Infor CloudSuite Industrial

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Detailed Functional Overview

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Introduction

Developed by experts in discrete manufacturing, Infor CloudSuite Industrial (SyteLine) has more than 30 years of experience built in. That means you can be confident you've got the tools you need to get the job done—and that you're getting it all from an experienced support team.

You get a solution that works for you, and lets you define your own business processes and deployment option. You can run a complete industry suite in the cloud or on-premise. So you can make the system your own instead of letting it dictate to you and quit trying to drive a square peg into a round hole.

Complexity and competition continue to increase in discrete manufacturing. Personalize your enterprise resource planning system, focus on your work, and be confident you've got the right software and support team for the job...all with Infor CloudSuite Industrial.

Built-in processes go to work for you immediately, you'll:

- Go to market faster
- Deliver products on time
- Do more with less.
- Reduce the impact of change.

Infor CloudSuite Industrial's comprehensive functionality supports your business and operational challenges. Regardless of your mode or mixed-mode method of manufacturing, Infor CloudSuite Industrial has the business processes configured for you:

- ETO - Engineer to order
- MTO/CTO - Make/configure to order
- MTS – Make to stock
- Repetitive
- Process
- Service

Infor CloudSuite Industrial provides flexible application screens, efficient data management and tactical processes, which adapt to your unique business requirements and ensure smooth, efficient process execution. Advanced process automation technology handles routine tasks and lets you continuously improve processes in response to changing business conditions. Built-in scalability lets you add users, products, production sites or warehouses and make other changes as business grows.

Infor CloudSuite Industrial is built and deployed on the Microsoft .NET technology platform for more flexibility, better application integration and improved interoperability compared to mixed-platform solutions - all at a lower total cost of ownership.

Collaborating with our Hook & Loop team which is one of the largest design firms in New York City, we have updated many of the key forms in the application with new layouts responsive design. What that means to your organization is that the forms will resize and adapt to the screen format. So, there is consistency as to the layout and display of information whether you are on a desktop, laptop, tablet or phone.

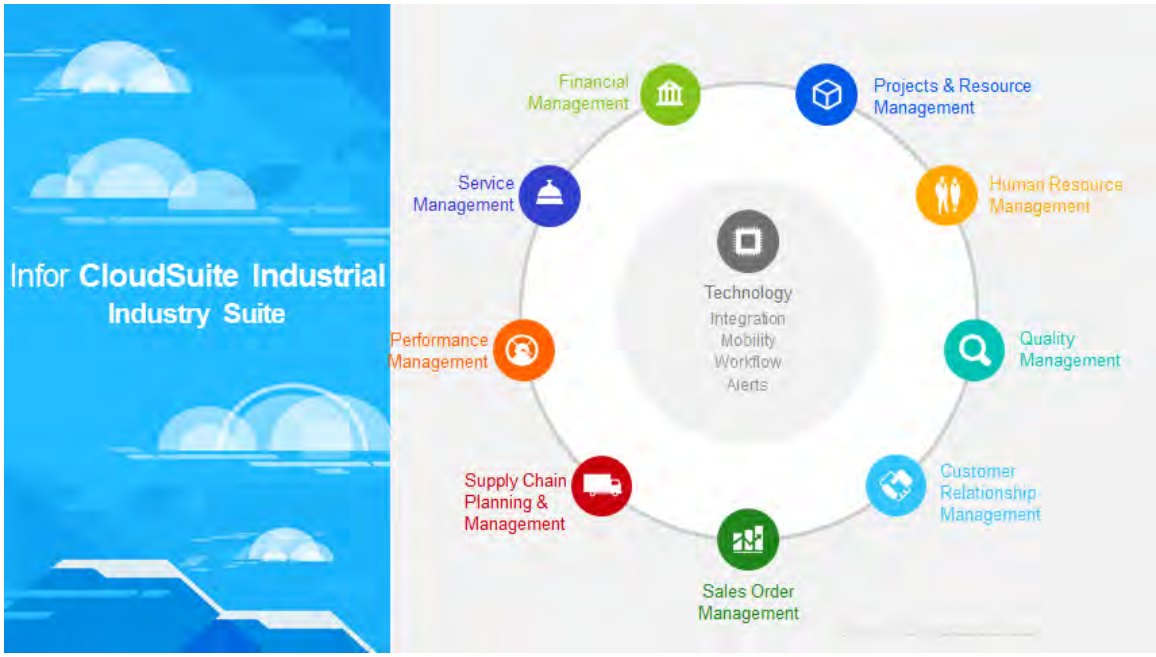
This Functional Overview provides a view into the core capabilities of the industry suite as well as the optional capabilities available to you both in the cloud or on-premises. This information is provided at a strategic level and is intended to help you in your selection of Infor products, as well as in strategic planning for your internal system development.

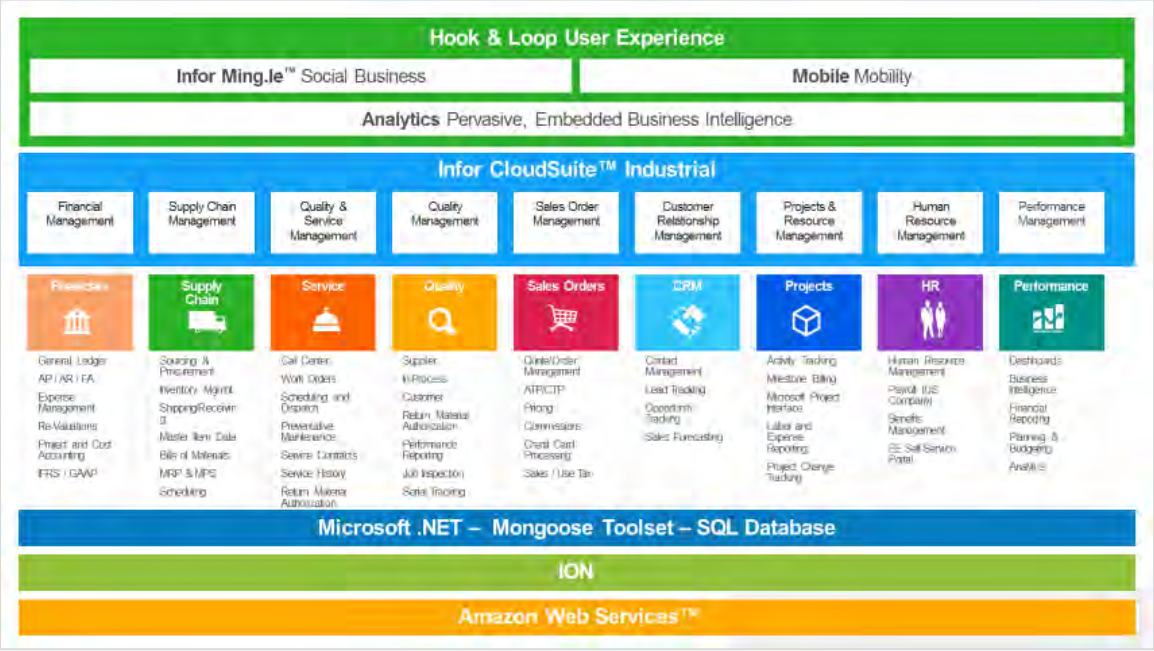
This document is not intended to serve as a complete listing of all the new capabilities, nor does it reflect the extent to which we may enhance the products. Rather, it represents an overview of the product as of the date of publication and is subject to revision or change without prior notice.

If you have questions or require more information about features and functions of Infor CloudSuite Industrial, please contact Infor or your account executive.

Infor CloudSuite Industrial

Core Capabilities & Components:





Infor CloudSuite Industrial (SyteLine)

Improve Productivity

What if instead of racing against the clock, you could deliver on time, every time? With fierce competition, you must be able to get to market quickly and do a better job matching up supply with demand. No matter how complex your supply chain, you must respond faster to change, reduce excess inventory, and cut costs. Even more importantly, your customers expect what you promised, when you promised it. You can deliver all this and more with an ERP solution that helps you improve productivity—both in the office and on the shop floor. Infor® CloudSuite Industrial (SyteLine®) is that ERP solution.

Make decisions faster

What if you could know the exact delivery date when an order is placed? What if you could order what you need at the time you need it? And what if you knew in advance how an unplanned order would affect your other customer orders, capacity, material requirements, and cost of manufacturing?

Meet Your Unique Needs

With Infor CloudSuite Industrial, you can do all that and more. You'll no longer have to deal with unreliable, outdated processes for monitoring customer demand, scheduling delivery dates, and tracking resources. You can see everything you need to see at the time it happens, so you can make better decisions, faster. No matter the size, scope, or scale of your company, Infor CloudSuite Industrial can be configured to meet your company's operational needs.

You'll be able to:

- **Make it your own**—Fine-tune your ERP system on the fly and create a tool that solves your day-to-day business challenges, quickly and efficiently.
- **Get back to work**—When an unexpected order parachutes onto your production floor, you can adjust your current schedule so you can deliver all of your orders on time, without interruption.
- **Be confident**—You'll know you have the tools you need to get the job done. And you'll know you're getting them from an experienced team that has what it takes, knows what to do, and knows manufacturing.

Operate more efficiently

Whether you are a small to mid-size manufacturer with mixed mode processes or an enterprise-size OEM with a complex MTO and ETO business model, Infor CloudSuite Industrial can help you operate more efficiently.

Experience industry-specific functionality

Advanced planning and scheduling (APS)—Find out if you have the materials, people, machines, and tools you need to manufacture an item. And continually monitor demand as it occurs. Before you commit to an unplanned order, see the ripple effect it will have on your schedule and your shop floor, so you can reset expectations with existing customers. If a machine goes down, you can update production schedules quickly. In the process, you'll boost productivity, improve order accuracy, increase on-time delivery-and keep your customers happy.
Complex product configuration—Make sure your production department can handle configured orders and that you can provide accurate configured orders to customers.

Materials and inventory management—Would you like to reduce your inventory while avoiding shortages? With Infor CloudSuite Industrial, you can buy what you need, when you need it. You can also do away with side systems, which are difficult and costly to maintain. Plus you can shorten order entry time, eliminate duplicate orders, cut down on costly data entry errors, and make sure data is consistent-leaving you with more time to grow your business.

Customer management—Manage all aspects of your relationships with customers and prospects, from estimating to invoicing.

Application event system—Customize your system without modifying your source code, and improve your workflow in the process. When you upgrade your system, you'll automatically upgrade your customizations at the same time.

Microsoft®-based system—With familiar tools and common navigation, you'll save time on implementation, customization, and training. Plus your IT staff will be able to focus on strategic projects rather than tactical issues. Not only that, you'll be able to draw from a huge talent pool that knows how to work with a Microsoft-based system.

Educational tools—Get your Infor CloudSuite Industrial users up to speed quickly with Infor Implementation Accelerator and Infor Campus Plus, an Internet-based learning solution. You'll speed up implementation and reduce the burden on your IT staff.

Role-based information—Get all the information you need to do your job in a single screen. For example, if you're a production planner, you'll get data that helps you manage planned vs. actual production, unplanned scrap by reason, resource utilization, and on-time completion.

Better user experiences—Personalize your user interface (UI) to fit your particular industry, team, or an individual user. Add, remove, and edit fields, labels, and complete screens without having to call on IT for help. Get the information you need, when you need it, with easy-to-use grid forms. Plus, reduce or eliminate costly modifications to personalized features when you upgrade your system.

Easy integration of new companies—If you bought a new business today, could you have it up and running quickly? With Infor CloudSuite industrial, you can add a new company to your organizational structure, replicate your data, and be good to go−while you continue business as usual. Plus, when you sell off an old business, you can easily separate data. And you can go to one place for financial information, since your financial reporting solution is integrated.

Deploy your solution safely and securely in the cloud

You can deploy Infor CloudSuite Industrial on-premise or in the cloud. To deploy in the cloud, all you need is an Internet connection and a subscription to cloud-based Infor CloudSuite Industrial. Plus, you can expand Infor CloudSuite Industrial to any location you want—without IT involvement— thanks to Infor's advanced cloud computing technology. Best of all, you can combine and multiply the performance enhancing and cost-cutting benefits of Infor CloudSuite Industrial by subscribing to it through the Infor cloud computing platform.

Get quick results

Complexity and competition continue to increase in discrete manufacturing. Personalize your enterprise resource planning system, focus on your work, and be confident you've got the right software and support team for the job—all with Infor CloudSuite Industrial.

Feel confident

With Infor CloudSuite Industrial you can feel confident you've got the tools you need to get the job done—and that you're getting it all from an experienced support team. Personalize your enterprise resource planning system, focus on your work, and be confident you've got the right software and support team for the job.

Technology

Infor Mongoose Framework

Infor CloudSuite Industrial is built with extensibility from the ground up. The Infor Mongoose Framework gives you the ability to adapt the system to your business, rather than requiring you to force your business to fit the software. The model in the Infor Mongoose Framework makes it possible to adapt the application to new business requirements without incurring the high cost and delays involved in modifying or writing new code. This, in turn, makes it feasible to rapidly adapt the system to your business, while continuing to receive new features and fixes.

In most ERP applications, adaptability is provided as a separate layer over the base application, so your ability to extend and build new functionality is limited. The changes you need to make will inevitably involve modifying the base application logic and that means modifying code. But the base application is built with the same metadata-driven approach provided to customers, so your capabilities to extend and adapt the application are virtually unlimited.

To meet these objectives, the Infor Mongoose Framework uses a model defined by metadata (data defining the application behavior, stored in rows and columns in databases); for the user-interface (forms), the business objects (IDOs, or Intelligent Data Objects); and business processes (Application Event System). In the metadata approach, changes can be kept separate from the base application and your changes automatically upgrade.

The Infor Mongoose Framework makes it possible to perform the following changes without programming:

- Extend any portion of any screen: By using the same tools as those used to build the base application, you can extend any portion of any screen, including new tabs, new fields, validation logic, and enabling logic. You can even embed controls you write in technologies like JAVA or HTML5 in any CloudSuite Industrial form.

- Extend any business process: Using the Application Event System (AES), you can define rules that execute whenever an insert or update occurs to any business object (order, item, etc.) in the application or when trigger conditions you define become true. These event actions include updating any data in the application, automating any process provided by the application, prompting a user or group of users to approve the change, integrating to an external application, or simply notifying users of the change. Defining these types of actions is all done without writing code.

- Extend any business object: You can extend any of the Intelligent Data Objects (IDOs) to create new relationships to other IDOs in the base application, add new calculated fields, add new tables, and publish their properties on the IDO. You also can create your own IDOs over your tables. All of these are done without writing code, although if you want you can write your own .Net classes and have that logic incorporated in the IDO processing as well.

- Add completely new functionality: You can build new functionality, such as new tables, IDOs, and forms as required by processes unique to your business. These are automatically deployed with the base application and automatically take advantage of other framework functions, such as translations, Web Service access, and the Application Event System.

- Build forms for use as standalone web pages, like your own vendor portal, which can also adapt to alternative layouts for various devices like smart phones.

- Introduce workflow, automation, or other business process-level changes using the Application Event System, without writing code. With drag-and-drop editing, you can construct rules that can, for example, query, update and execute functions on any IDO, notify or prompt users, or invoke web services from external applications. You can have your rules executed on a wide variety of events, including trigger rules you specify (e.g. item quantity on hand is below safety stock), or whenever data on an IDO is updated in various ways.

- The flexibility of the tool set allows for responsive design, meaning that using the new Flex Layout Component, and Infor Hook and Loop controls or your own HTML5 controls via the new UserComponent mechanism, you can build layouts that adapt to the size of the display design whether you are on a desktop, laptop, tablet or phone. This reduces your development efforts by building forms once and using them anywhere.

This ability to extend and tailor the application helps you to lower the cost of your IT ownership and increase productivity for your business.

Mongoose Productivity Tools - DataViews, KPIs, and DataSearch
(formerly known as Workbench Suite)

Infor Mongoose Productivity Tools gives users a "home base" panel that consolidates several role-related screens, performance gauges, navigation shortcuts, process flow guides, and advanced search/report tools—all in one easy-access, power location.

Providing employees with real-time performance data empowers them to identify predictive trends, take preemptive actions, and respond quickly to critical issues pertaining to their role, department, or division.

Infor Mongoose Productivity Tools are tailored around specific company roles, from the C-level officer monitoring company-wide KPIs for long-range strategic planning, to the billing manager striving to expedite invoicing and maintain steady cash flow. Infor Mongoose Productivity Tools provide quick, timesaving access to data (and supporting layers of related data), increase productivity, provide valuable role-related feedback, and support each employee's problem-solving efforts.

Infor Mongoose Productivity Tools gives users colorful, highly visible gauges so key performance indicators and influencers can be easily monitored as needed, whether it is minute-by-minute, hourly, daily, or weekly. The performance indicators are tied to the live, integrated CloudSuite database, rather than a static snapshot, and provide right-click access to multiple layers of influencing specifics behind the numbers.

- Monitor the easy-to-read gauges continuously for critical information, providing the ability to project outcomes and take appropriate preemptive actions.

- Identify influencing factors and avoid potential delays before they escalate and affect the bottom line.

- Access "role-based" critical numbers to help user's measure metrics relevant to their position, empowering self-regulation and performance improvements.

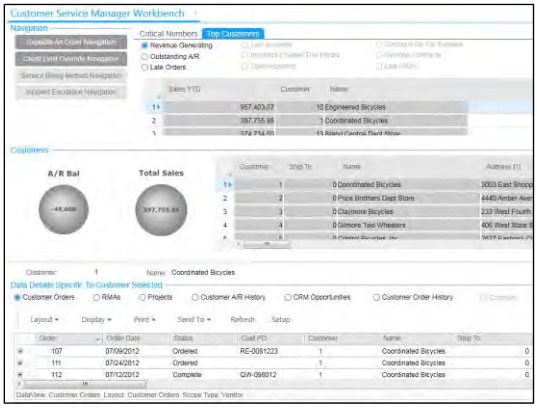
- Consolidated screens and navigation shortcuts save user's time and improve productivity, leaving more customer attention.

- Process flow charts speed performance, simplify training, and encourage compliance with best practices related to each function.

- Extended search capabilities save time by simplifying detailed research and multi-level performance analysis.

- Dynamic DataViews allow users to analyze data in detail and write reports with real-time, drill down capabilities for confident strategic planning.

    - DataSearch enables the user to search the entire system for occurrences of a text value.
    - DataView Actions extends the drilldown results for user-defined right-click menu actions to be executed.



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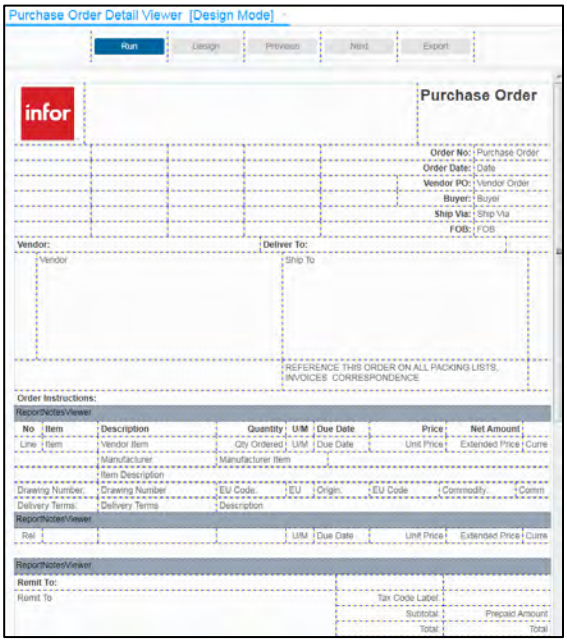
Mongoose Reporting Engine

Mongoose Form Reporting

Report type forms are specialized Mongoose forms that you can create to produce your own custom reports. Report form are true Mongoose forms and can be edited in Mongoose Design mode.

A Report type of form actually contains only the layout or definition of a report. Form reports have full background task support so that reports can be scheduled to run at specific intervals.

The New Form Wizard determines the initial form size and orientation when generating reports. Both the orientation and paper size can be changed later, however. By using Glue properties along with the main Flex Layout region, you can adapt the form design to different paper sizes.



Mongoose DataView Reporting

DataView Reporting is used for simple, list type reports.

DataView Reporting uses Pre-Defined DataViews as a basis for reporting. DataView reports have full background task support so that reports can be scheduled to run at specific intervals.

DataView Reporting Output Formats are controlled by DataView Layout Controls. Users are able to input specific parameters before running the report.

Comparing Reporting Engines

- **Form Reporting**
- Specific Layout
- Sub-report Support
- Data Setup in Mongoose Design Mode
- Form Layout in Mongoose Design Mode
- More Setup
- More Control

- **DataView Reporting**
- Simple Column Layout
- DataView Collections only
- Data Setup on DataViews Setup
- Form Layout Uses Runtime DataView Layout
- Less Setup
- Less Control

Multi-Company/Multi-Site Operations
Infor CloudSuite Industrial is inherently a multi-company, multi-site, multi-lingual and multi-currency solution. CloudSuite Industrial allows your companies to work together or separate based on your needs. A "site" or organization/company represents any place where work is done. So, a "site" may correspond to company headquarters, a manufacturing plant, or a distribution center.

Sites and Entities: Sites have relationships with each other. They combine to form financial entities, supply each other parts, Ship-to common customers, and share administrative functions.

Sites may report to financial reporting units called "entities." An "entity" has a specific currency, a chart of accounts, and the ability to produce financial statements. The entity is the highest-level organizational component. For financial reporting purposes, you can group sites under a particular entity. However, sites can belong only to one entity.

Sites can be set up in Multiple databases, or you can define multiple sites within a Single CloudSuite Industrial database. You can also have a combination of both – a hybrid model.

- Inter-Site/Warehouse Transfers— CloudSuite Industrial provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be RECEIVED at that site from an additional shipping site. CloudSuite Industrial also provides functionality for any one site to enter a Multi-Site Quantity Move or Transfer Order for items to be SHIPPED to an additional receiving site.

- Centralized and Decentralized Order Entry— Any site can originate a multi-site order, and line items can be shipped from any site. Credit checking and inventory visibility is provided from site to site. In Multi-Site order entry, you can enter an order that spans across sites. In decentralized environments, you can enter an order at any site.

- Centralized Purchasing — Any site can set up a PO that encompasses purchase orders to be created remotely at multiple target sites. A multi-site purchase order can take advantage of quantity breaks from the vendor for items that are required at multiple sites. Items being purchased may be subject to a Master Buy Agreement. This option accumulates quantities of like items from one vendor, to determine the best quantity break available. You can create printed documentation that groups purchase order information from various sites. Cross site vendor maintenance can also be done.

- Multi-Site Linked MRP and APS— CloudSuite Industrial supports site-based, linked MRP and APS. When you run the Planning activity in Global mode, the activity regenerates the plan at each site in order of site priority (defined on the Planning Parameters form). The activity generates planned transfer orders for Transfer items across sites.

- Multi-Site Transfer Accounting—Multi-Site Transfer accounting automates inter-company financial transactions and inter-company financial consolidation. CloudSuite Industrial provides parameter set-up for profit/cost eliminations, and offers separate account tracking for inter-company profit, cost, Accounts Receivable, Accounts Payable, sales, and cost of sales.

- Manual Voucher Builder—The Manual Voucher Builder allows you to quickly create a voucher in one or more sites for a single vendor's invoice. On any site, you can specify the portion of the vendor invoice amounts to allocate. You can enter all or some subset of the vendor invoice amounts. You can use the originating site as the To Site.

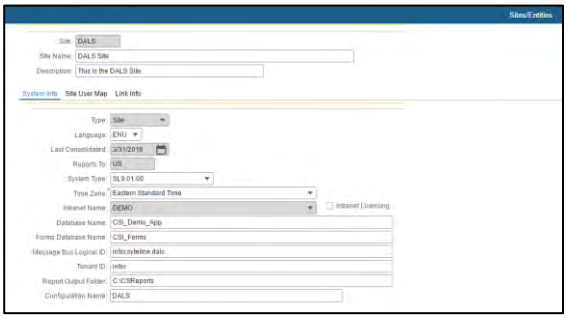
- Multi-Site Journal Processing—The multi-site journal processing activity allows for the creation of a single journal processing form that will distribute transactional information into each sites respective MS Journal.

- Multi-Site Items, Customers, and Vendors – Allows you to set up Items, Customers, and Vendors at a master site and copy these records to other sites.

- Multi-site copy of Bills of Materials – allows you to copy Bills of Materials from one site to other sites.

- Multi-site Vouchering — Multi-site vouchering functions enable a single user to create a cross site voucher based on PO generated receipts.

- Multi-site Invoicing - Multi-site invoicing functions enable a single user to generate and print invoices for CO shipments and returns in multiple target sites from a base site.



Sites have relationships with each other. They combine to form financial entities, supply each other parts, Ship-to common customers, and share administrative functions.

Localizations – Country Packs

In recent years, globalization has become a reality. Companies of all sizes now have the opportunity to conduct business in more than one country. To conduct their business, these companies must comply with a specific country's laws and regulations. Because of this, establishing a new office, warehouse, or factory in another country presents many new challenges. In short, when operating in a new country, companies are required to comply with local laws and regulations to complete their daily business transactions and operations.

Our goal at Infor is to support our customers throughout this process. We do this by offering country packs of our software with country-specific code to help with localizations. To create country packs, we have done extensive research into each country where our customers need support. We have built our knowledge and insights about the requirements in each country from a legal and statutory perspective. Compliance to the specific requirements of a country are accomplished by a number of ways;

- Functionality built and delivered within the core application – these are general features that can be used by multiple countries and may be legally required in some.
- Country packs that are additional forms and functions that are contained in a country pack for a specific country. These are unique requirements only required for the specific country for which they are built.
- The use of Local.ly which is a global Infor team that has developed a set of applications that addresses the local requirements that can be utilized by multiple ERP systems. This allows us to efficiently enter more markets by developing software one time rather than for each ERP system.

Infor customers can achieve the following advantages by using our country packs:

- Rapid implementations of our products in new countries
- Future solutions for changes in law and regulatory requirements
- Lower total cost of ownership from a system owner perspective because country packs use the same technology, same developments methods, and the same user interface (UI) as the other parts of our products
- Lower total cost of ownership from an educational perspective because country packs share the same look and feel as other parts of our products

Please check with your Infor Representative to check on the most current version available for the countries that you are interested in.

System Manager

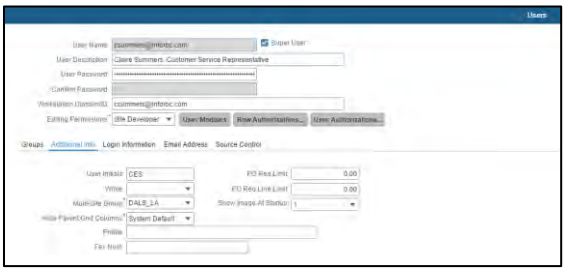
You manage and administer Infor CloudSuite Industrial using various end-user tools, which are built into the product. Some of the management tools available within CloudSuite Industrial include:

- **CloudSuite Industrial Configuration Wizard** — Allows administrators to create and configure new CloudSuite Industrial environments.
- **User Maintenance Screens** — Set up new users and administer security settings and user privileges.
    - Complies with US government FedRAMP security requirements
- **License Management Screens** — Manage licensed modules and administer user/module privileges
- **Session Management** – Monitor and manage user sessions.
- **Background Task Administration** — Create, monitor and manage background system tasks.
- **User Audit Tracking** — Set up user audit trails to monitor user activity. Audit trails can be set to field level capturing time stamped previous and new values.
- **User Extended Tables Administration** — Change the schema of the database to add fields that may be required to provide specific user functionality securely and safely.
- **Electronic Signature Administration** — Assign users Electronic signature authorization and determine which tasks require electronic signatures.

SQL tools are designed to aid administrators with the common tasks involved with managing SQL databases.

The database is administered using SQL tools, such as:

- Enterprise Manager—Centralized view of SQL databases with access to all common administration tasks,
- Query Analyzer—Easily create, parse, and execute T-SQL queries,
- SQL backup and restore—Create automated online backup routines and maintenance plans to automatically protect your data,
- Query Optimizer Built-in tool to analyze and maximize the performance of T-SQL queries.



Set up new users and administer user settings through the User Maintenance Screen.

Personalization

Infor CloudSuite Industrial provides customers with the ability to change the look and behavior of forms without having to impact source code.

This provides you the ability to adapt CloudSuite Industrial where required to provide not only a functional fit but more importantly to achieve a Business Process fit.

CloudSuite Industrial customers are able to take an 'as shipped' form and change the look and behavior to best suit the requirements. These changes can be migrated forward in conjunction with patches and upgrades to the base product.

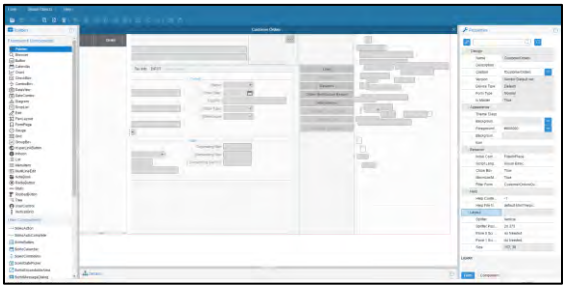
Changing forms is a secure activity and the level or personalization that is allowed to a user can be set from 'none' up to full control. Customers are able to add and change the position of fields, buttons and labels on a form as required. The default size and shape of a form can also be changed.

Changes to forms can be made that will be used for a whole site, a group of users, and individual user level.

Such personalization's are made through to the user interface and include copies of forms and form objects, new forms and form objects, and changes to forms and form objects. These changes can automatically be migrated forward in conjunction with patches and upgrades to the base product.

Personalization's can be made to:

- Forms
- Variables
- Menus
- Strings
- Validators
- Scripts
- Event handlers
- Property Class Extensions
- Component Classes
- UETs (User Extended Tables,8000 bytes per table)
- UDFs (User-Defined Fields, 44 predefined per table)



Sample Infor CloudSuite Industrial form.

Application Event System

The Infor CloudSuite Industrial Application Event System is a key element in providing an organization with the means for automation of business processes.

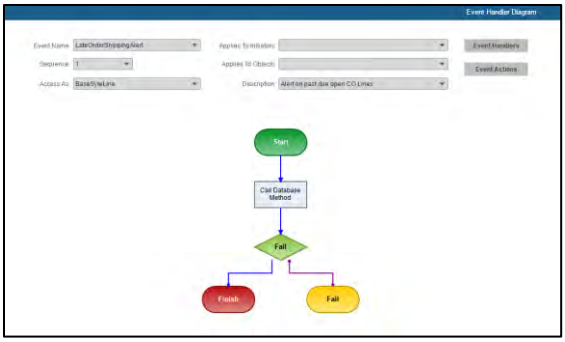
Event-Driven functionality is rapidly becoming a fundamental core desktop technology, as important and omnipresent as e-mail, spreadsheets, databases, intranets and the Internet.

The Application Event System enables the right people to make the right decisions at the right time. The software's e-mail and internet-enabled environment provides Information access, delivery and work support across organizational dimensions.

The Application Event System streams the flow of work throughout your enterprise, providing complete visibility and routing for all the vital documents, notes and data required for each person in the supply chain-from the executive suite to the factory floor and including suppliers and customers-to react and execute the tasks necessary for adapting to change rapidly and competing more effectively.

You can export and deliver business Information to and from CloudSuite Industrial. Triggered by events in CloudSuite Industrial, the Application Event System activates tasks and e-mails details for subsequent execution by the user. Information is automatically passed to the right participant at the right time according to a set of intelligent business rules.

Open business issues, such as customer credit issues, proposal sign-off, or purchase order approvals are automatically routed to the designated recipient(s) for action. Once a decision has been made or a task completed, the Application Event System processes the new Information into CloudSuite Industrial and moves forward with the next open issue until the entire process is completed.



Easy access for user control of all your business processes.

Microsoft Outlook Integration
For many people, especially those in sales and marketing positions, Microsoft® Outlook® is an essential tool for communication and organization. You use Outlook tools to manage your e-mail, your calendar, your task list, and your contacts.

Infor CloudSuite Industrial includes a user calendar, task lists, and sales contacts that can be tightly integrated with their Outlook counterparts, so you can work with the same information seamlessly in both Outlook and CloudSuite Industrial. With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or CloudSuite Industrial into the other application.

When you view e-mails in Outlook to or from certain customers, the CloudSuite Industrial details for orders made by that customer display along with the e-mail, for easy reference when you reply to or call that customer. The details of CloudSuite Industrial customer interactions are also available with the Outlook e-mail, so you can see all interactions with that customer and refer to ongoing discussions.

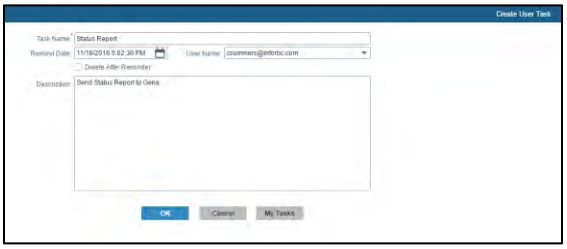
You can also add selected incoming or outgoing Outlook e-mails to the CloudSuite Industrial Customer Interactions form by clicking a button in Outlook.

CloudSuite Industrial Application Search (SAS) can also be used to search and access CloudSuite Industrial directly from Outlook, Word and Excel. By defining search terms in CloudSuite Industrial, then the Office application's Research pane displays the result of the search in the CloudSuite Industrial database. For example, if a user right-clicks on an item, the results could display the item description plus a link. The user could click on the link to drill down to the related CloudSuite Industrial form, filtered for that item.

If SmartLink is enabled in Microsoft Outlook, then when a user opens some e-mails in Outlook, text in the e-mail that matches a search item displays as a link. The user can click the link to open a CloudSuite Industrial form that displays more information about the text.

The CloudSuite Industrial Explorer module in the Microsoft Outlook Navigation pane displays folders, subfolders, and link items that let you access CloudSuite Industrial forms (in the Web client) directly from Outlook.

- Emails Added to Customer, Vendor, Prospect, and Sales Contact Interaction Logs with Attachments
- Task List Associated with Calendar Events
- Sync Contacts and Tasks
- Sync Calendars
- Sync Task Lists
- Application Search
- SmartLink
- View the CloudSuite Industrial Explorer



With the click of a button, you can selectively duplicate contacts, appointments, and tasks from either Outlook or CloudSuite Industrial into the other application.

Microsoft Projects Integration

Infor CloudSuite Industrial interfaces with Microsoft Project®. The interface includes an add-in that adds a CloudSuite Industrial toolbar and menu option to Microsoft Office Project, similar to the ones in Outlook and Excel. This add-in allows you to pull in data from CloudSuite Industrial and also to send data from Microsoft Project to CloudSuite Industrial.

The Microsoft Project add-in is very easy to install and configure. Once the add-in is installed, you can create a CloudSuite Industrial project from within Microsoft Project. Infor CloudSuite Industrial can import and export project task data to and from Microsoft Project. If you have Microsoft Project installed on the local machine, import and export buttons appear on the Project Tasks form.

- Sync In, Sync Out, and Enable Auto Sync Out—Sync In and Sync Out synchronize changes on the Project between CloudSuite Industrial and the Microsoft Project client. Enable Auto Sync Out enables you to Sync Out changes

- Create new projects in CloudSuite Industrial using Microsoft Project

- Create a new estimate project in CloudSuite Industrial using Microsoft Project

- Create a new project task in CloudSuite Industrial using Microsoft Project

- Create a new resource (Material) in CloudSuite Industrial using Microsoft Project

- Create a new work resource (employee, user, etc.) in CloudSuite Industrial using Microsoft Project

- Assign existing work resources to different tasks using Microsoft Project

Infor OS Platform

Infor OS is your cloud operating platform for the future, designed to bring productivity, business processes and Artificial Intelligence together, and offer operational insights that were never accessible to a business before. The platform delivers technology that goes beyond enabling business—it drives it, putting the user at the center of every experience, and serving as a unifying foundation for your entire business ecosystem. The result is a connected, intelligent network that automates, anticipates, predicts, and informs your stakeholders, unifying your business.

Highlights

- Unified UX
- Application builder
- Networked analytics and business intelligence
- Intelligent digital assistant for advice and feedback
- Automation of multi-step and complex tasks
- Digital document management
- Open business process integration
- AI Transparency

Features and Benefits

Embedded Collaboration— By marrying business processes to employee communications, Infor OS's collaboration capabilities allow you to contextualize intelligence, make single sign-on a reality, and increase efficiency by enabling employees to work smarter and faster.

Extensibility— Quickly develop enterprise capabilities tailored to your needs with the extensibility provided by Infor OS. Whether you seek an intuitive consumer-grade web interface or a high-productivity form, Infor OS can help create the right experience with minimal coding via desktop, tablet, or smartphone.

Process Integration— Easily integrate both Infor and third-party software applications with Infor OS's purpose-built middleware solution. By providing a simple, powerful, and scalable framework, Infor OS lets you eliminate operational silos, revamp exception management, and achieve unparalleled end-to-end efficiency.

Infor Ming.le

A single platform for more efficient business throughout your organization

Infor Ming.le is a comprehensive platform for social collaboration, business process improvement, and contextual analytics. Giving you the most innovative social media concepts translated into a business environment, the solution marries communications with business processes to help you work smarter and faster.

Unlike information sharing technologies that are disconnected from your core applications, Infor Ming.le is fully embedded with organizational systems like ERP and financials. All employees, regardless of their roles, can communicate, collaborate, and share information, such as documents, plans, photos, and videos, from a centralized location, with all activity captured and easily searchable.

You can put information at employees' fingertips with contextual intelligence, increase response times and prevent problems with tasks and alerts, get the full picture of any issue or question with drillback capabilities, and change the way work is done with the use of social objects. Once you have Infor Ming.le, you won't be able to imagine living without it.

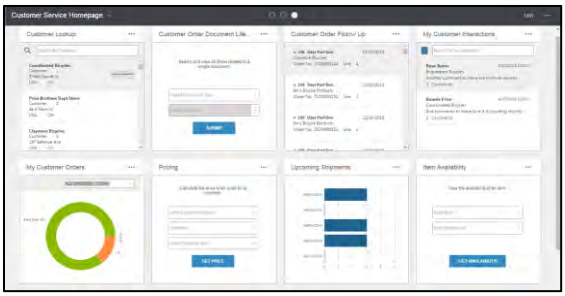
Make information silos a thing of the past

Infor Ming.le makes it easy to tap into "tribal knowledge"—the information usually gained through years of experience with a company—by extending to key organizational systems like ERP and supply chain management (SCM).

Need to know who has information on inventory? Or what happens to your production schedule when a critical resource requires maintenance? Infor Ming.le dramatically simplifies this process. Like Twitter™, Infor Ming.le's core functionality is discovery. The solution can instantly connect a query with the right group or person to handle it.

With Infor Ming.le, employees across all areas of your business can communicate and collaborate—sharing information such as documents, plans, photos, videos, and more—in a centralized location, with real-time updates that are stored and easily searchable.

You'll also be able to organize conversations around enterprise-wide business topics; share key screens, data, and attachments; have relevant data automatically displayed based on the context of discussions; and extend conversations and information sharing to external parties, such as suppliers, customers, or citizens.



Infor Ming.le Homepages offer a flexible and configurable way to present your users with information and activities. Build pages for users, roles, departments, business functions, etc. Select from the library of available Infor widgets or build your own.

Features to empower your business

- **Contextual Intelligence -** Infor Ming.le combines real-time information from ERP, SCM, enterprise asset management (EAM), and financial systems, as well as any other transactional information, on a single screen. It automatically senses the type of work you're doing and displays information relevant to that task, without requiring you to search for information and store the results.

- **Infor Ming.le Mobile -** Infor Ming.le's mobile capabilities let you work smarter and faster anytime, and anywhere. You can head off problems and keep business moving with critical information and alerts accessible on your mobile device.

- **Tasks and Alerts -** Infor's technology transmits transactional information in real time, so you can keep up with the progress of important activities. You can filter, view, and monitor information to keep tabs on the items that matter most. Infor Ming.le also includes a workflow interface that can push approvals and alerts to the appropriate people when problems arise.

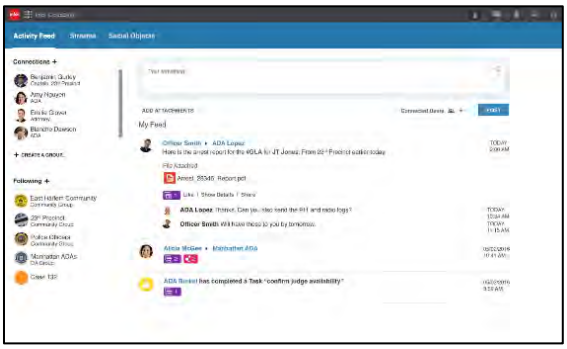
- **Drill back -** Analytics and reports in Infor Ming.le feature full drill back capabilities so you can see the information supporting the data on your screen. If total costs suddenly spike on one production line, for example, you can immediately drill down and see which component of cost changed most to contribute to the increase. You'll be able to zero in on issues that matter and keep your operations under control more easily.

- **Streams -** The Infor Ming.le platform enables you to organize recurring conversations around a business topic, defined by the users, with the ability to involve internal and external participants. Streams captures conversations that relate to unstructured business processes as participants collaborate to complete activities, due on different dates and times, organizing documents by threading them around each activity.

- **Ming.le Homepages -** Infor Ming.le Homepages offer a flexible and configurable way to present your users with information and activities. Build pages for users, roles, departments, business functions, etc. Select from the library of available Infor widgets or build your own.

Increase efficiency, productivity, and employee satisfaction

By delivering information in new ways and letting people work more efficiently. You'll also reduce email loads by putting information where people can easily find it and marrying communications with business processes.



Infor Document Management

Always have the right document

Finding the right document should be the least of your concerns. When you've aligned your documents with your business systems, you'll always have all of the information you need— securely stored in a searchable database. With Infor® Document Management, you can work with the most accurate and up-to-date information, while ensuring that everyone in your organization is working together. Infor Document Management is a central repository where you can maintain your common business rules for creating documents, as well as all of your documents.

Manage the entire lifecycle of your documents

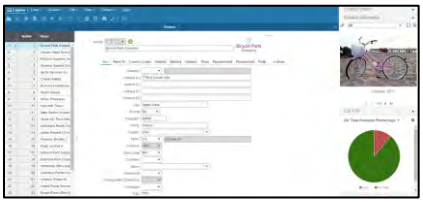
Thanks to Infor Document Management, you get support for the whole lifecycle of your business documents— from input through storage, retrieval, and sharing. In addition, you can use free text and attribute searches to find your documents. And, your documents can be edited in either the clients supplied with Infor Document Management, or in Microsoft® Office applications. You can also collaborate by working on documents in Infor ION® workflows or use them as shared content in Infor Ming.le™ conversations.

Take advantage of a fully integrated end-to-end solution

Infor Document Management is a completely integrated end-to-end solution, bundled with a content repository that securely stores all of your documents. With one content repository, you can consolidate all of your business documents, while ensuring that common practices around governing the permissions around documents are always enforced. Should there be a need to use a content repository other than the one that comes with Infor Document Management, you also have the option to use IBM® DB2® Content Manager or Microsoft SharePoint as your content repository.

Get the capabilities you need to:

- **Input -** Automatically add documents to Infor Document Management as part of a capturing process or an automated process. Or, add them manually using your ERP applications or any of the Infor Document Management clients, all inside Infor Ming.le. You can even use a Microsoft Office application to add documents directly to the back-end platform. The system creates the appropriate metadata, referencing your documents to your ERP objects. With Infor Document Management's Document Capture component, you can store an invoice image file together with data that's extracted from the invoice. Later, when looking at the invoice in your invoice matching program, the scanned document is also there to view. All this can be accomplished using basic setup and configuration.
- **Store -** All of your documents are stored in a repository that applies role-based authentication and authorization to ensure the safety of your information. The repository also provides versioning and check-out/check-in capabilities, so you can be sure you're always working with the latest, most complete version of a document.
- **Connect** - Attributes that are stored with your documents allow soft links to be created between your documents and your applications. Your application doesn't have to know any of the specifics about a stored document to connect to it. Infor Document Management creates this connection for you, since your business objects and documents share all of the same attributes.



Infor ION

Eliminate Information Silos

Operating your business with multiple, unconnected systems often results in unfocused and inconsistent information that delays decision making, reduces productivity, and puts you at a competitive disadvantage. You need highly focused software to help you solve your specific problems. At the same time, you need the power to pull together all relevant information seamlessly, without having to search, sort, and manipulate that data before you can use it. You get that power with Infor ION®.

Unify Connections

With Infor ION, you can easily integrate your Infor and non-Infor enterprise systems, whether they're on premise, in the cloud, or both. A true integration platform as a service (iPaaS) platform, Infor ION is a cloud-native application, built using HTML5 and open-source technologies. With everything in the browser, no plug-ins are required to use Infor ION. Infor ION gives you an unparalleled breadth of unified, powerful functions that all run simultaneously, along with integration services that combine with contextual intelligence to deliver an intelligent, intuitive user interface. With Infor ION, you can:

- Easily integrate both Infor and third-party software applications.
- Create workflows and alerts that dramatically improve exception management.
- Design, standardize, monitor, and change business processes without IT involvement.
- Connect applications to the events in your business process.
- Easily monitor your entire business and make better decisions, faster.

Synchronize interactivity

Infor ION operates as overlapping, interconnected domains that are layered on top of one another, with each domain maintaining synchronized, cross-functional interactivity with all other components. Infor ION includes:

Infor ION Connect—At the heart of Infor ION lies Infor ION Connect, a connective network that lets your applications exchange information quickly and flexibly through a lightweight, loosely coupled system. This network allows your applications to operate together quickly, so you can seamlessly execute business processes and get fast results.

- Connect easily: Infor ION Connect integrates Infor and third-party applications, whether hosted in the cloud or on premise.
- Accelerate integration: Infor applications operate with a standard business language, making Infor ION setup easy. You'll be able eliminate the two top integration challenges—the need to translate your data and to map it.

Infor ION Process—With Infor ION Connect unifying your business software footprint, Infor ION Process allows you to tap into that shared data and instantaneously generate feedback to help you identify business exceptions; flag overdue tasks; automate alerts, notifications, and approvals; and more.

- *Stay connected*: Connect your software to the actions taking place outside of it, allowing your users to manage, monitor, and document what's happened; what needs to happen; and what didn't happen, but should have.
- *Keep informed*: Intuitively model repeatable data patterns to rapidly detect events and exceptions that occur within a system or across a set of systems, and ensure events are surfaced to key decision makers. You can empower users to self-subscribe to alarms that keep the users aware of granular business events—from

specific sales opportunities to particular production problems—in real time.

Infor ION Workflow & Events—With Infor ION Workflow & Events, you can better structure the human side of your business processes by creating, standardizing, and monitoring your business processes—while being able to make changes without IT involvement.

- *Make your own rules*: Automatically detect exceptions and alert specific users based on business rules that you define.
- *Create workflows quickly*: Easily design complex workflows that work across applications using simple, flowchart-based graphical modeling.
- *Prevent oversights*: Automatically detect events that should have occurred, but didn't (such as an important shipment that missed its due date), and ensure that the right people are immediately notified.
- *Provide better service*: Monitor service levels to make sure that you meet your performance levels and maintain excellent customer service.
- *Automate approvals*: Create simple or sophisticated workflows to automate document routing and approvals across departments and office locations.

Sales

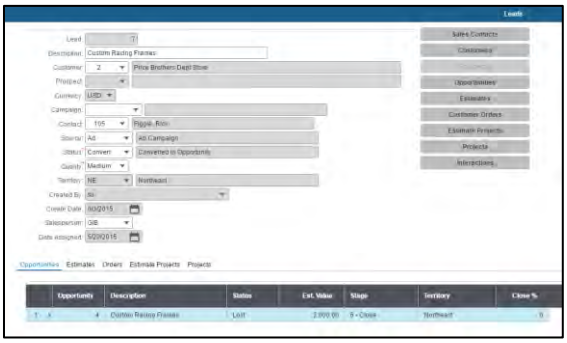
Customer Relationship Management (CRM)

***CRM ONLY license not offered Multi-tenant at this time**

CRM is a customer relationship management module that provides an efficient method for managing the entire sales process within Infor CloudSuite Industrial, from customer lead origination and sales opportunity tracking through converting prospects to customers and placing the order.

The features in CRM provide an integrated solution between your front and back offices. It delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

- Track all elements of a marketing or sales campaign through Opportunities
- Manage all tasks associated with an opportunity using the Opportunity Tasks form
- Manage contact information and basic company information of your competitors
- Create and manage campaigns
- Track estimate orders assigned to prospects or customers
- Maintain territory information, the SIC code, company revenue and number of employees for each customer
- Cross reference your sales contacts with customers and prospects
- Assist prospects and customers from initial interest through order placement using the Prospects and Leads forms
- Convert prospects to customers
- Organize prospects and customers by Territories
- Create and manage sales teams for customers, prospects, and opportunities
- Track communications with sales contacts, prospects, and customers
- Maintain basic information about your sales contacts
- Create sales forecasts
- Add opportunities to a sales forecast
- Create sales periods
- Sales person homepage
- Mail Merge and email Blasts
- Visibility into the lifecycle of a customer order through the Customer Order Document Lifecycle form.
- Determine how much money and time current promise-and-expedite scheduling is costing your company by using the Customer Service Impact form



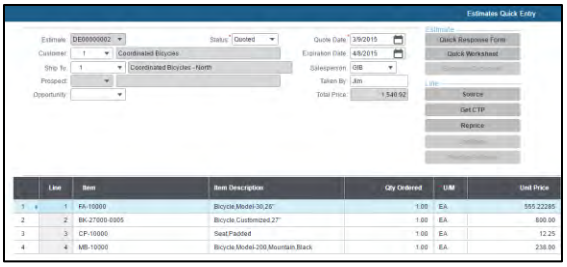
Track all elements of a marketing or sales campaign with CRM.

Estimating

Infor CloudSuite Industrial Quoting and Estimating capabilities allow you to create professional and comprehensive quotations and turn these quotes into sales orders. You can create Estimates quickly and easily by copying from another Estimate, an existing work order, or a Bill of Material, then modifying the new Estimate to match the customer's specifications.

CloudSuite Industrial computes a cost estimate that includes material, labor, burden, and outside services. When awarded a contract, you can easily create both a sales order and a work order from the Estimate. CloudSuite Industrial lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

- Engineering Sandbox Development
- Quoting and Cost Analysis
- Copy an Estimate from another Estimate, a work order, or Bill of Material, and then make modifications as necessary.
- What-if Scheduling
- Pricing tables
- Multiple Price Breaks
- Estimate Status to reflect Customer acceptance
- Estimates Quick Entry Form
- Estimate Response Form for customers

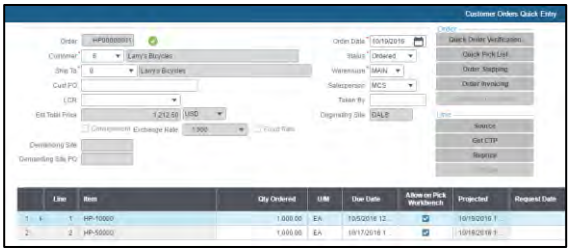


Infor CloudSuite Industrial lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

Customer Order Entry and Invoicing
Infor CloudSuite Industrial Customer Order Entry and Invoicing features allow you to access complete sales order information instantly, while providing your customer service representatives with online support to enter and track customer orders and create invoices. CloudSuite Industrial is fully integrated from the point of customer quotes through customer order entry, engineering, production, costing, shipping, and customer service.

This integration allows customer service representatives to take action on credit problems, reschedule requirements, and release orders in a timely manner to meet required shipment dates. It also provides access to crucial data including general customer information and credit status, order backlog, material and resource availability, order acknowledgments, commissions, percentage of completion, and shipping information. Comprehensive sales analysis reports help decision makers track everything from customers to sales representatives.

- Centralized and decentralized order entry
- Customer Orders Quick Entry Form
- Automatic credit checking, warnings and hold
- Order change history
- Volume, customer/item, contract and matrix pricing
- Hard and soft allocations
- Three-tier Customers (Corp—Bill To, Sold To(s), Ship To(s))
- Drop Shipping by order/line/release
- Regular/Blanket Orders
- Kit orders
- Ship Early/Partial processing
- Time-phased item availability
- Ability to link customer order lines directly to Job Orders, Inventory, Purchase Orders and Transfer Orders
- Order/Line Discounts
- Available to promise for real delivery dates
- Features and Options order configuration
- Multi-lingual customer paperwork, including invoices
- Foreign currencies
    - Define multiple currencies for Customers
- Sales tax calculations: VAT & GAT
- Progressive billings
- Customer Document Profiles
- Letters of credit
- Order acknowledgements
- Advanced Shipping Notices
- Consolidated invoicing
- Invoice Batching
- Drop ship orders (direct from vendor)
- Customer Service Homepage
- DIFOT Reporting (Delivery In Full and On Time
- Promotion pricing and rebates
- Shipment approvals
- Multi-site item sourcing form
- Calculated freight shipment for credit cards
- Customer 360 form

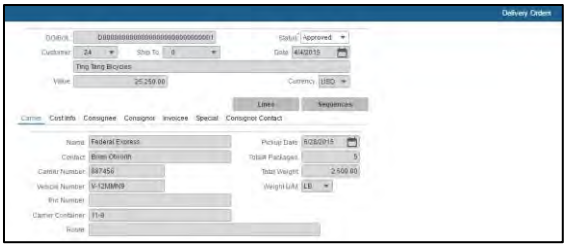


Infor CloudSuite Industrial Customer Order Entry and Invoicing features allow you to access complete sales order information instantly.

Delivery Orders

Infor CloudSuite Industrial Delivery Orders allows you to ship multiple customer orders to a single customer/ship-to combination under one tracking number. In addition to shipping under one tracking number, delivery orders are also invoiced using one invoice number through consolidated invoicing.

- Consolidate multiple Delivery Orders onto one invoice
- Invoice for a specific Delivery Order
- Create Delivery Orders before, during, or after Shipping
- Track multiple shipments with one Tracking number
- Create Export Documents
- Printing a Delivery Order can be used to create a Bill of Lading, Packing List, Pro Forma Invoice, Advance Ship Notice, Generating an Electronic Data Interchange (EDI) Advance Ship Notice (ASN) for a Delivery Order
- Specify Information about the Delivery Order such as carrier, consignee, consignor, invoicee, and special instructions



Infor CloudSuite Industrial Delivery Order allows you to ship multiple customer orders to a single customer/ship-to combination under one tracking number.

Return Material Authorization (RMA)
Infor CloudSuite Industrial allows companies to manage Return Material Authorizations (RMAs); documents that control the return of parts previously sold and shipped to a customer. Easily tailored to your particular business, CloudSuite Industrial offers codes and parameters that allow you to define your processes or to track important issues.

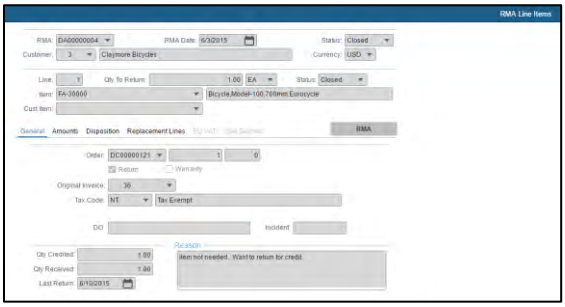
Many times, Customer Returns must be routed through multiple groups within your organization. CloudSuite Industrial RMA capabilities allow you to easily manage the steps of a returned part. RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material. You can also repair the returned item using a rework order.

CloudSuite Industrial provides access to the business information created through your day-to-day transactions of customer returns. This information can help you identify problems quickly, track issues, verify progress, and improve processes.

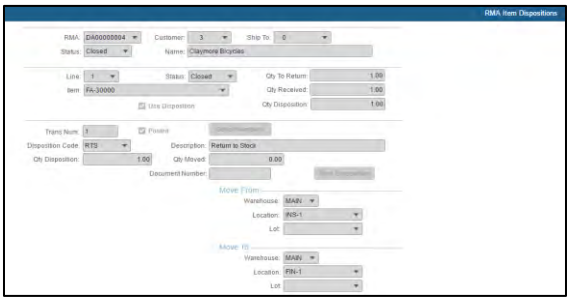
- Generate a unique RMA number automatically
- Receive returns to non-nettable locations
- Customer credit memos based upon receipt of the returned item
- Add Notes or Documents to RMAs
- Manage cost of returned product by linking to the original order shipped
- Issue repair or replacement orders for returned materials
- Track information that will help you improve both customer service and overall part quality
- Maintain documented control over the return of parts

Use Extended Dispositions to specify multiple disposition codes for one RMA line. These codes identify the next steps for the returned material. Each disposition code has one of these disposition types:

- *Scrap*: The material is damaged beyond repair and must be thrown away.
- *Return to Inventory*: The material can be put back in inventory so that it can be resold on another customer order or used as a material on another job.
- *Return to Vendor for Repair*: The item can be returned to the vendor either for credit or repair.
- *Return to Vendor for Credit*: The item can be returned to the vendor for credit that automatically creates a voucher adjustment.
- *Rework*: If your system is licensed for the Service module, material can be cross-referenced to a service order to repair the item.



RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material.



RMA Disposition Maintenance is the main screen used to enter disposition codes, item descriptions, and quantities returned, received, or dispositioned.

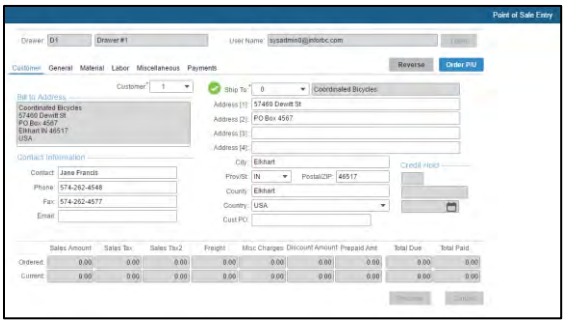
Point of Sale (POS)

Infor CloudSuite Industrial Point of Sale (POS) module is used in retail applications to manage over-the-counter cash transactions or phone-in requests where customers pick up or are shipped product/materials. POS streamlines the Order Entry, Order Fulfillment, Order Invoicing and Order Payment process speeding data entry of sales transactions.

The POS transaction process automatically prints an invoice and posts payments at the same time. POS supports multiple cash drawers generating invoices simultaneously. Standard FS-Plus SROs (service repair orders) are created for POS transactions making it possible to add items to an order at a later time. For material transactions, visibility into item availability by warehouse, location, or lot is also provided.

A complete audit trail is kept and maintained aiding in cash drawer reconciliation. Built-in security supports multiple types of payment on each transaction including cash, credit card, on account, and check.

- **Convenience** — Record materials, labor, and miscellaneous charges and payment transactions from a single screen.
- **Payment types** — Supports multiple types of payments, including cash, credit card, on account and check.
- **Update inventory** — As items are added to customer's POS order, the item's availability status is automatically updated.
- **Visibility** — Access details on each of the items being purchased from the POS Entry screen.
- **Easily update orders** — Add, change or delete items to the customer order from the Point of Entry Screen.
- **Integration** — Seamless integration to CloudSuite Industrial allows all POS data to flow through to other financial and service reports.



You can access details on each of the items being purchased from the POS Entry screen.

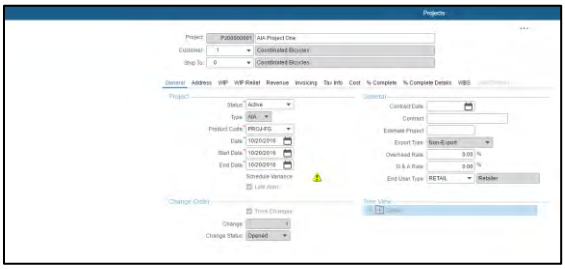
Enterprise Planning

Projects
If you are a project-based business or a professional services firm, Infor CloudSuite Industrial offers a solution that will have you managing your projects with ease and accuracy. It's time for you to take advantage of features that unite your project managers with integrated data for capturing costs, maintaining contracts and projects, handling long lead-times, and delivering on-time complex projects.

Your project-oriented customers need complex goods built to specification and delivered within budget. Your project managers need real-time integrated tools to track revenues, expenses, and profitability.

Project Management automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction. This solution facilitates teamwork and encourages the exchange of information.

- User defined activity tracking
- Full interface to manufacturing, purchasing, accounts payable, accounts receivable, order entry, inventory, payroll, & general ledger
- User defined project types and cost codes
- Multi-level % to complete analysis
- Revenue recognition by milestones
- Invoice milestone billing
- Invoice and Revenue milestones in different currencies
- Retention invoices
- Microsoft Project interface (import/export)
- Work Breakdown structures
- Budget by period
- Labor and expense reporting
- Shipping
- Microsoft Project add-in
- Late Alerts on Projects, Project Tasks, and Project Resources to alert managers about scheduling problems
- Out of Range (Schedule or Cost Code Variance) Indicators by Project
- Grid View of Project Transactions
- Project Change Tracking



Project Management automates workflow, increases efficiency, and, most importantly, promotes customer satisfaction.

Advanced Planning & Scheduling (APS)
To meet your lean manufacturing goals—to do more and more with less and less—lean planning capabilities are vital. Planning must focus on customer demand today, pulling to the customer due date and synchronizing the flow of material and capacity accordingly. Infor CloudSuite Industrial APS is a powerful solution that synchronizes the use of work centers, inventory, resources, and supply with customer orders.

With CloudSuite Industrial APS, you can rely on a solution that is built, serviced, and managed by manufacturing professionals who understand your specific requirements— the need for processes to flow smoothly and without mistakes; unnecessary steps; wasted resources; and waiting downstream because upstream activities are late. Our solution helps you meet this goal by providing seamless advanced planning capabilities, increasing your on-time performance and throughput while reducing inventory and operating costs.

- Greater visibility in planning — Our solution provides exceptional visibility into the lean manufacturing plans it creates. You get a continuously visible plan for each order, so that every order “knows” the jobs and POs it needs, and every supply “knows” the demand it supports. You also gain new insight into your inventory and your resources (machines, operators, work centers, cell, and facility utilizations).

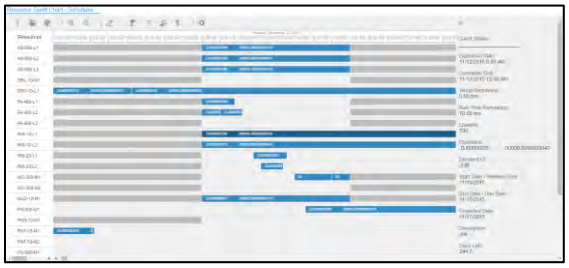
- “What-if” capabilities — The “what-if” capabilities of the CloudSuite Industrial APS engine let users determine the impact of decisions. For example, you can insert a high priority order into your current production plan, add overtime hours, or outsource specific components. The system instantly determines which customer orders will be affected and how delivery timeframes will change.

- Freeze schedule

- Freeze schedule with offset

- Predict demand for jobs that are configured through CPQ

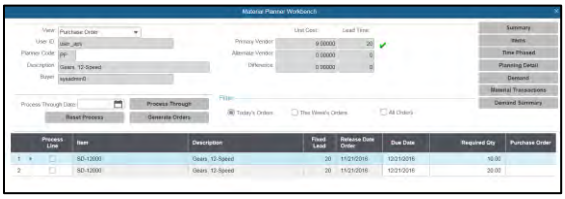
- Automatically enforce Get ATP(Available to Promise)/CTP(Capable to Promise)



Material Requirements Planning (MRP)
Infor CloudSuite Industrial Material Requirements Planning (MRP) module assists you in managing the balance between supply and demand. MRP is a mode of planning that plans requirements in order by the lowest level in which the item appears in a bill of material. That is, it plans all end items first, then all items at the next level, and so on, backward planning each requirement from the requirement's needed date to the item's lead time and batching together requirements needed at the same period of time.

Unlike APS, MRP does not consider routing times, resource capacity, or shifts. The responsibility rests with you, the planner, to make sure your shop floor has the available capacity to work the plan. MRP generates planned orders and exception messages to help you implement an accurate plan. MRP helps reduce inventory, increase manufacturing productivity, and ultimately facilitates cash flow.

- Explode all assembly schedules into component requirements
- Consume the forecast with actual orders as they are received
- The master production schedule (MPS) allows you to control production of key end items to help you protect your schedule from fluctuations in order-based demand (forecasts, customer orders, parent job orders, etc.). MPS is a manually created, anticipated build schedule for an item. You create it based on your expectations of demand and your estimation of resource capacity.
- Material Planning Workbench for automatic creation of Purchase Orders, Jobs, or Transfer Orders
- Run MRP for all sites or individual sites
- Define a source per part – Manufactured, Purchased, or Transferred to define sourcing by site.
- Available To Promise
- View Exception messages when exceptions occur such as on-hand quantity drops below safety stock, or when a planned receipt is no longer needed (or needs to be moved in or out in time)
- Use the Order Action Report to determine the job orders and purchase orders you must generate and release for a given item to be available when needed
- Replicate MRP planned transfer orders to the supply sites in your multi-site environment
- Peg each supply against demand using the Pegging Display form



MRP generates planned orders and exception messages to help you implement an accurate plan that reduces inventory, increases manufacturing productivity, and ultimately facilitates cash flow.

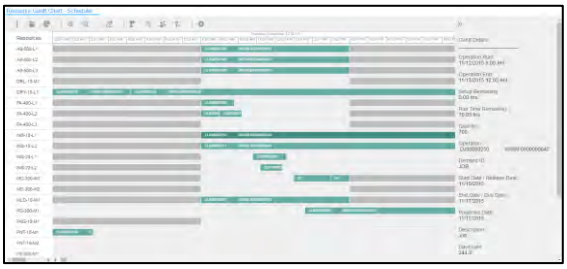
Scheduling

The Infor CloudSuite Industrial Scheduler calculates the dates and times to work on a subset of existing orders - those manufacturing orders that you need to complete in the near future. You can run the schedule over any horizon: a shift, day, week, month, etc. However, you will usually run it for a one-day horizon, and you will usually run it each day.

The Scheduler adjusts operation start and end times, suggests operation sequences, and reports changes in inventory levels. It also generates summary information (such as job performance) you can view in reports and graphs.

The Scheduler processes individual operations for any Released jobs within the defined time horizon based on their routing and setup, run, and move times.

- Schedule Planned orders generated by MRP or APS, Firm jobs, Working estimate jobs, Planned estimate jobs, production schedules
- Schedule jobs forward in time
- Schedule resources to perform operations
- Event-based scheduling
- Utilize scheduling shifts, holidays, resources, resource groups, departments, and work centers
- Prioritize jobs by setting sequence and selection rules
- Identify late jobs and causes using the Scheduler output analysis forms or Analyzer
- Runs automatically in the Background Queue
- Dispatch lists by individual resources or resource groups
- Graphical views of capacity and schedule
- Schedule analysis by exception
- Resource Bottleneck analysis forms and reports



Production Management

Manufacturing Work Orders or Jobs
Infor CloudSuite Industrial allows you to use jobs, also referred to as manufacturing work orders, to track specific manufacturing processes, including labor, material, machines, costs, scrap, work in process, and finished goods inventory. A job is a mechanism to launch and monitor production to meet a planned requirement.

Jobs are very flexible and easily changed to meet a specific customer's requirements and provide great detail in cost tracking and analysis. It's also a way to cross-reference production to a specific customer order that needs to be tracked in detail. Jobs have their own bill of material and routing structure and are individually released to manufacturing. In addition, job definition for rework order processing is available, allowing for recursive item repair use with planning impact basis.

- CloudSuite Industrial provides several methods of creating and defining a job; you can use whichever method you prefer.
- Use the Material Planner's Workbench to manage the creation of all of your jobs in a single screen.
- Link customer orders directly to jobs
- Schedule jobs based on finite and infinite forward scheduling
- Issue materials to a work order or back flush materials automatically based on operation or job completions
- Validate material availability to determine whether or not a job can be completed on time
- Review estimated versus actual costs by job
- Payroll integration
- Machine-hour reporting
- Create jobs for By-products, Co-Products or Rework
- Allows for Overlapping Operations
- Outside Vendor Process
- Drive costs by Work Center & Department
- Track all actual (or standard) labor and material, as well as WIP (work-in-process) costs, through a detailed routing.
- Transactions can be entered manually, or posted automatically with bar code data collection or back flushing.
- Co-Jobs and Co-Product Jobs

Infor CloudSuite Industrial provides several methods of creating and defining a job; you can use whichever method you prefer.

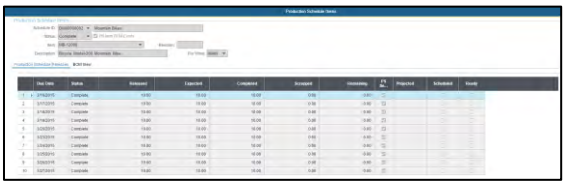
Production Schedules (Repetitive Manufacturing)

Infor CloudSuite Industrial Production Schedules are typically used when you manufacture the same item regularly — standard products — and do not need precise tracking of actual labor and material costs for every job.

Rather than being required to report all activity to a specific Work Order, CloudSuite Industrial Production Schedules allow activities and their costs to be charged to Work Centers. Production schedules allow you to authorize and release production in a simplified manner. A production schedule functions as a blanket job order. Production schedules are sometimes also referred to as work order-less production.

With CloudSuite Industrial's Production schedules, you create production schedules for an entire plant, planner, family of items, or specific customer for a selected time period. You can set up a production schedule for an item with releases for each month of the year; you don't have to create a separate job order each month or each time the item is manufactured.

- Allows manufacturers to be more spontaneous in authorizing production
- Flexibility in making schedule changes
- Reduce effort in establishing and maintaining production plans
- Reduce paperwork and system transactions
- CloudSuite Industrial Production Schedules do not require actual labor and material tracking. Instead, after a Production Schedule is created you need only report the item produced and the quantity and the labor and material are back flushed.
- Costs are charged to the items produced in the work center based on the standard bill of material and routing
- Track the cumulative production for an item in time buckets you choose (daily, weekly, or monthly)
- Best suited for Make-to-Stock Finished Goods/Components, and High Volume-to-Order



With Infor CloudSuite Industrial Production Schedules, you create production schedules for an entire plant, planner, family of items, or specific customer for a selected time period.

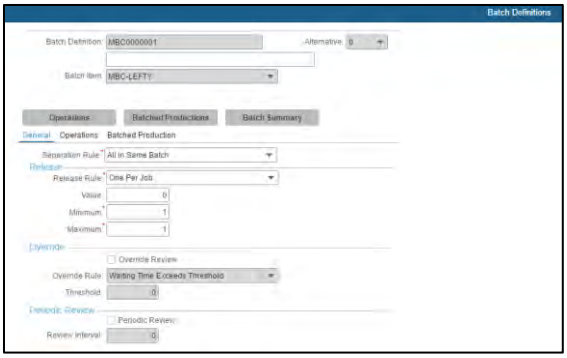
Batched Production

Using the Infor CloudSuite Industrial Scheduler, you can group several potentially different items on different jobs into a batch and process that batch through, for example, an oven or a paint booth. After the batch is processed, the different jobs then continue on their own routing. Batching affects only the Scheduler, not the Planner.

Each batch definition describes how batches are formed, including a routing that processes the batched parts. The operations form include a batch definition field. Any operation on which a batch definition is specified is referred to as the batch operation.

In a jobs or production schedule routing, an operation (the batch operation) references a batch definition when the job or production schedule can be combined with other jobs or productions schedules for processing. This causes batches to be formed, based on the rules defined on the Batch Definitions form, and transfers control to the batch definition routing. At the end of the batch definition routing, the job or PS returns to its original routing and continues processing as normal.

- User-defined or system-created batches
- Tell the Scheduler how batches should be formed including how jobs/production schedules will be batched together and when a batch will be released to be processed.
- Define operations that use the batch definitions
- Create user-defined batches which include specific released jobs and production schedule releases
- Define operations that use the batched production definitions
- View a summary of batch activity that occurs during a Scheduling run
- Maintain a list of the characteristics of items that can be separated into batches



Each batch definition describes how batches are formed, including a routing that processes the batched parts.

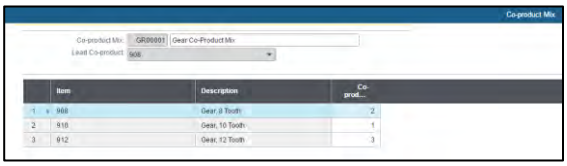
Co-products and By-products

Many production processes result in more than one stock keeping unit (SKU). These additional materials may be Co-products or By-products and Infor CloudSuite Industrial models both.

A By-product is something that is a residual of or incidental to the production process. You are not in the business of making the by-product, and if you could eliminate it from the process, you would. But since it has value, you need to inventory it. Co-Products arise when you create many SKUs with the same job.

CloudSuite Industrial lets you:

- Create jobs that make groups of items, rather than a single item
- Create Co-Product Mixes
- Support both Actual and Standard costs
- Support Production schedules and Estimates for By-products
- Perform Lot tracking
- Assign the cost distribution percentage between material, labor, and machine for each co-product job operation
- Process job material transactions to record receipt of By-products into inventory



Infor CloudSuite Industrial allows you to model both co-products and by-products.

Supply Chain Management

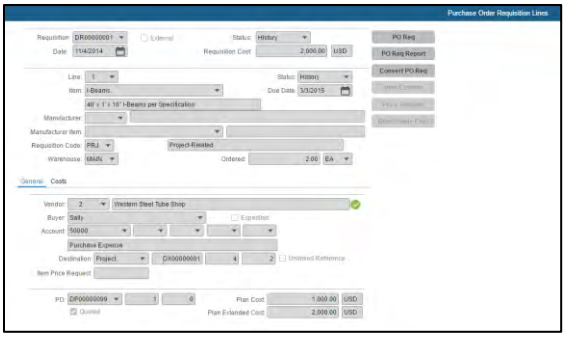
Purchase Order Requisitions

Infor CloudSuite Industrial Purchase Order Requisitions can help you enforce your organization's internal financial controls by managing requests for purchases that are originating from within various departments in your organization.

Purchase Order Requisitions authorize the purchasing department to procure goods and services. Requests are documented and routed for approval within the organization and then delivered to the accounting group. Then, CloudSuite Industrial allows you to manually create a PO requisition, or the requisition can be created by cross-referencing from a customer order, transfer order, BOM, or job. A planned order can also be firmed into a PO requisition.

Proposed purchases are subject to approvals and can be approved by users with the proper authorization levels.

- Generate a unique Purchase Order Requisition number automatically
- Create PO's for Inventory and Non-Inventoried Items
- Create PO Requisitions from Customer Order Lines, Customer Order Blanket Releases, Estimated Materials, Estimate Project Resources, Job Materials, Project Resources, and Transfer Order Lines automatically
- Set Approval Levels by PO Requisition Limit and PO Requisition Line Limit
- See and approve all of the PO Requisitions that an approver owns
- Convert approved PO Requisitions to Purchase Orders automatically



Infor CloudSuite Industrial Purchase Order Requisitions allow you to manually create a PO requisition, or the requisition can be created by cross-referencing from a customer order, transfer order, BOM, or job.

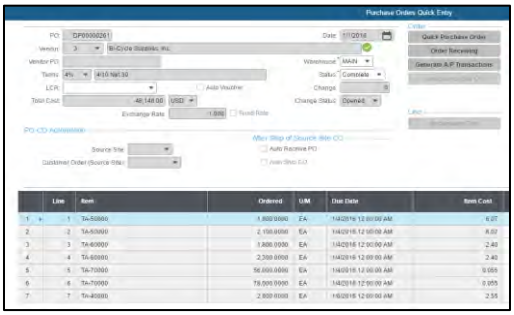
Purchase Order Processing

Infor CloudSuite Industrial allows you to easily coordinate material purchases by providing online decision support that simplifies record keeping. Purchasing supports your company in managing its expenditures and reimbursing vendors promptly for services or goods provided. It helps you maintain control of inventory to enhance your company's cash flow and shorten delivery times.

CloudSuite Industrial handles all types of purchases, including inventoried items, supply items, outside service operations pertaining to a manufacturing order, and subcontracted items that require components being sent to the vendor. Drop shipments can include specific locations other than the primary ship-to address, such as various warehouses or customer locations.

CloudSuite Industrial's purchasing module provides standard form reports such as purchase orders, acknowledgments, and order lists for purchasing personnel, as well as analytical accounts payable-related reports, including purchase order lists and voucher's payable reports.

- Enter purchase orders, order receipts, and returns in real-time and let CloudSuite Industrial automatically calculate the adjustments to POs
- PO Tolerance for Inventory and Non-Inventory Items
- Purchase materials directly to a job
- Link a PO line item to a specific job requiring that item
- Issue materials to a work order when you receive items purchased directly to a job.
- Generate vendor purchase requisitions with approval limits
- Maintain Blanket Purchase Orders, supporting multiple delivery schedules and shipping addresses
- Buyer Home Page
- Store and track information about a particular item from a specific Vendor using Vendor/Item Cross Reference function.
- Specify multiple parts and delivery dates on purchase orders and include the vendor's part number for cross-referencing.
- Access Vendor Performance information, the Vendor Communication Log, and a listing of vendor information for items purchased regularly. In this manner, you can ensure that you have selected the best vendor for each purchase.
- View the planned costs, actual unit costs, promise dates, and due dates for each line item.
- Place vendors on payment hold if their goods or services are unacceptable using the Payment Hold feature.
- Because a Purchase Order represents a contract with a vendor, Purchasing provides you with a utility for changing Purchase Orders and tracking the changes you make. Purchase Order Change Logs.
- Visibility into the lifecycle of a purchase order through the Purchase Order Document Lifecycle form.
- Vendor 360
- Foreign currencies
    - Define multiple currencies for Vendors

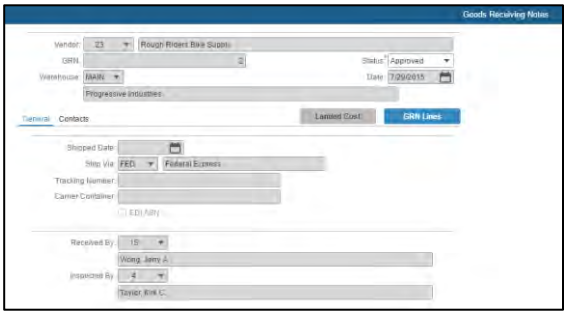


Enter purchase orders, order receipts, and returns in real-time and let Infor CloudSuite Industrial automatically calculate the adjustments to POs.

Goods Receiving Notes (GRN)
Infor CloudSuite Industrial Goods Receiving Notes allows you to link a receipt to multiple purchase orders for the same vendor. The GRN lists which items and quantities have been received and when. This GRN can be sent to the Accounts Payable department and can be used in the matching process.

Once the supplier sends the invoice, this is matched to the GRN and purchase order. In addition to receiving under one GRN number, multiple receipts can also be vouchered under one voucher number during the voucher generation process.

- Consolidate multiple Goods Receiving Notes under one voucher
- Generate a Voucher for a specific Goods Receiving Note
- Create Goods Receiving Notes from Purchase Orders or Posted Receipts
- Create a GRN record when an Advanced Ship Notice (ASN) is sent by a vendor automatically
- Use in place of packing slip for three-way matching



You can consolidate multiple Goods Receiving Notes under one voucher.

CloudSuite Request for Quote

Infor CloudSuite Industrial Request for Quote (RFQ) module allows CloudSuite Industrial users to create and maintain within their CloudSuite Industrial system the RFQs they send to potential vendors and subcontractors. Users can record a variety of RFQ responses including lead time, quote quantities, and price breaks for each individual RFQ. RFQs are created and managed out of the standard Purchase Requisition function of CloudSuite Industrial.

Using RFQ, a user can shop the purchase request to all or a predefined set of vendors. RFQ contains the complete flow from the creation of the RFQ Header to the selection of the winning Vendor. It helps streamline the entire purchasing process, making it more efficient and effective, helping managers make decisions to optimize use of resources.

- **Multiple price and quantity breaks** — Record pricing received from vendors or suppliers based on up to 10 different buckets for convenient evaluation and comparison of cost advantages based on variations to the RFQ.

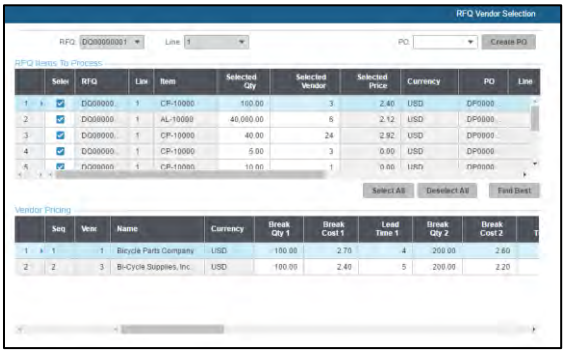
- **Predefined vendor sets** — Determine specifically which vendors or suppliers will be given the option to submit a quote based on the item or product code that is being purchased. (For example: One set of vendors may be used for buying materials but another set may be used for purchasing electronics.)

- **Automatic vendor/supplier** — Have the system automatically generate a list of vendors/suppliers to use based on the standard CloudSuite Industrial Vendor/Item Ranking, a past RFQ, or one of the Predefined Vendor Sets.

- **Multiple quote distribution** — Generate quotes and send to vendors or suppliers via email, fax, printed and mailed.

- **One-time vendor support** — Supports the use of vendors/suppliers that are not in the standard CloudSuite Industrial Vendor Master for quoting purposes only. This will allow a user to shop without creating a vendor until it is selected.

- **Multiple selection methods** — Select a vendor/supplier based on multiple selection methods, such as price, lead time, or response time.



Have the system automatically generate a list of vendors/suppliers to use based on the standard CloudSuite Industrial Vendor/Item Ranking, a past RFQ, or one of the Predefined Vendor Sets.

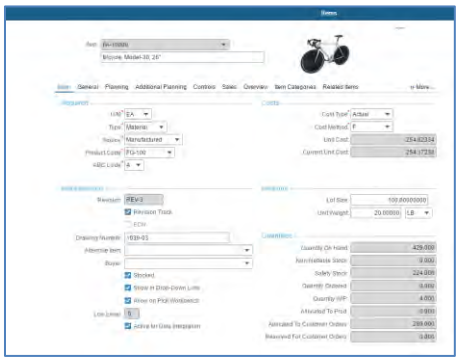
Inventory Management

Infor CloudSuite Industrial gives you more control over your inventory by providing greater accuracy and immediate access to inventory information throughout the company. CloudSuite Industrial automates the process of tracking parts by adjusting inventory whenever you create a transaction involving a part.

CloudSuite Industrial updates and maintains raw materials, WIP and finished goods inventory quantities and costs. Inventory items can be designated as purchased, manufactured, or transferred so that you can immediately place a purchase order or issue a job order when you need a particular item.

CloudSuite Industrial also allows you to easily track material and costs on a per-project basis. The extensive reporting capabilities provides complete profiles of any part in the system.

- Assign comprehensive part definitions including variable length part numbers up to 30 characters long, extended part descriptions, user-definable fields, and supplier information.
- Stock goods in one unit of measure while purchasing, selling, and/or consuming on a work order in another unit of measure.
- Assign multiple warehouse locations for a part and/or multiple locations within a single warehouse.
- Issue materials by work order, operation, or sub-assembly automatically.
- Issue floor stock items automatically.
- Set up specialized item pricing such as quantity and discounted pricing, contract pricing, etc., for both purchasing and selling.
- Perform automated physical inventories, cycle counting, and ABC analysis.
- Real-time material tracking and allocations
- Safety Stock, Reorder Points, Order min/multiple/max
- Lot/serial control
    - Lot Revisions
    - Lot Expiration
    - Restriction codes
- Kitting
- Container, Dimensional, and Consignment Inventory
- Manufacturer's Part Number
- Compliance Tracking
- Selectable dedicated warehouses (as for spares).
- Temporary and permanent item locations.
- Inter/Intra Warehouse transfers and moves
- Obsolete and slow moving inventory flags and analysis.
- Inventory aging reporting.
- Cost methods, including standard, actual, LIFO, FIFO and Lot Specific by item.
- Costs by Item or Item Warehouse.
- User defined unit of measure conversion.
- Multi-lingual item descriptions.
- Item 360 – View all item information from a single form



Infor CloudSuite Industrial automates the process of tracking parts by adjusting inventory whenever you create a transaction involving a part.

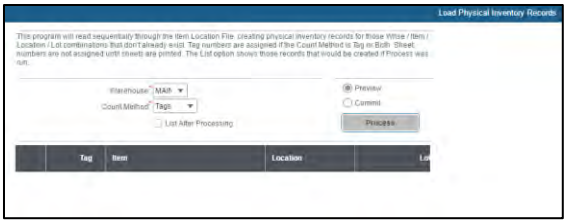
Physical Inventory

Infor CloudSuite Industrial Physical Inventory is the process of manually counting all inventory for a specific warehouse or location. Upon completion of the actual physical inventory, all numbers are then recorded, and discrepancies are identified and explained.

Accurate inventories result in more profitable and successful businesses. Customer relationships are improved because you can ship their orders. Accurate inventories also lead to buyers being confident in buying goods at the right time and the right quantity avoiding over- or under stock.

CloudSuite Industrial Physical Inventory allows you to obtain accurate information about quantities on hand, which will help you make more informed business decisions.

- Freeze/unfreeze inventory
- Inventory tags or inventory tag sheets
- Generation of inventory count for every item/location/lot/serial combination
- Inventory pre-adjustment report that lists quantity and cost variance
- Physical inventory approval
- Void/unvoid inventory tag sheets
- Void tag sheet report
- Generate blank tags or sheets



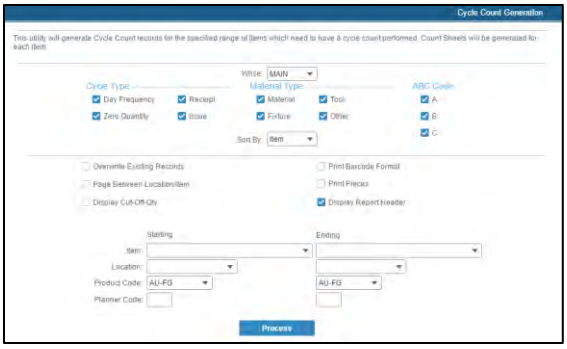
Infor CloudSuite Industrial Physical Inventory allows you to obtain accurate information about quantities on hand, which will help you make more informed business decisions.

Cycle Counting

Infor CloudSuite Industrial Cycle Counting allows you to perform an inventory count on small subsets of your total inventory on any given day. Cycle counts are similar to a total physical inventory in that it allows you to track your on-hand inventory but do not require a warehouse inventory freeze.

Therefore, Cycle counts do not disrupt your daily operations, provide continuous measures for inventory accuracy, and can be triggered to focus on the items with high value, high volume, and that are critical to on-time delivery.

- Multiple ways to determine the ABC Code on Items (Year-to-date usage, Future usage, or Unit Cost)
- Determine ABC percentages for Purchase, Manufactured, and Transferred Items
- Mass update to determine Cycle Type, Cycle Frequency, and Last Count Date for Items
- Count sheets automatically generated based on Cycle Triggers
- Exception reporting that does not allow records to post until corrected, such as:
    - Item is not in Items
    - Stockroom location not found
    - On-hand quantity is not equal to on-hand quantity when cycle count was generated
- Variance reporting
- Eliminate the need for yearly physical inventory counts



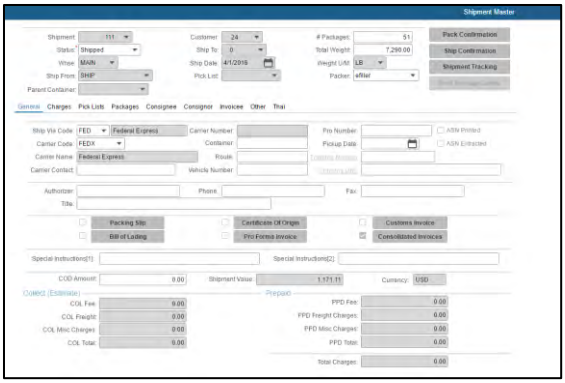
Cycle counts can be triggered to focus on the items with high value, high volume, and that are critical to on-time delivery.

Shipping/Receiving

Infor CloudSuite Industrial Shipping and Receiving allows you to ship and receive items coming in or out of your inventory. This might include shipping against a customer order, receiving raw material from a purchase order directly to a job or directly into inventory, or shipping an item from stock.

CloudSuite Industrial Shipping and Receiving are online transactions that are easy to use, efficient, and cost-effective. You get:

- Hard and soft allocations/reservations
- Picking and Packing lists
- Delivery Orders
- Goods Received Notices
- Advanced Ship Notice
- Available to ship analysis
- Multiple units of measure
- Pick, Pack, and Ship Workbenches
- Package Label Integration
- UPS/FedEx Integration *(not available for Cloud)*
- Receipt rejections and reason codes
- Landed Costs
- The ability to create payment vouchers from purchase order receipts
- The ability to create invoices from shipments to a customer
- Shipment of Non-inventory items



Ship against a customer order, receive raw material from a purchase order directly to a job or directly into inventory, or ship an item from stock.

Transfer Orders

Use Infor CloudSuite Industrial Transfer Orders for moving items or materials between distribution centers, or for component and sub-assembly movement between plants that require a more formal multi-stage transaction. Transfer Orders do not require an approval process or a requisition function.

CloudSuite Industrial Transfer Orders support the following:

- Visibility of in-transit inventory across the system including Transfer Order number, item, quantity in-transit, quantity to be shipped, date, shipment mode, freight cost, and value of shipment.
- Financial transactions
- Landed cost
- Cross-reference functionality
- Picking List functionality
- Packing Slip functionality
- Bill of Lading functionality
- Pro Forma Invoice functionality
- Various costing and pricing methods
- Automatic updating of inventory fields for Planned Transfer Orders
- Ability to enter a transfer order without knowing the location or lot number. Location not required until receipt.
- Partial shipping and receiving
- Ability to track quantity differences, such as: loss, shrink, damage, rejects, and advance shipmen using Reason Codes.
- Data Collection for shipping and receiving transactions
- Quick Entry form to enter all information on one screen

Infor CloudSuite Industrial Transfer Orders give you visibility into in-transit inventory across the system, including Transfer Order number, item, quantity in-transit, quantity to be shipped, shipment mode, freight cost, and more.

Electronic Data Interchange (EDI)

Any organization that exchanges information, including enterprises involved in procurement/purchasing, finance, trade and transport, health, law, and revenue/tax collection, can use Electronic Data Interchange (EDI).

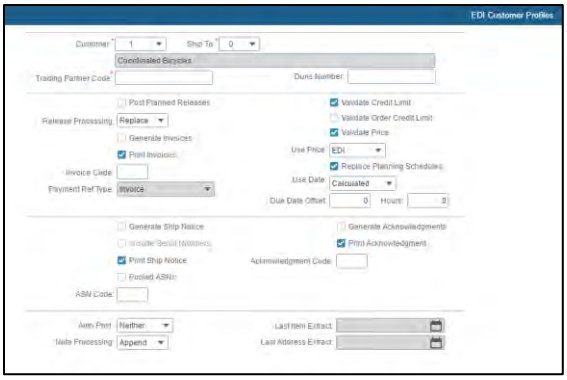
EDI can help you reduce paperwork and administrative lead times, send timely business transactions, access information quickly and easily, and eliminate redundant data entry. These benefits allow your enterprise to adopt more efficient practices such as Just-In-Time Delivery.

Infor CloudSuite Industrial has an interface that can be used to integrate to an EDI translator. The system imports inbound transactions from the translator and exports outbound transactions to the translator. The EDI translator interface supports six demand side and six supply side transaction sets.

Infor CloudSuite Industrial EDI can interface with several different translators: Inovis EDI, Sterling's GENTRAN:Server, Radley's RADEDI/CARaS or TSI's Mercator. You must purchase and install one of these separate programs in order to complete your EDI communication system. For more information, contact your Infor account representative.

CloudSuite Industrial EDI complies with the American National Standards Institute (ANSI) X12 and EDIFACT (International) standards.

- Create standard transactions to meet your trading partners' EDI requirements
- Convert inbound EDI documents into customer orders
- Manage releases and ship schedules from your customers
- Maintain fabricated and raw material authorizations
- Create data files for Advanced Ship Notices, Vendor Purchase Orders, and Invoices
- Cross-reference Customer Part IDs to CloudSuite Industrial Part Numbers



Create standard transactions to meet your trading partners' EDI requirements.

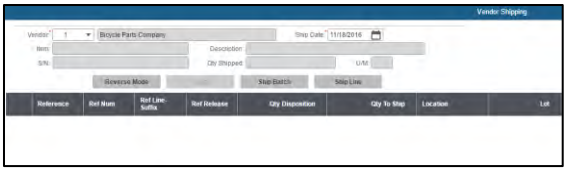
Outside Process Management

Infor CloudSuite Industrial Outside Process Management (OPM) extends the value of CloudSuite Industrial allowing the CloudSuite Industrial user to streamline the process of tracking and shipping materials from a standard CloudSuite Industrial job to an outside vendor/service.

OPM leverages the “Outside Service” field on the standard CloudSuite Industrial Work Center to flag material that requires the services of an outside vendor. With OPM, no changes to the standard CloudSuite Industrial Bill of Material are required. However, when the job material is moved into an operation flagged with an “Outside” work center, the system automatically creates a purchase order for the materials along with the necessary records to identify those items to be shipped and to which vendor.

Users also have the ability to print packing slips and ship items from a new Vendor Shipping screen. When the outside vendor completes the contracted service, items are received back into the job using the standard CloudSuite Industrial Purchase Order Receiving functionality.

- Create Purchase Orders automatically and cross reference the job.
- Track partial quantities for jobs producing multiple items.
- Track job materials with lot quantities.
- Generate packing slips automatically, as required, to include with shipments.
- Receive items back from a vendor.
- Produce various reports including “Items At Vendor” and “Vendor To Be Shipped”.



OPM leverages the “Outside Service” field on the standard CloudSuite Industrial Work Center to flag material that requires the services of an outside vendor.

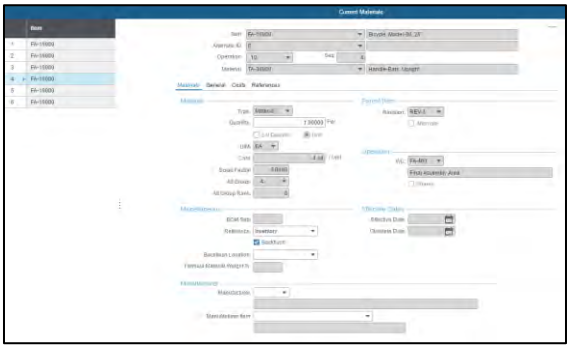
Master Data Management

Bills of Material

Infor CloudSuite Industrial supports the creation of Bills of Materials for manufactured parts. A Bill of Material (BOM) is the set of materials needed to complete each of the operations. The BOM can be multi-level, which means one of the materials required for operation xyz is a subassembly that has its own routing and BOM.

Changes to Bills of Materials are automatically captured at the time a Job is released. You can create a new BOM by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

- Create both the routing and Bill of Material on one screen using Engineering Workbench.
- Copy bills of materials from jobs, items, estimates, or production schedules
- Assign fixed and variable overhead rates to materials
- Maintain reference information (bubble number, reference designator, assembly sequence)
- Define alternate Bills of Materials
- Material Use-Up Report
- Set Items to back flush
- Enter the percentage of scrap expected for use with planning or purchasing
- Effectivity and obsolescence dates
- Phantom Items
- Non-inventory items
- Where used
- CAD BOM import
- Compliance tracking
- Use the Multi-Site Bill of Materials Builder to copy an item's bill of materials (BOM) from this site to all selected sites.



You can create a new BOM by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

Routings

Infor CloudSuite Industrial supports the creation of routings for manufactured parts. A routing is a group of operations, or steps which must be performed to assemble an item. In CloudSuite Industrial, Routings must be created first and Bills of Materials are linked to the Operations where they are consumed.

Routings are used for the Planning, Scheduling, and Costing of manufactured items. Changes to Routings are automatically captured at the time a Job is released. You can create a new routing by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

- Create both the routing and Bill of Material on one screen using Engineering Workbench.
- Copy routings from jobs, items, estimates, or production schedules
- Define your production standards — pieces/hour, hours/piece, fixed hours
- Support of Outside Service routing steps
- Capture move, queue, setup, and finish times
- Assign fixed and variable overhead rates
- Unlimited Notes to operations
- Resource planning available

You can create a new routing by copying it from another inventory item (which uses the current routing and BOM), another job, estimate job, or a production schedule item or release.

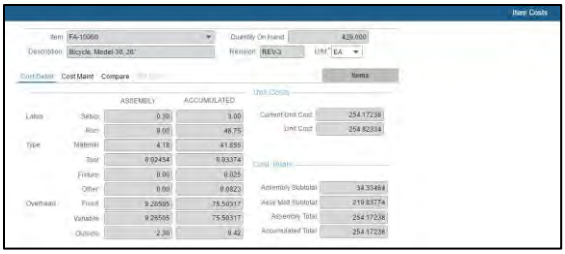
Costing

The Cost Accounting features within Infor CloudSuite Industrial support both actual costing and standard costing, providing you with the flexibility to choose the Cost Type and Cost Method that works best for you.

CloudSuite Industrial captures costs as changes occur, ensuring up-to-date and accurate costing. You can also link purchases directly to existing work orders through the Purchasing or Manufacturing module, earmarking costs specific to the appropriate job.

Additionally, you can link work orders to specific customer orders, which allows you to know the true margin earned for each customer order. CloudSuite Industrial automatically charges work order costs for customer orders to the Cost of Goods Sold upon shipment to the customer.

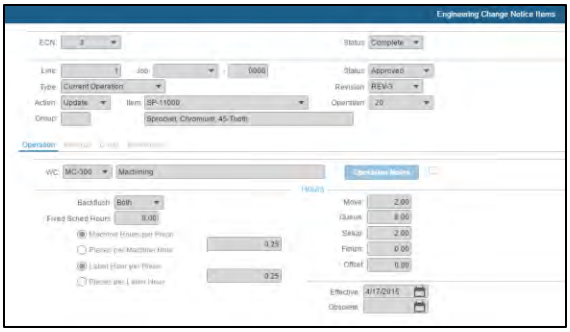
- Costs by Item or Item Warehouse
- Cost methods include Standard, Actual, LIFO, FIFO and Lot Specific
- Update stockroom and WIP inventory records in real-time automatically.
- Link POs to work orders to capture costs for a job.
- Link work orders to customer orders to measure true margins.
- Drive costs by Work Center and Department
- Break out Job tracking and costing into five cost buckets
- Create and post journals to the General Ledger quickly and easily.
- What-if costing analysis



Infor CloudSuite Industrial captures costs as changes occur, ensuring up-to-date and accurate costing.

Engineering Change Notices (ECN)
Use the Infor CloudSuite Industrial Engineering Change Notices (ECN) form to control and track revisions made to a Bill of Material or to the routing of an item. The ECN process is crucial in ensuring high quality, safety, and consistency of products.

- Approvals of changes before it can be used on Jobs or Estimates
- Mass replace/delete
- Enter a priority code to determine the order in which you want to implement the ECN
- Maintain reason codes
- Maintain distribution codes for who must be notified of the ECN change
- Identify what needs to be changed
- Copy ECN functionality
- Revision Control
- Track ECN and revision history
- Maintain an audit trail of changes to the ECN record throughout the change process.
- Reporting that will allow you to see the Jobs that are affected by ECNs
- Maintain a comprehensive audit trail of changes to the Bill of Material and routings
- Update part or document revision levels automatically upon incorporating changes.



Use the Infor CloudSuite Industrial Engineering Change Notices (ECN) form to control and track revisions made to a Bill of Material or to the routing of an item.

Financial Management

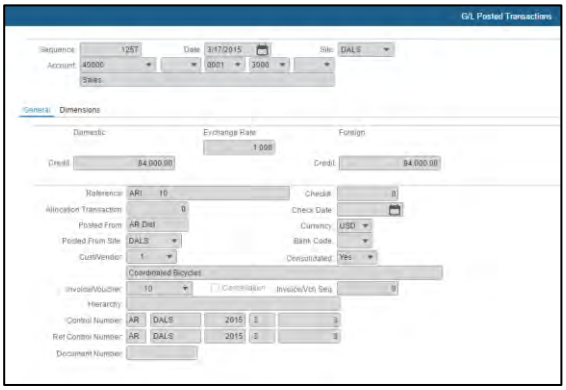
General Ledger
Infor CloudSuite Industrial General Ledger tracks financial expenditures within the company and generates financial statements and reports for management, auditors, and investors. The General Ledger is tied to other parts of the system through the Chart of Accounts and the distribution journals. A Chart of Accounts is easily created to control how you want to report on your business.

Financial information collected during day-to-day operations is posted frequently to distribution journals. In addition to the distribution journals, there is a General journal that you can use to hold closeout and summary entries for year-end procedures.

You can also create user-defined journals — custom journals to store, retrieve, and track entries specific to your business. Unit Codes can be activated for each account in the Chart of Accounts, to collect key management data.

- Hierarchical General Ledger
- Multi-Calendars, Multi-Books
- Define a Chart of Accounts that mirrors your enterprise structure.
- Statistical accounts
- Ability to Define Control Accounts
- Dimensions and attributes for accounts
- Create recurring journals, reversal journals
- Allocation accounts
    - By Percent
    - By Fixed Amount
    - By Variable or Statistical Account
- Upload Journal Data from External Sources
- Positive Pay
- Account Class
- Export results of queries to Excel, ASCII file, Clipboard
- Full G/L drill down to source documents
- Budgeting
- Multi-site journal entries
- Bulk Load of journal entries
- Post Journals in Background
- Banking
    - Bank Reconciliations
        - Import Bank Statement
        - Bank Reconciliation Utility
        - OCR Reference Control
    - Global Banking Requirements
        - Bank Transit Number
        - IBAN
        - Bank Identifier Code (BIC)
        - Bank Authority Party ID
- Obsolescence and effectivity dates on GL accounts
- Excel Financial Report Writer
- IFRS Certified
- Cash flow analysis
- SEPA direct debit functionality
- Currency conversions
- Re-open closed years
- Security for out-of-period postings
- Multi-Site Ledger Consolidation
- Create your G/L reporting method (monthly, 4-4-5,13 Period)
- Cancellation Posting for Single Entry Accounting
- DAS2 Fiscal Reporting

- Supports Sun Systems Financials
- Supports Infor Global Financials (German market only)
- Ledger Dimensions for Analyzing Financial Reports



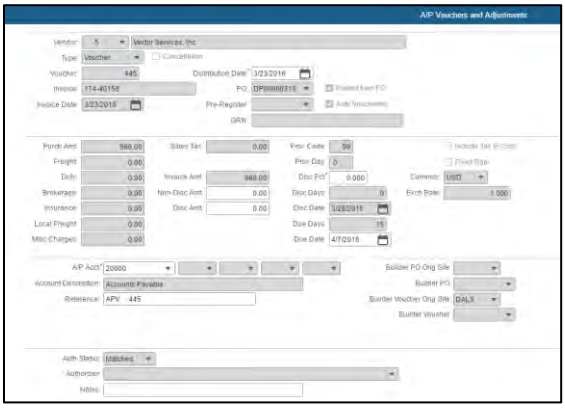
Infor CloudSuite Industrial General Ledger tracks financial expenditures within the company and generates financial statements and reports for management, auditors, and investors.

Accounts Payable

Infor CloudSuite Industrial Accounts Payable brings world-class functionality and control to your cash management system. With features that streamline and simplify the critical daily tasks that make sound financial management possible, CloudSuite Industrial Accounts Payable helps managers stay abreast of critical cash positions to improve efficiency and profitability.

CloudSuite Industrial Account Payable's rich connections to the entire suite of CloudSuite Industrial's modules will give your payables process full, fast, and accurate financial and operational information to help you make better decisions and execute your business strategy more effectively.

- Centralized or decentralized A/P payments
- Consolidate vouchers (one voucher for multiple POs)
- Create recurring vouchers and specify the frequency
- Create vouchers automatically through POs/receipts matching
- Selective Auto Voucher of PO Receipts
- Enter voucher prior to PO receipt (Voucher pre-register)
- Vendor and voucher holds
- Manage Surcharges
- Remit-To vendors
- Minority Owned Vendors
- Vendor Debit Memos
- Electronic funds transfer payments with remittance advice
- Multi-currency
- Payment processing
- Track 1099 Vendors and Payments
- Multi-lingual vendor paperwork
- Assign vendor accounts to specific A/P accounts on the G/L.
- Write checks "on-the-fly" in support of immediate payment of invoices
- Alternate Exchange Rates



Create vouchers automatically through POs/receipts matching.

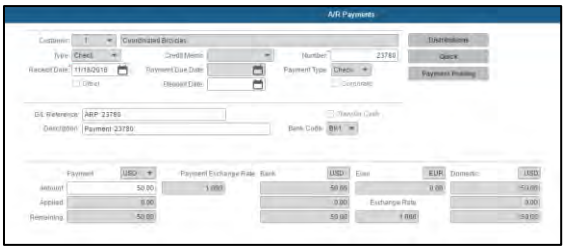
Accounts Receivable

Other than inventory, no asset is typically larger than your Accounts Receivable (AR). Infor CloudSuite Industrial AR helps you become more efficient, thus having a positive impact on cash flow, reduction of bad debt, and improved customer relationships.

CloudSuite Industrial AR facilitates the process of applying receipts, allows you to view current account balances, and improves the communication between your billing, credit, and collection departments in real time. Payment information is tracked instantaneously, allowing you to gather statistical information about customer payment history which helps to improve customer support and cash flow.

With CloudSuite Industrial AR, you gain the accurate, real-time information you need to make immediate decisions about extending credit limits, collections, and managing a key component of your cash flow.

- Centralized or decentralized AR Cash Receipts that automatically post to Bank Reconciliations
- Consolidated Invoicing by period or group of shipments
- Multi-user Invoicing
- Credit management including customer and order holds
- Progressive billing
- Manage Surcharges
- Support complex invoicing terms
- 3 Tier Customers (Corp— Bill To, Sold To(s), Ship To(s))
- Dunning letters
- Finance charges
- Letter of Credit support
- Multi-currency
- Multi-lingual invoices, credit memos & statements
- Generate A/R invoices automatically from shipping activities
- Assign customer accounts to specific A/R accounts
- Report customer prepayment and automatically deduct the amount of the prepayment or credit from the invoice total.
- Generate credit memos from returns
- Create credit memos for price adjustments, then apply them to open invoices
- Import electronic payments from bank files
- Centralized Invoicing
- Processing of Chargebacks



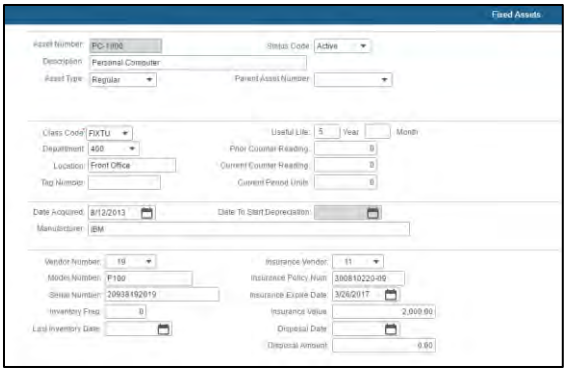
Infor CloudSuite Industrial AR facilitates the process of applying receipts, allows you to view current account balances, and improves the communication between your billing, credit, and collection departments in real time.

Fixed Assets

Full control over your entire asset picture — from acquisition to retirement and replacement planning — is crucial when it comes to managing assets. Infor CloudSuite Industrial Fixed Assets, a complete capital asset information and management system, gives your enterprise worry-free, boundary-free control.

CloudSuite Industrial Fixed Assets allows you to manage your assets through their entire lifecycle.

- Cradle to grave asset management
    - Parent/Child relationships
- User-defined asset numbers
- Useful Life displays in Year/Month
- Unlimited number of Asset classes
- Comprehensive Asset Definition
    - Location
    - Insurance
    - Original PO and Invoice Number
    - Serial and/or Model Number
    - Manufacturer
    - Costs
- Seven predefined depreciation methods and allows additional, user-defined depreciation methods to be added as needed.
- Maintain multiple depreciation schedules for each Fixed Asset.
- Partial depreciation
- Link to Purchase Orders
- Interfaces to the General Ledger:
    - Fixed Assets Disposal
    - Fixed Assets Transfer
    - Depreciation Posting (for BOOK schedule only)
    - Entering of a Fixed Asset purchase



Infor CloudSuite Industrial Fixed Assets allows you to manage your assets through their entire lifecycle.

Multi-Currency

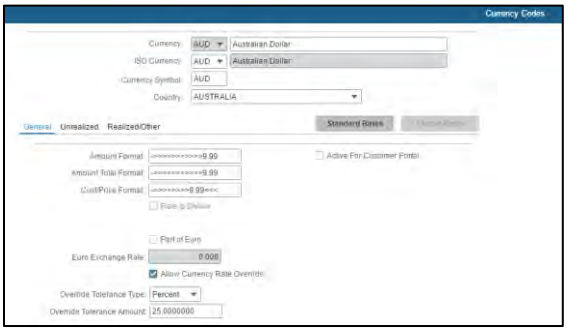
Infor CloudSuite Industrial Multi-Currency allows you to buy and sell in foreign currencies. Tracking of base (domestic) currencies as well as extensive exchange rate tables, reduce manual transactions. CloudSuite Industrial supports the following scenarios:

- Companies who process all transactions for a month at a given exchange rate. At the end of each month (or the beginning of the next month), the company performs a revaluation of all foreign currency translations.

- Companies who negotiate each foreign currency transaction at a fixed rate agreed with the customer/vendor. Payments are at that fixed rate. When using a fixed rate, specify that rate on the Customer Orders or Purchase Orders Form's Amounts tab. (Running the Currency Revaluation utilities will not impact these entries.)

CloudSuite Industrial also allows for a mix (using both the system exchange rate and orders with fixed rates) of the previous methods described above.

- Maintain Currency Rates and Tables
- Use either fixed or variable rates
- Euro conversion tools
- FASB52 compliance
- Recognition of currency exchange rate gains or losses
- Maintain customer and vendor records in the foreign currency but can quickly be translated to your domestic currency
- Maintain general ledger in your domestic currency
- Specify the currency used by the bank for each of your accounts
- Customer Orders defaulted in your Customer's currency
- Invoices defaulted to Customer's currency
- Converts Cash Receipts automatically
- Purchase Orders defaulted in your Vendor's currency
- Print checks in the Vendor's currency



Reduce manual transactions by tracking base (domestic currencies) and maintaining extensive exchange rate tables.

Human Capital Management

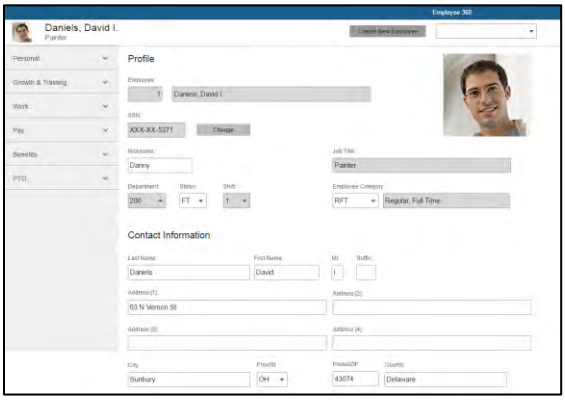
Human Resources

For US Companies only

Because employees can be a company's most valuable asset, Infor CloudSuite Industrial Human Resources (HR) provides a full range of tools to help you track all aspects of human resources. CloudSuite Industrial HR maintains vital data about applicants and employees and provides numerous standardized reports. The flexibility of CloudSuite Industrial Human Resources allows you to track as much or as little information as you require.

Because of its dynamic interaction with CloudSuite Industrial Payroll, the shared data between the two modules eliminates the need for repetitive data entry, and ensures consistency and accuracy.

- Record and track applicant information, interview notes, and results.
- “Hire” an applicant to automatically create an employee record
- Record and track employee performance, education, salary, attendance, seniority, and grievances
- Option to Mask Social Security Numbers
- Report and track accidents and workers’ compensation claims
- Track Recruiting Programs such as Application sources, Want Ad Usage, and Want Ads
- Benefits Management
- Bar-coded employee badges
- Regulatory Requirements (I-9 Documents, EEO Classes, Ethnic ID, Employment Eligibility
- Support for Rehire of Employee and Adjusted Date of Hire
- Process Manager to help manage processes such as Onboarding and Offboarding
- Supports reporting of Employee Injuries for Workman’s Compensation
- Employee 360 - manage employees from a single form
- Marital Status (Married, Single, Head of Household)



HR maintains vital data about applicants and employees and provides numerous standardized reports.

Payroll
For US Companies only

Infor CloudSuite Industrial Payroll automates the process of creating and maintaining complete employee payroll records. CloudSuite Industrial Payroll supports all federal and state taxes and includes state-of-the-art functionality, such as direct deposit, 401(k) plans, electronic tax and wage garnishment remittance using ACH or EFTPS payment systems, magnetic media tax filing, and sophisticated report sorting and timing features.

CloudSuite Industrial Payroll makes it so easy to do yourself; you won't need to hire an outside service.

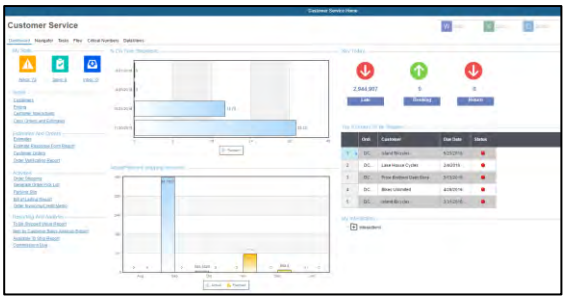
- Manage Employee information (Hourly or Salary, Shift ID, Deductions, Pay Rates, Tax Codes, Union Dues, 401(k)
- Manage Tax rate changes (federal, state, and local)
- Flexible pay periods
- Direct deposit
- Retirement deductions
- Withholdings
- Worker's Compensation
- W-2 processing
- 1094C and 1095C processing
- External Payroll Interface
- Vacation/Sick Leave Tracking
- Pay Types (Regular, Overtime, Double-time)
- Print payroll checks, the check register, and quarterly and year-end reports.
- Generate Pay from Manufacturing Labor or Time & Attendance
- Generate Pay from Service Hours

Performance Management

Dashboards

Infor CloudSuite Industrial Dashboards are role-based home pages where we have identified the specific daily tasks of specific career positions in our customers' organizations and defined the exact collection of information and actions that help you accomplish that job effectively. We call each collection a home page, the set of actions and data most closely associated with a specific, defined job in an organization, such customer service, controller, or production planner.

CloudSuite Industrial Dashboards gather the information that's most relevant to your responsibilities and puts it at your fingertips so that you can make rapid decisions and finish your daily work quickly and efficiently. This information is specific not only to your role in the organization, but also to the industry in which you compete. You can view and take action on the information from a single location on your computer. That way, you spend less time searching for information and more time getting your job done.



CloudSuite Industrial Dashboards present the key information for specific job functions, for example Customer Service, to make it easier to get your job done.

- Home Tab displays links to forms and activities useful for each Role
- Charts—Hover your mouse pointer over any of the columns to see the data value for that column
- Alerts, Tasks, Inbox buttons— Red and green indicators
- Navigator Tab includes pre-defined queries that equip each role with information to make informed business decisions
- Tasks Tab includes Alerts, Tasks, and Inbox
- The Flow tab for each form contains a business process flow including links to help topics and forms appropriate for each form. Double-click labeled ovals to open help topics. Double-click squares to open forms.
- Multi-Site Views – allow you to view information from multiple sites.

CloudSuite Industrial Industry Packs

Printing & Packaging Industry Pack
Keep your production running

Few industries have been disrupted by new technology as much as the printing and packaging industries. If you're in one of these industries, you aren't just using technology advances to execute long-standing business processes with greater efficiency. In printing and packaging, digital technology has fundamentally transformed your business model, changing how you produce products, your potential customer base, and your competitors. You're operating in a new high-speed, high-quality era that's putting new pressures on your business.

Making the transformation from the traditional film and metal plate processes has been a major accomplishment. But the transformation is incomplete if you haven't also modernized your approach to other core business processes with the help of a comprehensive software solution.

To complete the transformation, you need a business software solution with core enterprise resource planning (ERP) capabilities customized for the specific requirements of printing, publishing, and packaging. That's what you get with Infor® CloudSuite Industry Pack—Printing & Packaging.

Work with experts

With Infor CloudSuite Printing & Packaging, you get a comprehensive ERP solution with specific functionality for printing and packaging built in—not bolted on. You'll have tools to help streamline how you manage the entire printing and packaging lifecycle.

You'll be able to get a much clearer view of your entire business, so you'll know what's working right, what's not, and where there are opportunities for new efficiencies and organic business growth. You'll be able to adapt Infor CloudSuite Printing & Packaging to your business, not the other way around.
Infor experts have been meeting the changing business requirements of printing and packaging companies for more than 25 years, so you can be confident that we've included capabilities that you need. With Infor CloudSuite Printing & Packaging, you'll be able to:

- Accurately monitor customer demand.
- Streamline your quotation process.
- Automatically transfer successful quotes to production.
- Consistently deliver high-quality products, on time and at competitive and profitable rates.
- Better track and manage your resources.
- Fine-tune the solution quickly and easily, so you can better address competitive threats and opportunities for growth.

Get targeted capabilities

With Infor CloudSuite Printing & Packaging, you get broad and deep capabilities created specifically for printing and packaging companies that can help you speed the flow of accurate and relevant information in your enterprise, and help employees make the right decisions. You get flexibility, too. Because it's built on the .Net open development platform, you can enrich and extend the solution's capabilities to meet your unique requirements. You'll have multiple deployment options, including using the Infor cloud platform, an on-premises implementation, or a combination of both. You'll be able to customize your implementation without modifying the source code and automatically upgrade customizations when you upgrade your system.

You get core printing and packaging capabilities for managing:

- **Sales and customer relationships**. Efficiently manage all aspects of your relationships with prospects and customers, from lead origination and sales opportunity tracking to converting the prospects to customers, managing their orders, and sending the invoices. You can automatically formulate accurate quotes based on custom-defined rules and conditions. You'll be able shorten order-entry time, eliminate duplicate orders, and cut down on costly data entry errors, as well as reduce your loss rate for quotes and know why. And when you win, your profit margin will be better.

- **Planning**. Continually monitor demand as it occurs and use advanced planning and scheduling capabilities to determine if you have the materials, people, machines, and tools to fulfill an order before you commit. Factor in consumables such as paper and ink, and allocate production time for tasks such as collating, drilling, laminating, die-cutting, embossing, binding, assembly, and transportation. Adapt your production planning quickly in response to unpredictable events like a machine failure.

- **Production**. Use real-time data to monitor all aspects of production and other shop floor operations so you can precisely manage scheduling, productivity, and quality. Quickly produce and deliver accurate configured orders to customers using configuration capabilities specialized for your industry. Use pre-defined process flows to easily track overages, waste, and the amount of resources consumed in typical printing and packaging operations like two-side printing, stitching, assembly, gluing, and binding.

- **Inventory**. You'll be able to keep inventory levels as low as possible, without risking shortages. Use advanced inventory management capabilities to manage paper by finishes, weights, and sizes. Do the same for the other complex consumables you need to run your business. Factor space requirements and environmental controls for storing paper and other consumables into your inventory management plan.

- **Financials**. Integrate financial management processes with production to speed process flows. Share access to common data such as orders, account status, inventory, and resource availability across your company.

- **Quality control.** Use quality control capabilities to clearly define specifications for projects and monitor the step-by-step procedures and workflows to help ensure early detection and correction of errors. Give prepress managers, press floor managers, and bindery managers the customized workbenches, contextual decision-making tools, and personalized metrics they need to monitor adherence to role-based key performance indicators.

Automotive Industry Pack

Whether your company is a specialty vehicle builder, original equipment Tier 1 or Tier 2 supplier, aftermarket service parts provider, or remanufacturer, you're under constant pressure to meet customer demands and deliver on time while controlling costs and preserving profits. Regardless of the size of your company, its geography, or particular focus, you must navigate through an automotive supply chain that's filled with an incredibly complex set of business, industry, and regulatory challenges.

To tame this complexity, get your products to market quicker, do a better job of matching up supply with demand, and manage your operations more efficiently,
you need a solution that reaches every part of your business—from program and project management to planning to production to logistics, through financial management and reporting. To thrive in the automotive industry, you need a partner with a comprehensive and industry-specific portfolio of business solutions that address your complete enterprise needs and are ready to run with no custom modifications and coding. You need a solution that lets you focus on the automotive business, and not one that forces you to try to make generic software fit your specific business needs. You get all that and more with Infor CloudSuite Industrial.

With more than 25 years of expertise and commitment solving the business challenges of automotive manufacturers and suppliers, Infor can help you keep pace with today's intense and constantly changing business requirements with Infor CloudSuite Industrial—a highly flexible manufacturing and distribution enterprise resource planning (ERP) solution with full functionality that's designed to meet the unique requirements of specialty vehicle builders, Tier 1, and aftermarket parts industry segments.

You'll benefit from embedded support for a wide variety of automotive manufacturing processes, including program launch, prototype design and manufacturing, make-to-stock (MTS) for aftermarket manufacturers, make-to-order (MTO) repetitive manufacturing for Tier 1 suppliers, and configure-to order (CTO) and detailed configuration support for specialty vehicle builders. You'll be able to reduce waste, lower costs, and improve quality with Infor CloudSuite Industrial's support for lean manufacturing methods.

You'll increase efficiency throughout your organization with powerful project management capabilities to help with advanced product quality planning (APQP), new program launches, and vendor managed inventory (VMI). And you'll be able to manage your supply chain more effectively with deeper collaboration, more accurate forecasting, and efficient replenishment by applying the built-in best practices of the Global Materials Management Operations Guideline Logistics Evaluation (MMOG/LE) standard.

The Infor SyteLine Automotive Industry Pack contains specifically tailored functions to meet certain unique requirements of the automotive industry, including:

- Retroactive billing
- Failure mode effects analysis (FMEA) – A common analysis used in the auto industry to determine the risk of certain types of failure, and to implement corrective action to help prevent those failures. It is important to document the risk and the resulting outcome to help ensure that a procedure implemented to reduce risk is not removed due to undue circumstance.
- Advanced product quality planning (APQP) – Independent actions of the ERP that are required to be in compliance with certain quality programs. Each program has an independent set of requirements.
- Match delivery notice to invoice – Not all customers reference the invoice

during payment, so this features provides a way to match a payment to an invoice during accounts receivable (AR) payment distribution.

- You can now use the various customer and vendor master contract forms to create and manage a contractual agreement regarding customer and vendor order lines and releases.

- Returnable containers management – Helps manage containers in accordance with certain automotive industry requirements by adding data fields to the automotive containers form for the definition of physical dimension and capacity. It also records certain codes and markings necessary for compliance with specific provisions of ISO 6346.

- To facilitate highly repetitive manufacturing with just-in-time models that require multiple shipments a day for a particular part, customer and purchase order due dates can now include a time of day stamp.

- Overall Equipment Effectiveness (OEE) – A key metric that defines the percentage of production that is truly productive can now be viewed on the job operations and resource group load profile – scheduler forms.

Molding Industry Pack

The molding business seems simple in theory, but in practice there's plenty of complexity. The extensive assortment of tools and accessories associated with each molding machine creates a formidable logistical puzzle that you must solve repeatedly to keep production flowing. There's more to it than knowing you have all the equipment you need—you also need to be sure that you have the correct mix of tools on hand for the mix of jobs you've scheduled. Lacking an essential tool at a critical time has the same effect on production as having a broken machine. Efficient tool management is essential to achieving optimal throughput.

The Infor® CloudSuite™ Molding Pack embodies molding industry expertise build on decades of experience by Infor manufacturing experts. Our solutions help thousands of manufacturers around the world produce more efficiently, maintain top quality, and stay competitive in challenging business conditions. These powerful solutions, whether deployed in the cloud, on- premise, or in a hybrid environment, give you a fast, economical way to do business better at a sensible cost.

The Infor CloudSuite Molding Pack helps you improve any manufacturing process that either relies on tooling or is highly repetitive. You get a systematic platform for dealing with machines that require tools such as sprues, gates, fixtures, inserts, or other interchangeable tooling.

With the comprehensive manufacturing ERP capabilities of the Infor CloudSuite Molding Pack, you can better manage production in four important ways:

- **Tooling** - You can define, manage, and maintain individual tools or groups of tools to achieve optimal availability and productivity. That can include carriers, fixtures, cavities, and other tooling items.

- **Co-jobs** - When a group of jobs share at least one operation, the Infor CloudSuite Molding Pack can help you eliminate resource conflicts so that you get the best throughput for all jobs.

- **Estimating -** Creating co-jobs that share tooling can have an impact on costing information that you depend on for quoting a job. Infor CloudSuite Molding Pack helps you estimate more accurately.

- **Alternate BOMs—**Sometimes the fastest or most economical way to execute your production plan is to consider alternate BOMs. Infor CloudSuite Molding pack lets you designate alternate resources, materials, or labor to achieve the best overall production plan.

With the help of the Molding Pack, you'll be able to:

- **Improve capability to promise -** When you schedule a variety of orders with disparate tooling requirements, it's easy to accidentally create production bottlenecks with multiple plans that call for the same tool simultaneously. The Infor CloudSuite Molding Pack incorporates tool scheduling as an integral part of production planning, so you can deliver what you promise.

- **Plan more quickly and efficiently -** When tooling is a critical resource, there's no substitute for robust planning capabilities that take those requirements into account to help you plan more accurately.

- **Get more accurate costing -** By improving the accuracy of your production plan, you'll have better costing information and be able to provide better quotes.

You can make quick work of the complex planning around tools, machines, and other equipment required for the molding industry with the help of the Infor CloudSuite Molding Pack.

CloudSuite Industrial Service

An efficient service department improves your company's performance and productivity. A streamlined service process helps you deliver error-free responses to customer inquiries and quick completion of work orders. You'll achieve an even higher level of performance when you schedule and dispatch technicians efficiently, provide them with access to accurate historical data, and make sure they have the appropriate parts and tools on hand. With higher resolution rates and a shorter order-to-cash cycle, you'll enjoy higher profits and greater customer loyalty.

With exceptional flexibility and ease of use, CloudSuite Service is the ideal solution for companies that utilize work orders in any capacity within their business or want to manage extended warranties and sell contracts to better capture profitability of each. This robust service management solution meets the specific needs of companies that manufacture, install, or service complex products. Its powerful features include:

- **Contact center** - Give your call center easy access to detailed data for fast response to inquiries and work order creation.

- **Work orders** - Track and manage work orders for faster completion of service requests, more accurate billing, and greater customer satisfaction. ***Break/fix, reactive service, and preventive maintenance, rework/teardowns, MRO, and Depot Repair*** activities are all managed through a common UI.

- **Labor and Expense Management** – the service module can be configured to track time and attendance of internal and sub-contracted resources, plus allows for company paid or employee paid purchases to be reviewed and run through an approval process.

- **Scheduling and dispatch** - Gain visibility into each technician's schedule, certification level, and experience with CloudSuite Service, whether the technician is outside or inside the company's four walls so that you can match the right resource with the right job. Visibility to truck stock and route optimization for technicians in the field plays a big role in optimizing and improving efficiency; increasing resolution rates and minimize the cost of non-essential trips back to the warehouse.

- **Preventative maintenance** - Schedule routine maintenance for internal assets or customer owned assets in order to prevent unexpected downtimes, extend the lifecycle of equipment, and maximize warranty cost savings.

- **Service contracts** - Track and manage service level agreements with maximum efficiency. Visibility into the contract details, unit, and service history improves decision making and creates opportunities to up sell or extend service agreements.

- **Loaners and Rentals** - Never lose track of equipment as it enters and exists your doors through either rental contract agreements or customer loaner shipment and returns.

- **Service History** - Access complete historical data, including customer profile, unit description, contract status, and service history.

- **Analytics -** Integrated data, total visibility, and accurate tracking make it easy to analyze data down to the detail level. Flexible reporting aids in decision making, planning, and providing engineering with valuable information needed to adapt product or part designs.

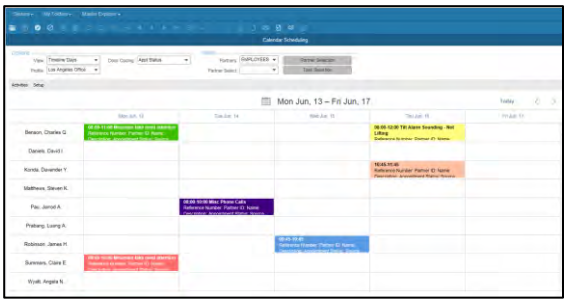
CloudSuite Service also supports multiple languages and currencies, and has the ability to support local regulations. Its flexibility means it can grow to meet your expanding needs.

Improved first-call resolution rates and error-free billing will boost long-term customer loyalty and will give you a unique competitive advantage. With a streamlined service lifecycle and a condensed call-to-cash cycle, you'll be positioned for maximum profit opportunities.

Beyond Service

A company which does not have a dedicated service department, field technicians, or call center may still benefit from this feature rich module to support the following business needs.

- Tickets for the IT department or Maintenance department can be used to keep track of internal work order requests.
- Inspection procedures and readings can be leveraged by the Quality team.
- Inventory can be accurately valued when returns from customers are processed as cores, torn down for parts, or reworked through the service order module.



Gain visibility into each technician's schedule, route, certification level, and experience with CloudSuite Service, so that you can match the right technician with the right job.

CloudSuite Industrial Quality

Your customers require products made to their precise specifications. You require the same of your suppliers. You are equally committed to the same exacting level of quality within your company and across your entire organization. You face endless challenges in complying with government regulations, providing quality records to auditors and customers, and continually making improvements to your organization.

Infor CloudSuite Quality integrates best-in-class quality into the CloudSuite Industrial functions you already use to run your manufacturing operation. It supports quality activities related to receiving, manufacturing, shipping, and returns.

CloudSuite Quality also manages advanced quality activities across your entire organization, including quality incidents, change management, and responses to audit findings. CloudSuite Quality creates the framework for building a culture of continuous improvement throughout your organization.

CloudSuite Quality supports the quality activities of your entire enterprise, not just the manufacturing process.

Support Your Enterprise

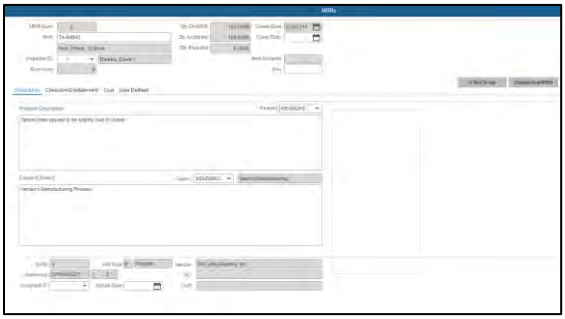
CloudSuite Quality includes support for quality incidents, change management, responses to audit findings, machine and maintenance issues, safety, training, and opportunities for continuous improvements. With CloudSuite Quality, you can make specific reviews mandatory and require that those reviews get addressed as a precondition to closing a change-management report.

Because consistency of quality processes is a critical component to every quality system. QC Process templates allow employees to apply a standard process template to each individual application of their standard process. Process also monitors the progress and completion of each task within the process.

Manage Your Suppliers

The process of managing your suppliers never ends. Beginning with a review of the supplier facilities and an approval process, CloudSuite Quality helps track vendor communications and quality control (QC) status. The receiving process of this module includes material handling, safety alerts, printing tags, assigning unique tracking numbers, and putting material in a QC holding area pending disposition.

From here, QC inspects and assigns the material to inventory for production or tracks non-conforming material to its final disposition. It also provides integrated Vendor RMA support, including links with accounting. CloudSuite Quality automatically calculates vendor product quality and delivery performance to help you build strong supplier relationships.



Beginning with a review of the supplier facilities and an approval process, CloudSuite Quality helps track vendor communications and quality control (QC) status.

Improve Quality on your Jobs

Tracking quality requirements during production often becomes a chore, what with the need to record the disposition of materials at multiple inspection points, track sign-offs, capture test results, record defects, and track items requiring rework or repair. CloudSuite Quality streamlines your entire process.

Many situations require you to track and inspect manufactured items piece-by-piece, according to serial number or tag number. CloudSuite Quality supports all CloudSuite Industrial production methods—jobs, production schedules, and just-in-time (JIT). It also allows you to enter all details while in a job, including disposition, non-conformance tracking, cost of quality, test results, defects, and failures.

In addition, CloudSuite Quality reports the cost of scrap including labor, material, and overhead. You can identify defective raw material at the point of use rather than at receipt, which helps you report the issue promptly. When you mark items as defective during manufacturing, CloudSuite Quality lets you track each nonconforming item and capture the associated costs of quality. In addition, when a job requires you to send material outside for processing, CloudSuite Quality prints paperwork to attach to the product when it leaves your facility and when it returns again.

Meet Customer Requirements

Customers may require you to ship paperwork with each product to confirm that you have designed, manufactured, or inspected the product to meet regulatory or customer requirements. CloudSuite Quality improves your work process by identifying which items require such confirmation and ensuring that these items are routed through QC prior to shipping. You can record inspection results, print necessary paperwork and then tag the product as accepted and ready to ship.

If your customers return the product, CloudSuite Quality works with the CloudSuite Industrial RMA module to direct that product to QC for receipt, inspection, disposition, and non-conformance tracking. The Customer Complaint Reporting (CCR) function helps you respond to feedback from your customers, assign responsibility, track your internal review and corrective action, and measure customer satisfaction.

Infor CloudSuite Quality is built to help you manage key quality requirements that span every facet of your organization. This includes:

- Non-conformance
- Quick reporting of quality issues
- QC item definition
- Corrective action
- Cost of quality
- Record inspection results

CloudSuite Industrial Credit Card Interface

Cash flow is the lifeblood of any enterprise, especially for manufacturers that invest significant capital bringing products to market. Although business-to-business transactions are traditionally invoiced and billed, businesses—including manufacturers—are increasingly offering credit card options to customers. The benefits are numerous. Perhaps the most important is the significant improvements in cash flow that accepting credit card payments can provide. Accepting credit card payments against open invoices can reduce the administrative collections costs. It means cash in the bank account in hours, rather than weeks or more. Also, accepting credit card payments at order entry virtually eliminates late payments and long outstanding accounts receivables.

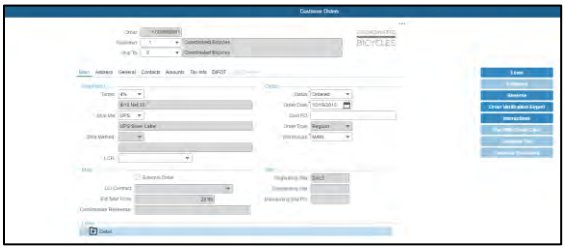
For manufacturers looking to initiate a new credit card processing system or upgrade their current manual credit card processing system, Infor CloudSuite Industrial Credit Card Interface offers an integrated, efficient system to process transactions conveniently for the customer and cost-effectively for the manufacturer. Integrating with a hosted gateway solution of your choice, Credit Card Interface offers customers a safe and convenient payment method. Because the payment is processed directly through Infor CloudSuite Industrial, the transaction smoothly flows through to the financials without any cumbersome manual data entry or reconciliation of accounts. It's fast, easy, and secure.

Credit Card Interface also provides a positive customer experience, contributing to overall improved customer satisfaction. Customers especially appreciate the convenience when purchasing after-market services or spare parts or using payment cards that accumulate points or cash back.

There are no per transaction charges associated with CloudSuite Industrial Credit Card Interface, only the normal credit card processing fees from your bank's merchant account and transactional fees from the gateway software of your choice.

With Credit Card Interface for Infor CloudSuite Industrial, you'll be able to:

- Increase the efficiency of your order entry and collections administration.
- Speed cash flow.
- Improve the profitability of spare parts and repair services.
- Eliminate redundant data entry.
- Reduce data entry errors.
- Support centralized and decentralized order entry models.
- Have support for Multiple Credit Card Gateways and Currencies
    - CenPOS and BridgePay



Improve customer satisfaction by offering the convenience of credit card payments.

CloudSuite Industrial Tax Interface

*** Multi-tenant Cloud only supports AvaTax**

Infor CloudSuite Tax Interface performs all aspects of the tax compliance process, including billing, collections, remittance, and audit trail maintenance.

Managing tax compliance across multiple countries, states, providences, cities and counties can be a tedious and time consuming process. If compliance issues are not managed properly, the results can have serious repercussions. In addition to incorrect invoices, late payments and disgruntled customers, the company may be facing government fines and costly audits. This can all be avoided.

The CloudSuite Tax Interface provides a seamless interface between CloudSuite Industrial and tax management systems from AvaTax, Taxware, Vertex, and Quantum. These tax management systems and the CloudSuite Tax Interface work together to streamline the sales tax compliance process reducing administrative costs, improving customer satisfaction and minimizing compliance risks.

Calculate taxes on the following invoicing functions:

- Customer Order Invoices
- Customer Order Credit Memos
- Customer Order Price Adjustment Invoices
- Project Invoices
- SRO Invoices (FS-Plus)
- Service Contract Invoices (FS-Plus)
- A/R Invoices
- A/R Credit Memos
- A/R Debit Memos

Features and functions:

- Calculate taxes using the tax software system and report them in CloudSuite Industrial.
- Calculate “What-If” tax situations without affecting posted transactions.
- Calculate taxes on a line-by-line level, if needed.
- Include tax parameter and customer tax exemption maintenance.
- Provide tax exemption reporting.
- Interface directly with the tax systems’ geo-codes and sales tax APIs.
- Customize to suit individual needs.

CloudSuite Industrial External Payroll Interface

*** Currently only supports Celergo**

Managing your most critical asset—your people—is typically your biggest expense and most important investment. To maximize your return on this investment, you might need to integrate to a global, comprehensive payroll system that acts an informational bridge between your operational accounting, general ledger, and finance.

Infor CloudSuite External Payroll Interface gives you access to your external payroll system, so you can easily transfer employee data and updates from Infor CloudSuite to your global payroll system.

The CloudSuite Payroll Interface provides a seamless interface between CloudSuite Industrial and payroll systems. These payroll systems and the CloudSuite External Payroll Interface work together to streamline the payroll process reducing administrative costs, improving employee satisfaction and minimizing compliance risks.

CloudSuite External Payroll Interface performs two-way data exchange between Infor CloudSuite Industrial and your third-party payroll system. With this two-way integration you will be able to send the following data from CloudSuite to your payroll system:

- Employee personal data
- Employee address data
- Employee job/payroll data
- Employee country-specific data
- Employee direct deposit data
- Employee deduction and earning data
- Payroll data, including hours worked and rates

You will be able to receive the following data from your payroll system.

- Journal entries, including account numbers, and amounts
- Error data regarding records sent from CloudSuite that could not be processed

CloudSuite Industrial APS

****Basic APS in Core CloudSuite Industrial (SyteLine) offers Infinite Planning. CloudSuite APS offers "Finite" Planning.**

To meet your lean manufacturing goals—to do more and more with less and less—lean planning capabilities are vital. Planning must focus on customer demand today, pulling to the customer due date and synchronizing the flow of material and capacity accordingly. Infor CloudSuite Industrial APS is a powerful solution that synchronizes the use of work centers, inventory, resources, and supply with customer orders.

With CloudSuite Industrial APS, you can rely on a solution that is built, serviced, and managed by manufacturing professionals who understand your specific requirements— the need for processes to flow smoothly and without mistakes; unnecessary steps; wasted resources; and waiting downstream because upstream activities are late. Our solution helps you meet this goal by providing seamless advanced planning capabilities, increasing your on-time performance and throughput while reducing inventory and operating costs.

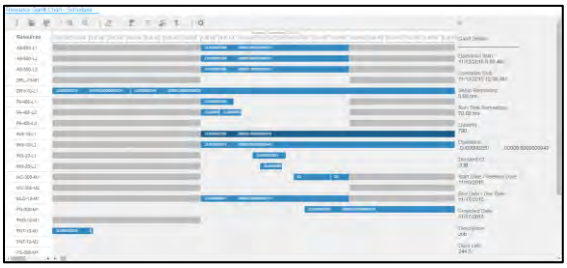
- Greater visibility in planning — Our solution provides exceptional visibility into the lean manufacturing plans it creates. You get a continuously visible plan for each order, so that every order "knows" the jobs and POs it needs, and every supply "knows" the demand it supports. You also gain new insight into your inventory and your resources (machines, operators, work centers, cell, and facility utilizations).

- Simultaneous materials and resource scheduling — Our solution concurrently plans all materials and capacity needed to satisfy the customer order. It balances available capacity with the actual projected workload without assuming that capacity is unlimited or "infinite." Plans are continually adjusted based on the changing dynamics of your manufacturing environment.

- "What-if" capabilities — The "what-if" capabilities of the CloudSuite Industrial APS engine let users determine the impact of decisions. For example, you can insert a high priority order into your current production plan, add overtime hours, or outsource specific components. The system instantly determines which customer orders will be affected and how delivery timeframes will change.

- Real-time promise dates — At the time of order entry, our solution provides the ability to obtain a promise date for the order which considers the finite constraints of both material and capacity. Users only need to perform a Capable to Promise (CTP) check within the order entry screens. This powerful feature gives you real-time date promise capability at both the order header and line detail level.

- Freeze schedule



At the time of order entry, our solution provides the ability to obtain a promise date for the order which considers the finite constraints of both material and capacity.

Implementation Accelerators

Streamline for faster benefits

For manufacturing companies like yours, business is always a race. You are constantly looking for ways to deliver better customer service via multiple sales channels, improve value-added services, and offer a wider product assortment. When implementing IT solutions, you need to get up-and-running quickly. And to do all this, you need a streamlined implementation process that can deliver benefits in weeks, not months or years, and provide the foundation for the expanded features you'll need as your business evolves and grows.

Find specific solutions to immediate needs

Infor® builds and implements software based on decades of industry-specific experience and first-hand knowledge of what makes a company successful. Infor Implementation Accelerators embody that experience by providing highly focused, pre-built content you can use to quickly implement Infor CloudSuite Industrial, while delivering a variety of outputs, including training modules and operational dashboards, to monitor the pulse of your business. By reducing the internal effort and complexity of deploying Infor CloudSuite Industrial, Infor Implementation Accelerators reduce risk and accelerate your time to value.

Implement quickly

Infor Implementation Accelerators deliver predefined processes, templates, training, and more—based on industry leading practices and expertise. Infor Implementation Accelerators can deliver value and benefits, faster and more cost-effectively than many full-blown implementations using traditional implementation techniques.

Infor Implementation Accelerators get your business up and running quickly, delivering:

- **Quick implementation**. By leveraging pre-defined core business processes that are readily available which are flexible enough to adapt to your requirements by changing the configurations.
- **Industry best practices**. Is based on experiences gained from hundreds of projects.
- **Reduced implementation risk for employees**. Infor Deployment Methodology refines your preconfigured solution proposal step by step, so fewer personnel need to be involved in developing the project scope and implementing the solution. Instead, you can focus on helping your users become proficient in the Infor applications.
- **A foundation for future success**. Is ideal for companies that want to implement Infor CloudSuite Industrial rapidly and easily, and need long-term scalability and continuous improvement.
- **Lower overall total cost of ownership.** Your Infor implementation can be less costly, less risky, and deliver faster time to benefit.

Get lasting results

Infor Implementation Accelerators can be your final step—or just the first step—in an on-going process of continuous improvement. As your business changes and grows, it's easy to expand the scale and scope of your Infor CloudSuite Industrial solution and integrate it more fully with other applications by:

- Growing from one or a handful of sites to a global company with multi-division, multi-site capabilities.
- Increasing the complexity and scope of your product line.
- Integrating supply chain partners and customers into your enterprise resource planning (ERP) solution.
- Optimizing your operations by adding strategic extensions, such as e-commerce, mobile solutions, sales force automation, human resources, and business intelligence functionality.
- Entering new markets with the confidence of knowing that you have the integrated application support you need to compete successfully anywhere, against companies of any size.

With Infor Implementation Accelerators there's no end to where you can take your business with Infor solutions.

Key benefits:

- Quickly implement an enterprise solution
- Utilize preconfigured processes, templates, and more.
- Customize processes to meet your needs
- Invest in a foundation for future growth
- Easily educate new users.

Optional Components for Infor CloudSuite Industrial

Infor Campus Plus

Cost Effective, Expert Training

With budgets tightly constrained, your organization may be like many others that are looking for cost effective ways to train employees without sacrificing learning quality.

You can minimize training costs and maximize learning results with a Campus Plus membership for Infor CloudSuite Industrial.

Once you have a membership, you follow a simple three-step process to get your folks trained.

The membership supports these 17 CloudSuite Industrial learning paths (the hours show the duration of each path):

- Foundation (21 hrs)
- Accounts Payable (8 hrs)
- Account Receivable (8 hrs)
- Customer Service (22 hrs)
- Engineering (16 hrs)
- Financial Control (80 hrs)
- Human Resource (12 hrs)
- Inventory Control (16 hrs)
- IT Development (72 hrs)
- IT Sys Admin (16 hrs)
- Multi-site Users (16 hrs)
- Planning (68 hrs)
- Production (62 hrs)
- Purchasing (12 hrs)
- Quality (24 hrs)
- Sales (4 hrs)
- Service (8 hrs)

To help each of your people along those paths you get unlimited access to:

- The official Infor training guides
- Self-directed courses with videos, hands-on exercises, and access to instructors to ask questions
- Instructor-assisted courses (a blend of live sessions and self-study)
- 7 live instructor-led courses
- One-on-one instructor office hours
- On-going training for those who have finished their paths, including all the updates for the latest versions.

You also get an additional 25% saving off of TechEd, certifications, and other instructor-led courses.

Benefits

With a membership you can:

- Maximize the value of your consultants time, letting them focus on advanced topics instead of the basics.
- Remember and expand on what's been learned.
- Teach end users what they need to do.
- Address cross-training, upgrade, and turnover training needs.
- Offload routine questions, freeing up your IT department for other tasks.

Campus Plus is here to help you maximize the value of your consultant visits, save you hundreds of hours of work, and get your people trained.

For more information, go to education.infor.com.

Infor Factory Track

Infor Factory Track is a manufacturing automation solution, purpose built for CloudSuite Industrial. With extensive support for Field Service and Quality capabilities within the ERP, Factory Track provides you with many additional capabilities to enhance your ERP system. In addition to automating several manufacturing and warehousing functions, Factory Track also provides the ability to deploy industrial devices (barcode scanners, time clocks, label printers etc.) for improving operational efficiencies.

Factory Track consists of 3 modules that can deployed individually or together to provide maximum licensing flexibility:

- The *Shop Floor module* is a modern touch-screen solution that allows tracking of production activities. Operators can access the shop floor kiosks to track labor, WIP, attendance transactions and much more.
- The *Warehouse Mobility* module a real-time barcoding and data collection solution that servers an online extension of CloudSuite Industrial's inventory management capabilities
- The *Time Track module* is a comprehensive time and attendance management solution that delivers capabilities like vacation management, centralized time reporting, supervisor dashboards, and configurable payroll extracts

Factory Track is built on the Infor Mongoose framework, which is a rapid application development tool. It is same framework that CloudSuite Industrial is also built on. This not only provides a uniform technology stack but also allows customers to personalize the solution to meet their requirements.

Paperless shop floor

In Factory Track, labor reporting from the shop floor can be accomplished in a number of ways, including using touch-screen devices that can run browser pages. The work center user interface provides users with the capability to start or stop labor, start or stop machine times, issue materials, report production, and perform a number of other functions with a touch of a screen.
Labor functions can be fully integrated into the time and attendance functionality, or they can be used in stand-alone mode. The system allows an operator to work on several jobs simultaneously using the workset feature or, for a team of operators to work on a single job or multiple jobs, using the teams feature. Machine time recording allows for the recording of machine usage either integrated with labor recording using the automatic method or as a stand-alone function using the manual method.

The module retrieves data from the ERP as needed and updates the ERP in real-time to accurately chronicle the usage of material or to record job progress. The operator is able to retrieve drawings or notes for a specific item, operation, or job. They can also request replenishment of material via Kanban. For work centers producing Kanbans, production can be recorded while filling Kanban requests. For repetitive environments, production schedule reporting capabilities are also available.

Using an attached barcode scanner, operators can scan items, lots, serial numbers, and other production data as needed for transaction purposes. The system can be configured to send output to a barcode printing program for most transactions. Lost or ruined labels can easily be reprinted with the reprint transaction.

Inventory management

Most shops use barcodes to identify inventory. The efficiency, accuracy, and ease of use afforded by barcodes have made the technology nearly universal in many industries. Due to advances in communication technologies, Wi-Fi capabilities for mobile devices are now common. Industrial handheld barcode scanners often serve as an integral part of a modern integrated shop floor environment.

ERP screens are often complex and support multiple extended features that are often poorly-suited to the average implementation. By re-designing these screens to better fit the intended task and concentrating on the user profile of the employee using them, Factory Track provides a simple step-by-step method for performing tasks. These screens include only the data needed, much of which is Factory Track read by scanning barcodes, allowing higher accuracy and efficiency to be achieved, resulting in higher productivity.

Using these devices, the shop can link employees to the system in real time, allowing them to act on current information and priorities without the need for paper printouts. This gives the system an up-to-date status for many material activities, such as picking or shipping customer orders, goods received at the dock, and floor replenishment.

Factory Track bridges the disconnect between an ERP system and the shop floor and warehouse. Using modern input methods, including handheld scanners and touch-screens, and an intuitive interface, Factory Track meets users where they are by bringing the robust capabilities of an ERP system directly to the shop floor and warehouse where they are needed. By integrating time and attendance with labor reporting, work center support, and inventory management into a cohesive system that communicates with the ERP system in real-time, Factory Track eliminates the lag that comes from filling out paper forms, reading printouts, and entering data into a database, thereby ensuring that databases are always updated and users always have the information they need at their fingertips.

Time and attendance with labor reporting

The time and attendance with labor reporting functionality enables your site to have employees clock in, time their daily activities, record lunches and breaks, and clock out in an integrated fashion. The data is captured by its reporting date and is available for supervisor review and approval. This functionality includes the most commonly requested features, such as vacation and holiday handling, excused and unexcused absence processing, and overtime determination rules. The data can be wholly or partially integrated back to the ERP system to record actual hours per operation. In addition to collecting hours, the system can also record pieces completed and scrapped. An extract of the data can then be transmitted to a payroll system.

The system can operate as an exception system. The system can be configured to correct minor discrepancies, within the parameters of the system, and to alert supervisors to unexpected occurrences. Supervisors are visually cued to correct, accept, or report problems when established tolerances are exceeded.

By configuring unique employee types, different rules can be applied for different circumstances, or different modes applied to different employee groups. Rather than using a clock-in and -out scheme, some employees may be configured to report their time using a simple time sheet mode, either to general tasks or to ERP-defined activities; for example, engineers working on specific tasks or projects.

CloudSuite Industrial Portals

Portal Manager

The Infor Portal Foundation is an application which provides an administrator the ability to control the complete look and feel of each CloudSuite Industrial Portal.

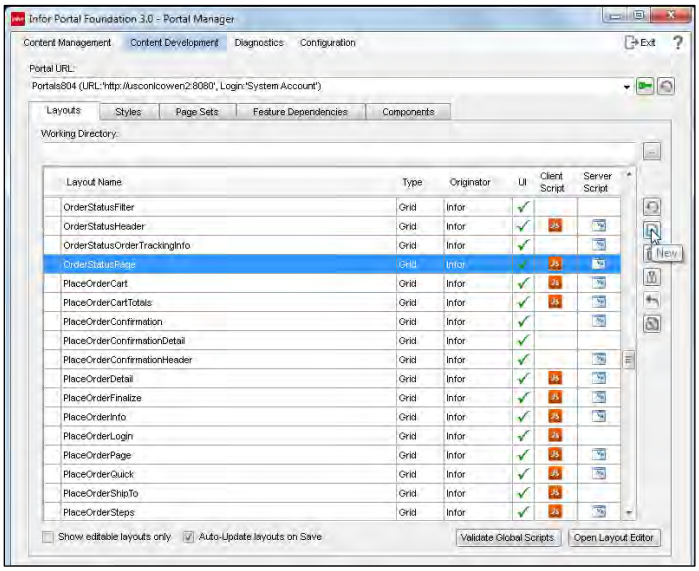
Personalizing the behavior of page layouts, styles, pages sets, and components (such as field display and images) as well as managing the deployment of the alterations is the focus and strength of the Portal Manager.

The database to which the portals will connect along with the authentication and security is easily managed using the Configuration tool.

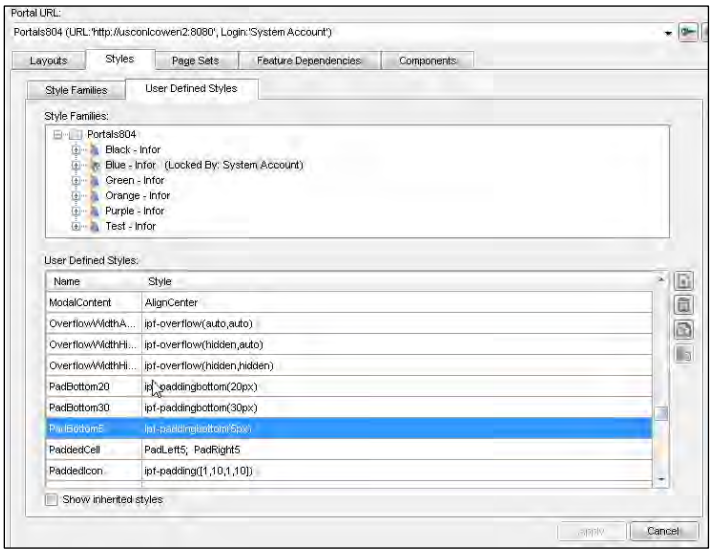
Full debugging capabilities can be accomplished by monitoring specific events of the portals using the built in Diagnostics.

Development Features

- Preview of layouts for visually charged development
- Table design: row and columns control with split and merge cell functions
- Cell designation, property binding and unbound component support
- Embedded cell development
- Full UET support
- Single access to multi-site data
- UI, Client, and Server Script Editing
- VISUAL Studio integration
- Full CSS support
- Pre-packaged and User Definable Styles
- Component level visual manipulation from Collection Definitions down to Styling, Field Display Formats, and Image Management
- Diagnostic Options; selection of which events are monitored with advance filter capabilities
- Import, Export, and Transfer capabilities for easy deployment with version control support
- HTML5 Email Generation
- Animations; smooth scrolling, plus multiple transition options for pop-ups and cards with 3D display and duration control
    - leverages HTML 5 and CSS 3



The Portal Manager organizes the development features in an intuitive UI, from configuration to deployment, and leverages common web application editing tools to reduce training time and speed publication.



Customer Portal

The Infor CloudSuite Industrial Customer Portal enhances your customer relationships by giving them direct access to CloudSuite Industrial data that they care about. Checking on order status, viewing estimates, requesting an RMA, or reprinting an invoice can now be handled directly by the customer.

In addition, detailed product information can be made available including browsing products by category, displaying featured products and top sellers, and then drilling down to individual items with pictures, pricing and associated recommended items. Product and support information can be published as videos and white papers, etc. along with answers to frequently asked questions.

For companies that sell configurable goods and utilize Infor Product Configurator Management (PCM), configuration options can be made available to the portal users.

Shopping Features

- Intuitive Product Lookup
  - Inventory Availability
  - Top Sellers
  - Featured Products
- Shopping Cart capability
  - Credit Card Interface support
- Customer negotiated price support
- Customer Catalogs
- Multi-Currency
- Ability to review and place Order
  - Visibility of Shipping Charges
- Configurable Items for Estimates and Orders
  - Leverages PCM configurator Engine
  - Price calculation with options
  - Summary review of selections made

Communication

- Customer Interaction Log
- Documentation Sharing & Management
- Announcements
- Other; Press Releases, Videos, FAQ, KBase, & Contact Us

Checking on order status, viewing estimates, requesting an RMA, or reprinting an invoice can now be handled directly by the customer.

Account History

- Order Status
- Estimates Listing
- RMA Listing
- A/R Balance

Account Management

- Company Profile
  - Company Details, Billing & Shipping
  - Payment and Credit Limit
- User Profile
  - Name, E-mail preference
  - Password Management
  - Additional User Creation
- Inbox

Service

- Incident Entry and Inquiry
- Service Knowledge Base Query
- Unit Registration
- RMA Listing
- A/R Balance

Vendor Portal

The Infor CloudSuite Industrial Vendor Portal enhances your vendor relationships by giving them direct access to CloudSuite Industrial data that they care about. Viewing Purchase Orders, viewing consigned inventory, responding to a price requests, or updating a due date on a Purchase Order can now be handled directly by the Vendor.

In addition, how well they are performing can be viewed and then the information that was used to determine this evaluation can be drilled into by the Vendor for On Time Delivery. Product and support information can be published as videos and white papers, etc. along with answers to frequently asked questions.

Vendor Features

- Purchase Orders
- Consigned Inventory
- Inventory Level Projection
- Price Requests
- Vendor Interactions
- On Time Delivery
- Planned Orders
- Product Price Contracts

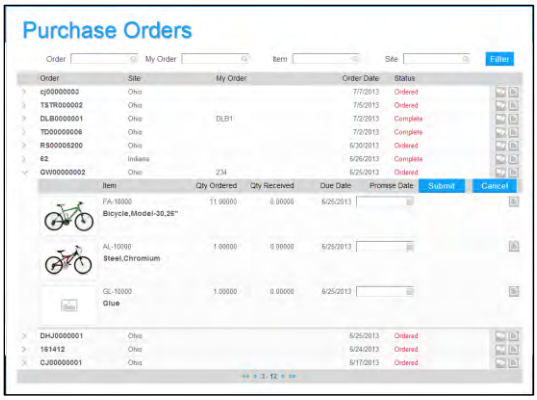
Communication

- Customer Interaction Log
- Documentation Sharing & Management
- Announcements
- Other; Press Releases, Videos, FAQ, KBase, & Contact Us

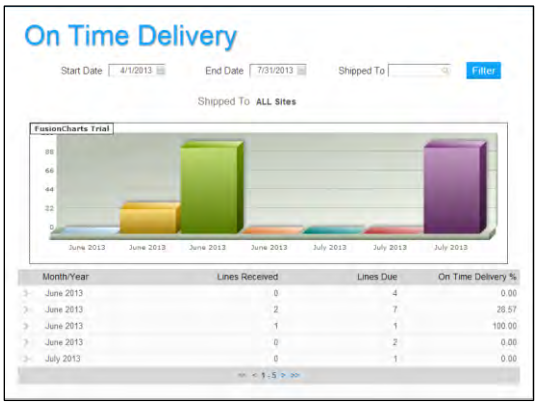
Account Management

- Company Profile
    - Company Details, Billing & Shipping
    - Payment and Credit Limit
- User Profile
    - Name, E-mail preference
    - Password Management
    - Additional User Creation
- Inbox

Vendors can submit new price breaks for their contracts.



Checking on purchase orders, responding to price requests, updating a due date on a purchase order can now be handled directly by the Vendor



Each supplier can view a graphical display of their On Time Delivery metric

Reseller Portal

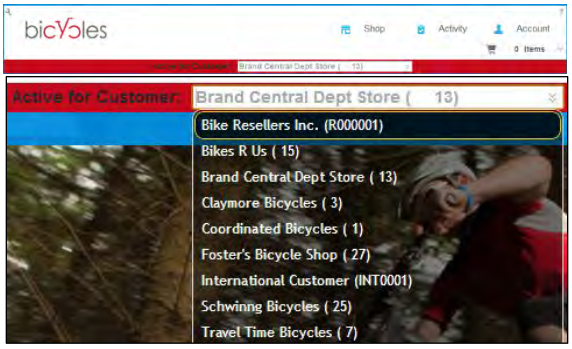
The Infor CloudSuite Industrial Reseller Portal enhances your reseller relationships by giving them direct access to CloudSuite Industrial data pertinent to both their own account as well as any customer account for which they represent.

A Reseller is setup in the back office as a Customer (to login to the Customer and/or Reseller portals), a Salesman (to associate other existing customers that belong to this reseller), a Vendor (to get paid for the commission earned due to the orders placed by their customers) and as a FS-Plus Partner (to submit SRO Transactions from the portal and to get reimbursed for the same).

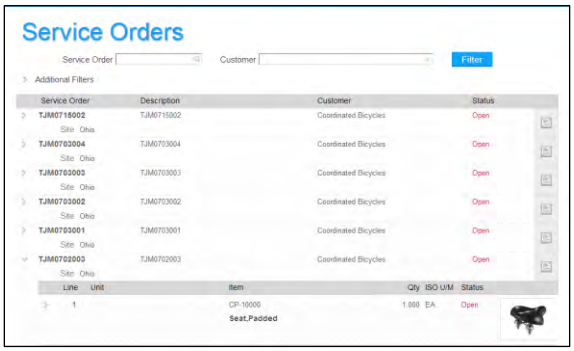
In addition to the features supported by the Customer Portal, having access as a reseller provides additional functionality such as:

- Commission Due
- Pose As
- Service Order Query
- Service Transaction Entry

Query commission information specific to the associated CloudSuite Industrial Sales person



Act on behalf of a specific customer for whom you represent; a reseller can be associated to one or more customer accounts. The ability to see all customer information or narrow down to just one is provided.



In addition to the Incident, Unit, and Knowledgebase capabilities of a customer, the reseller has access to Service Request Orders (SROs) associated to the customer represented as well as the ability to log material, labor, and expenses incurred on each SRO.

Mobile

CloudSuite Industrial Mobile

***To use this Mobile module users must be connected to the Internet.**

Infor CloudSuite Industrial Mobile Access puts key functions on your mobile device for various user roles within CloudSuite Industrial. This data can be viewed from multiple sites.

The **Executive** must have visibility into the health of your organization. They require a quick reference into key values for Cash Balance, Today's Bookings, Today's Shipments, and Order Backlogs. You can also link to Accounts Payable and Accounts Receivable details for all the pertinent information you need. As well as set up alerts:

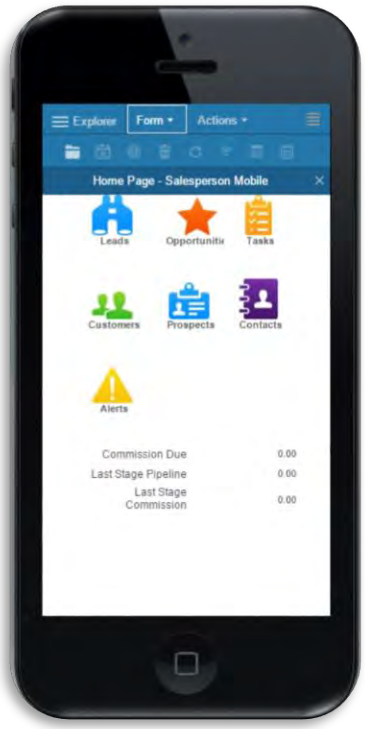
- Alert when an order for a specified customer is overdue
- Alert when a specified account is over budget
- Alert when an order line for a customer is projected to ship late.

While **Salespeople** are on the road, they are able to enter new contact information, view Sales Orders, Leads, Opportunities and Contacts. They can also receive alerts regarding critical customer information. Using the calendar, they can also see any tasks that are needed to close opportunities.

- Alert when a customer order is on credit hold.
- Alert when an order has shipped for a specified customer.
- Alert when a lead has been assigned to them
- Alert when an opportunity or follow-up is due
- Alert when an order line is projected late

Your **Production Manager** gains the ability to be notified and resolve issues as they occur even when away from their desk regarding critical shop floor and production information. Alerts can be configured to be sent in certain unexpected cases such as when the material issues are more than required or when the Actual labor hour posting is more than planned. Using production calendar forms, planned production can be viewed for the day and into the future.

- Jobs to complete
- Jobs to release
- Jobs completing late
- Job labor status
- Alert when the material issues are more than required
- Alert when the actual labor hour posting is more than planned
- Alert when a job is projected late for a customer.
- Alert when completed quantity is more than released
- Alert when there is any transaction with status error in the DCSFC table (shop floor transactions)



The **Controller** has the responsibility to control costs for the day to day operations of your company. By using the mobile controller application, they can view Accounts Payable, Accounts Receivable, Account Balances, inventory value, evaluate Funds committed for Purchases, and see Today's bookings. Alerts can also be set to notify them of issues before they occur.

- Alert when a specified account is over budget.
- Alert when any customer goes on credit hold.
- Alert when material is over-issued for a job.
- Alert when a transaction for a specified account is over a specified amount.

The **Mobile IT** functions will help your IT staff identify and resolve various issues in order to help provide a stable and responsive IT environment. There are a number of Windows Services and Processes that are required for the smooth functioning of CloudSuite Industrial and other programs, e.g. TaskMan, Web Server, Exchange Server, etc.

You want to know the status of these services, whether you're on site, off site, or temporarily away from your desk. You can create a list of services to be monitored and CloudSuite Industrial can trigger an alert (in the form of text message) to your mobile device when one of these services is stopped or not responding. You can view the list of services you're monitoring on your smart device and perform tasks like start, stop, or restart the service, if required.

- Service monitoring/alerts and resolution
- Unlock locked out users
- Kill active tasks
- Unlock locked functions
- Unlock locked journals

The **Service** functions will help companies outfit their technicians with mobile handheld devices. As a delivery mechanism, it bridges the costly gap between the field and the back office, improves operating efficiencies, and leads to increased corporate wealth and stakeholder value.

Service provides accurate and near real- time information, enabling field technicians, back-office users, and executives to make informed decisions.

- Access customer contacts and data
- Process transactions for labor, material, and miscellaneous expenses
- Create appointments
- Process Credit Card payments
- Capture signatures
- Inbox
- Transmit coordinate information to the back office

CloudSuite Industrial Service Management Mobile

***Mobile app can be used in connected or disconnected mode.**

Service Management Mobile helps companies outfit their technicians with mobile handheld devices. As a delivery mechanism, it bridges the costly gap between the field and the back office, improves operating efficiencies, and leads to increased corporate wealth and stakeholder value.

Customers expect faster and more efficient service order resolution. Faster response times and more first-call resolutions are the building blocks of increased field technician productivity. When field technicians have access to information concerning unit history, appointment details, and repair instructions, there is a fundamental shift in productivity gains. Online access of information minimizes service order documentation and operational delays normally experienced with a manual process. Service Management Mobile minimizes the time spent on service order resolution and billing processes, improving overall operational efficiencies throughout the service delivery life cycle.

Service Management Mobile acts as a delivery mechanism especially designed for mobile field service organizations that rely on a steady flow of incoming and outgoing data. Field technicians require access to centrally stored customer, service order, scheduling, and resolution data. A competitive advantage is gained by seamless integration between field technicians and back-office customer service, service logistics, and accounting systems. Service Management Mobile helps organizations speed response time, complete more service orders per day and provide superior customer service.

World-class service firms use resource productivity (i.e. service orders completed per day/per technician), service response time, customer satisfaction, and first-time resolution rate as some of their key performance indicators (KPIs) and look for ways to drive greater efficiencies with the wealth of data provided by mobile solutions.

Service Management Mobile provides accurate and near real- time information, enabling field technicians, back-office users, and executives to make informed decisions.

- **Device compatibility** — Empower your workforce through the use of mobile devices. A mobile license grants a technician access to work disconnected using an Apple or Android phone or tablet or connected, via an internet browser, on a phone or mini-tablet.

- **Customer and Service Details —** Field technicians can easily access customer contact information as well as and historical data such as incidents, service orders, service contracts, invoices and unit configuration details related to that customer.

- **Transaction Processing** — Field technicians can process transactions for labor, materials and miscellaneous expenses associated with a Service Request Order (SRO).

- **Follow-up Service & Future Requests** – While in the field, future service commitments can be made by creating follow-up appointments for the job at hand or creating new incidents to address additional service requests.

- **Credit Card Processing** — With use of the support gateway provider, a technician can process credit card payments while in the field.

- **Native Device Calls** – easily launch phone dialing or mapping features of the iOS or Android device to assist with the technician routing and communication

- **Signature Capture** – capture a signature as part of the service order completion and approval process.

- **GPS Polling** — Technicians that have mobile devices equipped with GPS can transmit their coordinate information to the back office. The information is useful to a scheduling manager or dispatch which needs track the partners last known location for route optimization and chart historical locations for a given day.

- **Clock On/Off**— Clock on when the technician arrives on-site and clock off when the work is completed for accurate time tracking for billing purposes and labor analysis.

- **Picture Attachments** — Quick access to the device's camera and photos for attaching an image to the work order to further document the work complete and the equipment serviced.

- **Service Work Order Printing** – Print and Share a PDF with the details of the work performed, the company logo and a signature from the customer.

Service Management Mobile acts as a delivery mechanism especially designed for mobile field service organizations that rely on a steady flow of incoming and outgoing data.

CloudSuite Industrial Forecasting

For discrete manufacturers, many factors contribute to an efficient operation and healthy bottom line. One important factor that can get overlooked is forecasting — determining the right amounts of raw materials and components needed to meet production requirements. A manual, informal process can result in costly excess inventory or order fulfillment and production efficiency problems.

At many companies, forecasting is done using inefficient and error-prone spreadsheets. To compensate, many companies maintain an inventory "fudge factor," keeping too much inventory on hand. Other times, they maintain too little and consequently lose sales, incur expediting costs, or ship late.

Forward-thinking discrete manufacturers overcome these operational challenges by automating their forecasting processes with a solution integrated with their ERP system to help them quickly calculate more accurate forecasts and optimal safety stock levels.

Infor CloudSuite Forecasting automates the calculation of forecasts and other inventory drivers such as safety stock, and alerts you when actual demand varies from the plan. Forecasting is easy to use and implement, and automates the following processes:

- **Collect data** — Collect historical sales of products or usage of components in both units and dollars.

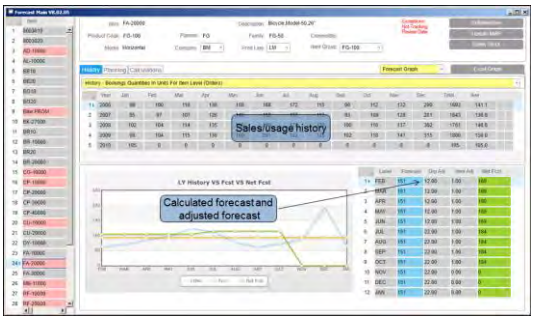
- **Calculate forecasts** — Use historical demand and various algorithms with what-if analysis. Forecasts also can be generated collaboratively with multiple data points like customer input, salesperson input, manager input, etc... The solution also supports combined forecasting methods, such as when part of demand is forecast by statistics and part by imported customer data.

- **Analyze data** — Analyze forecasts, sales, bookings, or usage of materials by unit and dollar volume and compare forecasts to historical trends and to actual demand. Information is presented graphically by groupings, including product, family, commodity, planner, and user defined.

- **Adapt the forecast** — Adjust the forecast for specific market factors such as promotions, competitive situations, and new opportunities. These adjustments can be made at the various group levels or at the item level.

- **Calculate optimum inventory levels** — Calculate optimum safety stock, order size, and re-order points, factoring in average usage, variability, lead time, and desired service level.

- **Perform top-down forecasting** — For configure-to-order products, use planning bills to calculate or specify a single forecast for a group of items and then consume that forecast when members of the group are sold. For common components but with unlimited end-item possibilities, the solution enables you to forecast the components, rather than the end items, and consume the forecast when the components are used.



Statistically calculate forecasts based on historical demand using various algorithms with what-if analysis.

CloudSuite Industrial SytePlan

Sales & Operations Planning is a business management process to achieve the alignment of all business activities to balance supply and demand. The Infor CloudSuite SytePlan process helps sales, production, inventory, and financial manager's work together to maximize customer fill rates, optimize inventory, and maximize profits.

SytePlan provides workbenches, queries, graphs, and reports that facilitate the Sales and Operations integrated management process. These tools assist you in creating an Annual Operating Plan (AOP) and monitoring your performance against the plan.

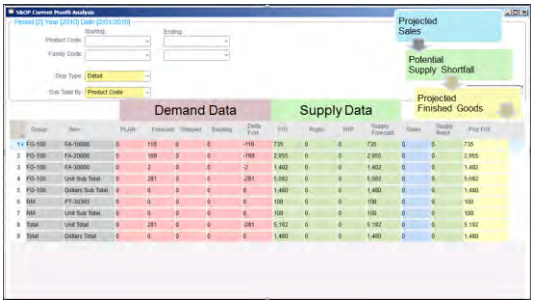
SytePlan helps identify supply and demand problems and directs your management team towards the activities that will balance supply and demand and keep you on track with the plan. Identify problems such as:

- Producing WIP/inventory for products in excess of the demand
- Booking more or less than the forecast
- Changing the forecast too much for production to respond
- Building up WIP/inventory for products that have a backlog
- Planned production that is inadequate to reduce the backlog
- Creating unreasonable forecasts considering our capacity
- Selling what is most available and most profitable
- On-time delivery problems

CloudSuite Industrial tells you what jobs and POs are needed to fill demand. SytePlan tells you if you will make your revenue and inventory plans; why you've failed to make them in the past; and how you can make them in the future—with a big picture perspective of dollars and units of various product groupings and drill down to identify root causes and corrective actions.

Features:

- Plan/Budget Definition
- Plan/Budget Detail
- Annual Operating Plan Workbench
- Master Report
- Current Month Analysis
- Last Month Analysis
- Historical Forecasts
- Forecast Stagger Chart
- Supply-Demand Weekly Summary
- Monthly Analysis Report
- Customer On Time Delivery Analysis
- On Time Delivery Detail
- Rough Cut Capacity Analysis
- Inventory Turns Analysis
- Gross Margin Analysis
- Vendor Performance Analysis



Infor CloudSuite SytePlan tells you if you will make your revenue and inventory plans; why you've failed to make them in the past; and how you can make them in the future—with a big picture perspective of dollars and units of various product groupings and drill down to identify root causes and corrective actions.

CloudSuite Industrial Process Industry Pack

Manufacturing in the process industry requires a unique set of capabilities that are vastly different than discrete manufacturing. Where discrete manufacturing assembles many different parts to create a single finished good, process manufacturing formulates a set of materials that can produce many different finished products with unique packaging configurations.

These differences require a formula management system that allows for construction of formulas that account for factors like solubility and total yield. It requires having the flexibility to resize formulas to produce batches according to your production needs. You can design a formula to produce a batch of 10,000 pounds, but if you only have demand for 6,000 pounds you can resize the production lot and it will make all the mathematical calculations based on the formula for all the materials going into that production lot.

Although there are many differences there are also similarities between discrete and process. These similarities such as requiring lot and serial traceability, inventory location management, integrated quality management functionality, and advanced planning and scheduling are provided by the core Infor CloudSuite Industrial application. The Process Industry Pack adds the functionality that is unique to the process industry and blends in with the core CloudSuite Industrial functionality.

Companies in the food, beverage and chemical industries all are facing increased quality assurance requirements. Leveraging the Infor CloudSuite QCS module provides you with full life cycle management that is needed to adhere to those tough regulatory requirements. A Recall Management application is included to fully trace lots affected by a recall all the way back to the raw material vendor and forward to all the customers that received those lots.

The Infor CloudSuite Industry Pack - Process contains specifically tailored functions to meet certain unique requirements of the process industry, including:

- Split Bills of Material – create bills to create a batch of product that is then used to fill multiple container sizes.
- Manage multiple units of measure for any item
- Model formulas based on weight or volume as well as loss or yield percentages
- Account for materials used in the formula that are soluble or are removed from the process prior to packaging
- Resize a formula based on production needs, scaling all of the components accordingly
- Maintain full history of formulation revisions and be able to recall prior versions and place into production as needed.
- Manufacturing Specifications allow you to combine the materials on the formulation with a routing from the standard CloudSuite Industrial application providing the efficiency of defining templates and the flexibility of combining the templates to define your process manufacturing operations.
- Process Workbench allows you to be able to see for a Manufacturing Specification all the jobs that are created from that specification, it includes the formulation job and well as the multiple fill jobs to various packaging sizes.
- Issue materials quickly and efficiently by reporting in batch production quantities.

- Leverage core CloudSuite Industrial functionality that addresses costing and lot and serial traceability.

CloudSuite Industrial Employee Self Service

Simplify human resource management

Every business leader knows that people are a company's most important asset. Managing human resources effectively can improve company performance. One tactic that has proven effective is to give employees more autonomy around benefits, time off, and other essential employment information. By offering a broad range of HR self-service options, your employees will develop a sense of ownership, and your HR staff can keep focused on strategic issues rather than administrative details.

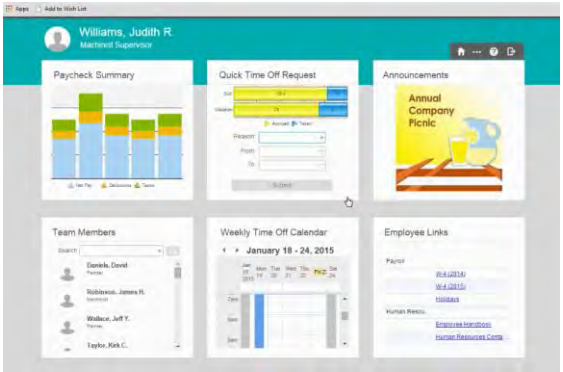
Team up with an experienced partner

Infor® solutions embody decades of experience at helping manufacturers like you improve performance in every phase of business. Our advanced technology lets you work the way you live, respond rapidly to new business situations, collaborate easily, and lower total costs. You'll also enjoy the exceptional extensibility of Infor solutions, which give you the ability to expand, relocate, collaborate with suppliers worldwide, and respond to new opportunities at a moment's notice.

Gain greater control

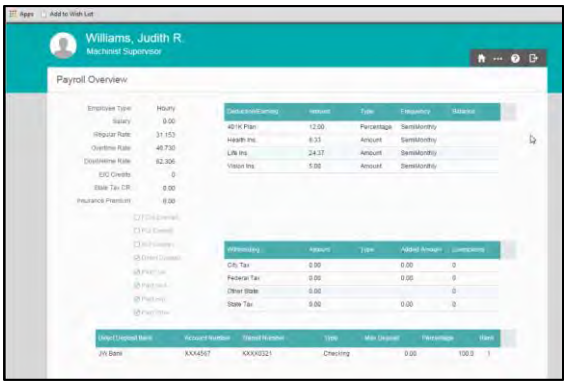
Infor CloudSuite™ Employee Self-Service brings you powerful human resource management capabilities in the context of the same technology platform that drives the rest of your business. You'll get easy, online access to features for improving HR management, including:

- **Employee and manager self-service—** You can streamline your HR process by instituting employee and manager self-service features that let employees view and update personal and payroll information. They can also view their paystubs and submit paid time-off requests.
- **Human resources—** Infor CloudSuite Employee Self-Service frees up HR employees to focus on more strategic tasks. It also gives managers access to key human resource data such as performance reviews, organization charts, and educational background to drive strategic decisions.
- **Payroll—** You'll improve payroll accuracy and gain seamless integration with Infor's financial management solutions thanks to Infor CloudSuite Employee Self-Service's fast, direct access to payroll data. You'll also be ready to streamline the way you manage hours, pay, deductions, and direct deposits.
- **PO Requisitions-**You can now use the Employee Self Service (ESS) web application to create or edit purchase order requisitions and submit them for approval. Managers can approve requisitions, as well as create or update requisitions, for their direct reports. Employees and managers can also view PO requisition history.



Do business better

With this powerful, browser-based employee self-service module, you can allow employees to log in from the Internet to review personal and payroll information, enter time-off requests, view company information, and more. You'll not only reduce the labor required for HR processing, you'll also gain valuable insight about what your workforce is doing, what it costs, and how to use it more effectively. And because it's part of your business software solution, you'll have that information in the same system that drives your strategic decision making. As a result, you'll be able to improve the way you manage your most important asset.



Infor Configure Price Quote

Infor Product Configurator

The Infor Product Configurator is a new-generation product, pricing, manufacturing, services, and sales configurator that is easily integrated with any or all of your web, enterprise, desktop, or laptop systems. Powerful and intuitive, The Infor Enterprise Configurator has the flexibility to handle any customizable product or service, and support practically any type of user or application.

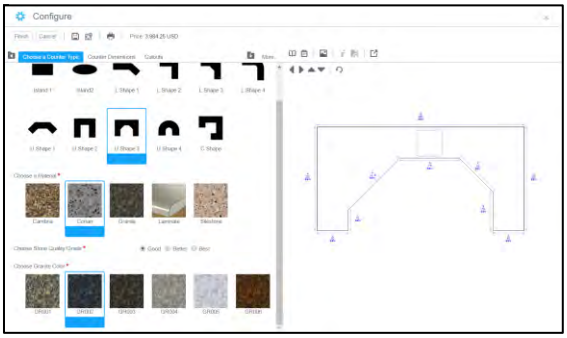
Intuitive user interface — A dynamic user interface makes the entire configuration experience highly intuitive, productive, and personalized.

Powerful configuration engine — The core configuration engine processes the rules, constraints and associated data in product models based on inputs from the user interface or other applications to provide guided product selection, product configuration, pricing, real-time product visualization, and output generation.

Graphical Design Studio — The product models that drive the Infor Enterprise Configurator are developed in the Design Studio. You can easily create comprehensive product models that make selection and configuration of even the most complex products intuitive and error-free.

Deploy anywhere, manage centrally — Besides its flexibility and ease of use, the Infor Enterprise Configurator has uniquely powerful integration and administration capabilities. Using these tools, you can easily deploy the Infor Enterprise Configurator for a specific function, or across all your applications and computing platforms. You can decide to make it available to particular individuals or to your global community of employees, partners and customers.

- Increase sales by making every sales person, customer service rep, dealer, and distributor a product expert.
- Decrease costs by reducing the need for engineering support in sales and other processes.
- Eliminate errors in product specification and pricing.
- Enable growth with the ability to quickly train new employees and sales partners.
- Speed new product introduction by reducing or eliminating the need to distribute product and pricing updates.
- Streamline production and improve quality by providing accurate configuration-specific information to manufacturing.
- Differentiate from the competition by becoming “easy to do business with” when dealing with your customized products.



Infor Configurator’s dynamic user interface makes the entire configuration experience highly intuitive, productive, and personalized.

Infor Sales Portal

***Not Multi-tenant on Premise Only**

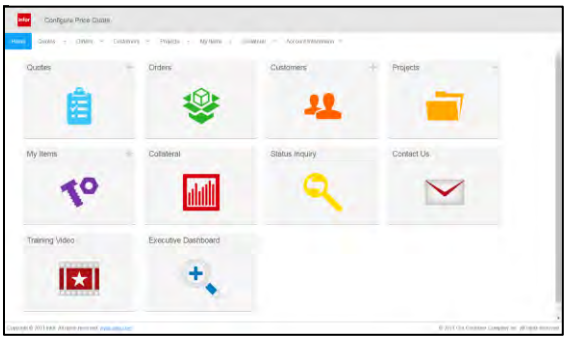
Infor Sales Portal is a comprehensive quoting and ordering system for selling both configured and standard products through all your channels, including dealers, distributors, and/or your direct sales force.

Sales Portal provides a full range of capabilities to guide your sales people, channel partners, and key customers through product selection, configuration, pricing, quoting, proposal, ordering, and status inquiry.

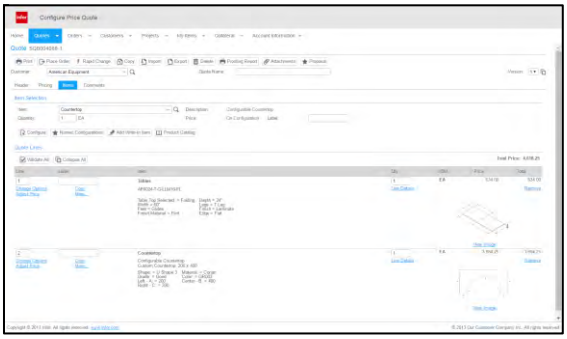
- Select, configure, price, quote, and order with confidence:
    - Flexible product catalog
    - Guided product selection
    - Product configuration
    - Product visualization
    - Dynamic pricing
    - Quote/proposal document generation
    - Ordering
    - Status and History Inquiry
    - Internationalization

- **Collaborate throughout your sales channel** — Support fast, effective communication among all levels of your sales channel, from customer to dealer, distributor, and you as the manufacturer. Export/import and Internet-based communication capabilities for RFQs, orders, and other transactions allow your multi- level sales channel to work closely together to win more business. Customer service reps can work on open quotes or orders with dealer or outside sales reps to provide assistance

- **Deploy anywhere, manage centrally** — Modular, Internet-centric deployment architecture that lets you get the right tools into the hands of all your sales people, regardless of where they work. You can deploy the system online as a website, distributed to offline laptop or desktop PCs, or both. In any case, you manage one system and one data repository with the confidence that everyone's information is always be up-to-date.



Infor Sales Portal provides a full range of capabilities to guide your sales people, channel partners, and key customers through product selection, configuration, pricing, quoting, proposal, ordering, and status inquiry.



Infor 2D Design Automation

Infor 2D Design Automation reduces order errors by providing real-time visual feedback of selected options. It also eliminates non-value-added time by generating configuration-specific outputs for use by sales and manufacturing.

2D Design Automation is a powerful geometry engine that works with the CloudSuite Industrial Configurator to dynamically generate dimensionally accurate 2D drawings. Outputs are produced in a variety of raster (e.g. JPG, GIF) and vector (e.g. SVG, EMF) formats that are used as:

- 2D model Images displayed during the configuration and quoting process.
- 2D print Images used in printed documents such as bids, proposals, product brochures, and reports.
- Annotated Drawings that are used in submittals or as sales drawings.
- AutoCAD and CAD Files for inclusion by engineers and designers in their own CAD drawings.

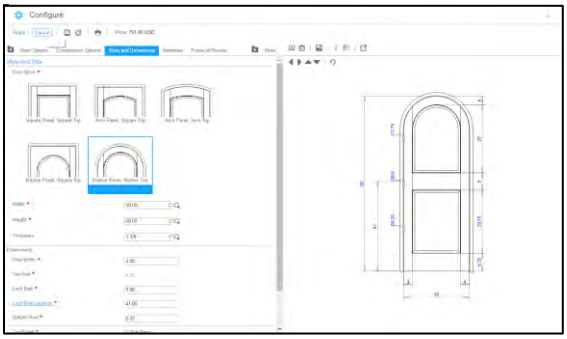
2D Design Automation provides immediate confirmation that a configured product looks exactly the way the customer wants it to look. It can be run interactively, as an integral part of the configuration process, or after all configuration selections are made.

The 2D Design Automation geometry engine can be queried for values it calculates based upon inputs from the configurator. Key driving dimensions are passed to the geometry engine which resolves the constraints and dimensional relationships to calculate the values of derived dimensions.

The Infor Enterprise Configurator can then use those values in the configuration session. This capability can be used to keep complex engineering logic or math external to configuration rules, reduce errors in computation by using a robust geometry engine to do the math, and improve performance by using powerful mathematical solvers built into the geometry engine.

Parametric 2D Design Automation template models used by the geometry engine are created with the 2D sketching capabilities of the popular AutoDesk Inventor™ or SolidWorks CAD system enhanced with a 2D Design Automation plug-in. Using this innovative approach, existing drawings can often be turned into “smart” 2D models in a matter of hours.

The resulting models enable 2D Design Automation to automatically resolve constraints and dimensional relationships between geometric elements and perform complex calculations necessary during configuration to generate the images dynamically. This results in reduced model design time, easy maintenance of complex logic in visual templates, optimal run-time performance.



2D Design Automation provides immediate confirmation that a configured product looks exactly the way the customer wants it to look.

Infor Document Automation

*** Not Multi-tenant on Premise Only**

Infor Configure Price Quote allows manufacturers to streamline the selling and production of their configured products. With Infor CPQ software you can drive revenue, reduce costs, and differentiate your brands in the marketplace. You'll be able to create compelling quotes, accurate orders, and complete bills of materials and routings.

Make current, relevant product information available on demand by adding Infor® Document Automation. With this application, you can dynamically generate Microsoft® Word and Adobe® Acrobat PDF documents. Whether you need to generate proposals or submittals from your quoting system, technical specifications from your online portal, production documents from your ERP system, or personalized product brochures from your marketing website, you'll be able to do it quickly and easily with Infor Document Automation.

Key benefits

- Reduce sales cycle time by delivering personalized proposals, submittals, and other sales documents.
- Communicate effectively by crating warranty and other performance documents, specific to user selections.
- Close business quickly by generating personalized contracts focusing only on terms related to the business at hand.
- Reduce errors by producing shop-floor documentation that includes drawings and detailed instructions specific to the order.
- Deliver value to your channel by providing material safety data sheets, installation instructions, and other documents that ease the setup and use of your product.
- Deliver a rich experience by including elements such as images, drawings, tables, and graphs with dynamic application data and selected product attributes in your dynamic documents.

Personal Documents on demand

You can set up Infor Document Automation to produce personalized documents on demand from virtually any business or web application. A document can represent a single product or multiple products, as in a quote or order. You'll be able to generate a variety of documents using PCM's configuration content, including proposals, submittals, contracts, specifications, instructions, warranties, datasheets, and regulatory statements.

Setup and maintain with ease

Setting up Infor Document Automation is as simple as creating template documents in Microsoft Word to define the style of the output document.

You can define any boilerplate text, bookmarks, or intelligent tags in the template. The Infor Document Automation engine processes these tags at runtime to include information based upon your selections. These selections can include configurator options, or simply attributes or data elements within the business application. Bookmark types can include text, text blocks, images, tables, charts, graphs, dynamic images and dynamic tables.

Use with multiple applications

You can use Infor Document Automation from a variety of business and web applications. You also can generate multiple documents from a single application process. For example, during quoting, you can use Document Automation to deliver external proposals, warranty and specifications sheets, and internal review documents.

Infor Enterprise Quoting

***Available as MT - can be used with CSI in the cloud or On-Premise**

Win more business

To accelerate your sales process, you need a quoting and ordering system that provides an intuitive experience for selling configured and standard products through all your channels, including dealers and distributors. Infor CPQ's Enterprise Quoting provides a cloud based solution with customization capabilities that make the sales process simple and straightforward. Enterprise Quoting enables collaboration within your sales organization, streamlining workflow to create an accelerated, optimal buying experience that's fast, accurate, and visual.

Empower your salespeople to configure, price, quote, and order with confidence

Infor CPQ Enterprise Quoting guides salespeople to available items and configurable product features, options, and dimensions, while ensuring that configurations represent valid offerings. Product visualization helps your reps quickly confirm their products, features, and option selections during configuration. Dynamic pricing instantly produces a configuration-specific list price, dealer cost, and quoted selling price. Document Automation capabilities dynamically generate personalized proposals that include configured product information and images. Orders are automatically passed to your business system via enterprise integration.

With Infor CPQ Enterprise Quoting, you have a single point of control for sharing product, customer, and order information with all back-office manufacturing and business systems, including collaborative demand and supply chain systems. As a result, you can be sure that everyone in your value chain is working with the most up-to-date information. The solution is easy-to-use, and you can quickly tailor the quoting and selling experience to your match your market and unique needs. Detailed Reporting and analytics provide your sales leaders with increased visibility into the performance of their direct and deal the sales process organizations.

Benefits

With Infor CPQ Enterprise Quoting, you can increase sales, cut costs, and differentiate your brand.

- Pursue more opportunities by accelerating the quoting and ordering process.
- Increase your deal size by recognizing up-sell and cross-sell opportunities.
- Arm your sales team with product expertise.
- Protect margins by ensuring consistent application of pricing rules.
- Support your growth plans by quickly training new sales staff and deploying consistent selling processes globally.
- Reduce selling costs by reducing rework and eliminating the need for paper quoting tools and catalogs.
- Differentiate your brand within your dealer network by putting your products first.

Collaborate across your sales channels

You get fast and efficient communication throughout all levels of your sales channel—from customer to dealer and from dealer to manufacturer—with Infor CPQ Enterprise Quoting's robust collaboration capabilities.

With Infor CPQ Enterprise Quoting, you can:

- Collaborate with your dealer sales network to win more business.
- Obtain status and process approvals for new product variations and/or unique pricing requests using collaboration capabilities.

Take advantage of a platform designed for customer personalization

Infor CPQ Enterprise Quoting is built on a rules-driven platform designed for converged commerce quoting, so you can quickly and easily tailor EQ to meet the unique needs of your sales organization. The result is a solution that so it capitalizes on the competitive differentiators of your brand and meet the unique needs of your sales organization. The

personalization tools within EQ represent business logic graphically, so they are easy to understand and tailor change by administrators without a technology background. These rules are also stored as data, which is then layered to support extensions and protect those extensions in future upgrades to the core cloud solution.

Easily integrate with enterprise and partner business processes

Infor CPQ Enterprise Quoting can be easily integrated with your enterprise and partner business processes. The cloud based EQ solution supports end-to-end process integration for opportunity to cash, design to customer delivery. Via its integration layer, you get a single point of control for sharing product, customer, and order information with all your back-office business systems and partners. As a result, you'll be able to create customer-facing experiences that improve your brand loyalty and increase your sales.

Infor CRM

***Cloud – can be sold as Single-Tenant and integrated to Multi-tenant CSI**

***On Premise – On Premise CRM to On Premise CSI**

Organizations have more options than ever before to get work done. But relying on multiple systems to access information can be confusing and frustrating. By integrating CRM and ERP data, including detailed customer information, invoices, orders, and more, interactions with customers will become more relevant and meaningful, leading to a much stronger relationship.

Automate your business Processes

Infor CRM provides users with rich, mobile access across popular smartphones and tablets for team members who need access in the field. With a greater understanding of each account, sales and service teams can take a more consultative approach to qualify customers better, run more credible sales cycles, and lower the total cost of sale. Access to account information and other CRM functionality is also accessible directly within Microsoft® Outlook via the embedded Xbar.

Infor CRM gives users access to critical ERP data within the system through Infor ION, purpose-built middleware that provides an innovative framework to automate business processes, drive better decision making, and dramatically improve exception management. It allows the connection of Infor CRM and ERP solutions such as Infor CloudSuite Industrial (SyteLine)—so you can view all of your data across all of your systems.

Enjoy seamless information access

Infor CRM gives sales people the information they need to have insightful conversations and rich interactions with customers, prospects, and partners.

The solution provides native multi-office, multi-company integrations and adds new tabs to Infor CRM so you can display mission-critical ERP information like:

- Customers and contacts
- Bill-to, ship-to, and pay-from
- Quotes and sales orders
- Shipments and returns
- Receivables and invoices
- Products and locations

Create a consistently flawless experience

Infor CRM delivers a complete view of customers, contacts, transactions, and products by integrating disparate systems and data sources into a single view. Infor CRM is the hub to manage and track customer interactions across teams. The power of Infor CRM makes it easy to connect processes, share intelligence, and deliver a consistently flawless customer experience.

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Help key team members deliver meaningful customer interactions

Infor CRM equips teams with the information needed to provide a consistent customer experience at any point during the customer journey. For example:

- **Sales managers**—Use holistic customer experience data to teach sales staff how to be better at building relationships. Customer history data can also be used to predict forecasts and pipeline.
- **Sales representatives**—View complete information about customer interactions across all departments to forge closer customer relationships. Gain valuable insights into the account receivables that can affect commissions.
- **Marketing managers**—Gain insights into the products that have high tickets/returns, and avoid promoting them. Know what customers have outstanding invoices and use this information to create better campaign list segmentations.

- **Service/support representatives**—Get instant access to sales orders and return details to rapidly resolve customer calls. Confirm ship-to, bill-to, and pay-from details to ensure proper deliveries. And, use CRM and ERP data to address receivable and invoice issues

Delivery options

Infor CRM offers a complete view of every customer touch point across sales, marketing, customer service, and support teams. Infor CRM helps maximize the impact of every interaction—across the entire customer lifecycle—whether in the office or out in the field. Infor CRM and ERP integration is available out-of-the-box with Infor CRM, and can be deployed in the cloud, on- premise or hybrid options.

Unify data and systems

With Infor CRM and ERP, you can:

- Access company information managed in multiple systems quickly and easily.
- Enable seamless cross-functional team collaboration.
- Make changes to information and have the updates synchronize across systems.
- Easily monitor the entire business and make better decisions faster.
- Lower Total Cost of Ownership and simplify upgrades.

Infor Enterprise Asset Management (EAM)

Capital assets often generate unseen costs that turn profit into loss. If you don't pay attention to the total cost of operating capital assets, you may be passing up the opportunity to ensure the success of your business for months or years into the future. Successful companies know that effective enterprise asset management (EAM) does more than add to the bottom line—it also reduces risk and gives your business a measure of stability that makes a big difference in volatile business conditions. Infor EAM delivers a time-tested solution that helps your company increase the life and value of assets, optimizes asset utilization, decreases costs of operation, and improves decision-making. It also gives you an easy to use solution that you can implement quickly.

Infor EAM is a powerful enterprise asset management solution that enables small and mid-size organizations to control critical functions such as work orders, purchasing, inventory, and preventative maintenance, without the investment and extended implementation time required for a larger-scale installation. Designed for companies with single or multiple sites, this solution increases productivity while reducing downtime by enabling organizations to manage several essential business functions from within a single web-based solution

Infor EAM provides companies that have small or no IT departments with a full-featured solution that delivers unparalleled insight into operations and can fully integrate with additional enterprise applications, advantages typically reserved for applications designed for large, multinational corporations. The security model is also uncomplicated, reducing installation time even further. System users access the features and functions of web-based Infor EAM software through a browser, working with an easy-to-use graphical user interface.

Features:

- Graphical User Interface
- Predefined Reports
- Key Performance Indicators
- Web Architecture
- Minimal Hardware

Modules:

- Assets
- Work Management
- Preventive Maintenance
- Materials Management
- Purchasing
- Mobile
- Asset Sustainability
- Reliability, Planning, and Analysis
- Inspections
- Energy Performance Management
- Call Center
- Project Management
- Infor ION Integration

Flexible buying and deployment options: Infor now gives you unprecedented choice over how you purchase, deploy, and manage Infor EAM Enterprise Edition. Now you can get the power of Infor EAM Enterprise Edition three different ways:

- On-Premises—Traditional perpetual software license operated by the customer on site

- SaaS Hosted License—Traditional perpetual software licensing with hosting from Infor

- SaaS Subscription—Customer subscription for on demand usage

With such a wide range of deployment and buying options for Infor EAM, your company can choose the model that best meets your business needs.

Infor Expense Management

Infor Expense Management offers unique and insightful capabilities for spending control, reporting, and analysis. You can actively manage employee-initiated expenses while on the go, thanks to mobile capabilities and cloud deployment, and reduce those costs without impeding your business. Whether your organization has one location, or it's a complex, multinational operation, you can automate expense-related business processes with social collaboration tools, enforce policy compliance, cut administrative costs, and reduce the risk of accidental errors and intentional fraud.

With Infor Expense management, you can:

Streamline the reporting process

Employee-initiated expenses can represent the second largest corporate expense outside of payroll. To help increase employee participation—and help organizations collect more complete, timely, and accurate expense information—Infor Expense Management features a modern and beautiful user-experience design that streamlines all phases of the expense reporting process. As a result, you'll be able to improve the way you track, analyze, and control employee-initiated expenditures to realize important opportunities for cost savings.

Act quickly on alerts

Infor Expense Management incorporates alerts and automatic analysis capabilities to help nip policy violations in the bud and uncover hidden opportunities for savings. The system alerts employees to violations as they enter data, allowing them to provide explanations or make corrections before submitting plans or expenses. It also alerts reviewers and obtains necessary approvals.

Maintain security

Companies subject to the Sarbanes-Oxley Act of 2002 can't afford to let large costs go uncontrolled or risk a major security breach or performance failure. Infor Expense Management has obtained clean SSAE 16 (formerly SAS 70) reports every year since 2004, which satisfies adherence to the most stringent Sarbanes-Oxley requirements.

Remain in compliance

Compliance needs change by country and region, Infor Expense Management can help you maintain compliance with the Bribery Act 2010 in the UK, as well as the Transparency Reports and Reporting of Physician Ownership or Investment Interests section of the Patient Protection and Affordable Care Act (ACA), commonly referred to as the "Sunshine Act." You also get PCI compliance so you can protect sensitive employee credit card data and meet PCI DSS standard, as well as tools to maintain ISO and SOC 1 compliance.

With a centralized platform for employee communication and collaboration across the enterprise, Infor Expense Management lets you interact with colleagues in ways you never imagined possible. You'll be able to take control of your T&E and related needs with:

- **T&E budget controls**—Import cost center or project-related budget figures into Infor Expense Management and monitor accruals against budgets, so that you can avoid getting surprised by unexpected spending.
- **Online booking integration framework**—Automatically and easily create expense transactions with the Deem Work Fource online booking solution, seamlessly integrated with Infor Expense Management.
- **Digital receipt management**—Scan and fax receipts to help substantiate expense reports and payment requests. You can also email receipts, store them, and send them as attachments—from a desktop or mobile device.
- **Standard credit card feeds**—Process standard feeds from American Express®, MasterCard®, Visa®, and Diners Club® to automatically populate expense reports with credit card transaction details.

- **Electronic payment processing—**Enable electronic payment for out-of-pocket expenses to a user's preferred bank account or credit card. Pay after submission, after approval, after receipts are received or after the audit is completed.
- **Global functionality—**Support global compatibility with modules available in English, Swedish, Italian, German, French, Slovak, Russian, Danish, Finnish, Norwegian, Spanish, Brazilian Portuguese, Japanese, Thai, Korean, Polish, Dutch, Traditional Chinese, and Simplified Chinese. You can also support transactions in multiple currencies and manage international taxation issues.
- **Mobility—**Whether it' s desktop or mobile, users can access Infor's expense management solutions from the platform they prefer. Create and approve expense reports on your mobile device or tablet with Infor Expense Management for mobile web; or f or business travel, use Infor Expense for iOS, a consumer-grade native application with r eceipt photo capture, offline functionality, currency conversion, and auto-population for faster, easier expenses on the go.
- **Back-office integration tools—**Provide a standard means for importing information such as cost centers, employees, hierarchies, remittance information, vendors, and GL codes from Infor or non-Infor backend systems to Infor Expense Management. You also can export data, such as approved expenses or invoices for payment.
- **Infor Reporting—**Get out-of-the box management and auditor r eports, as well as reports you can create and modify, so you can get i nsights into your travel spending and negotiate rates with vendors.
- **Policy controls—**Consistently enforce all travel and audit policies by alerting employees to policy violations as they enter data and allowing them to provide explanations or make corrections before submitting plans or expenses.

Infor Expense Management Integration Functionality Summary:

- **Master Data Synchronization**
  - Employees
  - Departments/Cost Centers
  - Expense Types
  - Payment Types
  - Project Roles
  - Attendance/Absence Codes
  - Currency Exchange
  - Project information is shared between Infor CloudSuite and XM
- **Timesheet Management**
  - Process an XM timesheet and, once approved, it will be processed in Infor CloudSuite and booked to the appropriate cost center or order (Project, Job, Service)
- **Expense Report Integration**
  - Choose to process employee reimbursements via Payroll or Accounts Payable
  - Approved XM Expense Reports flow into Infor CloudSuite and are recorded against the appropriate Cost Center, Project, Job or Service Order
  - Employees may be linked to external Vendors or Service Partners

Product Lifecycle Management (PLM)

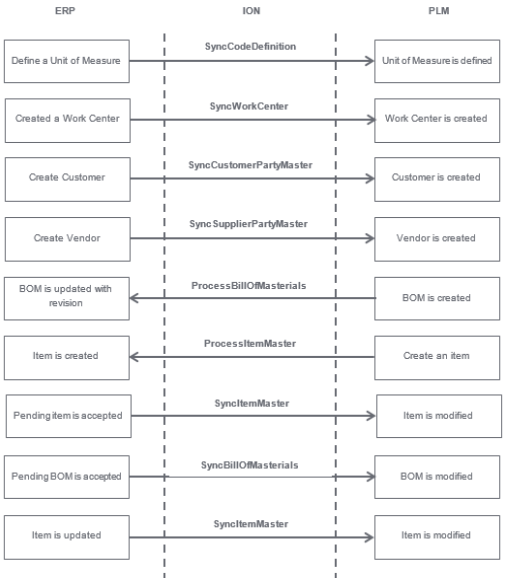
Infor PLM Accelerate

***Not Multi-tenant at this time**

New product development, manufacturing, and supply chain processes have never moved faster or been more complicated than they are right now. And the pace is increasing.

In the coming months and years, you may need to unify your product development process across mechanical, electronics, software, and firmware; manage more complex configurations of your bills of material; bring data together from across the lifecycle; securely enable global supply chain access; provide systems engineering functionality; make social and mobile a reality; and provide some form of cloud or hybrid cloud capabilities.

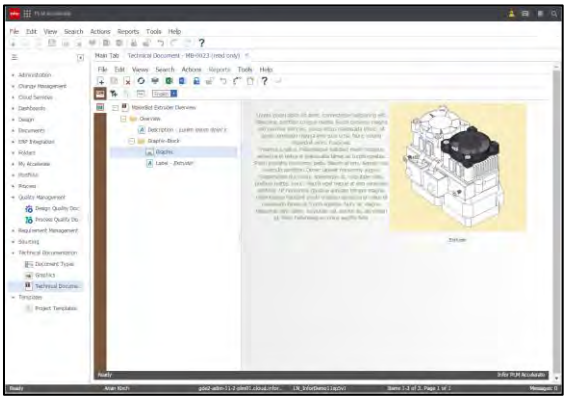
To be successful, you need an advanced PLM solution that can handle the level of complexity you have today and adapt quickly to address tomorrow's accelerating rate of change. Infor® PLM Accelerate—powered by Aras—provides a full-featured, highly scalable, flexible, and secure PLM solution built on industry best practices that easily adapts to your company's changing business practices.



Standard ION Integration for CSI; Items, BOM, Work Center, Customer and Vendor data maintained between the two applications

In addition to a standard integration with CloudSuite Industrial, PLM Accelerate modules which promote best practice engineering and product management procedure such as:

- New Product Introduction
- Project collaboration
- Program Management
- Requirements Management
- Configuration Management
- Engineering Change Management
- Multi-CAD Data Management
- Document Version Control and Visual Mark-up Capability
- Digital Mock-up and Visual Collaboration
- Modularized Technical Documentation
- Quality Planning Management
- Plus, embedded Modeling, Lifecycle Management on SOA architecture



Provide content consistency utilizing reusable document structures that can be version and change controlled; ideal for Technical Documentation, User Manuals, Work Instructions etc.

Warehouse Management: (Formerly Infor Supply Chain Execution - SCE)

***Not Multi-tenant at this time**

In today's competitive economy, you must deliver the perfect order in full, the first time and every time, to win and retain customers, and drive sales. While you face these external customer pressures, distribution operations are also forced to look for ways to reduce costs and ramp up productivity. To accomplish this, you need a single fulfillment solution that will provide you with real time inventory visibility at your fingertips, allowing you to meet or exceed your customer's unique demands, adapt to regularly changing requirements, and where necessary, provide detailed tracking for accurate customer invoicing. You also need productivity tools to keep work flowing to the warehouse staff consistently and efficiently, and accurately measure your workforce in real-time against dynamic time standards. The success of a business is dramatically influenced by the ability to grow without increasing labor and transportation costs, and control expenses by optimizing the use of all of their key resources.

Infor® Supply Chain Execution (Infor SCE) is the first solution that lets you view and manage your warehousing activities as a coherent whole to eliminate bottlenecks and improve all-around efficiency. Infor SCE combines warehouse management, labor management, and third-party logistics (3PL) billing in a unified solution, built on a single technology with a common user interface. Today, many systems are disjointed and offer inconsistent information, which makes it impossible to make important decisions quickly and easily.

With Infor SCE, it's easier than ever to manage and monitor every facet of your warehousing and distribution needs, including dock management, receiving, , put away, replenishment, picking, and shipping as well as more strategic functions such as order processing, wave planning, task interleaving, labor management, inbound quality control, and VAS operations. You'll be able to improve core warehousing processes by customizing the configuration for put away, replenishment, picking, and attribute capture depending on your industry and warehouse design.

A best-in-class supply chain execution solution can help your company thrive in a challenging economy by providing better visibility into people, inventory processes, and freight optimization through technology advancements like service-oriented architecture (Infor ION®), mobility, social collaboration (Infor Ming.le), voice, and radio frequency.

Infor Supply Chain Execution is your foundation for flawless order fulfillment. The solution optimizes your distribution environment by utilizing resources to improve efficiency, labor performance, inventory, freight, and order accuracy. By optimizing your distribution environment, you can realize measurable, ongoing savings that can account for 10% to 25% or more of your product handling costs and 5% to 20% or more of your freight costs.

Combining warehouse management capabilities and fully integrated radio frequency (RF) or voice technology provides an opportunity to streamline your supply chain, specifically your distribution operations. By improving data capture accuracy and reducing product touches in the supply chain, your employees become more productive, order accuracy increases, damages are reduced, and quality control activities become less necessary. Your employees become more efficient and your warehouse becomes more flexible and productive, all of which contribute to your bottom line. In short, with Infor SCE you'll be able to optimize your supply chain and maximize your investment.

Features:

- Outbound Order Picking
- Dock Management (Inbound and Outbound Appointment Scheduling
- RF, Workstation and Paper Receiving
- Configurable Putaway strategies
- Dynamic Slotting
- Crossdocking and Flow-thru
- Task Management (Interleaving)
- Wave Planning
- Replenishment (RF and Voice Enabled)
- Multiple Picking methods (RF and Voice Enabled)
- Inventory Management
    - Stock Rotation (LIFO, FIFO)
    - Attribute Capture (BBD, Perishable, Serialization, Catch Weight
- Manual and System Generated Cycle Counts (RF and Voice Enabled)
- Kitting
- Cartonization
- Ecommerce Packing and Consolidation
- In-context Business Reports
- BI Dashboards (KPI's)
- Labor Management
- Labor Planning
- Small Parcel Shipping (BluJay)
- RF Loading and Unloading
- Shipping (Transshipment Support)
- Visual Warehouse
- 3PL Management

Infor Supply Chain Execution offers end-to-end management of your warehouse and logistics operations that go beyond conventional expectations.

Whether you need core warehouse management system functions or more advanced supply chain execution capabilities, Infor Supply Chain Execution has the ability to support and improve your logistics operations.

This powerful solution optimizes your distribution environment by helping you effectively perform the complex, business-critical operations demanded of a modern fulfillment operation: inventory management, labor management, work and task management, slotting and optimization, cross docking and flow-thru, value-added services, voice- directed distribution, and billing for 3PLs and distributors. Using Infor Supply Chain Execution, you can reduce costs by increasing throughput and productivity, and achieve unparalleled end-to-end efficiency

Optional Components for CloudSuite Industrial only offered On-Premise

Cloud Suite Industrial Advanced Plant Maintenance

Infor CloudSuite Industrial Advanced Plant Maintenance (APM) makes it possible for organizations to manage their entire internal maintenance process, from scheduling preventative maintenance events to handling the unexpected service repair.

Advanced Plaint Maintenance reduces equipment downtime, improves resource utilization, and streamlines service operations. It helps protect against unscheduled maintenance when part and materials may not be available. It helps prevent interruptions in production which can lead to bottlenecks in the system, inventory shortfalls and hampered abilities to fulfill customer orders.

Advanced Plant Maintenance seamlessly integrates to CloudSuite Industrial and provides organizations with an internal system to manage preventative maintenance schedules and/or service repairs. It manages inventory, purchasing, accounting, shop floor, and scheduling files. Any organization with equipment needing routine inspection, calibration, preventative maintenance, or potentially service repairs on equipment can benefit from this integrated service management solution.

Advanced Plant Maintenance helps the organization be proactive in its approach to maintenance of machines, tools, fixtures, fleet, facility, or plant assets. A preventative maintenance schedule means fewer equipment failures. Routine service can be planned according to a schedule that will least affect production demands.

Preventive maintenance reduces the threat of sub-par performance due to improperly maintained equipment and fixtures. Overall quality levels can be sustained. By maintaining equipment/tools/fixtures on a routine, scheduled basis, the life expectancy of assets is significantly extended. In addition, by tracking maintenance expense over time, organizations can make better, informed decisions about future “repair versus replacement” options.

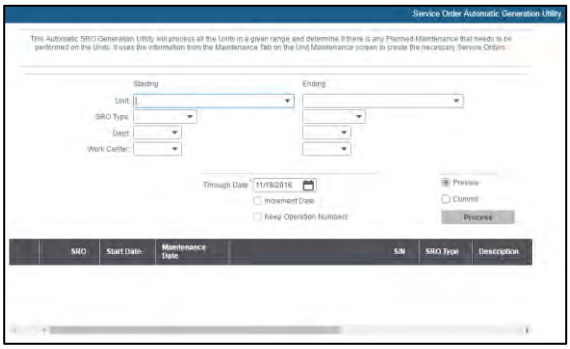
Advanced Plant Maintenance helps profit-minded organizations enact such proactive, asset-protecting strategies. Now your organization can effectively manage the entire maintenance process:

- **Unit configuration** — Manage complex equipment, tools, and fixtures, the Unit Configuration Screen can be used to track the detailed configuration of any date. Each line item can have its own set of comments and its own warranty tracking information. SROs for PM, inspection and calibration can be generated automatically. For tools and less complex equipment, the configuration need not be built.

- **Automated SRO scheduling** — Each Unit has a Unit master record. SROs of any user-defined type such as “PM” for preventive maintenance or “INSP” for inspection may be established to automatically generate either on a time or meter basis. All SROs are tied to the proper machines and tools giving the user the ability to track all costs.

- **Resource scheduling** — When reviewing the schedules for a resource or resource group, the user can view “Shift Exceptions” for blocks of time required to perform maintenance on the resource. With a click of the mouse, the list of maintenance orders generated for a resource or resource group can also be shown.

- **Incident/event tracking** — All service repair requests can be managed via the Incident Maintenance screen. Calls may be related to specific PM or SRO item or any item/part within the unit configuration. Full user-defined traceability is supported for multi-level reason and resolution codes. If a unit is identified as part of the incident, warranty information is made available to the user. Priority and status codes are a basis for escalation and reporting.



Infor CloudSuite Industrial Advanced Plant Maintenance provides organizations with an internal system to manage preventative maintenance schedules and/or service repairs.

CADLink for Infor CloudSuite Industrial

***Can only be installed on premise but can be integrated to Customers in the Cloud**

Streamline your engineering design process

You can reduce rework, minimize scrap, and work more efficiently when you use CADLink to establish a fully automated, two-way connection between Infor CloudSuite™ Industrial and your CAD system. You'll also be able to shrink engineering costs dramatically—most CADLink customers achieve payback in 6 months! CADLink creates a two-way channel between engineering design and Infor CloudSuite Industrial that takes data directly from the drawing or model and integrates that information with Infor CloudSuite Industrial.

Integrate Infor CloudSuite Industrial with your favorite CAD package

CADLink provides a two-way integration between Infor CloudSuite Industrial and the most popular CAD systems, including:

- SolidWorks®
- Inventor®
- AutoCAD®
- NX™
- Creo® (formerly Pro/E®)
- more!

By allowing you to automatically exchange routing data and bill of materials (BOM) items with Infor CloudSuite Industrial, CADLink eliminates the manual re-entry of data. As a result, you'll be able to improve accuracy, increase speed, and build a more efficient engineering and manufacturing process.

Engineer more efficiently

Don't waste valuable engineering resources with laborious, error-prone data re-entry tasks. With CADLink, you can make your preferred CAD platform a natural extension of the Infor CloudSuite Industrial software you already rely on to optimize your manufacturing operations. As a result, you'll be able get more done with less effort and free up engineers to do what they do best.

Ensure accuracy

By combining Infor CloudSuite Industrial with CADLink and your preferred CAD package, you'll be able to ensure a vastly higher degree of accuracy between your design process and manufacturing operations. That's because you'll eliminate error-prone manual steps required to reconcile information between the systems. You'll also improve your ability to make plans and execute those plans, because all relevant systems will contain consistent, accurate, up-to-date information. Put all that together and you get faster performance and better results.

Benefits

- Cut design cost
- Reduce cycle time
- Improve information flow
- Reduce data entry errors
- Eliminate engineering ERP clerical work
- Ensure drawing data is consistent
- Speed design throughput
- Reduce BOM errors by tying dimensions directly to BOM

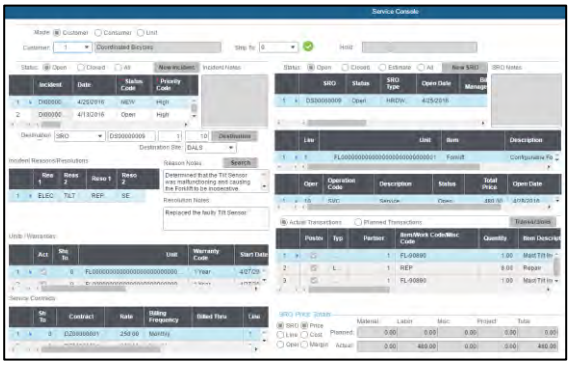
CloudSuite Industrial Service Lite License

Optional Alternate License

For companies that have resources which require no access to setting up and maintaining data, but simply data entry users the option to purchase a lite user exists.

Visibility of Assignments

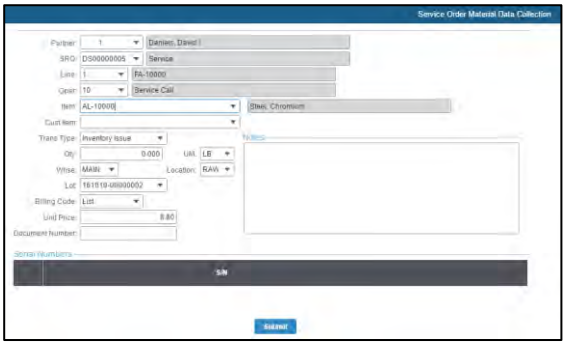
All appointments (Schedule), service order operations, and incidents to which a technician is assigned are listed in a single form. The ability to control the date range of appointments presented is provided to allow the technician to look forward/backward at scheduled work.



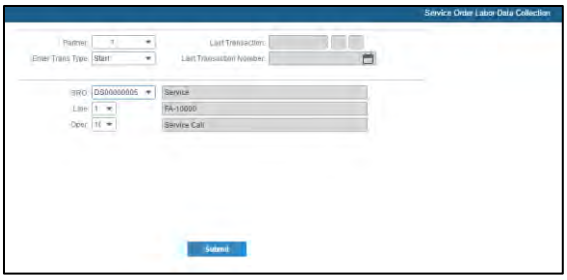
Quick Cost Entry

For technicians that work through tasks one after the other, a Clock-on and Clock-off feature is provided to reduce data entry and potential user error for creating labor transactions.

To enter material used on the work order, a streamline Material Entry form can be accessed to enter item, quantity, serial information plus detailed notes.



A streamlined form for manual time entry can be accessed to edit hours worked and billed plus capture any detailed notes necessary.



Service Lite Form Access Listing:

Partner Console, Service Order Labor Data Collection, & Service Order Material Data Collection