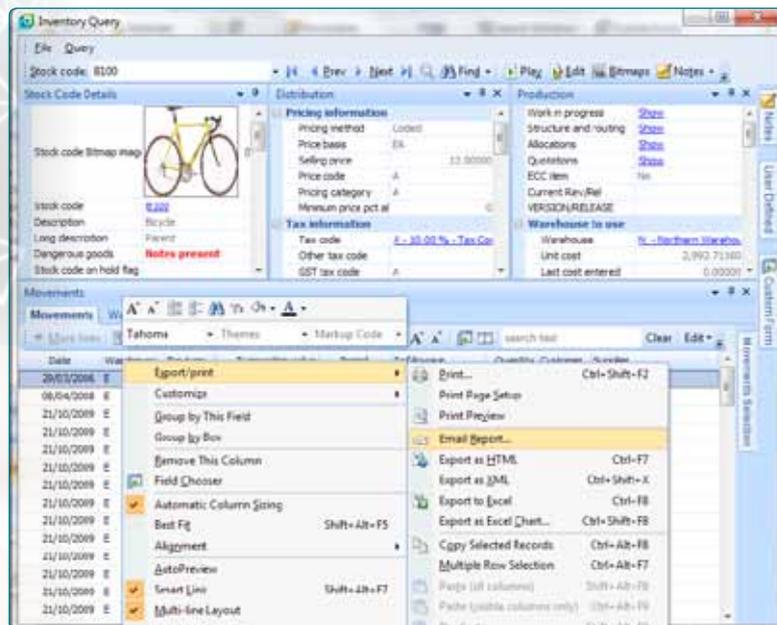


## Communicating organizations to the enterprise

### Using Outlook for Emailing from SYSPRO

SYSPRO uses emailing for communicating both within an organization and to the enterprise. Emails can either be generated automatically (for example, when a business alert occurs), or you can send reports and documents via email as required. Here are some ways in which SYSPRO uses emails for communicating:

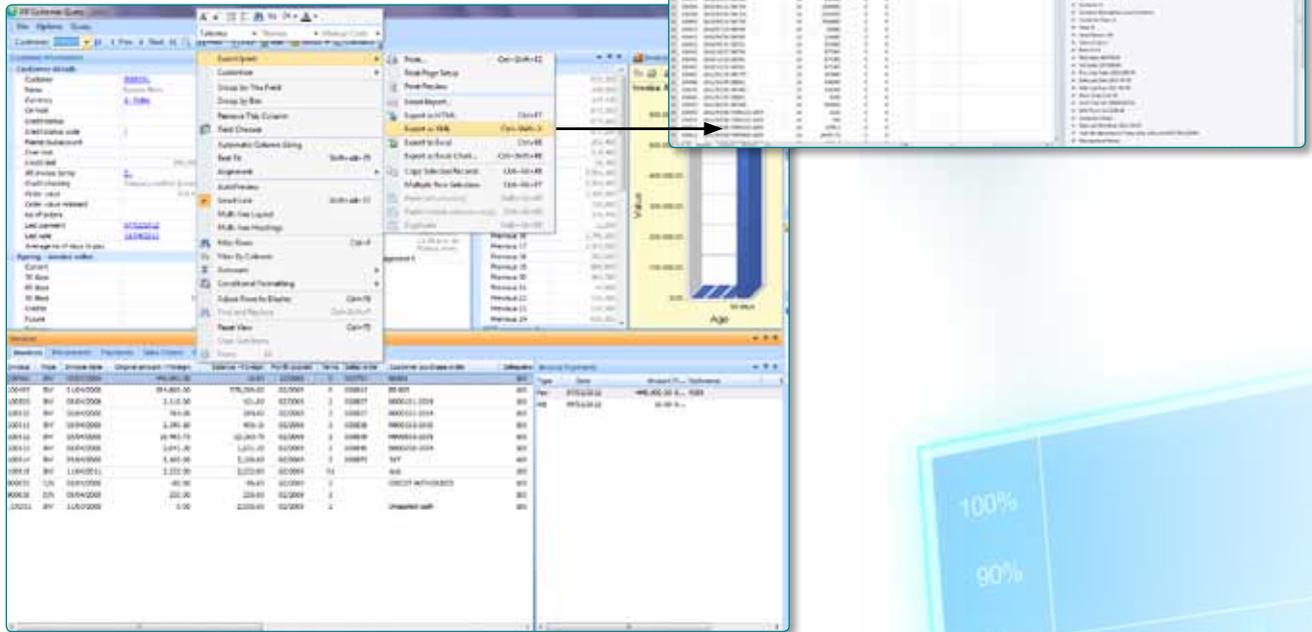
- **Automated events:** Emails can be sent automatically as predefined events occur within SYSPRO. For example, if a sales order is placed for a customer whose credit limit has just been exceeded then an email can be automatically sent to the relevant person for inspection.
- **Electronic Signatures:** Emails can be sent automatically as transactions are processed within SYSPRO. You might want to be notified, for example, each time a customer is released from hold.
- **Contact Management:** Incoming emails can be stored as activities against the relevant contact. Similarly, outgoing emails can be logged against contacts.
- **Email reports and documents:** You can email reports and documents from SYSPRO Reporting Services in a variety of formats, including HTML, PDF and Excel.
- **Email list view data:** You can email the data in a list view. Simply right click on any column header and select Email Report.



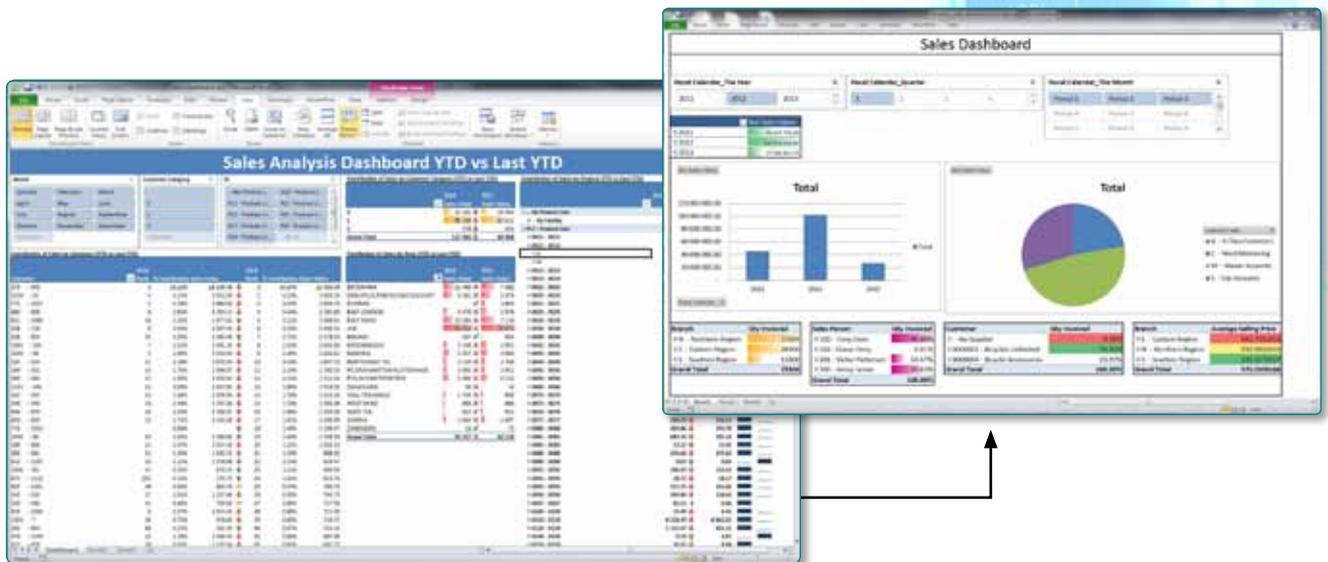
## Integration to Microsoft Excel

Data can be instantly shared with an Excel spreadsheet from any list view anywhere in SYSPRO.

In this example, the Customer Query has been used to see the outstanding invoices. You can export these invoices directly to Excel for further analysis.



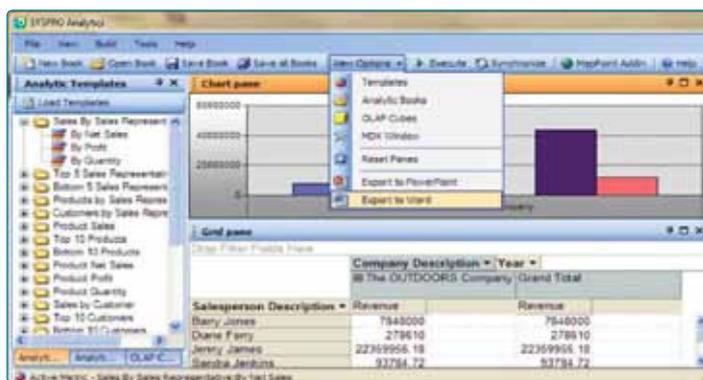
The data in any list view can also be exported directly into Excel as a variety of chart types. For example, you might like to see the customer invoice values graphed according to salesperson. Just click on the Export as Excel Chart menu option, select the appropriate chart type and click OK.



## Analyzing KPIs in Excel, PowerPoint and Word

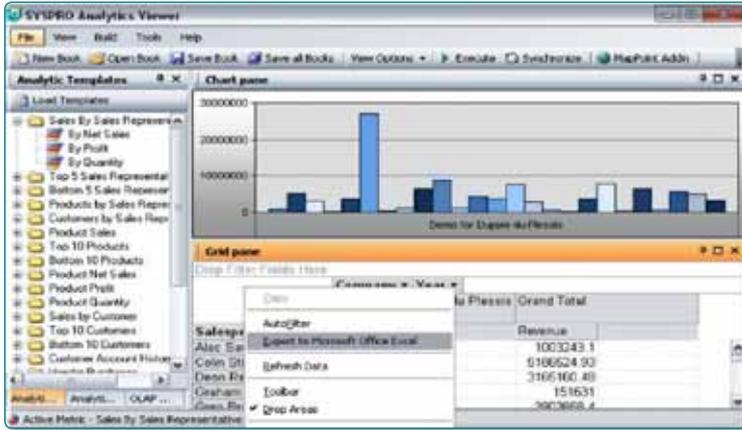
SYSPRO Analytics is a business intelligence tool that can help you analyze your company's key performance indicators. SYSPRO Analytics can export views directly to various Office products.

Click on Export menu option to show KPIs in PowerPoint or Word:



Business  
intelligence

Or click on Export to Excel option to create a pivot table in Excel (NB this is part of the Microsoft Office web components used by Analytics viewer).



The screenshot shows a Microsoft Excel spreadsheet with a pivot table. The pivot table is set to show 'Revenue' by 'Salesperson Name' and 'Year'. The data is summarized in the following table:

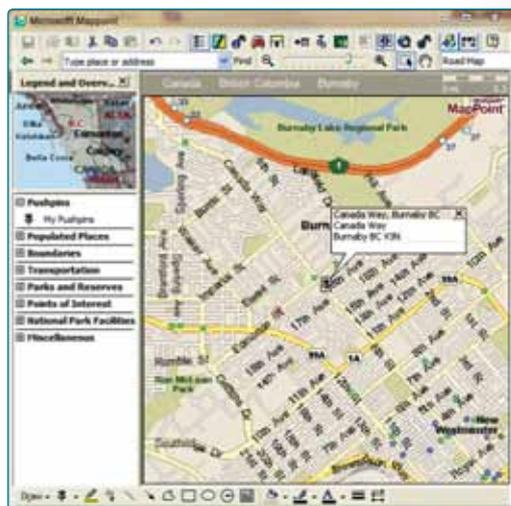
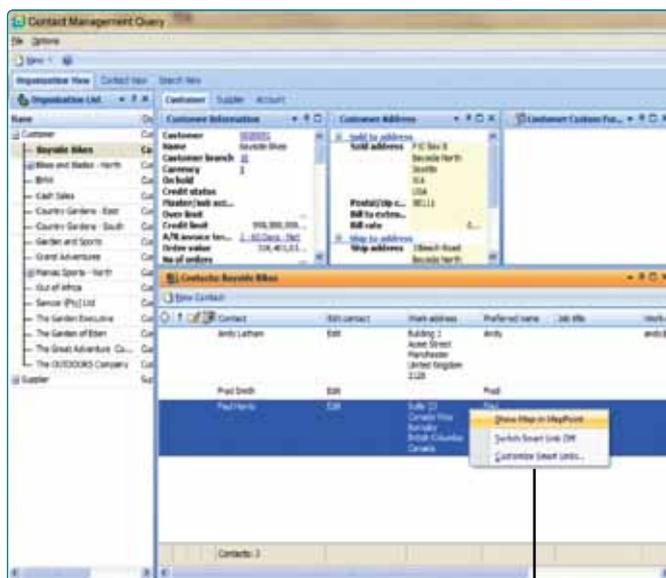
Salesperson Name	2005	2006	2007	Demand for Outdoors
Alec Saville	77506.39	926698.72		30666.1
Colin Steekollis		5155668.83		3739.06
Dean Riedelghuis	277351.49	2694099.93		
Graham Ingram	36673.1	111967.9		
Oreg Brand	191241.63	3717579.26		9037.62
Nesma	1671343.85	24961376.44		437384.71
IAN DAVIDSON		451169.36		14000.21
Jacque Luffe-Eaton	82233.12	1048300.91		12543.31
Jamie Pretorius	60391.01	6295402.00		146297.12
Jim Lithgow	366052.26	8426765.1		65147.85
John Damzell		1316009.68		
Kim Orth	343184.2	3663487.98		
Liesllyn van der Merwe	167146.15	3622302.6		16697.39
Mandy Bezuidenhout	606922.65	7039944.49		44575.15
Mandy Conkelver	167796.06	3730746.98		10914.67

# Analysis

## Integration to Microsoft MapPoint

While MapPoint is not part of the Office suite of products, it is worth noting that SYSPRO integrates to this product. Contact Management can find and show a map of an address using MapPoint.

Consider you are intending to visit a client, but are unsure of how to find the address. You can simply click on the Smart Link in a list view and select to Show Map.



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