



Infor CloudSuite Industrial

Detailed Functional Overview
April 2025

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Introduction

Developed by experts in discrete manufacturing, Infor CloudSuite Industrial (SyteLine) has more than 35 years of built-in experience. That means you can be confident you have 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-premises. 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 to:

- 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:

- Engineer to order (ETO)
- Make or configure to order (MTO/CTO)
- Make to stock (MTS)
- 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. Advances 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 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 Infor Design team, we have updated many of the key forms in the application with new layouts and responsive designs. What that means to your organization is that the forms will resize and adapt to the screen format, creating consistent 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 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 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.

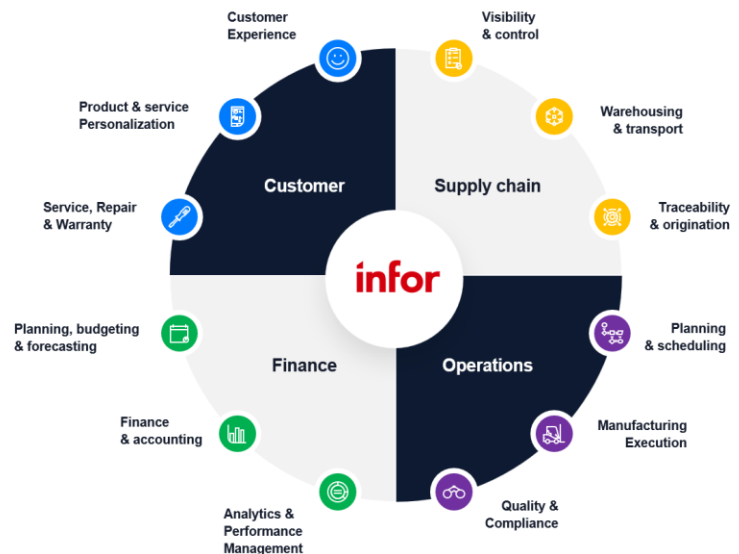
If you have questions or require more information about features and functions of Infor CloudSuite Industrial, please contact Infor or your account executive.

Infor CloudSuite Industrial Core Capabilities & Components

Integrated Suite of Applications

CloudSuite Industrial

is an industry cloud platform that connects every business process to transform customer service, operational efficiency and ensure future business agility for uncertain times



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 enterprise resource planning (ERP) solution that helps you improve productivity – both in the office and on the shop floor. Infor CloudSuite Industrial (SyteLine) is that ERP solution.

Meet your unique needs and 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?

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 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.

Experience industry-specific functionality and 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.

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 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, but you'll be also 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 Process Intelligence and Infor Education, 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 versus actual production, unplanned scrap by reason, resource utilization, and on-time completion.

Better user experiences

Personalize your user interface (UI) to fit your 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 from 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-premises 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 and feel confident

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.

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 Data Search

(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.

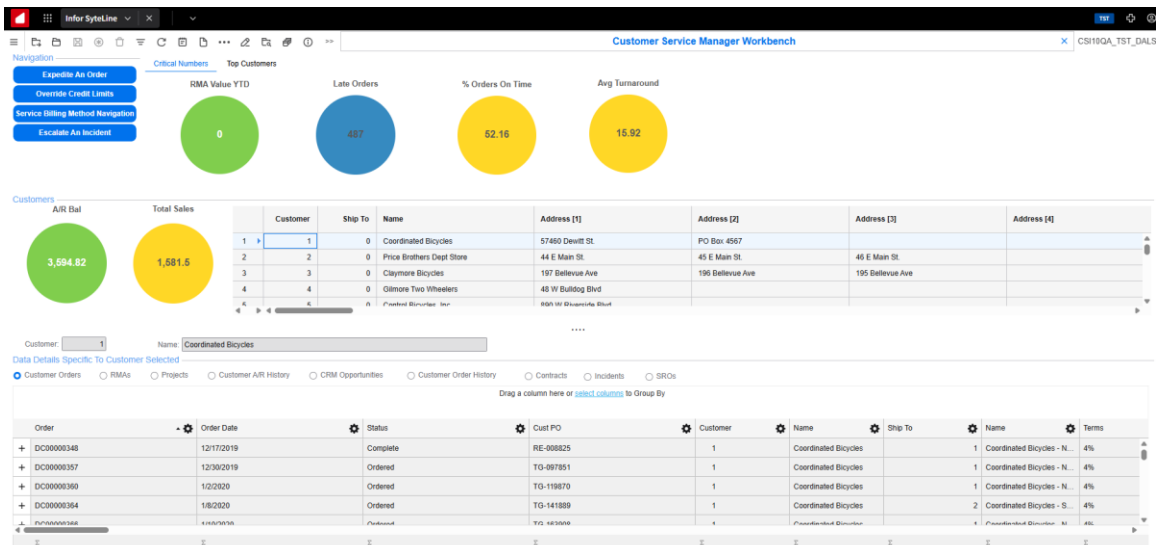
Providing employees with real-time performance data empowers them to identify predictive trends, take preemptive actions, and respond quickly to critical issues pertaining to their role, department, or division.

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.



Infor Mongoose Productivity Tools gives users colorful, highly visible gauges so key performance indicators and influencers can be easily monitored, whether it is minute-by-minute, hourly, daily, or weekly.

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 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.

The screenshot displays the Mongoose Form Reporting interface. On the left, the 'Purchase Order Detail Viewer' form is shown in design mode, featuring a grid layout with various data fields and a red 'infor' logo. On the right, the generated report is displayed, showing a list of customer orders with columns for Order, Order Date, Status, Salesperson, Customer, Name, Total Price, and Net Price. The report includes a summary section at the bottom with 'Group Summaries Salesperson: BUS' and 'Count: 17'.

Order	Order Date	Status	Salesperson	Customer	Name	Total Price	Net Price
162	2/11/2013	Ordered	BJS	8	Ian's Bicycle Products	21,451.50	
Line	Item	Status	Qty Ordered	Description			
1	FA-10000	Ordered	10.00	Bicycle Model-30,26"		2,646.00	
2	FA-20000	Ordered	20.00	Bicycle Model-50,26"		6,048.00	
3	FA-30000	Ordered	30.00	Bicycle Model-100,700mm(Eurocycl		12,757.50	
Order	Order Date	Status	Salesperson	Customer	Name	Total Price	Net Price
169	10/14/2013	Planned	BJS	5	Control Bicycles, Inc.	1,593.75	
Line	Item	Status	Qty Ordered	Description			
1	BMX-13000	Planned	2.00	Bicycle BMX, Grey		1,500.00	
Order	Order Date	Status	Salesperson	Customer	Name	Total Price	Net Price
sc00000001	10/14/2013	Ordered	BJS	8	Ian's Bicycle Products	0.88	
Subject	Note						
Configuration	White Paint						
Line	Item	Status	Qty Ordered	Description			
1	BRKE	Ordered	1.00	Configurable Bicycle		0.00	
2	BRKE	Ordered	1.00	Custom Bike: White Paint Standard		530.00	
3	PT-10000	Planned	1.00	Paint, Blue		0.88	
Group Summaries Salesperson: BUS							
Count: 17						Average: 14,964.18	Sum: 508,782.21

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 can 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.

Site	Site Name
1	CORP CORP Entity
2	DALS DALS Site
3	DATALA DATALAKE
4	EMEA EMEA Entity
5	INFORB InforBus
6	LA LA Site
7	LOND LOND Site
8	UK UK Entity
9	US US Entity

Site: CORP

Site Name: CORP Entity

Description: This is the CORP Entity

System info Site User Map Link info Reports To

Language: ENU System Type: 10.00.00

Time Zone: Eastern Standard Time

Intranet Name: DEMO ☐ Intranet Licensing

Database Name: CSI10QA_TST_CSI_AIO_0

Forms Database Name: CSI10QA_TST_CSI_AIO_0

Message Bus Logical ID: infor.syteline.adc/corp

Tenant ID: CSI10QA_TST

Report Output Folder: c:\reports

Configuration Name: CSI10QA_TST_CORP

From Email:

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 can 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 is 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.

Group Name	Group Description	Primary Group
1 > EDI	Electronic Data Interchange Group	☐
2 General Ledger	General Ledger Group	☐
3 Human Resources	Human Resources Group	☐
4 Inventory	Inventory Group	☐
5 Order Entry	Order Entry Group	☐
6 Order Entry Hide Prices	Order Entry Group Hide Prices	☐
7 Payroll	Payroll Group	☐
8 MOR - Accounts Payable	MOR - Accounts Payable Group	☐
9 MOR - Accounts Receivable	MOR - Accounts Receivable Group	☐
10 MOR - Data Collection	MOR - Data Collection Group	☐
11 MOR - General Ledger	MOR - General Ledger Group	☐
12 MOR - Human Resources	MOR - Human Resources Group	☐
13 MOR - Inventory Control	MOR - Inventory Control Group	☐
14 MOR - Order Entry	MOR - Order Entry Group	☐
15 MOR - Payroll	MOR - Payroll Group	☐
16 MOR - Purchasing	MOR - Purchasing Group	☐

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.

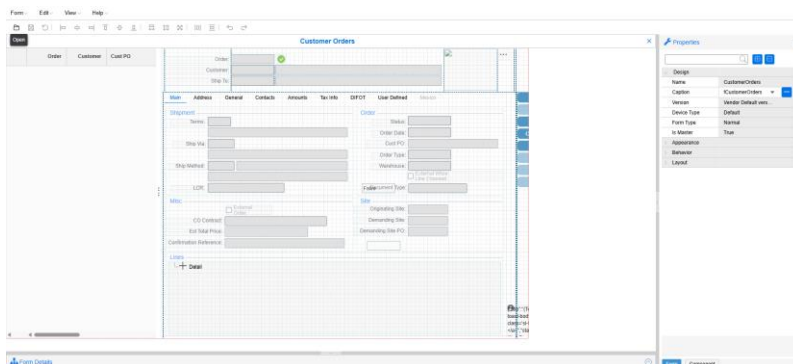
Changing forms is a secure activity and the level of personalization that is allowed to a user can be set from 'none' up to full control. Customers are able to add and change the position of fields, buttons and labels on a form as required. The default size and shape of a form can also be changed.

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 in Designer Mode.

Application Event System

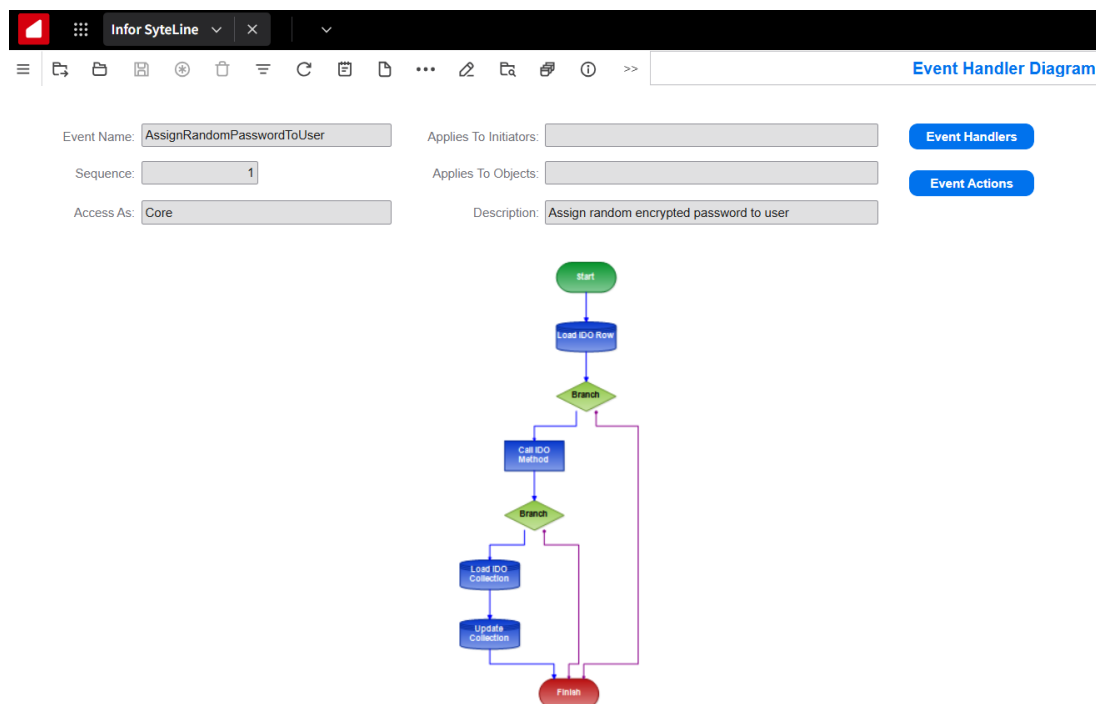
The Infor CloudSuite Industrial Application Event System is a key element in providing an organization with the means for automation of business processes.

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

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, like the ones in Outlook and Excel. This add-in allows you to pull in data from CloudSuite Industrial and 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

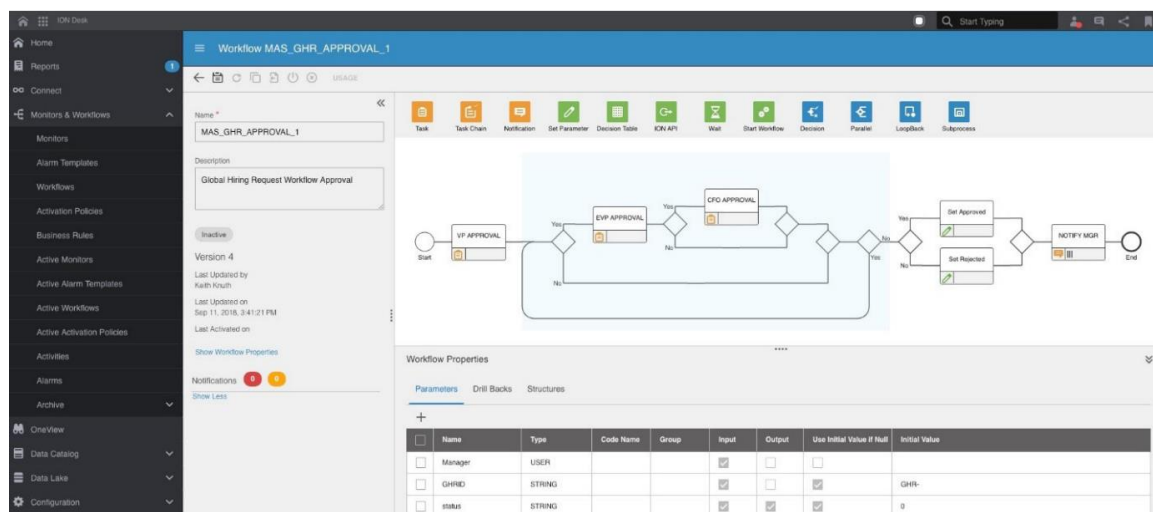
Infor OS Platform

Infor® has grown significantly in the past decade with a focus on industry-specific SaaS solutions via Infor CloudSuite™, numerous strategic acquisitions, and organic growth of its existing technologies. One essential piece to the company’s success and innovation is its foundational cloud platform, Infor OS (Operating Service). Infor OS provides horizontal technology services across all of Infor’s CloudSuites and extends into third-party solutions as well. The services range from essential, business-critical functionality to more advanced high tech capable of providing competitive advantages to the enterprise.

The collection of services are highly related in that each provides cascading benefits to the others, and it is this strategy that allows customers to reap the benefits of innovation quickly and easily without the need to custom-stitch services. With more than 10,000 customers, worldwide availability in nine Amazon Web Services (AWS) regions and growing, over 4,000 cloud tenants in the US-East region alone, and monthly updates with zero downtime, Infor OS is one of the most successful and proven cloud platforms on the market.

Integration & business process

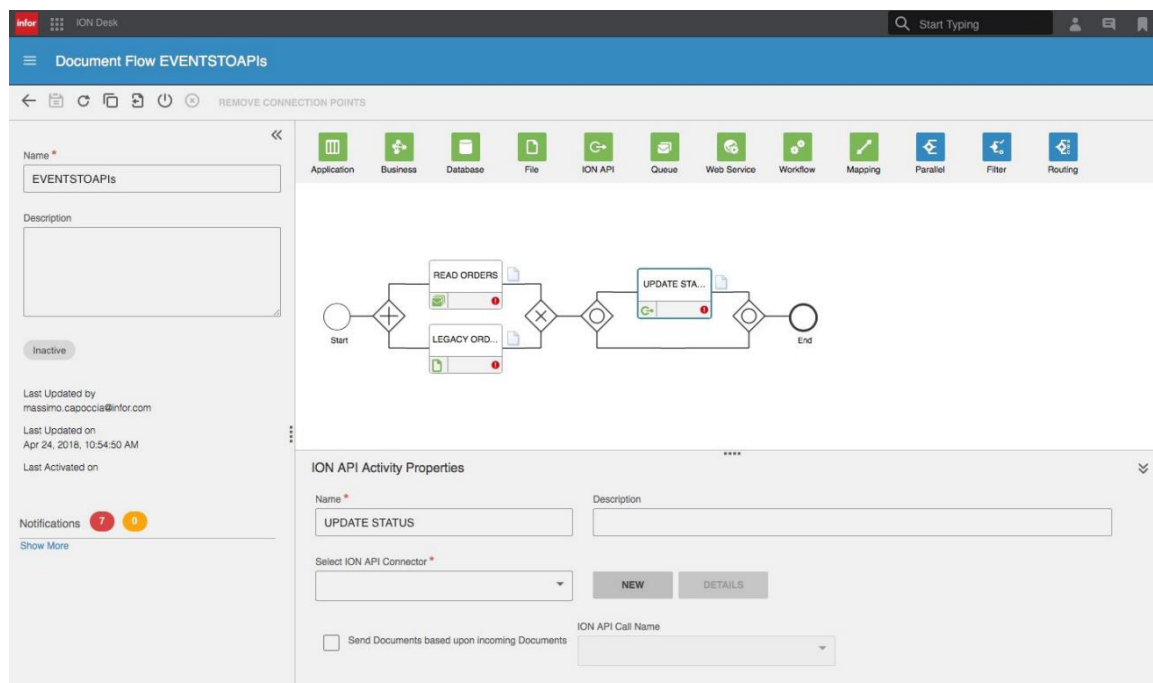
Infor ION (Intelligent Open Network) is the most mature service within the Infor OS platform and represents Infor’s integration strategy for creating industry-specific solutions. With over 15 billion cloud events, 225 million active workflows, and 75,000 active connection points—most of which are for custom and hybrid applications—Infor ION is built for scale. ION allows for Infor and non-Infor applications to easily connect and share messages and transactions in common asynchronous forms with available mapping services. Users are also able to create monitors and workflows on events that lead to distributed tasks, notifications, and even complete automation. The user experience is designed for citizen developers with easy-to-use modelers for system administrators. Infor ION is also used as the modeling service for data ingestion into the Infor Data Lake so that the experience of integration and mapping maintains consistency across the entire footprint.



Synchronous integration patterns are also available in Infor OS through the API Gateway. Similar to the history of ION, the API Gateway has a mature history with over 50 billion API calls within our current multi-tenant footprint. Infor applications register their APIs and documentation with a single catalog with common security and policy management for proper control of the ecosystem.

Advanced capabilities include the ability to create complex orchestrations and chaining of APIs with a similar modeling approach as ION connections and workflows. Users also can call registered APIs in ION's modeling services to effectively meet complex business process integration needs where asynchronous and synchronous worlds combine.

The API Gateway serves a foundational role for innovation as well, which includes being the backbone for our approach to extensibility in the cloud and customized innovative user experiences. Third-party APIs and documentation can also be registered and secured through the API Gateway, meaning the functionality is not exclusive to Infor products.



The entire footprint allows customers to securely and efficiently manage all integrations and communication links across their business, including hybrid on-premises and cloud capabilities. Complete end-to-end data lineage is available, and developers have complete documentation at their disposal. Infor ION and the API Gateway are staple technologies for the Infor community that will continue to progress and expand.

Security (Federation Services)

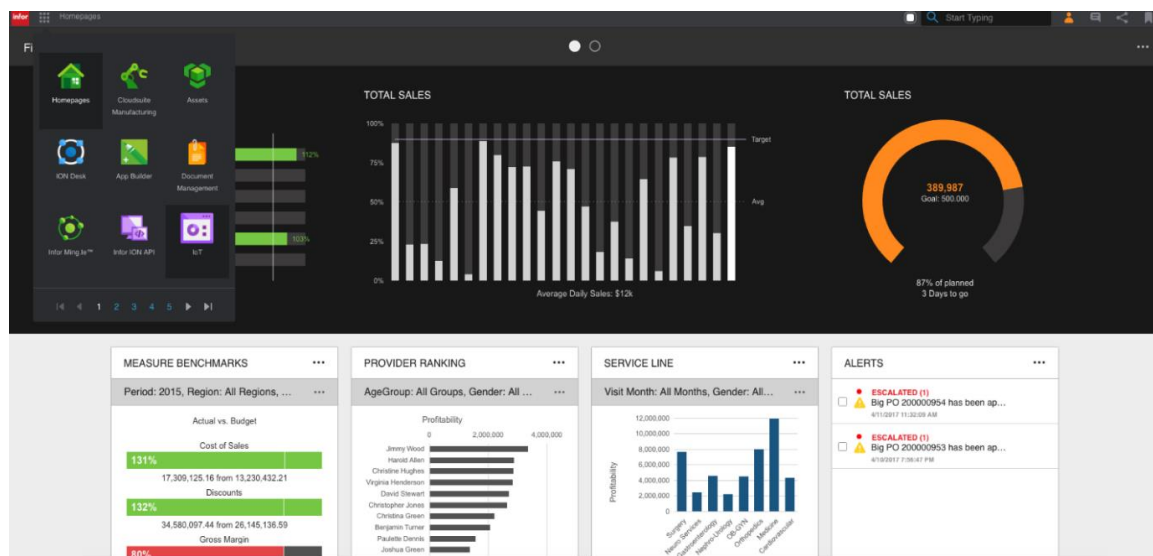
Infor OS provides world-class security services through its Federation Services to authenticate, authorize, and regulate users, APIs, and more. The security services use SAML 2.0 standards for authentication and can integrate Infor CloudSuite with a federated identity provider (3rd party) of the customer's choosing. Infor OS on-premises is now packaged with Infor STS (Security Token Service) to allow on-premises customers to integrate on-premises Infor applications with various identity providers in addition to Microsoft AD FS. Infor OS Federation Services provides the ability to create and handle single sign-on across applications, provides user role and attribute management as it relates to access, grants role management of all users, and orchestrates the capabilities of consistent mobile app access across more than 2 million current users in production environments.

Data management (Data Lake)

Infor OS provides the ability to efficiently manage enterprise big data consistently with the Infor Data Lake for cost-effective multi-consumption, allowing for more progressive innovation with advanced analytics and AI. Infor applications replicate their data automatically to the Data Lake through ION services, and streaming APIs are also available to ingest third-party data into the Data Lake as well. The Data Lake comes with a data catalog to register metadata and format to maintain data integrity as well as other services to query data in the admin user interface (UI) with a query editor or via APIs. Users can save common or complex queries and publish as an API, or transfer data for a variety of use cases, such as loads related to BI and analytics with a utility available for classic ETL (extract, transform, load) scenarios. The Data Lake can play a vital role in innovation, providing a data repository for extended applications, data analysis, machine learning, and advanced compliance. The Data Lake, among the other core Infor OS components, is certified for Health Insurance Portability and Accountability Act (HIPAA) and General Data Protection Regulation (GDPR) compliance.

Enterprise user experience

Infor OS provides a unique perspective when it comes to the software experience of everyday users. While the overall footprint of systems can be quite diversified and complex, Infor OS provides tools to keep the user experience consistent, secure, and personalized for every role, group, and user. Users can stay out of the complicated depth of systems and focus on what their role or task requires in a simplified form. All components are directly tied back to the core components of Federation Services, ION, and API Gateway interaction so that organizations can be assured that employees are using and seeing exactly what they should when they should, and in a manner that's fit for the individual's role, personality, demographic, and more.



The Infor OS portal provides familiar navigation and quick links for access to the user profile, mobile apps, favorites, and more. One business-critical feature of the portal is the in-context application tray. Infor OS can process what the user is doing at any given time and provide contextual information in the form of widgets displayed to the side of the core application.

The information in widgets updates as the user traverses and acts in the system. They can be shown relative tasks, alerts related to the ongoing work displayed, related documentation, or even custom apps where associated operations can be executed quickly at the same time.

Homepages are available as an application in Infor OS, where role-specific or personalized pages show relevant high-value activities in the form of widgets. These combine information and activity across all applications, allowing users to stay in a single location for their high-priority activity. This lets organizations train employees in unique, focused ways so that onboarding for complex systems may no longer be required. Users can have multiple pages and widgets, and pages can be dynamic based on user attributes, and organizations can automatically publish pages to specific roles and users. Homepages provide an immensely flexible and personalized way of presenting enterprise activity where organizations and users aren't subjected to complex systems.

Item	Description	Item Type	Default Supply Source	Product Variant	Text
115720	Battery - eam	Purchased	Purchase		
115720MCHR	Battery1	Purchased	Purchase		
146211	Grinder plate 1007.7.016.0 Se	Purchased	Purchase		
146214	Grinder plate 1157.022.2 Se	Purchased	Purchase		
146516	Diamond HLT 1/1 368M	Purchased	Purchase		
146520	Diamond HLT 1/1 511M	Purchased	Purchase		
220014	Grinder PWS 150-125 AVG	Purchased	Purchase		
220016	Grinder GWS 15-125 CIE Profi	Purchased	Purchase		
2200002_BRKT_CLAMP_DEFAULT	2200002_BRKT_CLAMP_DEFAULT	Manufactured	Job Shop		
300 8	STREAM001ER	Manufactured	Job Shop	90	
300 8	STREAMLINER	Purchased	Purchase	88	
300120	Ball valve	Purchased	Purchase		
300250	E-motor	Purchased	Purchase		
3002508	C-Clamp	Purchased	Purchase		
3002509		Purchased	Purchase		
300790		Purchased	Purchase		
330019	Drill unit GBM 23-2 E Profi	Purchased	Purchase		
330020	Drill unit GBM 16-2 RE Profi	Purchased	Purchase		
490120	Neopreen ribbon	Purchased	Purchase		
4901201	Neopreen ribbon	Purchased	Purchase		
4901201-1	Neopreen Ribbon	Purchased	Purchase		
490150	Flxy polycarbonate	Purchased	Purchase		
490500	Flxy frame	Purchased	Purchase		
490750	Flxy safety	Manufactured	Job Shop		
490750H	Flxy safety (HPP)	Manufactured	Job Shop		

Document Management is another business-critical feature in Infor OS. Document Management provides centralized storage of business documents in a format that's conducive to the in-context feature functionality of Infor OS. Documents are tagged with a variety of attributes (standard and custom) where related documents are established based on contextual relationships. Users can drag and drop documents into the "Related Information" context application and have them stored in Document Management automatically with the proper attributes attached based on the context of the event. Document Management also has output services as well, where documents can be designed and automatically created and distributed based on system activity. Options for optical character recognition (OCR) and automatic document ingestion are also available as an add-on to core functionality.

The inbox is a consolidated view of all tasks, alerts, and notifications available for users through the main portal header. All activity is tied either to distributions configured in the ION desk as a result of monitors, workflows, and more, or users can receive notifications related to some activity with security services. Users can act on tasks and activity in the inbox or drill back directly to the matter in applications. These views are also offered as widgets for Homepages and in-context apps, and can be viewed and acted on in mobile scenarios as well.

Infor Go is a mobile application that comes with Infor OS where Homepages, inbox, application views, and more can be viewed in a single native mobile application. Common security and SSO are applied where Infor Go becomes the portal of Infor OS in a mobile capacity.

Artificial Intelligence

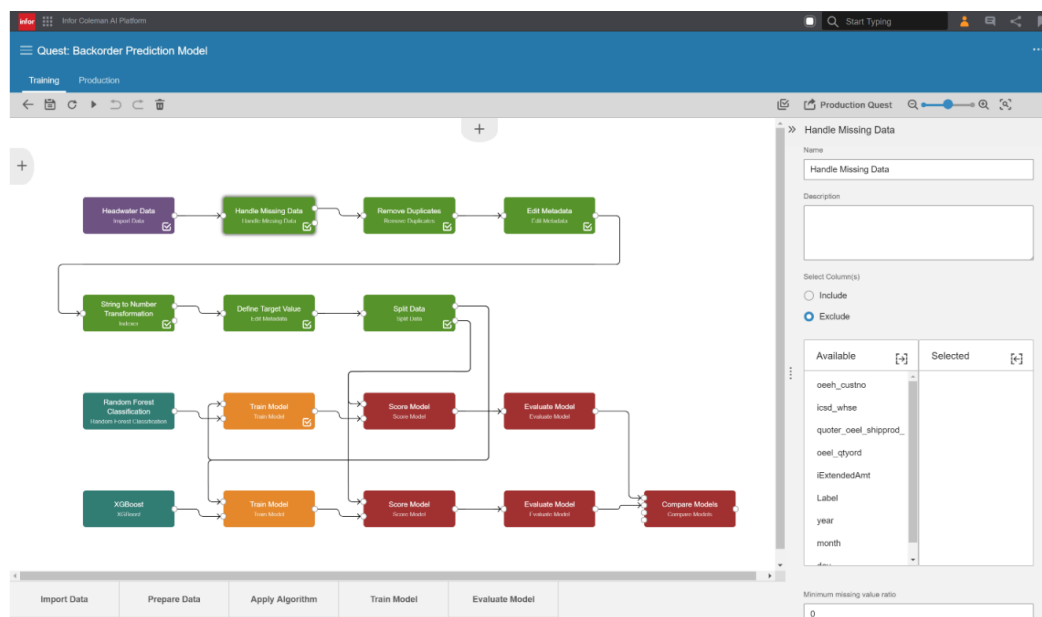
Our AI product suite comprises natural language processing (NLP) and machine learning solutions that are tightly connected with the Infor OS platform. Artificial intelligence can help with executing tasks in innovative ways, recommend next-best actions, and even predict potential issues and adjust systems accordingly. Infor's AI solutions represent a leap forward for practical and fast implementation of enterprise artificial intelligence at scale.

Infor AI Chat Bot

The Infor AI Chat Bot provides a conversational interface to the Infor OS platform and, by extension, the Infor CloudSuite. It offers custom skill building against the API Gateway, and a voice user experience (UX) for Q&A, task execution, and any other NLP-based extensibility use case. As a digital assistant, it uses conversational UX and NLP—with deep domain and industry knowledge—to convert typed or spoken words into inputs the system can understand without any level of deep technical training or knowledge. Infor provides example “skills”, but users can quickly build new skills without any development skills or custom coding.

Infor AI Platform

The Infor AI Platform is a complete ensemble of tools for creating, managing, securing, and deploying machine learning models and use cases for the enterprise. It is built on the premise of repeatability, meaning customers invest in a solution capable of producing multiple projects quickly with a significant return on investment (ROI). Data sets are directly derived from objects in the Infor Data Lake documents, and Infor delivers common templates for industry issues and opportunities around machine learning. Machine learning models are deployed automatically as a secure REST API in the API Gateway and are easily accessible—making it quick and easy to embed machine learning recommendations and results with Infor ION, custom applications, and more.



Key features:

- A single space for all of a company's machine learning projects, including Infor and third-party data.
- Seamlessly integrate machine learning insights with existing business logic and custom applications, the catalyst for a more intelligent CloudSuite.
- Spin up new projects faster than ever by combining custom data with Infor's industry-specific templates—enabling project implementation time in weeks, not months.
- A visual drag-and-drop interface that puts the power of AI into the hands of more business users.

The foundation for business excellence

A unified infrastructure delivers a proven multi-domain enterprise technology platform providing the foundation for business excellence, including integration and automation, a data fabric, and security and compliance.

A unified user experience drives customer success by systematically reducing the complexity of business processes— providing seamless access to relevant business information when you need it and how you want it. The user-centered experience provides an end-to-end framework for creating a competitive advantage and differentiation through an intuitive UX, including enterprise workspace, mobility, and application development.

Finally, Infor OS delivers an enterprise-grade AI platform designed to unlock new value and experiences by leveraging foundational AI technology to provide essential value towards enterprise goals. Whether exploring a user experience powered by voice, considering increased smart automation, or discovering predictive insights in enterprise data, Infor OS enables simplified operations.

Infor Document Management

Fully integrated end-to-end document management solution

Make sure you're always prepared for audit compliance

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.

Always have the right document

Infor Document Management (IDM) is a end-to-end document management solution, fully integrated with the ERP system that stores, secures, and tracks documents across the enterprise. IDM offers a single content repository, version control, and security governance to improve the document management process and increase efficiency.

Manage the entire lifecycle of your documents

Storage

IDM allows businesses to store their documents in a centralized location, making organization and authorization easy for approved users. Organize folders by document type, date, or custom

schema, allowing intuitive organization along with specific metadata/attributes for each document type. Search, send, sign, import/export, or lock documents within the IDM interface easily. Documents are stored and protected by role-based authorization to ensure the safety of your information.

Input

Automatically import documents from your ERP application, or any IDM client. Integration with products such as Microsoft Office, allows for easy template creation for adding documents to the repository. Automatically add, or update, metadata on import with document capture to further automate enterprise document management.

Share

IDM's role-based permissions offer a crucial mechanism to facilitate secure document sharing within and outside an organization. The system enables admins to assign specific roles to users, which determine their level of access to documents and features. This approach enhances security by ensuring that only authorized personnel have access to sensitive information. IDM's document sharing feature enables authorized users to share documents efficiently within the company and with external parties electronically. The feature's simplicity allows users to send documents directly from IDM, eliminating the need to switch between applications. Additionally, IDM supports the rapid creation of multiple documents by merging existing templates and data. This functionality can boost productivity and save time, allowing users to generate new documents without starting from scratch. Share documents with each other within the company, as well as external parties. Send documents electronically from within IDM is just the click of a few buttons. IDM also gives you the ability to create many documents by combining previously created templates and data.

Track

The IDM repository 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. IDM has also implemented digital signature capabilities in conjunction with DocuSign. Documents can be sent out for a digital signature and their status will be tracked on IDM appropriately, updating when the recipient has responded to a document.

Data handling at your fingertips

Automation

IDM integration with ION workflows allows for handling a document through its entire lifecycle. Upload a document and have it instantly locked down from any further changes or tampering. You can have it sent for manager approval and review, have the status of their decision be reflected on the document, and be notified of each step of the process and whether more work is required for the document or not.

Scan and Connect with a Standard Web Browser

Infor Document Management is powered by Ephesoft® Smart Capture™ Technology to give you optical character recognition (OCR) and intelligent character recognition (ICR) capabilities. These tools enable more complete and improved document capture processes, so you can scan and connect to your documents through a standard web browser—without having to install software on your laptop or desktop. Infor Document Management makes sure you can find the documents you need, so you're always working with the latest, most complete version of a document. With faster, easier access to all your critical business information in context, Infor Document Capture connects all of your documents directly to your core business systems to optimize your decision-making.

Get all the capabilities you need

- **Document organization:** The system allows users to organize their documents into folders and subfolders, making it easy to find the documents they need.
- **Document sharing:** Infor Document Management allows authorized users to share documents with other users within the company, as well as with external parties. This helps improve collaboration and communication within the organization.
- **Document security:** Security features ensure that only authorized users can access and view documents through access controls, password-protection, and document encryption.
- **Document version control:** Infor Document Management allows users to track different versions of documents, making it easy to see who made changes and when.
- **Document indexing:** The system allows users to index documents, making it easy to find specific documents using keywords.
- **Document workflow:** Infor Document Management includes a range of workflow tools that allow businesses to automate their document management processes, such as routing documents for approval, and tracking the status of documents.
- **Integration:** Infor Document Management can be integrated with other systems, such as enterprise resource planning (ERP) systems, making it easy to access documents from within other applications.
- **Storage:** Keep all documents in a centralized location making them easily accessible to authorized users.
- **Security:** Access controls, password protection, and document encryption keeps sensitive documents safe.
- **Organization:** Folder structure keeps documents organized and easy to find.
- **Sharing:** Document sharing from authorized users both internally and externally improves collaboration and communication.
- **Version Control:** Tracking changes across all users and versions makes it easy to see who made changes and when.
- **Indexing:** Improved search capabilities through keywords and document type.
- **Automation:** Workflow tools including document routing, approval, and tracking ensure critical steps are never missed.
- **Connect with 3rd party apps:** Allow third party systems permissions to access documents in other applications.
- **eSignature:** Go paperless with DocuSign integration and get contracts digitally signed.

Infor Birst

Infor® Birst's unique networked business analytics technology enables centralized and decentralized teams to work collaboratively by unifying IT-managed enterprise data with user-owned data. Birst automates the process of preparing data and adds an adaptive user experience for business users that works across any device.

Birst was designed from the ground-up based on the idea that trusted, well-governed data is not at odds with speed and ease of use. It leverages new capabilities made available by modern technologies like artificial intelligence and cloud computing— multi-tenancy, virtualization, machine learning, and web-scale architectures—to truly combine the centralized and decentralized models of BI, delivering the best aspects of both: enterprise scale end-user self-service without analytical silos.

At Infor, we believe that solving these real-world analytics problems is something that cannot be fully addressed by the user interface alone. While providing an intuitive experience is critical to analytic success, the most significant challenge in analytics continues to be unifying and refining data for business use—making data “business ready.” It could be argued that one of the biggest weaknesses in the dash to data discovery has been that it fails to address the complexity of data in most organizations. Birst embraces that complexity and provides unique solutions to tame it.

Working with data to support analytics should not be the exclusive domain of IT. Business users should also have the tools to prepare their own “edge” data and combine it with the trusted, centrally managed data from IT to analyze complex business processes. Birst provides both easy-to-use data preparation capabilities for self-service as well as the powerful data integration technologies required by IT.

For everyone to make confident decisions, it is critical to maintain consistency and trust in the data. Four primary design principles create that trust and guide Birst’s approach to data management.

Data Refinement

Birst leverages intelligent unification technologies that both map and model data from multiple sources. Whether it is existing warehouses, data lakes, cloud applications, or transactional systems, all data is captured and unified regardless of size, structure, or speed so that there is one consistent view of the data.

Birst can combine multiple data sources that each have their own definition of “customer” and unify these disparate sources into a single version of “customer” for all users.

Birst leverages its pre-built connectors, live access, a business-ready Data Store, query federation, intelligent data navigation, and a wide range of data mapping and extracting capabilities to accomplish data unification.

Infor believes that all data must be refined before it can be used by business users. The refinement can be as simple as turning 15 operational data tables into a representation of facts and dimensions or as complex as creating a business rule that leverages data from diverse and constantly changing data sources to create a common and reusable business metric.

The historical challenge in data refinement is that it takes too much time and too many resources to refine the data for day-to-day use, while managing changes in underlying data structures

prevents this process from keeping up with new business demands. In recent years, organizations have been investing in data lakes to remove this overhead.

Although a data lake does help, these structures are better suited to data scientists and tend to be unsuitable for normal business use. To overcome the speed and data source changing challenges, Infor Birst introduced patented Automated Data Refinement (ADR), a complete extraction ion transformation and loading (ETL) language, and smart data change detection to enable enterprises to create an agile semantic layer—or a “shared version of the truth”—that adapts at the speed of business today.

Networked Insights

A fundamental capability of Networked BI is multitenancy, which enables the creation of virtual—not physical—BI tenants that relate to each other.

The use of virtual instances is important because, traditionally, delivering trusted and reliable data across the enterprise largely depended on physical replication of BI infrastructure—not just hardware but also data, metadata, user profiles, system configurations, etc.—making it a time-consuming and expensive effort.

To allow business teams to work on their own, while staying networked to a central, governed data set, Birst enables different groups, such as finance, customer support, sales, and marketing to use their virtual copies of the high-performance data tier to gain access to centralized data and blend that with their local data and spreadsheets. This paradigm creates consistency and collaboration between IT and business teams, ensures centralized governance, and empowers data ownership, independence, and self-service data blending at the point of impact.

Networked BI creates unique and exciting possibilities. If we consider the analytical fabric as an organically grown or “crowdsourced” network of insights, it becomes a powerful method for harnessing the collective intelligence of an organization, turning the idea of “enterprise business intelligence” into a reality.

Adaptive user experience

The Infor Birst team's vision is for every individual within an organization to have business data at their fingertips to improve even the smallest decisions they make. Business people must have tools that provide flexibility and freedom to answer any question and blend their own user-generated data with enterprise data. To do this, Birst delivers a user experience that uniquely meets everyone's needs by supporting all the different styles of analytics, including pixel-perfect reports, highly interactive and responsive dashboards, intuitive visual discovery, native and offline mobile, embedded predictive tools, and self-service data preparation.

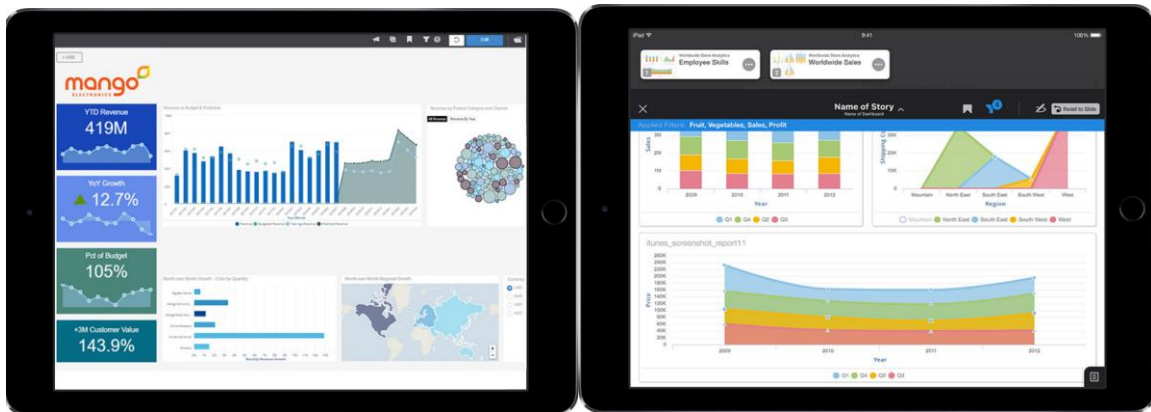
Birst's user experience blurs the traditional lines between dashboards, reporting, and discovery to create an adaptive interface where any user can automatically surface new, personalized insights, with AI-powered BI, and easily interact with business data to make better decisions. Equally important, these decisions can be made with full confidence because all analytics styles pull data from Birst's agile semantic layer, which delivers the necessary governance to ensure a single version of the truth.

Smart analytics

The key design principle underlying Birst Smart Analytics is to make it easier for the average business user to make data-driven decisions. This is realized by applying Birst's patented machine learning algorithms to dashboard KPIs to automatically diagnose or uncover drivers affecting business performance. The machine automation of tasks accelerates time to insight,

providing greater discovery into relationships that a human may not have even considered or that a human lacks the skills to perform. This moves analytics from the descriptive to diagnostic and predictive. Smart Analytics help business people go from “what happened?” to “why did it happen?” or to “what will happen?”

We build on Birst’s existing capabilities to offer AI-driven insights that are designed for a business user and can be personalized yet still governed through Birst’s agile semantic layer. The combination of smart analytics and networked BI means that smart analytics can be applied across extended enterprise datasets, not just personal data sources.



The landscape of business analytics has changed. Companies today are struggling to bridge the divide between centralized IT teams supporting enterprise requirements and user-led decentralized teams demanding greater agility. Closing this gap is the key to ensuring business analytics success.

Infor Birst’s unique approach empowers business users with the speed, autonomy, and agility they demand, while giving IT leaders the governance mechanisms they need to deliver a complete and consistent view of the business.

Born in the cloud, Birst’s networked business analytics technology plugs into centrally managed data sources and seamlessly unifies them with data generated by decentralized teams throughout the organization. Birst then automatically refines this data and prepares it for analysis by overlaying a consistent set of business rules and definitions—creating a shared fabric of analytics across the organization—to deliver a “shared version of the truth” through an adaptive user experience that includes reporting, dashboards, visual discovery, mobile, and automatically created, personalized, smart analytics.

Infor Velocity Suite

***Infor Velocity Suite is an additional license offered and is not part of core product.**

Infor Velocity Suite is a package of solutions and services that makes process innovation easy and impactful. Solve your business challenges with Infor's catalog of Infor Value+ process automations—prebuilt using Robotic Process Automation (RPA)—as well as Infor GenAI and Infor Process Mining. Our Infor experts implement it all for you.

74% of C-suite executives and software users say advanced technologies create business value. But often, there are barriers to using them. You may not know where to start, understand the full technology landscape, or have the in-house resources or skill set to move ahead. Infor Velocity Suite eliminates those barriers by giving you the most advanced and proven technology, along with implementation services, to make it happen.

Get future-ready

Access Infor's most advanced technology to stay agile, adaptable, and ahead of the competition. You can choose from Infor's catalog of Infor Value+ process automations using RPA, plus get usage of Infor GenAI and Infor Process Mining.

Simplify process innovation

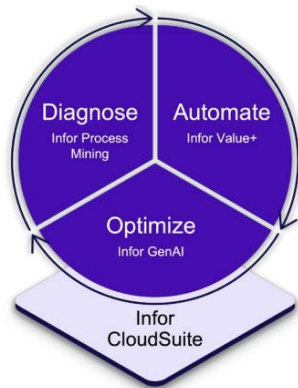
Easily buy, implement, and use technology to improve processes continuously. Infor Velocity Suite is a single technology package supported by Infor implementation experts who can make it happen for you.

Realize Value

Achieve your organization's objectives with solutions proven to deliver results. Whether you need to increase revenue, improve margins, or deliver better customer satisfaction, Infor Velocity Suite gets you there.

Infor Velocity Suite package includes technologies that innovate processes:

- **Infor Value+ catalog of solutions:** Choose from a catalog of Infor Value+ automation solutions. They're all designed to innovate a process in your organization and specific industry. Each one is ready to be added to your Infor CloudSuite ERP by a team of dedicated Infor experts.
- **RPA:** Get unlimited usage of RPA, an underlying technology in most Infor Value+ solutions. RPA uses bots to perform a sequence of activities or other system activities designed to remove manual work and streamline processes.
- **Infor Process Mining:** Uncover patterns, trends, and anomalies in your processes using Infor Process Mining. By using process analytics and mining algorithms, it uncovers actionable insights so that Infor CloudSuite ERP customers can transform their processes.
- **Infor GenAI:** Get unlimited usage of Infor GenAI embedded within Infor Value+ solutions. With a single click, you can write, summarize, analyze, and translate instantly—right within your workflow.



The Infor Velocity Suite package pulls together advanced technologies from our industry cloud platform to make process innovation easy. First, Infor Process Mining identifies inefficiencies in your existing processes. You then select the Infor Value+ automation solutions that Infor experts will implement for you. Finally, Infor GenAI optimizes your processes for maximum productivity.

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 to 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 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 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
- Salesperson 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

Opportunity	Description	Status	Est. Value	Stage	Territory	Close %
1	Ad Campaign	Lost	2,000.00	4 - Close	Northeast	0

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

Estimates Quick Entry

Estimate: Status:

Customer:

Ship To:

Prospect:

Opportunity:

Quote Date:

Expiration Date:

Salesperson:

Taken By:

Total Price:

Estimate

Line

	Line	Item	Item Description	Qty Ordered	U/M	Unit Price
1	1	FA-10000	Bicycle,Model-30,26"	1.00	EA	555.22285
2	2	BK-27000-0005	Bicycle,Customized,27"	1.00	EA	800.00
3	3	CP-10000	Seat,Padded	1.00	EA	12.25
4	4	MB-10000	Bicycle,Model-200,Mountain,Black	1.00	EA	238.00

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

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 act 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

Customer Orders Quick Entry

Order: HP00000001

Customer: 6 Larry's Bicycles

Ship To: 0 Larry's Bicycles

Cust PO:

LCR:

Est Total Price: 1,212.50 USD

☐ Consignment
 Exchange Rate: 1.000
 ☐ Fixed Rate

Demanding Site:

Demanding Site PO:

Order Date: 10/19/2016

Status: Ordered

Warehouse: MAIN

Salesperson: MCS

Taken By:

Originating Site: DAL5

Quick Order Verification

Quick Pick List

Order Shipping

Order Invoicing

Generate Document

Line

Source

Get CTP

Reprice

Configure

	Line	Item	Qty Ordered	U/M	Due Date	Allow on Pick Workbench	Projected	Request Date
1	1	HP-10000	1,000.00	EA	10/5/2016 12...	☒	10/19/2016 1...	
2	2	HP-50000	1,000.00	EA	10/17/2016 1...	☒	10/19/2016 1...	

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

DO/BOL: D00000000000000000000000000000001		Status: Approved ▼
Customer: 24 ▼	Ship To: 0 ▼	Date: 4/4/2015
Ting Tang Bicycles		
Value: 25,250.00	Currency: USD ▼	

Carrier	Cost Info	Consignee	Consignor	Invoicee	Special	Consignor Contact
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Name: Federal Express	Pickup Date: 6/28/2015
Contact: Brian Otworth	Total# Packages: 5
Carrier Number: 887456	Total Weight: 2,500.00
Vehicle Number: V-12MMN9	Weight U/M: LB ▼
Pro Number:	
Carrier Container: 11-9	
Route:	

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 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 Line Items

RMA: DA00000004 RMA Date: 6/3/2015 Status: Closed
 Customer: 3 Claymore Bicycles Currency: USD

Line: 1 Qty To Return: 1.00 EA Status: Closed
 Item: FA-30000 Bicycle, Model-100, 700mm, Eurocycle
 Cust Item:

General Amounts Disposition Replacement Lines EU VAT User Defined **RMA**

Order: DC00000121 1 0
☒ Return ☐ Warranty
 Original Invoice: 36
 Tax Code: NT Tax Exempt
 DO: Incident:

Qty Credited: 1.00
 Qty Received: 1.00
 Last Return: 6/10/2015

Reason
 Item not needed. Want to return for credit.

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

RMA Item Dispositions

RMA: DA00000004 Customer: 3 Ship To: 0
 Status: Closed Name: Claymore Bicycles

Line: 1 Status: Closed Qty To Return: 1.00
 Item: FA-30000 Qty Received: 1.00
☒ Use Disposition Qty Disposition: 1.00

Trans Num: 1 ☒ Posted Serial Numbers
 Disposition Code: RTS Description: Return to Stock
 Qty Disposition: 1.00 Qty Moved: 0.00
 Document Number: Post Disposition

Move From
 Warehouse: MAIN
 Location: INS-1
 Lot:

Move To
 Warehouse: MAIN
 Location: FIN-1
 Lot:

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

Point of Sale (POS)

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 later. 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.

	Sales Amount	Sales Tax	Sales Tax2	Freight	Misc Charges	Discount Amount	Prepaid Amt	Total Due	Total Paid
Ordered:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Current:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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, increase 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 and general ledger
- User-defined project types and cost codes
- Multi-level percent-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

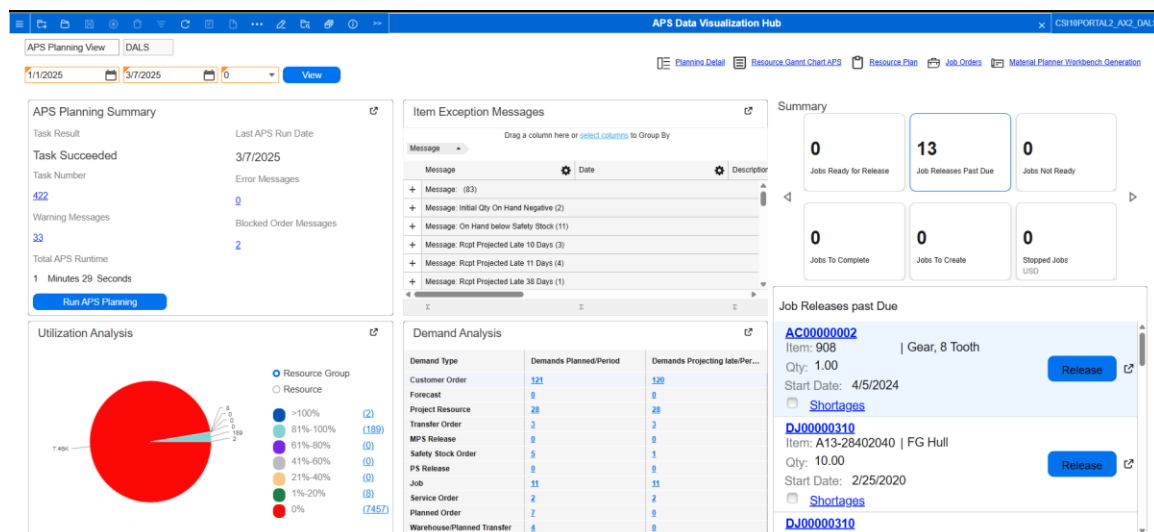
Project Management automates workflow, increases efficiency, and most importantly promotes customer satisfaction.

Advanced Planning & Scheduling (APS)

To meet your lean manufacturing goals – to do more with 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. Advanced Planning & Scheduling is a powerful solution that synchronizes the use of work centers, inventory, resources, and supply with customer orders.

With 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 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 hour delivery timeframes will change.
- Freeze schedule
- Freeze schedule with offset
- Predict demand for jobs that are configured through Configure, Price Quote (CPQ)
- Automatically enforce Get ATP (available to promise) / CTP (capable to promise)



The Production Plan Hub is your one-stop-shop for all your production planning information.

Material Requirements Planning (MRP)

Material Requirements Planning (MRP) 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, batching together requirements needed at the same time.

Unlike Advanced Planning & Scheduling (APS), MRP does not consider routing times, resource capacity, or shifts. The responsibility rests on 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. It also helps you 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 Planner 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)
- 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

The screenshot displays the 'Material Planner Workbench' interface. At the top, there are tabs for 'Material Planner Workbench Generation' and 'Material Planner Workbench'. Below the tabs, there are filters for 'View: Purchase Order', 'User ID', 'Planner Code', and 'Description'. A table shows 'Unit Cost' and 'Lead Time' for various items. On the right, there are buttons for 'Summary', 'Items', 'Time Phased', 'Planning Detail', 'Demand', 'Material Transactions', 'Demand Summary', and 'Component Shortages'. Below the filters, there are buttons for 'Process Through Date', 'Process Through', 'Reset Process', and 'Generate Orders'. A table at the bottom lists items with columns for 'Process Line', 'Item', 'Description', 'Fixed Lead', 'Release Date Order', 'Due Date', 'Required Qty', 'Purchase Order', 'Vendor', 'Vendor Name', 'Safety Stock', 'Lead Time', and 'Unit Cost'. The table contains 28 rows of data, including items like 'CS-PS-ChildItem', 'GR-10000', 'PK-20000', 'PF-30000', 'RF-20000', 'RF-30000', 'SA-10000', 'SD-10000', 'TZV1', 'TZV1', 'TA-40000', 'TA-60000', 'TA-70000', and 'ZL-MP10-01'.

Process Line	Item	Description	Fixed Lead	Release Date Order	Due Date	Required Qty	Purchase Order	Vendor	Vendor Name	Safety Stock	Lead Time	Unit Cost
11	CS-PS-ChildItem	Component Shortage - PS Demand	0	3/7/2025	3/7/2025	1.00				0.00	0	10.1
12	CS-PS-ChildItem	Component Shortage - PS Demand	0	3/7/2025	3/7/2025	1.00				0.00	0	10.1
13	CS-PS-ChildItem	Component Shortage - PS Demand	0	3/7/2025	3/7/2025	1.00				0.00	0	10.1
14	CS-PS-ChildItem	Component Shortage - PS Demand	0	3/7/2025	3/7/2025	1.00				0.00	0	10.1
15	GR-10000	Gravel, Grey	3	3/7/2025	3/7/2025	5,000.00				0.00	3	0.2
16	PK-20000	Shipping Box, Customized, Color	5	3/7/2025	3/7/2025	4,000.00		8	Wilson Supply	0.00	10	1.2
17	PF-30000	Paint, All Purpose, White	5	3/7/2025	3/7/2025	100.00		3	Bi-Cycle Supplies, Inc.	0.00	5	0.1
18	RF-20000	Reflectors, Front	5	3/7/2025	3/7/2025	260.00		7	Brunswick Hardware	0.00	5	0.1
19	RF-30000	Reflectors, Wheel	5	3/7/2025	3/7/2025	5,530.00		1	Bicycle Parts Company	0.00	5	1.1
20	SA-10000	Sand	5	3/7/2025	3/7/2025	10,000.00				0.00	5	0.1
21	SD-10000	Greens, 10 Speed	20	3/7/2025	4/6/2025	0.00		23	Rough Riders Bike Supply	0.00	20	8.4
22	SD-10000	Greens, Standard	5	3/7/2025	3/7/2025	4,700.00		3	Bi-Cycle Supplies, Inc.	0.00	5	1.1
23	TZV1	Test	0	3/7/2025	3/7/2025	1.00				0.00	0	0.1
24	TZV1	Test	0	3/7/2025	3/7/2025	1.00				0.00	0	0.1
25	TA-40000	Chain, #35-15	5	3/7/2025	3/7/2025	1,100.00		3	Bi-Cycle Supplies, Inc.	0.00	9	2.1
26	TA-60000	Hubs, Wheel, 32 Hole	5	3/7/2025	3/7/2025	6,500.00		3	Bi-Cycle Supplies, Inc.	0.00	7	2.4
27	TA-70000	Spokes, 16"	5	3/7/2025	3/7/2025	228,000.00		3	Bi-Cycle Supplies, Inc.	0.00	20	0.9
28	ZL-MP10-01	Material Planner WBS Item 1	0	3/7/2025	3/7/2025	5.00				0.00	0	0.1

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.

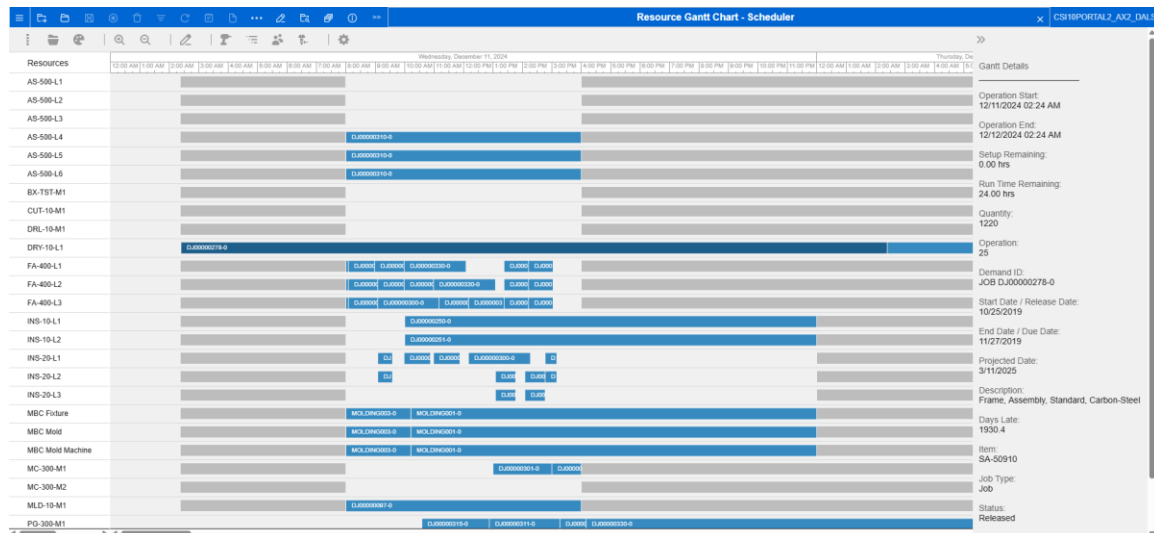
Scheduling

The Scheduler calculates the dates and times to work on a subset of existing orders – those manufacturing orders that you need to complete soon. 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, and 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 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 the shop floor. 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, and you can use whichever method you prefer
- Use the Material Planner Workbench to manage the creation of all your jobs in a single screen
- Link customer orders directly to jobs
- Schedule jobs based on finite or infinite forward scheduling
- Issue materials to a work order or backflush materials automatically based on operation or job completions
- Validate material availability to determine whether a job can be completed on time
- Review estimated vs. 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 management
- Drive costs by work center and 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 backflushing
- Co-job and co-product jobs

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

Production Schedules (Repetitive Manufacturing)

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 center, 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. They are sometimes also referred to as work order-less production.

With production schedules, you can create them for an entire plant, planner, family of items, or specific customer for a selected period time. You can set up a production schedule 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
- 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 backflushed.
- Costs are charged to the items produced in the work center based on the standard bill of material and routing
- Track 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

Due Date	Status	Released	Expected	Completed	Scrapped	Remaining	PS Re...	Projected	Scheduled
12/31/2018	Complete	10.00	10.00	10.00	0.00	0.00			
1/1/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/2/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/3/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/4/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/7/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/8/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/9/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/10/2019	Complete	10.00	10.00	10.00	0.00	0.00			
1/11/2019	Complete	10.00	10.00	10.00	0.00	0.00			

You can create production schedules for an entire plant, planner, family of items, or specific customer for a selected period of time.

Batched Production

Using the 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 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 includes a batch definition field, and any operation on which a batch definition is specified is referred to as the batch operation.

In the routing of a job or production schedule, an operation (the batch operation) references a batch definition when the job or production schedule can be combined with other jobs or production 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 production schedule 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 process
- 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

The screenshot displays the 'Batch Definitions' form in CloudSuite Industrial. At the top, there is a table with one row for 'MBC0000001'. Below the table, there are three tabs: 'Operations', 'Batched Productions', and 'Batch Summary'. The 'Batched Productions' tab is selected, showing various configuration fields. The 'Separation Rule' is set to 'All in Same Batch'. The 'Release Rule' is set to 'One Per Job'. The 'Value' field is 0, 'Minimum' is 1, and 'Maximum' is 1. The 'Override Rule' is set to 'Waiting Time Exceeds Threshold' with a 'Threshold' of 0. The 'Periodic Review' checkbox is unchecked, and the 'Review Interval' is 0.

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.

- 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

			Co-product Mix		
	Co-product Mix	Dr	Co-product Mix: T000001 Tape Mix		
1	GR000...	Gr	Lead Co-product: TA-10000		
2	M000001	Mi			
3	P000001	Ct			
4	T000001	Ta			
	Item	Description	Co-product Quantity		
1	TA-10000	Tape, 1" Masking	3		
2	TA-25000	Tape, 2.5" Masking	2		
3	TA-45000	Tape, 4.5" Masking	1		

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

Supply Chain Management

Purchase Order Requisitions

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 POs 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 the PO Requisitions that an approver owns
- Convert approved PO Requisitions to Purchase Orders automatically

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

Purchase Orders

PO: ZPO0000001 Vendor Name: Vendor for Test Chakri Status: Planned

Header

PO: ZPO0000001 PO Type: Regular Terms: NT No Terms Change: 0 Change Status: Opened

Status: Planned Date: 10/1/2023 Ship Via: Builder PO: Originating Site:

Vendor: CVR-001 PO Contract: Warehouse: MAIN Vendor PO: Total Cost: 100.00

Vendor Name: Vendor for Test Chakri LCR:

Purchase Order Lines

Line	Item	Item Description	Ordered	UM	Item Cost	Extended Cost	Line Status	Due Date
1	ZL-JOBSHOP10	Job Shop Item - Child	20.00	EA	5.00000	100.00	Planned	10/2/2023
2	CG-10000	Grips, Coathorned	0.00	EA	1.00273	0.00	Planned	10/1/2023
3	WLTBcou	Inventory Control Slow Moving/Obsolete	10.00	EA	0.00000	0.00	Planned	10/1/2023
4	WLTBcou	Inventory Control Slow Moving/Obsolete	10.00	EA	0.00000	0.00	Planned	10/1/2023
5	WLTBcou	Inventory Control Slow Moving/Obsolete	10.00	EA	0.00000	0.00	Planned	10/1/2023

Lines

PO: ZPO0000001 Vendor: CVR-001 Status: Planned

Item	Line	Ordered	Status	Item Cost	Extended Cost
ZL-JOBSHOP10	1	20.00 EA	Planned	5.00000	100.00

Vendor Item: Due Date: 10/2/2023 Promise Date: ☐ Preassign Lots ☐ Preassign Serials

Tax Code: Tax Exempt Terms Code: NT Exchange Rate: 1.000 Sales Tax: 0.00 Total Cost: 100.00

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)

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

Goods Receiving Notes

	Vendor	Nar
1	1	Bicycle Parts Company
2	23	Roller
3	23	Roller
4	24	Qu...

Vendor: 1 Bicycle Parts Company GRN: GRN-2 Status: In Process Date: 10/10/2022

Warehouse: MAIN Progressive Industries

General **Contacts** **Landed Cost** **GRN Lines**

Shipped Date: 10/10/2022 Ship Via: UPS UPS Silver Label

Tracking Number: Carrier Container: ☐ EDI ASN

Received By: Inspected By:

You can consolidate multiple Goods Receiving Notes under one voucher.

Request for Quote

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.

The screenshot displays the CloudSuite Industrial RFQ module interface. On the left, a sidebar lists various RFQs with their IDs and descriptions. The main area is titled 'Main' and shows the details of a specific RFQ. The 'General' tab is active, displaying fields for RFQ ID, Description, Status, Due Date, Buyer, and a 'Vendors' table. The 'Vendors' table lists vendors like 'Bicycle Parts Company' and 'Bicycle Supplies, Inc.' with columns for Line, Item, Status, Item, Description, Vendor Item, Reply By, and Quote Sent. Below the vendors table is an 'RFQ Items' table with columns for Line, Item, Description, UOM, Preferred Lead Time, Selected Vendor, Selected Qty, Selected Price, and Reply Date. At the bottom, there is a 'Create PO' button and a 'View PO' button.

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.

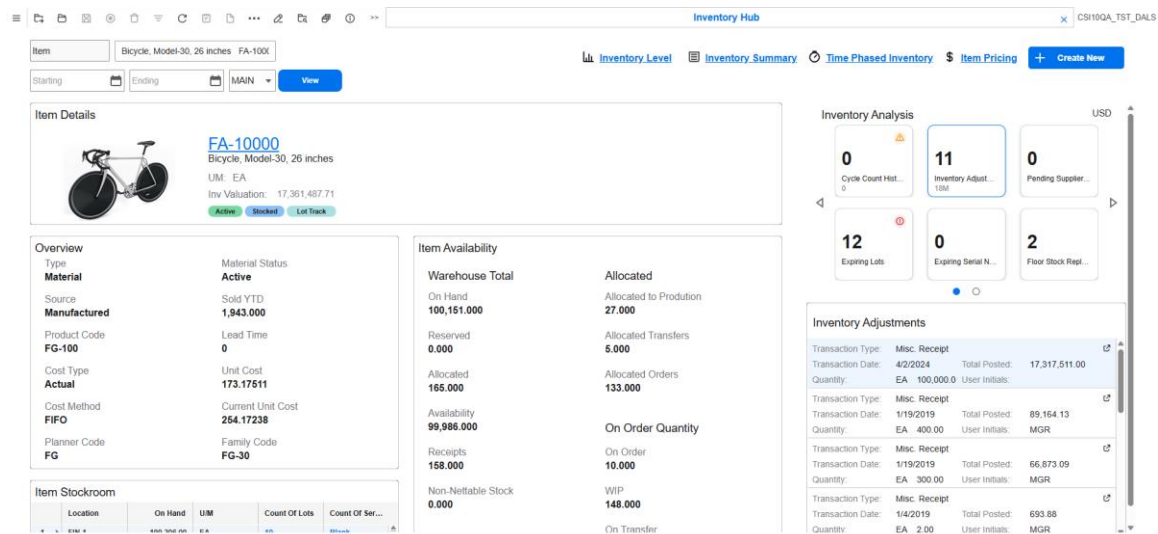
Inventory Management

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.

Multi-Warehouse Backflushing

In a multi-warehouse manufacturing environment, there is currently no way to perform backflushing on jobs across warehouses for non-Tracked material, without posting transactions one job at a time. The current posting utility accepts only one warehouse that is used for all transactions which is a limitation when the jobs are for multiple warehouses.

This update provides the user the ability to backflush non-tracked material for a range of jobs using the warehouse from the job associated with the material.

Post Job Transactions

☐ Post Negative Inventory
 Checked may result in Negative On Hand Quantities.

☐ Post "Complete" Transactions
 Not checked will result in only non-complete job transactions being posted.

Starting

Job: 0000
 Transaction Date:
 Employee:
 Department:
 Shift:
 User Initials:

Ending

9999
 ☐ Increment Date

Employee Types

☒ Hourly
 ☒ Salaried
 ☒ Non-Employee

Backflush Materials

☒ Backflush From Job For Whse
 Warehouse: MAIN

Process

Physical Inventory

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

This program will read sequentially through the Item Location File, creating physical inventory records for those Where / Item / Location / Lot combinations that don't already exist. Tag numbers are assigned if the Count Method is Tag or Both. Sheet numbers are not assigned until sheets are printed. The List option shows those records that would be created if Process was run.

Warehouse **MAIN**
Count Method **Tag**
☐ List After Processing

☒ Preview
☐ Commit

Process

Tag	Item	Location

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

Cycle Counting

Cycle Counting allows you to perform an inventory count on small subsets of your total inventory on any given day. Cycle counts are like 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

This utility will generate Cycle Count records for the specified range of items which need to have a cycle count performed. Count Sheets will be generated for each item.

Whse: MAIN

Cycle Type

☒ Day Frequency ☒ Receipt
☒ Zero Quantity ☒ Issue

Material Type

☒ Material ☒ Tool
☒ Fixture ☒ Other

ABC Code –

☒ A
☒ B
☒ C

Sort By: Item

☐ Overwrite Existing Records ☐ Print Barcode Format
☐ Page Between Location/Item ☐ Print Pieces
☐ Display Cut-Off-Qty ☒ Display Report Header

Starting

Item:
Location:
Product Code:
Planner Code:

Ending

Process

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

Shipping/Receiving

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.

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
- 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

Shipment

1	130
2	129
3	124
4	121
5	120
6	119
7	117
8	116
9	115
10	114
11	113
12	112
13	111
14	110
15	109
16	108
17	107
18	106
19	105
20	104
21	103
22	102
23	101
24	100
25	99
26	98
27	97

Shipment Master

Shipment: 130
Status: Shipped
Whse: MAIN
Ship From: SHIP
Parent Container:

Customer: Y000001
Ship To: 0
Ship Date: 12/30/2024
Pick List:

Packages: 1
Total Weight: 0.00
Weight U/M: LB
Packer:

Pack Confirmation
Ship Confirmation
Shipment Tracking
Print Package Labels

GeneralChargesPick ListsPackagesConsigneeConsignorInvoiceeOtherThaiTransportation Management

Ship Via Code:Carrier Number:Pro Number:ASN Printed
Carrier Code:Container:Pickup Date:ASN Extracted
Carrier Name:Route:Tracking URL
Carrier Contact:Vehicle Number:

Authorizer:Phone:Fax:
Authorizer Title:

☐ Packing Slip☐ Certificate Of Origin☐ Customs Invoice
☐ Bill of Lading☐ Pro Forma Invoice☐ Consolidated Invoices☐ Order Invoicing

Special Instructions[1]:Special Instructions[2]:

COD Amount:0.00Shipment Value:40.00Currency:USD

Collect (Estimate)Prepaid

COL Fee:0.00PPD Fee:0.00
COL Freight:0.00PPD Freight Charges:0.00
COL Misc Charges:0.00PPD Misc Charges:0.00
COL Total:0.00PPD Total:0.00
Total Charges:0.00

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.

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Transfer Orders

Use 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.

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

Transfer Orders

Combined Transfer Order Ship/Receive

Item Availability

Landed Costs

Material Transactions

On Hand Quantities

Search Transfer Orders

Transfer: 1202-00005 Status: Ordered Order Date: 12/1/2022

Header

Transfer: 1202-00005

Status: Ordered

Order Date: 12/1/2022

Shipping

Packages: 0

Entered By Site: DALS

Exchange Rate: 1.000

From Site: DALS To Site: LA

From Whse: MAIN To Whse: MAIN

Ship Via:

Currency: USD

Export Type: Non-Export

Transfer Order Line Items

Line	Item	Item Description	Status	Quantity	UOM	Unit Cost	Transaction (LA) Currency	Transaction (LA) Unit	Transaction (LA) Each	Sched Ship Date
1	A001	SN Tracked	Ordered	1.00	EA	0.00	USD	0.00	1.000	12/2/2022

Lines

Line: 1 Item: A001 Status: Ordered

Item: A001 Line: 1 Unit Price: 0.00 Qty Less: 0.00 Last Ship: Last Rcvd: Source - Job:

Price Code: Extended Price: Shipped: Received: Destination - Inventory:

Packages: 0 Material: 0.00 FDBIL: 0.00 Total: 0.00

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.

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 to complete your EDI communication system. For more information, contact your Infor account representative.

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

Customer

1	1
2	1
3	3
4	3
5	3

Customer: 1 Ship To: 0

Coordinated Bicycles

Trading Partner Code: CB1234 Duns Number:

☒ Post Planned Releases

☐ Generate Invoices

☒ Print Invoices

Release Processing: Replace

Invoice Code:

Payment Ref Type: Invoice

☐ Validate Credit Limit

☐ Validate Order Credit Limit

☒ Validate Price

Use Price: EDI

Use Date: EDI

Due Date Offset: 0 Hours: 0

☐ Generate Ship Notice

☐ Include Serial Numbers

☒ Print Ship Notice

☐ Pooled ASNs

ASN Code:

☐ Generate Acknowledgments

☒ Print Acknowledgment

Acknowledgment Code:

Auto Post: Neither

Last Item Extract: 9/11/2024 2:57:22 PM

Note Processing: Append

Last Address Extract: 3/1/2023 7:17:58 PM

EDI Customer Profiles

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

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.

Users also can 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 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"

Outside Process Management leverages the “Outside Service” field on the standard 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.

The screenshot shows the 'Current Materials' form in Infor CloudSuite Industrial. On the left, there is a list of items with 'FA-10000' selected. The main form area is divided into tabs: 'Materials', 'General', 'Costs', and 'References'. The 'Materials' tab is active, displaying fields for Item (FA-10000), Alternate ID (0), Operation (10), and Material (TA-30000). Below these, there are sections for Material properties (Type, Quantity, Unit, Cost, Scrap Factor, Alt Group, Alt Group Rate), Miscellaneous (BOM Seq, Reference, Backflush, Backflush Location, Formula Material Weight %), and Manufacturer (Manufacturer, Manufacturer Item). The 'Operation' section on the right shows 'WC: FA-400' and 'Final Assembly Area'.

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

Item: FA-10000 Quantity On Hand: 425.000
 Description: Bicycle Model-38, 29" Revision: REV-3 UoM: EA

Cost Detail Cost Maint Compare Set Cost

		ASSEMBLY	ACCUMULATED	
Labor	Setup:	0.30	3.90	Current Unit Cost: 254.17238
	Run:	0.00	48.75	Unit Cost: 254.82334
Type	Material:	4.18	41.858	
	Test:	0.02434	0.03374	
	Fixture:	0.00	0.025	
	Other:	0.00	0.0623	
Overhead	Fixed:	0.26505	75.50317	Assembly Subtotal: 34.33484
	Variable:	0.26505	75.50317	Assembly Subtotal: 219.83774
	Outside:	2.30	9.42	Assembly Total: 254.17238
				Accumulated Total: 254.17238

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
 - 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 Add in Financial Report Writer and the (New) SL Financial Report Writer
- IFRS Certified
- Cash flow analysis
- SEPA direct debit functionality
- Currency conversions
- Re-open closed months and 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

Sequence: Date: Site:

Account:

G/L Posted Transactions

Sequence Detail

Budget and Plan

Summary By Account

Reverse Transaction

General

Dimensions

Domestic	Exchange Rate	Foreign
Debit: 874.25	1.000	Debit: 874.25

Reference: Check#:

Allocation Transaction: Check Date:

Posted From: Currency:

Posted From Site: Bank Code:

G/L Voucher: Consolidated:

Approver: Approved Date:

Cust/Vendor:

Lake House Cycles Inc.,

Invoice/Voucher: ☐ Cancellation Invoice/Vch Seq:

Hierarchy:

Control Number:	SF	DAL5	2016	11	44
Ref Control Number:	SF	DAL5	2016	11	44

Document Number:

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

A/P Vouchers and Adjustments

Vendor: Bicycles Parts Company

Type: ☐ Cancellation

Voucher:

Invoice: PO: ☐ Posted from PO

Invoice Date: Pre-Register: ☐ Auto Vouchered

Distribution Date: GRN:

Background Post Status:

Distribution

Distribution Generation

A/P Voucher Posting

A/P Posted Transaction Detail

Purch Amt: 0.00	Sales Tax: 0.00	Prox Code: 99	☐ Include Tax in Cost
Freight: 100.00	Sales Tax: 0.00	Prox Day: 0	☐ Fixed Rate
Duty: 100.00	Invoice Amt: 200.00	Disc Pct: 2.000	Currency: USD
Brokerage: 0.00	Non-Disc Amt: 200.00	Disc Days: 10	Exch Rate: 1.000
Insurance: 0.00	Disc Amt: 0.00	Disc Date: 7/17/2024	
Local Freight: 0.00		Due Days: 30	
Misc Charges: 0.00		Due Date: 8/6/2024	

A/P Acct:

Account Description:

Reference:

Tax Code:

VAT:

Builder PO Orig Site:

Builder PO:

Builder Voucher Orig Site:

Builder Voucher:

General
VAT Procedural Markings
Multicurrency Invoice
SAD
Manual VAT Entry
VAT / VIES

Auth Status:

Authorizer:

Notes:

Fiscal Reporting System Type:

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

A/R Payments

Customer: 1 Bicycles Parts Company

Type: Check Credit Memo: Number: 987

Receipt Date: 1/17/2025 Payment Due Date: Payment Type: Check

☐ Offset Deposit Date: Background Post Status: Allow ▼

☐ Corporate

Distributions

Quick

Payment Posting

A/R Draft Remittance

G/L Reference: ARP 987

Description: Payment 987

☐ Transfer Cash

Bank Code: BK1

Payment	USD	Payment Exchange Rate	Bank	USD	Euro	EUR	Domestic	USD
Amount:	0.00	1.000		0.00		0.00		0.00
Applied:	0.00				Exchange Rate			0.00
Remaining:	0.00				1.000			0.00

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

Fixed Assets

Asset Number:

Status Code:

Description:

Asset Type:

Parent Asset Number:

Class Code:

Useful Life: Year Month

Department:

Prior Counter Reading:

Location:

Current Counter Reading:

Tag Number:

Current Period Units:

Date Acquired:

Date To Start Depreciation:

Manufacturer:

Vendor Number:

Insurance Vendor:

Model Number:

Insurance Policy Num:

Serial Number:

Insurance Expire Date:

Inventory Freq:

Insurance Value:

Last Inventory Date:

Disposal Date:

Disposal Amount:

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

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[Currency Codes](#)

Currency: AED

ISO Currency: AFN

Currency Symbol: AED

Country: UNITED ARAB EMIRATES

General Unrealized Realized/Other **Standard Rates** Excise Rates

Amount Format: ->>>>>>>>>9.99 ☐ Active For Customer Portal

Amount Total Format: ->>>>>>>>>9.99

Cost/Price Format: ->>>>>>>9.99<<<

☐ Rate Is Divisor

☐ Part of Euro

Euro Exchange Rate:

☒ Allow Currency Rate Override

Override Tolerance Type: Percent

Override Tolerance Amount:

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

Financial Report Writer

The Financial Report Writer brought back the functionality available in previous versions of the software (formerly known Financial Statement Definition) with the Financial Report Writer wizard, which was revamped to make it easier to use and configure in a wizard-like experience.

Using the Financial Report Writer, the Users can write and configure their own custom financial reports in whatever format and function is required of their business. This allows for financial reports generated directly from the application, and not from Excel, as many auditing procedures require.

The new Financial Report Writer comes with the following pre-built reports, which can also be copied and modified to the customer's needs:

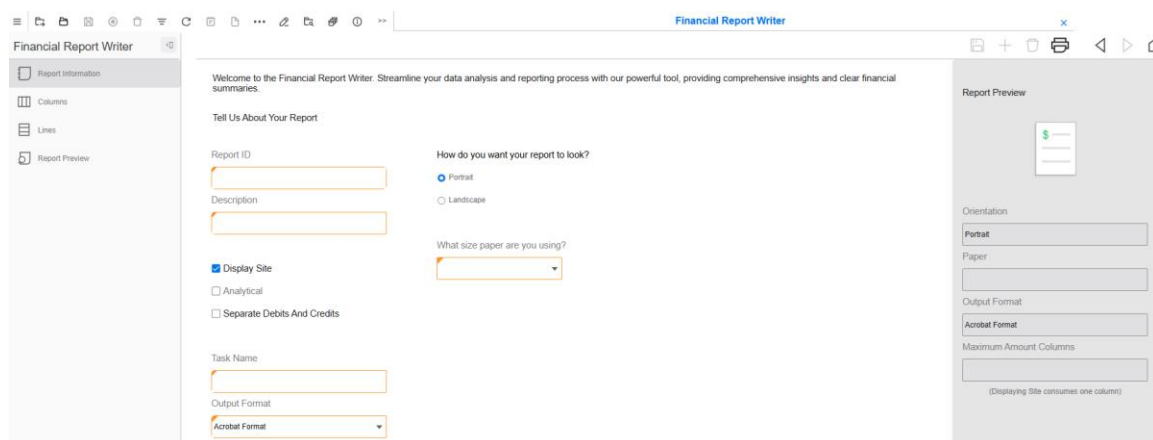
- Balance Sheet
- Profit and Loss Statement

The new Financial Report Writer is in addition to the existing Excel add-in tool.

The new Financial Report Writer tool allows the users to generate account lines to be inserted into a report as a single sequence instead of individual account line sequences. This change enhances the user experience when creating new reports using the Financial Report Writer. Users can now create a single account line sequence from a specified account type and accounts populated in the From Account and To Account fields using the Generate Lines utility button on an existing financial report.

This report writer can generate statements in foreign currency and is able to generate consolidated financial reports. The user can set the output format to several excel formats, pdf, or various paper sizes. This report writer also includes the ability to add ratio's and generate reports by individual profit centers with unit codes or unit code combinations.

A new Financial Report Groups form has also been added to allow users of the Financial Report Writer the ability to group together selected financial reports and then later launch one print task that will print all the reports in that group. This new grouping function ties together select existing financial reports, allowing the user to print them all together instead of one at a time.

The screenshot shows the 'Financial Report Writer' application window. On the left is a sidebar with a tree view containing 'Report Information', 'Columns', 'Lines', and 'Report Preview'. The main area is titled 'Welcome to the Financial Report Writer. Streamline your data analysis and reporting process with our powerful tool, providing comprehensive insights and clear financial summaries.' Below this is a section 'Tell Us About Your Report' with several input fields: 'Report ID', 'Description', 'Display Site' (checked), 'Analytical' (unchecked), 'Separate Debits And Credits' (unchecked), 'Task Name', 'Output Format' (set to 'Acrobat Format'), and 'How do you want your report to look?' with 'Portrait' selected and 'Landscape' unselected. There is also a 'What size paper are you using?' dropdown. On the right is a 'Report Preview' panel showing a small icon of a document with a dollar sign and a list of settings: 'Orientation' (Portrait), 'Paper', 'Output Format' (Acrobat Format), and 'Maximum Amount Columns'.

The Financial Report Writer wizard is easier to use and configure in a wizard-like experience.

Human Capital Management

Human Resources

**For US Companies only*

Because employees can be a company's most valuable asset, 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 Human Resources allows you to track as much or as little information as you require.

Because of its dynamic interaction with 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)

The screenshot shows the 'Employee 360' profile form for David I. Daniels. The form is divided into several sections: Personal, Growth & Training, Work, Pay, Benefits, PTO, and Contact Information. The 'Personal' section includes fields for Employee ID (1), Name (Daniels, David I.), SSN (XXX-XX-5371), and a photo. The 'Work' section includes fields for Job Title (Painter), Employee Category (RPT - Regular, Full Time), and Employment Status (FT - Full Time). The 'Contact Information' section includes fields for Last Name (Daniels), First Name (David), MI (I), Suffix, Address (1) (83 N Vernon St), Address (2), Address (3), City (Sunnyvale), State (CA), Postal ZIP (43074), and County (Delaware).

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

Payroll

**For US Companies only*

Payroll automates the process of creating and maintaining complete employee payroll records. 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.

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

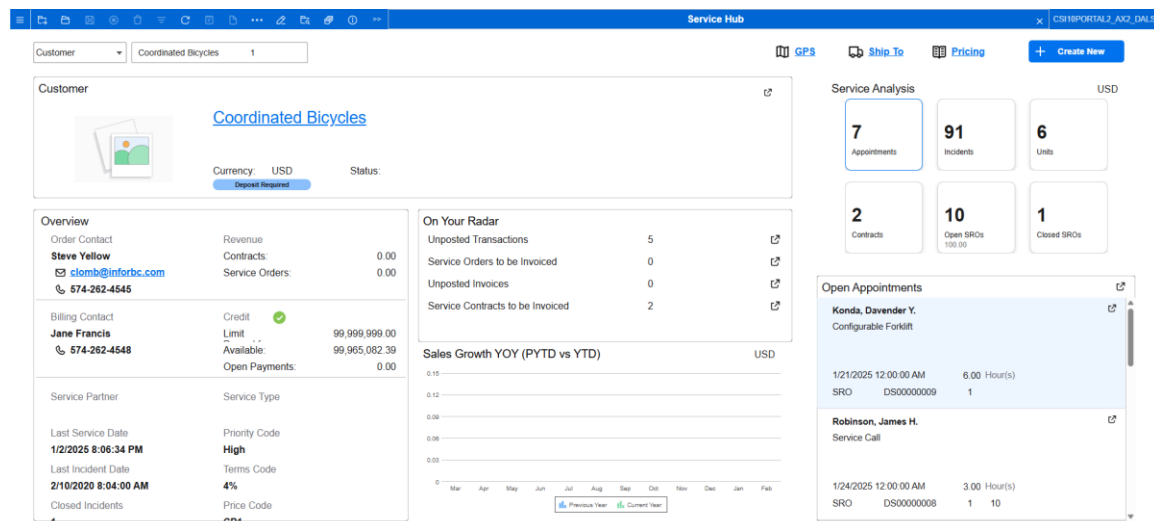
Hubs

Our entity-based hub forms provide a reimagined user entry experience that helps provide a consistent experience across the CloudSuite that is role and industry-specific, aggregates critical information, provides actionable insights, improves user productivity, and takes advantage of Infor's innovative technologies.

Hub forms provide an entity-level view of specific master data sets by aggregating content from across CloudSuite Industrial, while offering multiple views relevant to the entity.

The hub forms are designed to be drilled into from the role-based workspaces to provide more specific insights on an entity (item, customer, vendor, unit, etc.). They also help boost user productivity by pulling together data for an entity, emphasizing exceptions that need immediate action. By providing quick actions that streamline activities, without the need to go to many different forms to collect the information, hub forms reduce user processing time, providing a 360-degree view. Hub forms also surface relevant important links to help users navigate more quickly to perform more complex workflows.

- Provide more specific insights on an entity (item, customer, vendor, unit, etc.)
- Boosts user productivity by pulling together relevant data for an entity in a 360-degree view, emphasizing exceptions that need immediate action
- Reduces user processing time by providing quick actions to streamline activities
- Surfaces relevant important links to help users navigate more quickly to perform more complex workflows



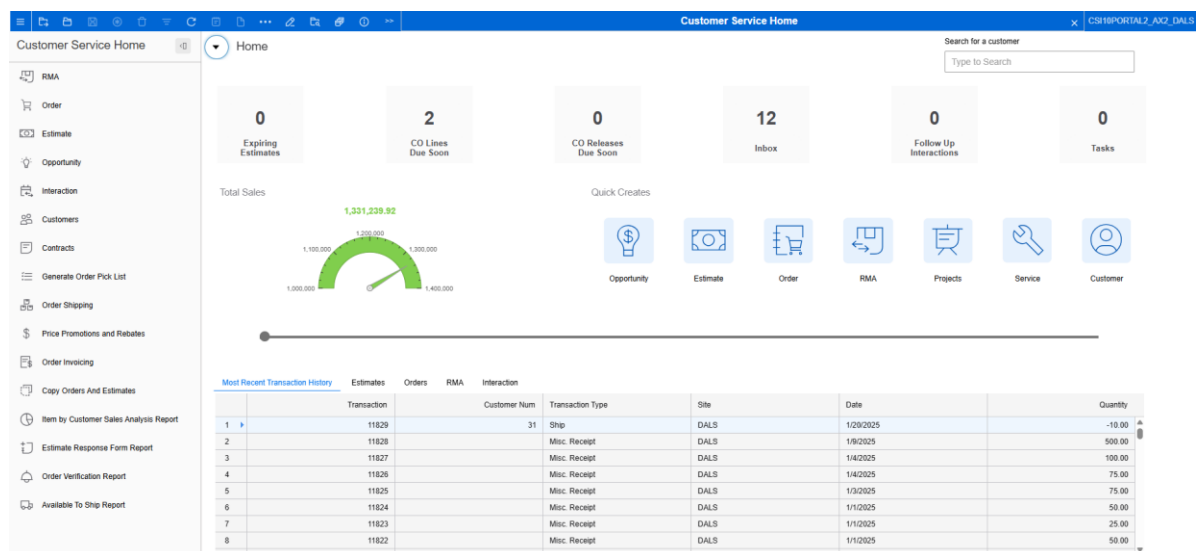
Hub forms aggregate critical information, provide actionable insights, improve user productivity, and take advantage of Infor's innovative technologies.

Dashboards

Infor CloudSuite Industrial offers role-based homepages where specific daily tasks of positions in your organization are defined, collecting the exact information and actions to help them accomplish their jobs effectively. These set of actions and data are most closely associated with a specific, defined job in an organization, such as customer service, controller, or production planner.

These 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 act on the information from a single location within the application. Therefore, you spend less time searching for information and more time getting your job done. These homepages offer a good alternative for on-premises customers who do not have access to the powerful Role-based Workspaces of OS Portal in the cloud.

- Home tab displays links to forms, activities useful for each role, key performance indicators, commonly-used quick create actions and relevant data
- Navigator tab includes pre-defined queries that equip each role with information to make informed business decisions
- Tasks tab surfaces the important actions of the user, such as alerts, tasks and inbox
- Critical Numbers tab surfaces role-based, module specific key performance indicators to help with visibility and decision-making
- DataViews tab gives the user the power to interact with massive datasets through the powerful capabilities of the DataView technology
- Flow tab for each form contains a business process flow, including links to help topics and forms appropriate for each role
- Multi-site views allow you to view information from multiple sites



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

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 follow 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 feature 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.

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, 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 preventative maintenance, rework/teardowns, MRO, and Depot Repair activities are all managed through a common user interface.
- **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, whether the technician is outside or inside the company's four walls so you can match the right resource with the right job. Visibility into truck stock and route optimization for technicians in the field plays a big role in optimizing and improving efficiency, increasing resolution rates and minimizing the cost of non-essential trips back to the warehouse.
- **Preventative maintenance** – Schedule routine maintenance for internal assets or customer owned assets to prevent unexpected downtime, 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 exits 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.

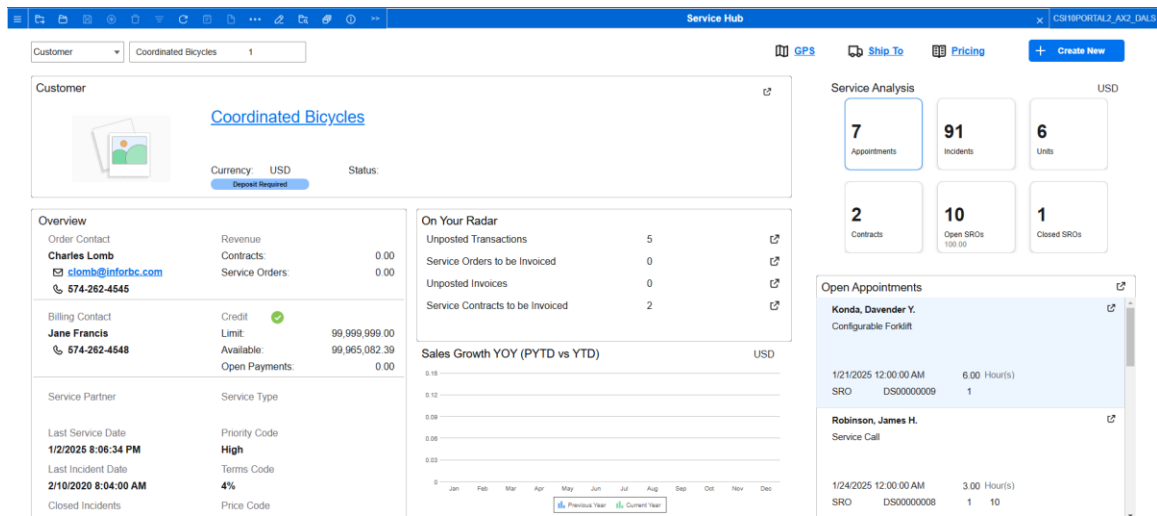
- **Analytics** – Integrated data, total visibility, and accurate tracking make it easy to analyze data down to the detail level. Flexible reporting aids in decision-making, planning, and providing engineering with valuable information needed to adapt product or part designs.

Service also supports multiple languages and currencies with the flexibility to support local regulations and the ability to grow to meet your expanding needs.

Additional service benefits

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.
- Standard business responses and processes can be captured and used to troubleshoot any number of internal or external support scenarios.
- Inventory can be accurately valued when returns from customers are processed as cores, torn down for parts, or reworked using service orders.



Gain visibility into the detailed service history of a customer or specific unit to better understand and serve your customer base with the Service Hub form, providing a 360 degree service view.

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.

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

Support your enterprise

Quality supports the quality activities of your entire enterprise, not just the manufacturing process, by managing advanced quality activities across your entire organization. It includes support for quality incidents, change management, responses to audit findings, machine and maintenance issues, safety, training, and opportunities for building a culture of continuous improvement throughout your organization.

Consistency of quality processes is a critical component of every quality system. Quality Control 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, 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. Quality automatically calculates vendor product quality and delivery performance to help you build strong supplier relationships.

Vendor Scorecard

1/10/2023 9:23:45 AM
Period: 7/1/2022 to 12/31/2022



Vendor
17
National Paint Supply
35 Ward Rd
Lancaster NY 14086
USA
Phone: 716-489-8773

Terms:
Net 15 Days
Certifications:
• ISO-14001 (Exp. 3/2024)
• ISO-9001 (Exp. 4/2025)

Total Score this period: 183/200 (91.50%) ★★★★★

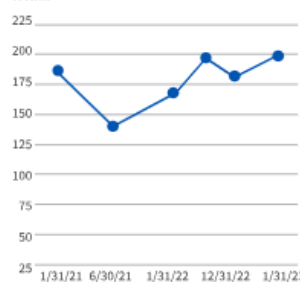
Quantitative Results

Delivery Score	25 / 25	Quality Score	68 / 75
Criteria	Points	Criteria	Points
Total Quantity Received:	250	Quantity Rejected	5
Receipts:	100	Quality Points	3680
On Time:	98	Receipts	100
Early:	1		
Late:	1	PPM	0
Percent On Time	98.00%		
Delivery Points	2490.00		

Qualitative Results

Performance Score	90.00 / 100.00
Criteria	Points
Corrective & Preventative Action	1 / 1
Cost Reduction Initiatives	5 / 5
Quality Certification	10 / 10
Lead Time Favorability	10 / 15
Purchasing Resources Requires	10 / 10
Sales Support and Involvement	20 / 20
Supplier Schedule Availability	12.50 / 15
Technical Assistance and Support	8 / 9
Favorable Terms & Conditions of Sales	8.50 / 10
Timeliness and Responsiveness	5 / 5

Trends



In addition to quantitative measurements, you can also create a set of user-definable and customizable qualitative criteria on which to rate your vendors. In total, these quantitative and qualitative measurements can be summarized in a vendor-facing scorecard.

Improve quality on your jobs

Tracking quality requirements during production often becomes cumbersome, requiring the recording of disposition of materials at multiple inspection points, tracking sign-offs, capturing test results, recording defects, and tracking items requiring rework or repair. 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. 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, 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, Quality lets you track each non-conforming item and capture the associated costs of quality. In addition, when a job requires you to send material outside for processing, Quality prints paperwork to attach to the product when it leaves your facility and when it returns.

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. 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, 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 correction action, and measure customer satisfaction.

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

Credit Card Interface

Cash flow is the lifeblood of any enterprise, especially for manufacturers who 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, the 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 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 rewards.

There are no per transaction charges associated with 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, 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
 - BridgePay

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 (Service)
- Service Contract Invoices (Service)
- 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.

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.

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 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.

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

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 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.

Industry Process Catalog (IPC)

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 Industry Process Catalogs embody that experience by providing highly focused 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 Industry Process Catalogs reduce risk and accelerate your time to value.

Implement quickly

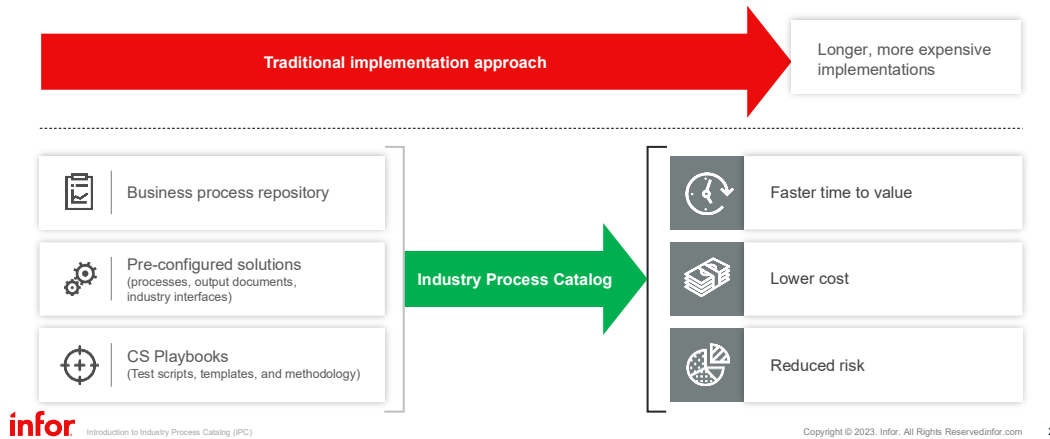
Infor Industry Process Catalogs deliver predefined processes, templates, training, and more - based on industry leading practices and expertise. Infor Industry Process Catalogs can deliver value and benefits, faster and more cost-effectively than many full-blown implementations using traditional implementation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

Infor Industry Process Catalogs 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.** IPC is based on experiences gained from hundreds of implementation projects.
- **Reduced implementation risk for employees.** Infor Time-to-value 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.** IPC 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 by using industry Process Catalogs.



Industry Process Catalog



Get lasting results

Infor's Industry Process Catalogs 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's Industry Process Catalogs, 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
- Keep up to date with the latest process updates
- Easily educate new users

Optional Components

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.



1. Identify
employees
to train



2. Match
each with a
learning path



3. Start
them on their
first course

The membership supports these 39 CloudSuite Industrial learning paths (the hours show the duration of each path):

- SyteLine - Buyer/Purchasing Manager (72:30)
- SyteLine - Customer Service/Sales/Marketing (38:00)
- SyteLine - Demand to Build (77:45)
- SyteLine - Design to Release (33:45)
- SyteLine - Developer (59:00)
- SyteLine - Engineer (33:45)
- SyteLine - Finance (58:00)
- SyteLine - Financial Plan to Report (58:00)
- SyteLine - Hire to Retire (11:00)
- SyteLine - HR/Payroll (13:00)
- SyteLine - Inspect to Correct (32:30)
- SyteLine - IT/System Administrator (118:00)
- SyteLine - Lead to Order (18:00)
- SyteLine - Multi-site Operations and Finance (21:00)
- SyteLine - New and Updated Courses (46:45)
- SyteLine - Order to Cash (35:00)
- SyteLine - Payables Administrator (23:30)
- SyteLine - Plan to Inventory (75:45)
- SyteLine - Procure to Pay (80:30)
- SyteLine - Production/Planning/Scheduling (81:45)
- SyteLine - Project to Profit (49:15)

- SyteLine - Quality (32:30)
- SyteLine - Receivables Administrator (29:00)
- SyteLine - Receiving Clerk (15:15)
- SyteLine - Service Technician/Manager (21:00)
- SyteLine - Service to Cash and Service Contract to Cash (21:00)
- SyteLine - Shipping Clerk (21:00)
- SyteLine - Warehouse Clerk/Manager (18:00)
- SyteLine v9 - IT/System Administrator (28:00)
- SyteLine v9 - Receiving Clerk (20:00)
- SyteLine v9 - Shipping Clerk (28:00)
- SyteLine v9 - Warehouse Clerk/Manager (36:00)
- SyteLine: Foundation (13:15)
- SyteLine: Infor OS (2:00)
- SyteLine: Planning and Scheduling (71:00)
- SyteLine: Process Manufacturing (0:00)
- SyteLine: Procurement (13:15)
- SyteLine: Sales and Orders (30:00)
- SyteLine: System Extensions and Integrations (56:00)

For a Grand Total of 1,492 hours

To support the learning journey of each team member, you have unlimited access to the following resources:

- Official Infor Training Guides: Comprehensive manuals for structured learning.
- Self-Directed Courses: These include videos and hands-on exercises.
- Live Instructor-Led Courses: Participate in six interactive sessions guided by expert instructors.
- Ongoing Training: Continuous learning opportunities, including updates on the latest versions for those who have completed their learning paths.

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

Membership Benefits

With a membership, you can enjoy the following advantages:

- Optimize Consultant Time: Allow consultants to focus on advanced topics, rather than basic training, maximizing their expertise.
- Enhance Learning Retention: Reinforce and build upon existing knowledge to ensure continuous learning.
- Facilitate User Instruction: Effectively train end users on necessary tasks and processes.
- Support Training Initiatives: Address needs for cross-training, system upgrades, and staff turnover.

Campus Plus is dedicated to helping you make the most of your consultant visits, saving you significant time and effort, while effectively training your team.

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 be 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 on which CloudSuite Industrial is built. 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 several 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 several 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 work set 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 can retrieve drawings or notes for a specific item, operation, or job. They can also request replenishment of material via Kanban. For work centers producing Kanban, 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 touchscreens, 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 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.

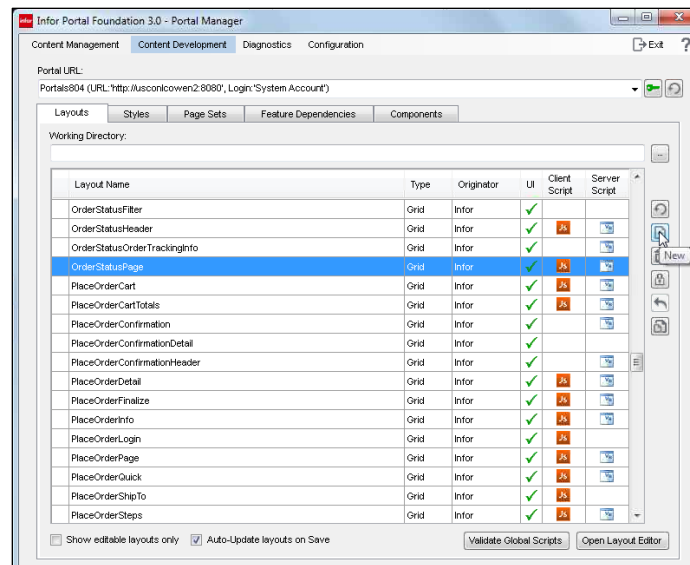
Personalizing the behavior of page layouts, styles, page sets, and components (such as field display and images) as well as managing the deployment of the alterations is the focus and strength of the Portal Manager.

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

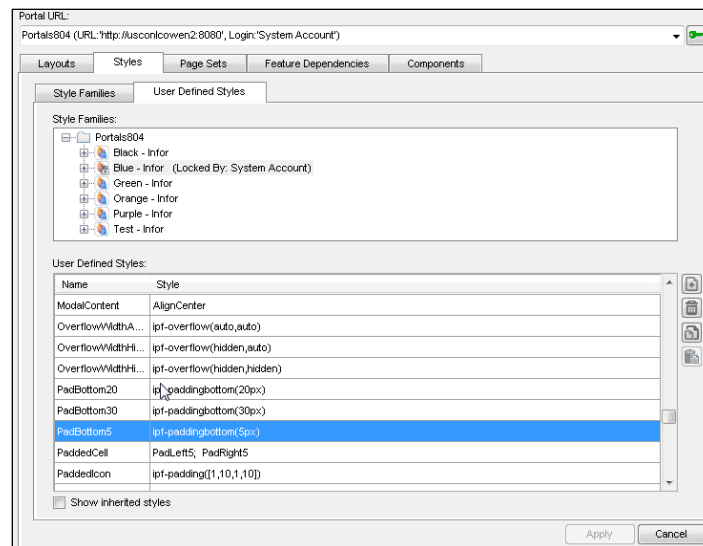
Full debugging capabilities can be accomplished by monitoring specific events of the portals using the built-in diagnostics.

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 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

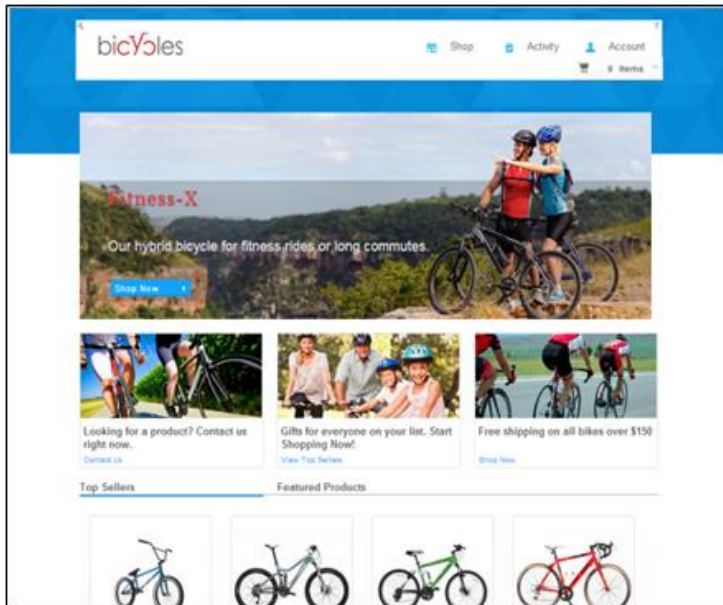
with pictures, pricing and associated recommended items. Product and support information can be published as videos and white papers, etc. along with answers to frequently asked questions. For companies that sell configurable goods and utilize Infor Product Configurator Management (PCM), configuration 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, KnowledgeBase, Contact Us



Checking on order status, viewing estimates, requesting an RMA, or reprinting an invoice can 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 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

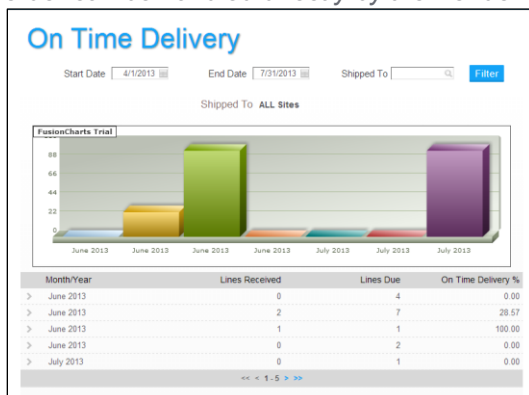
- Documentation Sharing & Management
- Announcements
- Other: Press Releases, Videos, FAQ, KnowledgeBase, Contact Us

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 be handled directly by the Vendor.



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

Reseller Portal

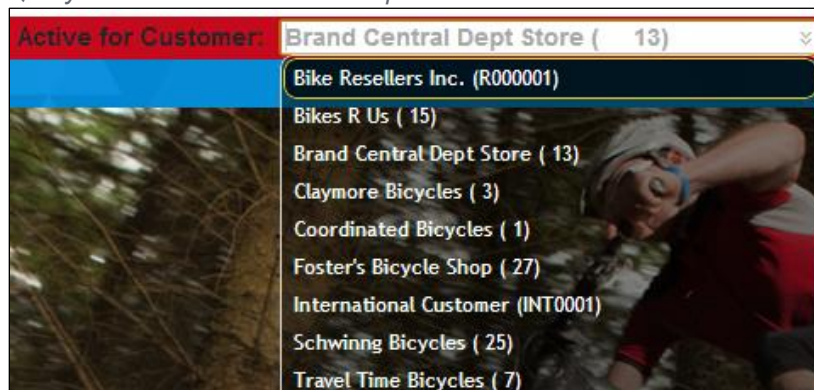
The Infor CloudSuite Industrial Reseller Portal enhances your reseller relationships by giving them direct access to CloudSuite Industrial data pertinent to both their own account as well as any customer account for which they represent.

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

Commissions Due						
Invoice		Order		Status		Site
						Filter
Invoice	Order	Customer	Status	Commission Amount	Commission Paid	Commission Balance
990	CJ00000008	25 - Schwinn Bicycles	Unpaid	\$4.98	\$0.00	\$4.98
		Site Ohio				
		Due Date 7/9/2013				
980	CJ00000005	25 - Schwinn Bicycles	Unpaid	\$32.34	\$0.00	\$32.34
		Site Ohio				
		Due Date 7/8/2013				
981	CJ00000005	25 - Schwinn Bicycles	Unpaid	\$32.34	\$0.00	\$32.34
		Site Ohio				
		Due Date 7/8/2013				
977	30162583	1 - Coordinated Bicycles	Unpaid	\$21.17	\$0.00	\$21.17
		Site Ohio				
		Due Date 7/5/2013				
967	163224	1 - Coordinated Bicycles	Unpaid	\$0.13	\$0.00	\$0.13

Query commission information specific to the associated CloudSuite Industrial salesperson.



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.

Service Orders

Service Order
Customer
Filter

Additional Filters

Service Order	Description	Customer	Status
> TJM0715002	TJM0715002	Coordinated Bicycles	Open
Site: Ohio			
> TJM0703004	TJM0703004	Coordinated Bicycles	Open
Site: Ohio			
> TJM0703003	TJM0703003	Coordinated Bicycles	Open
Site: Ohio			
> TJM0703002	TJM0703002	Coordinated Bicycles	Open
Site: Ohio			
> TJM0703001	TJM0703001	Coordinated Bicycles	Open
Site: Ohio			
▼ TJM0702003	TJM0702003	Coordinated Bicycles	Open
Site: Ohio			

Line	Unit	Item	Qty	ISO U/M	Status
> 1		CP-10000	1,000	EA	Open
Seat,Padded					

Transactions for Service Order# TJM0702003

Status	Service Order	Partner	Transaction	Item / Code	Qty / Hrs	Qty / Hrs To Bill	Actions
Submitted	TJM0702003-1-10	David Daniels	Material	CP-10000	1,000	1,000	
	TJM0702003			Seat,Padded			

Additional Info

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:

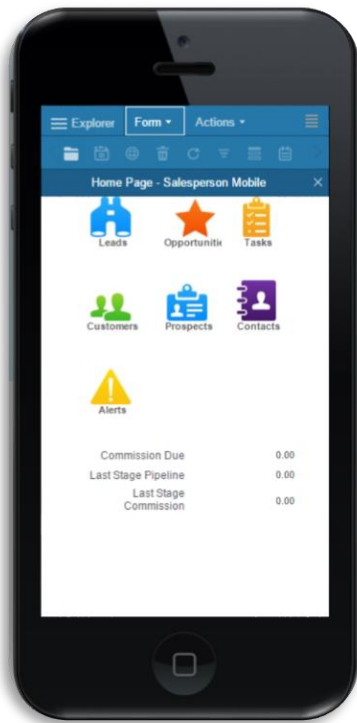
- Alert when an order for a specified customer is overdue
- Alert when a specified account is over budget
- Alert when an order line for a customer is projected to ship late.

While **Salespeople** are on the road, they can 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 to help provide a stable and responsive IT environment. There are several 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

Service Mobile

***The SyteLine Service 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.

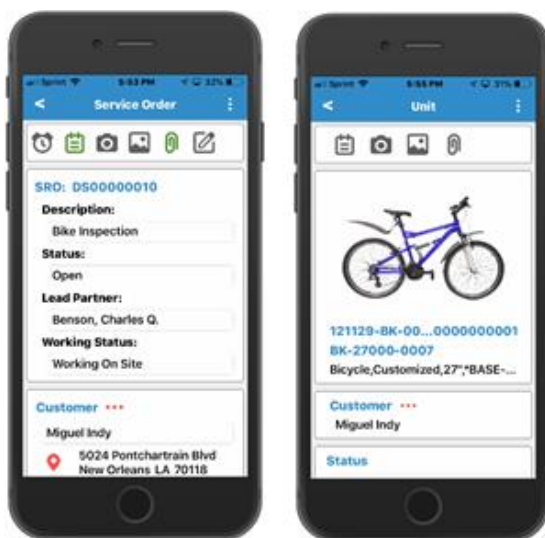
Service Management Mobile acts as a delivery mechanism especially designed for mobile field service organizations that rely on a steady flow of incoming and outgoing data. Field technicians require access to centrally stored customer, service order, scheduling, and resolution data. A competitive advantage 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 with 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.

Advanced Forecasting

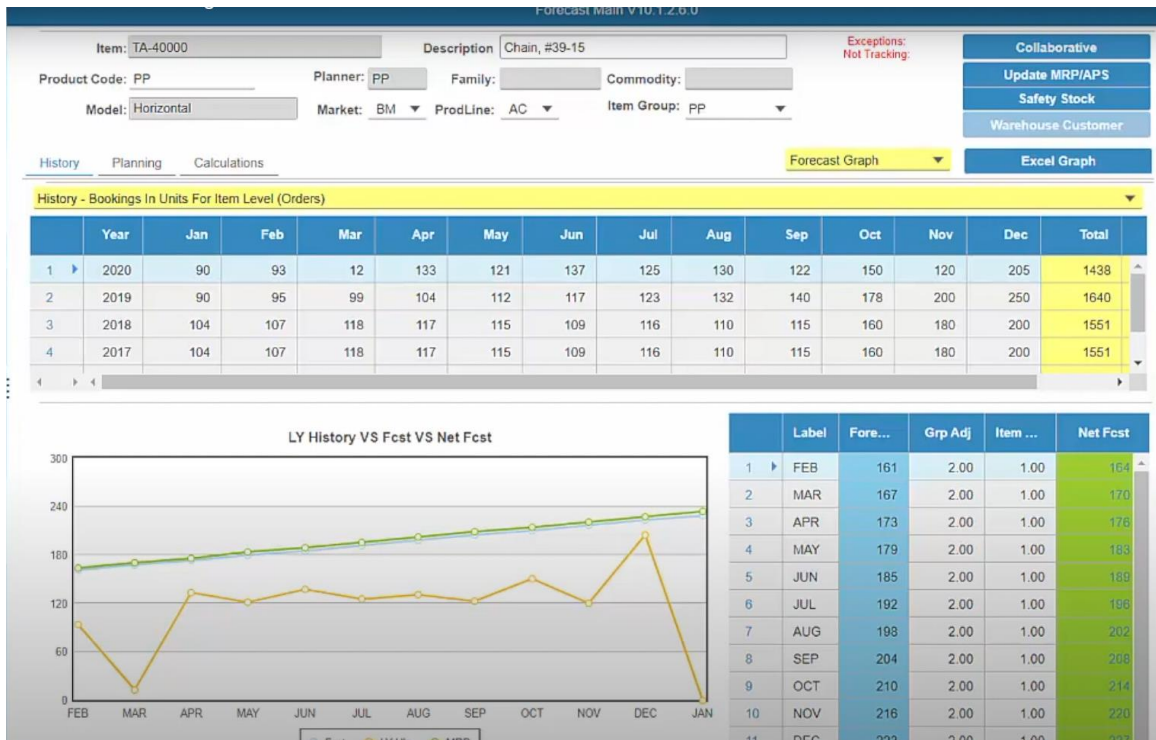
For discrete manufacturers, many factors contribute to an efficient operation and healthy bottom line. One important factor that can get overlooked is forecasting — determining the right amounts of raw materials and components needed to meet production requirements. A manual, informal process can result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

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.

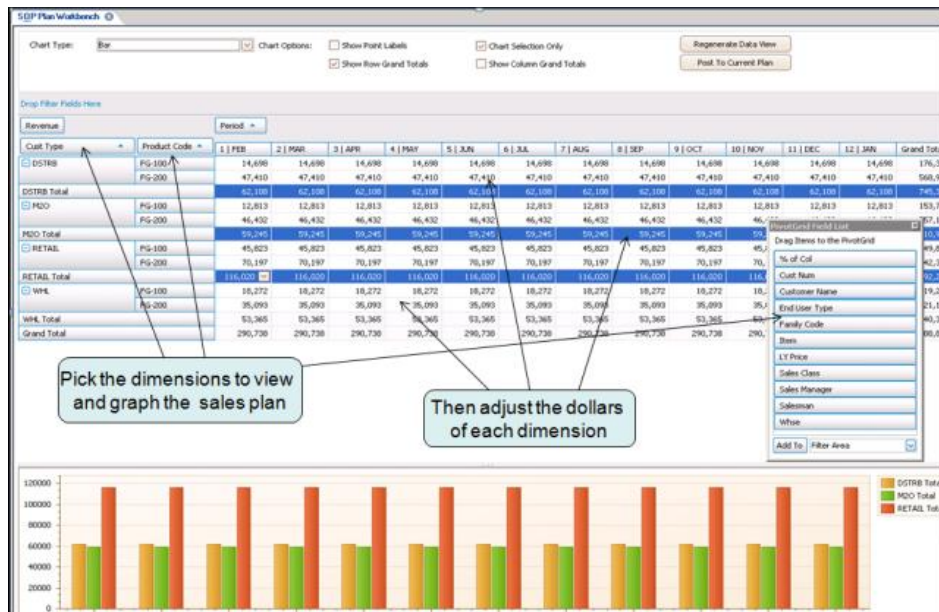
SytePlan helps identify supply and demand problems and directs your management team towards the activities that will balance supply and demand and keep you on track with the plan. Identify problems such as:

- 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



SydePlan Current Month Analysis

Period [2] Year [2010] Date [2/01/2010]

Starting:

Ending:

Product Code:

Family Code:

Disp Type: Detail

Sub Total By: Product Code

Projected Sales

Potential Supply Shortfall

Projected Finished Goods

		Demand Data					Supply Data							
	Group	Item	PLAN	Forecast	Shipped	Backlog	Delta Fcst	F/G	Rcpts	WIP	Supply Forecast	Sales	Supply Req'd	Proj F/G
1	FG-100	FA-10000	0	110	0	0	-110	735	0	0	735	0	0	735
2	FG-100	FA-20000	0	169	0	0	-169	2,955	0	0	2,955	0	0	2,955
3	FG-100	FA-30000	0	2	0	0	-2	1,402	0	0	1,402	0	0	1,402
4	FG-100	Unit Sub Total	0	281	0	0	-281	5,092	0	0	5,092	0	0	5,092
5	FG-100	Dollars Sub Total	0	0	0	0	0	1,480	0	0	1,480	0	0	1,480
6	RM	PT-30365	0	0	0	0	0	100	0	0	100	0	0	100
7	RM	Unit Sub Total	0	0	0	0	0	100	0	0	100	0	0	100
8	Total	Unit Total	0	281	0	0	-281	5,192	0	0	5,192	0	0	5,192
9	Total	Dollars Total	0	0	0	0	0	1,480	0	0	1,480	0	0	1,480

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.

SyteLean

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.

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

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.



Configure Price Quote (CPQ)

Buyers' increased demand for personalized products has made the need for flexibility and highly tailored digital transactions greater than ever. It is crucial for manufacturers and distributors to get their products included in more opportunities, quickly deliver complete and accurate estimates and quotes, then rapidly fulfill the orders – or risk losing deals to competitors.

From within a corporate website, eCommerce, Quoting, CRM, and ERP application, Infor's CPQ solution suite provides a rich, compelling, visual platform that allows any user – an anonymous prospect, customer, salesperson, distributor, dealer – to research, select, specify, price, quote, and order their simple and complex products faster – to help win more business, differentiate brand, and avoid wasted time, duplicate activities, costly errors, and friction within the processes. Significant return on investment (ROI) is driven from key areas:

- Visual engagement and interaction (40% increase in conversion rates)
- Multi-channel research, interest capture, estimating, quoting and ordering (10x faster quote generation)
- Easy selection, configuration, and pricing of products (90% reduction in errors)
- Complete, compelling proposals (80% faster quote cycle time)
- Enterprise integration for BOMs, Routings, Kits, SKUs, Smart Part Numbers, EDI, and robust APIs (78% *touchless order conversion*)

Visual Engagement & Interaction

Visual engagement and interaction significantly enhance the sales and customer experience by allowing users to interact with and customize products in a virtual environment, reduce errors by providing a clear and accurate representation of the final product, ensuring that customer expectations align with the end-result. Visualization also accelerates the decision-making process by making it easier for customers to understand the products and options, increasing customer confidence and satisfaction.

Interactive 3D Visual Configuration

Empowers customers who want to explore the details and complexities of the product through real-time, interactive 3D capabilities that engage the buyer while they're researching and provide visual confirmation of the product that they just selected:

- Gives the customer the ability to explore details of the product through interactive 3D capabilities
- Scalable images with rotation, zoom
- Collision detection, click accessory and move, locate snap points
- Snapping supports complex mulling
- Increase quote conversion by visually confirming selections by sales, dealers, consumers
- Decreases costs by eliminating the need to create redundant rules / logic to drive marketing-grade imagery



Augmented Reality

Provides ultimate reassurance by letting the customer place the product in physical space, which drives even more engagement through the rendering of digital images and data in the buyer's particular space:

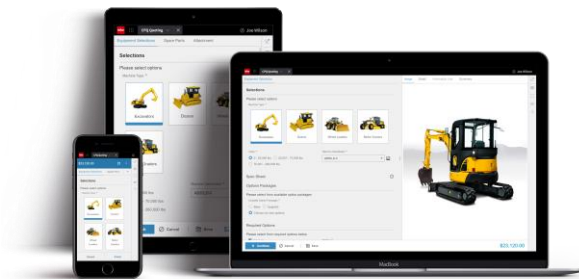
- Adds layer of customizability from customer to customer
- Rendering of digital images and data
- Delivers projected image of product just configured within that space
- Strengthens brand by further engaging a user in their personal space



Fully Responsive UI and Native Mobile App

A fully responsive experience makes research, selection and other activities easy for the user anytime, anywhere, on any device:

- Rendering is different for laptop, tablet, and phone for easier viewability
- Provides optimal experience for device being used
- iOS and Android support



Photorealistic Images

Photorealistic, responsive, and interactive product visualization dynamically presents products that respond to configuration selections and engages the user with interactive options:

- Multiple views enable zoom, pan, 3D rotation
- Custom text using embossing, engraving, or printing methods while ensuring lighting and perspective corrections
- Improves engagement by encouraging online customers to stay on the site, experiment with different personalization and interact with product viewer



Dynamic 2D CAD Drawings

Supports sales and manufacturing through the dynamic generation of 2D CAD drawings with Real-time visual confirming selections:

- Lightweight, parametric line drawings
- Formats include SVG, JPG, PNG, EMF, TIFF, etc.
- Sales-level approval drawings
- Strengthens brand by reducing time to manufacturing



- Decreases costs by automating redundant engineering time and effort

Dynamic 3D CAD Assemblies

Supports sales and manufacturing through the dynamic generation of 3D CAD model assemblies that contain user-selected values that dynamically size assemblies:

- Engineering-and-manufacturing-level assembly drawings
- Shop / construction drawings in almost any 2D format, 2D PDF, and any other SolidWorks / Creo format
- Dynamic Bill of Materials, service parts lists
- Increase quote conversion by enhancing consumer experience with product personalization



Static Images

Although user expectations are shifting from static images to interactive, digital imagery, they are an intricate part of any selling process. Customers can easily view a product from a glance, and images are often the first thing that catches a customer's interest.

Multi-channel estimating, quoting & ordering

To close sales quickly and accurately, an intuitive estimating, quoting and ordering system for your internal and external selling teams will provide an accelerated, optimal buying experience that's fast, accurate, visual, and collaborative.

Product Catalog

The Product Catalog acts as the storage for all products. Users can navigate through the catalog to add specific items to an estimate, quote or order, with both standard and configurable products. The Product Catalog is integrated with to apply descriptions, rules, and pricing dynamically, ensuring all the details are up-to-date and accurately reflected in estimates, quotes and orders.

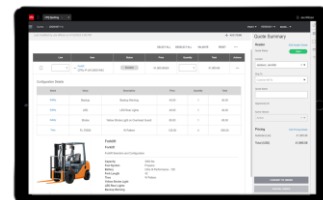
Guided Selling

Streamline and enhance the selling process by incorporating intuitive features that help sales teams create accurate quotes more efficiently through automated configurations and intuitive configuration interfaces that guide sellers through the complexities of product configurations, ensuring they can focus more on selling rather than technical details.

Advanced Estimating, Quoting & Ordering

Capture the best sales strategies of experienced sales reps and share this knowledge across your selling channels, reducing the learning curve for new sellers, so they can estimate, quote, and order faster and attain better quote-to-order ratios:

- Enhance the customer experience by delivering quick and precise quotes, ultimately closing deals faster
- Ensures that products are represented the same way, every time
- Improve the profit-per-sale, make suggestions to meet margin objectives and customer requirements



Workflows & Approvals

Allows for automated approval processes by eliminating the need to physically get approval for an item. Instead, with the use of workflows powered by Infor OS, the user will be able to create a flow that requests approval with a subsequent chain of events following the approval decision:

- Collaboration with customers and internal resources
- Approval tracking
- 1 Source of the truth



Analytics

With the use of our analytical tools, customers are given the ability to visualize their data, whether it be sales, quotes, purchases or any other metric they wish to visualize. This is beneficial for simplification of visualized data & having it conveniently located on a single platform:

- Branded, manufacturer's dashboard
- Drill back into data & to CPQ
- Leverages Infor OS
- Selling Channel dashboard

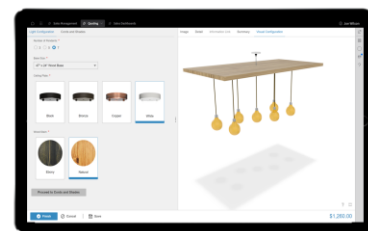


Easy selection, configuration, and pricing of products

Designed to handle simple and complex product configurations across diverse industries, Infor's enterprise configuration capabilities enable businesses to customize products and services to meet specific customer needs.

By providing a perfect quote and converting it to a perfect order, users avoid the time, effort, cost, and frustration associated with the selection of invalid options:

- Capture knowledge about customizable products once, then share with any user – on any device
- Advanced rule-based engines help automate the selection, configuration, and pricing process, reducing the risk of errors and speeding up the sales cycle
- Attain the same level of quality for any variation of products and add-ons
- Ensure all necessary choices have been made, order is submitted correctly, and is built to the customer's exact specifications
- Real-time data synchronization and improved collaboration between sales, engineering, and production teams
- Expand product lines and adapt to changing market demands without compromising on efficiency or accuracy



Complete, compelling proposals

Automatically assemble a variety of documents the user needs to form a complete, accurate proposal; on a case-by-case basis, the user can select whether they want to include things like

cover letters, spec sheets, warranty information, terms and conditions, marketing collateral, contracts:

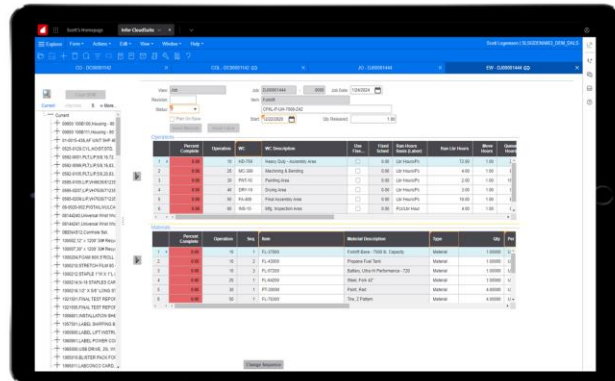
- Includes key information such as the customer's product with their specific configuration specs, billing & contact information
- Increases customer engagement by allowing them to confirm their choices & pricing, which decreases the chances of errors



Enterprise Integration and Robust APIs

CPQ's unique, enterprise integration facilitates seamless connectivity with CSI and other enterprise systems, such as CRM, eCommerce, and CAD, ensuring data is consistently shared across platforms, minimizing the need for manual data entry and reducing the risk of errors. 80+ standard, supported integration points with CSI, collaborating on a variety of processes:

- Sales teams can access real-time information, enabling them to generate accurate estimates, quotes and orders efficiently, while also maintaining up-to-date customer and product information
- Rules-based BOM process avoids labor-intensive creation of thousands or even millions of "star parts" with all possible combinations of product choices.
- Manufacturing instructions are recorded only once, which speeds new product introduction and eliminates the production of price books
- Labor required to fulfill an order can be significantly reduced, as users won't need to rekey orders into CSI again, since they were already completed in other enterprise systems
- Enhances internal collaboration by providing a unified data environment but also improves customer interactions with faster response times and more accurate service

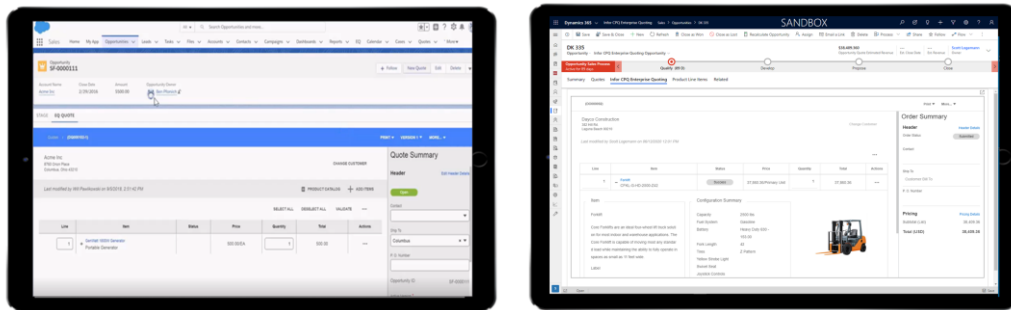


Open APIs allow for flexible integration, ensuring compatibility with a wide range of systems and supporting complex business processes:

Quoting / Ordering integration with CRM solutions

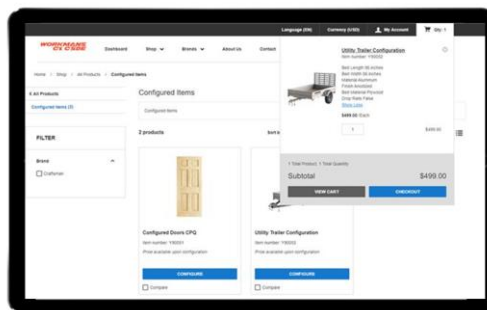
Ensuring seamless data flow between systems, reducing errors, and improving accuracy is dependent on real-time data access for efficient quote generation and order management while maintaining up-to-date customer information, facilitating better collaboration across departments, enhancing communication and service delivery:

Theming capabilities are used to match CRM applications' look and feel:



eCommerce integration

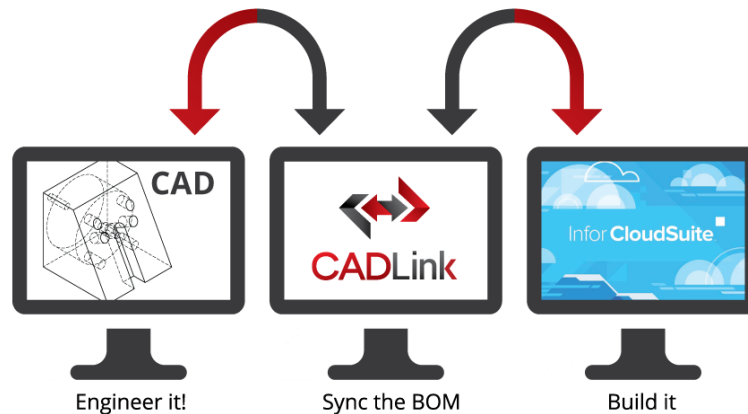
Ensuring seamless data flow between systems, reducing errors, and improving accuracy is dependent on real-time data access for efficient quote generation and order management while maintaining up-to-date customer information, facilitating better collaboration across departments, enhancing communication and service delivery:



CADLink for Infor CloudSuite Industrial

Streamline your engineering design process

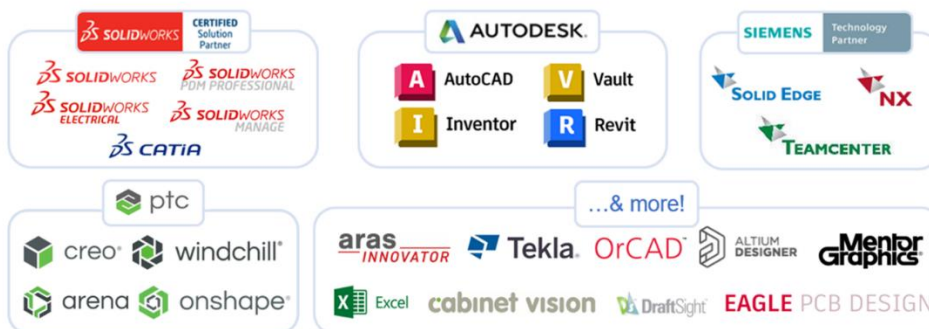
You can reduce rework, minimize scrap, and work more efficiently when you use CADLink to establish a fully automated, two-way connection between Infor CloudSuite™ Industrial and your CAD/PDM/PLM system. You'll also be able to shrink engineering costs dramatically—most CADLink customers achieve payback 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 / PDM / PLM package

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

CAD/PDM/PLM Partners

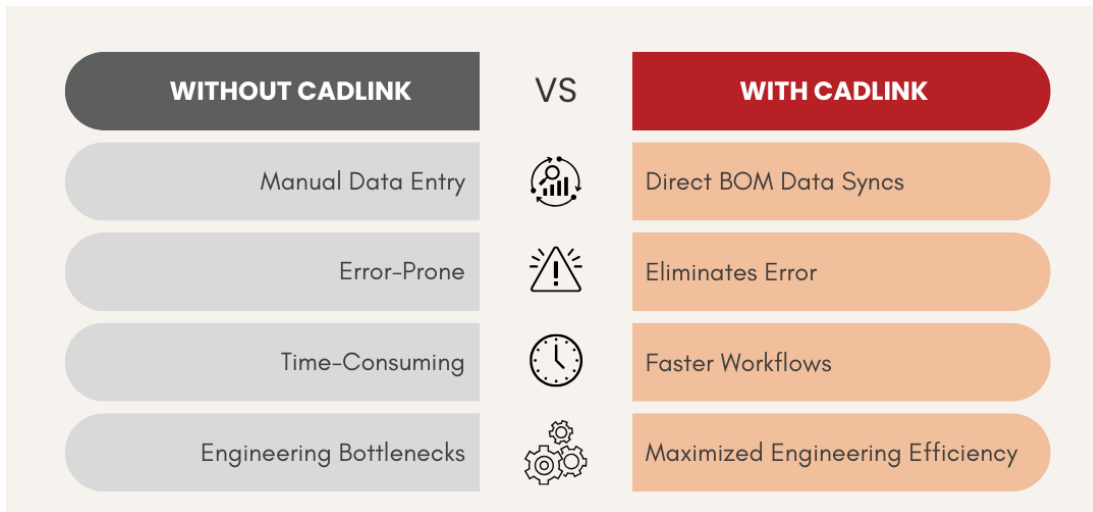


By allowing you to automatically exchange routing data and bill of materials (BOM) items with Infor CloudSuite Industrial, CADLink eliminates the manual re-entry of data. As a result, you'll be able to improve accuracy, increase speed, and build a more efficient engineering and manufacturing process.

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/PDM/PLM 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/PDM/PLM 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 include:

- 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

Additional functionality:

- Compatible with SyteLine ECNs
- IDM Integration
- Language packs available

Optional Components (on-premise only)

Advanced Plant Maintenance

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 Plant 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 integrated to SyteLine 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 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.

Preventative 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 does not need to be built.
- **Automated SRO Scheduling** – Each Unit has a Unit master record. SROs of any user-defined type such as “PM” for preventative 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 screen. Calls may be related to specific PM or SRO items 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.

The screenshot displays the 'Units' screen in CloudSuite Industrial. On the left is a list of units. The main area shows the configuration for a specific unit (Unit ID: 121129-BK-00000000000000000001). The configuration includes fields for Item, Description, Customer, Ship To, Customer Name, Unit Status Code, and Last Meter Date. Below this are tabs for General, Customer, Maintenance, Service History, Incidents, Owner History, Status History, and Meter History. The 'Maintenance' tab is active, showing a table with columns: Active, SRO Type, Frequency, Month, Day, Date Duration, Increment, Lead Time, Increment, Start Date, Start Meter, SRO, SRO Line, Last Qty, SRO ID, and Start Time. The table contains one row with the value 'CLEAN' and a frequency of 'Every'.

Active	SRO Type	Frequency	Month	Day	Date Duration	Increment	Lead Time	Increment	Start Date	Start Meter	SRO	SRO Line	Last Qty	SRO ID	Start Time
1	CLEAN	Every			6	Monthly	7	Days	2/22/2024	0	MAINT				

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

Service Lite

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.

The screenshot displays the Syteline Service Console interface. It features a top navigation bar with the Syteline logo and a 'Service Console' title. Below the navigation bar, there are several tabs and sections:

- Incident Notes:** A table with columns for Incident, Date, Status, Priority, and Code. It shows two incidents with dates 2/7/2020 and 2/7/2020, both with a status of 'NEW' and a priority of 'Medium'.
- SRO Notes:** A table with columns for SRO, Status, SRO Type, Open Date, and Manager. It shows two SROs with dates 1/2/2025 and 12/20/2024, both with a status of 'Open' and a type of 'Service'.
- Reasons/Resolutions:** A section with tabs for 'Reasons' and 'Resolutions'. It includes a 'Search' button and a table for 'Resolution Notes'.
- Units / Warranties:** A table with columns for Active, Ship To, Unit, and Warrant Code. It shows two units with ship-to locations 'FL00000000000000000000000000000000' and 'FL00000000000000000000000000000000'.
- Service Contracts:** A table with columns for Ship To, Contract, Amount, Billing Frequency, and Billed Thru. It shows one contract with a ship-to location 'FL00000000000000000000000000000000' and a contract number '0200000001'.
- SRO Price Totals:** A table with columns for Material, Labor, Misc, Project, and Total. It shows a total price of 0.00 for each category.

Quick Cost Entry

For technicians that work through tasks one after another, 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 streamlined Material Entry form can be used to enter item, quantity, serial information and any detailed notes.

The screenshot displays the Syteline Service Order Material Data Collection form. It features a top navigation bar with the Syteline logo and a 'Service Order Material Data Collection' title. Below the navigation bar, there are several sections:

- Partner:** A dropdown menu with 'Daniels, David I.' selected.
- SRO:** A dropdown menu with 'DS00000019' selected.
- Line:** A dropdown menu with '1' selected.
- Oper:** A dropdown menu with 'Assembly' selected.
- Item:** A dropdown menu with 'AL-10000' selected.
- Trans Type:** A dropdown menu with 'Inventory Issue' selected.
- Qty:** A text input field with '0.000' entered.
- Whse:** A dropdown menu with 'MAIN' selected.
- Lot:** A dropdown menu with 'Lot' selected.
- Billing Code:** A dropdown menu with 'List' selected.
- Unit Price:** A text input field with '9.02' entered.
- Document Number:** A text input field.
- Notes:** A text area with the note 'This was used to replace the broken part.'
- Serial Numbers:** A table with columns for S/N.
- Submit:** A blue button.

A streamlined form for manual time entry can be accessed to edit hours worked and billed in addition to capturing any detailed notes.

SyteLine

Service Order Labor Data Collection

Partner: 1

Last Transaction:

Enter Trans Type: Start

Last Transaction Number:

SRO: DS00000017

Line: 1

Oper: 1C

Break & Fix

A13-39CJ8020

Service

Submit

Service Lite form access listing:
Partner Console
Service Order Labor Data Collection
Service Order Material Data Collection