Infor VISUAL 9

Features & Benefits through VE 9 R3

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Core Business Features

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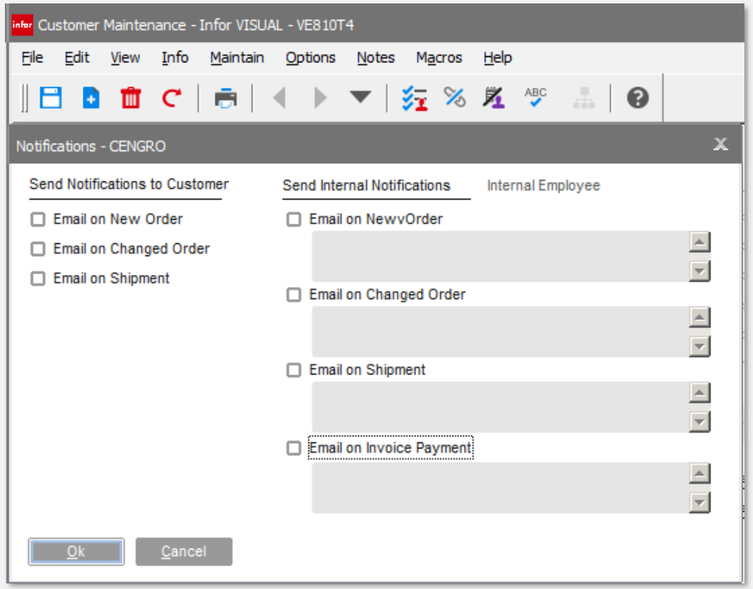
Lifecycle Notifications

Features

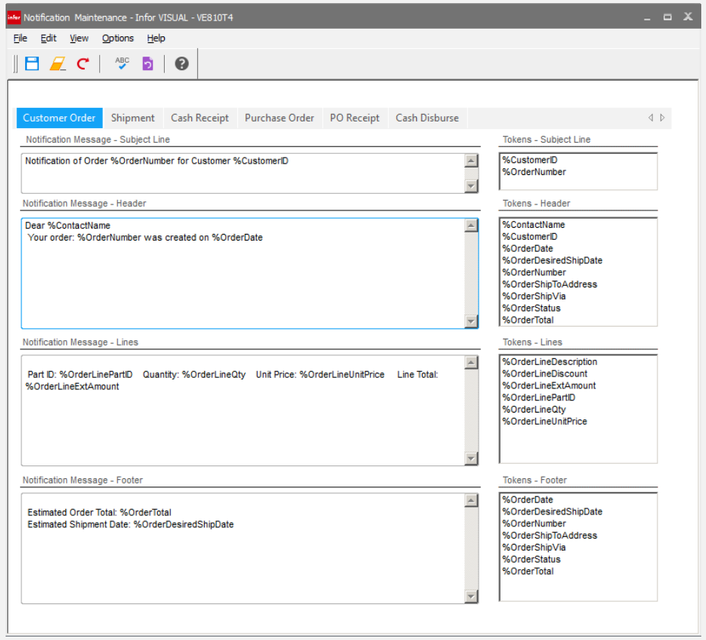
- Send e-mail notification when sales and purchasing events occur
- Determine notification points at the business partner level
- Override or begin notification points at the document level
- Define e-mail notification layout for each document type

Benefit examples

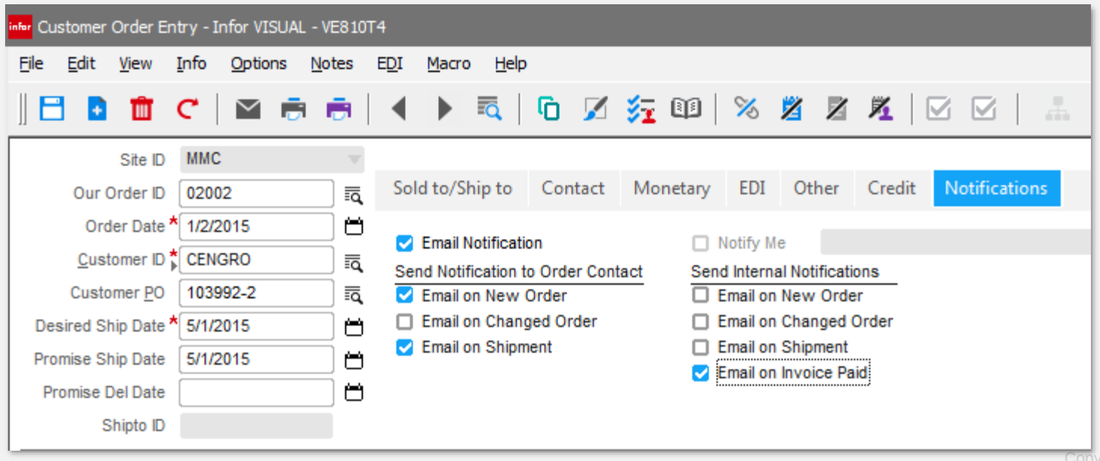
- Easy end-user setup
- Eliminates having to remember to alert someone when an event occurs
- Alert sales reps and dealers when steps in a customer order lifecycle changes
- Notify production when a late or urgent delivery is received



Define notification points at the business partner level



Specify e-mail format for notifications



Define or override notification points at the order level

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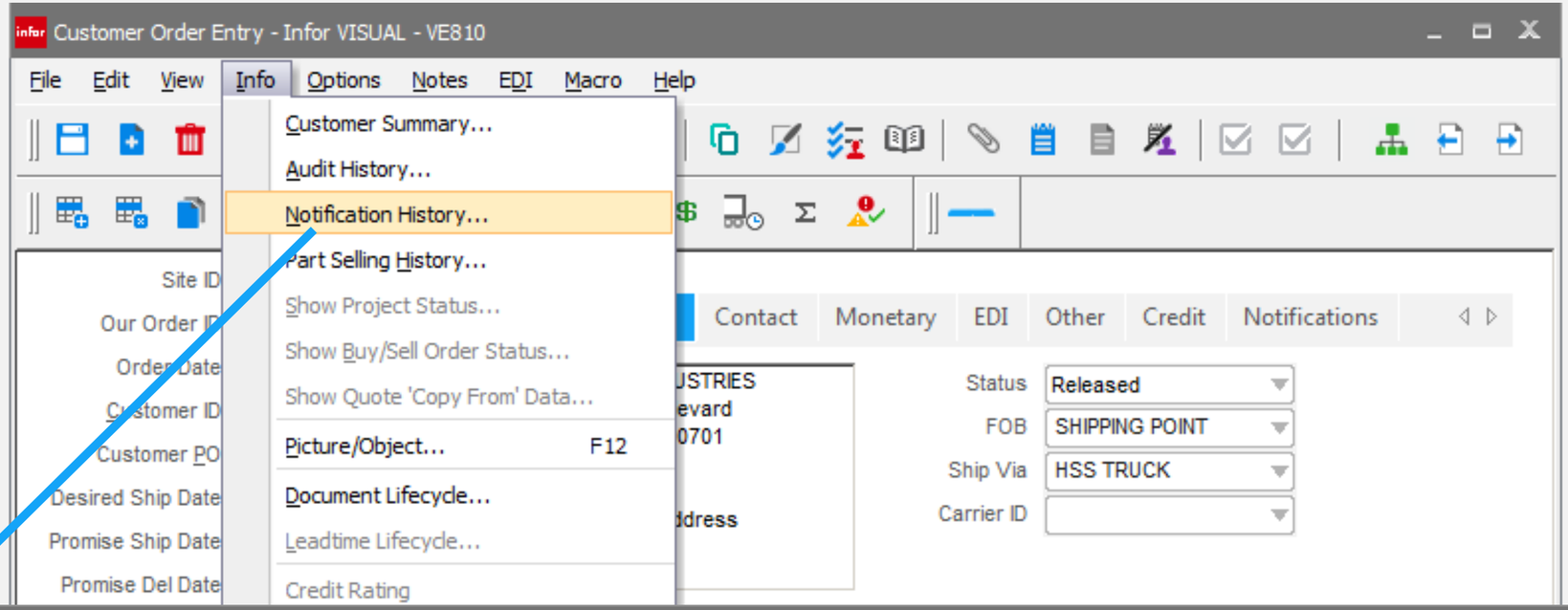
Notification Tracking

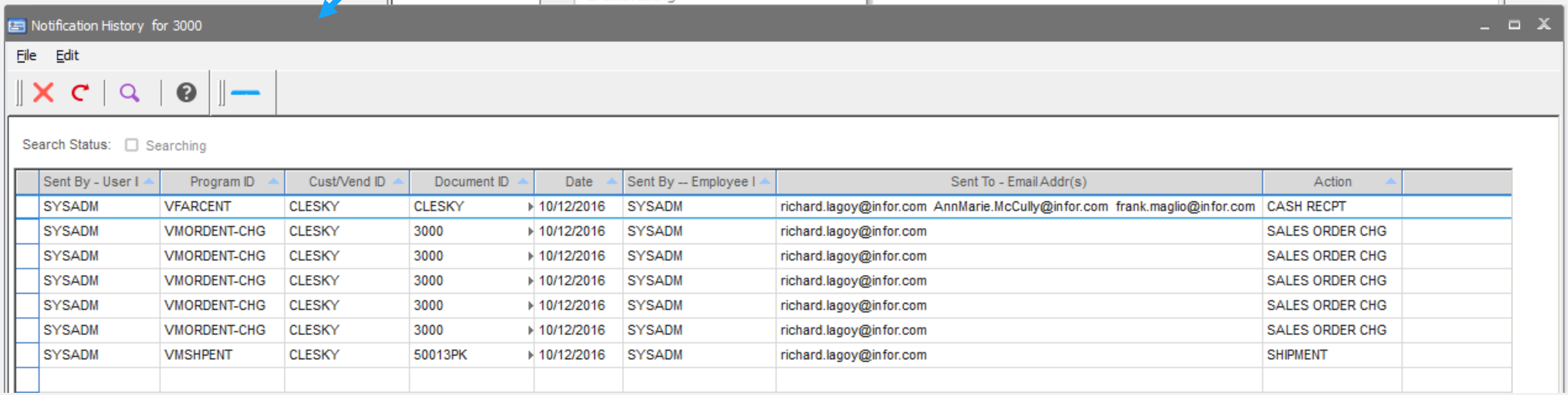
Features

- Logs when e-mail notifications are sent for the document

Benefit examples

- Confirms notification was sent
- Specified date, time, and recipients
- Drill to document that resulted in the notification





Sent By - User I	Program ID	Cust/Vend ID	Document ID	Date	Sent By -- Employee I	Sent To - Email Addr(s)	Action
SYSADM	VFARCENT	CLESKY	CLESKY	10/12/2016	SYSADM	richard.lagoy@infor.com AnnMarie.McCully@infor.com frank.maglio@infor.com	CASH RECPT
SYSADM	VMORDENT-CHG	CLESKY	3000	10/12/2016	SYSADM	richard.lagoy@infor.com	SALES ORDER CHG
SYSADM	VMORDENT-CHG	CLESKY	3000	10/12/2016	SYSADM	richard.lagoy@infor.com	SALES ORDER CHG
SYSADM	VMORDENT-CHG	CLESKY	3000	10/12/2016	SYSADM	richard.lagoy@infor.com	SALES ORDER CHG
SYSADM	VMORDENT-CHG	CLESKY	3000	10/12/2016	SYSADM	richard.lagoy@infor.com	SALES ORDER CHG
SYSADM	VMORDENT-CHG	CLESKY	3000	10/12/2016	SYSADM	richard.lagoy@infor.com	SALES ORDER CHG
SYSADM	VMSHPENT	CLESKY	50013PK	10/12/2016	SYSADM	richard.lagoy@infor.com	SHIPMENT

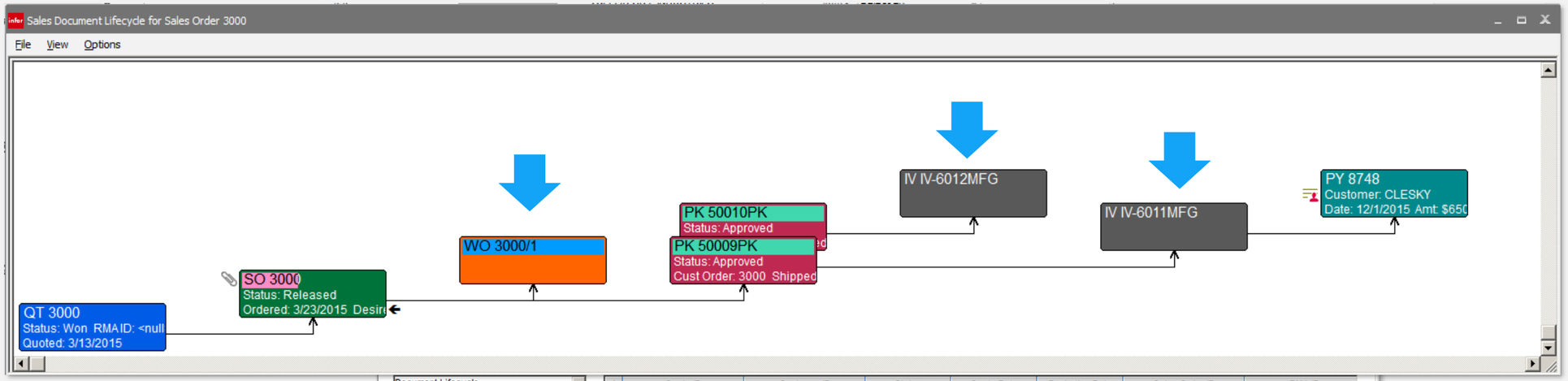
Document Lifecycle

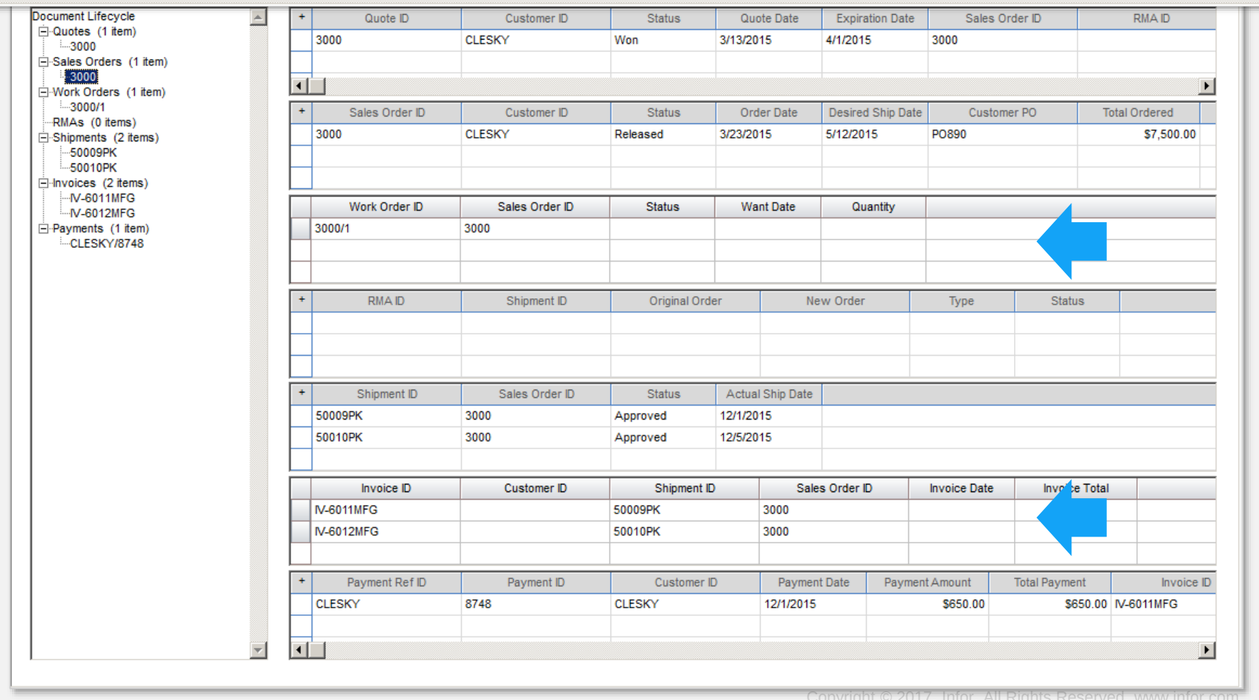
Feature

Display blank card when document exist but user doesn't have permission to view

Benefits

Indicates the event occurred, however access to the detail is not available





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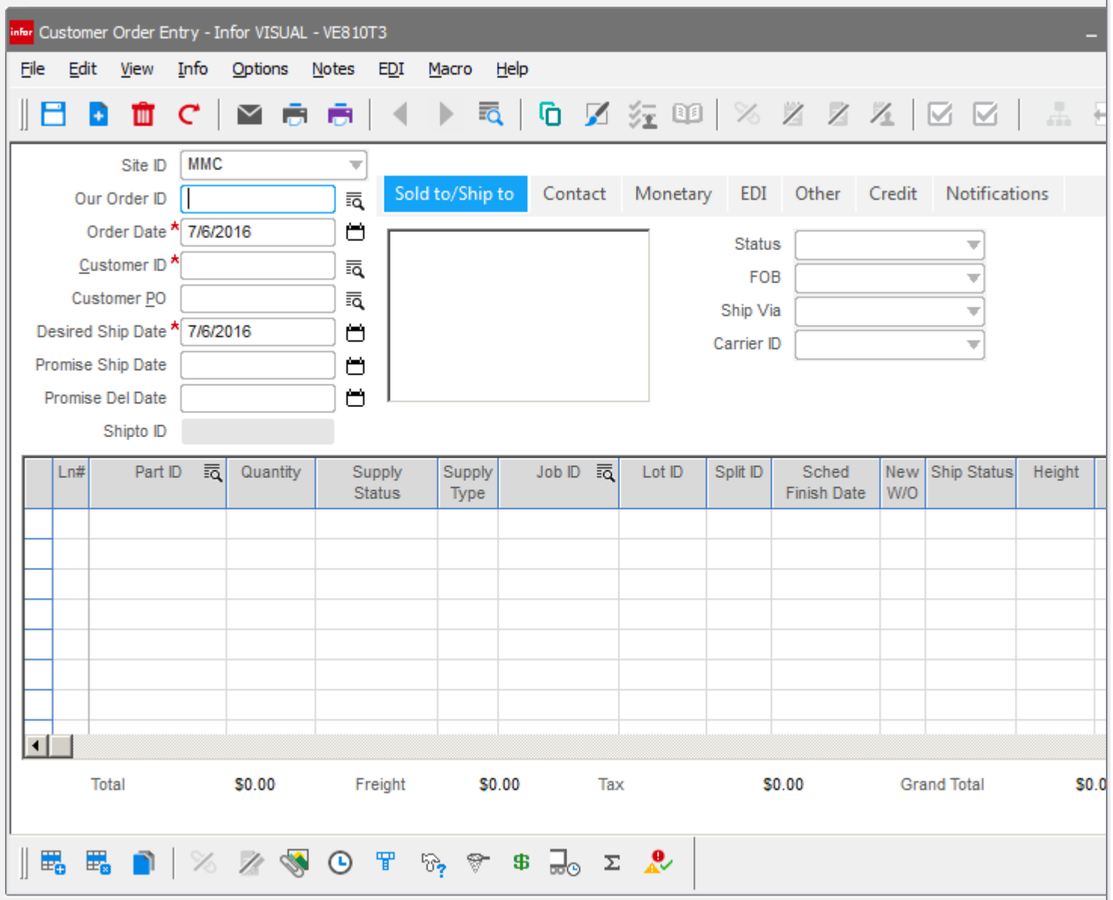
Configure Table Window

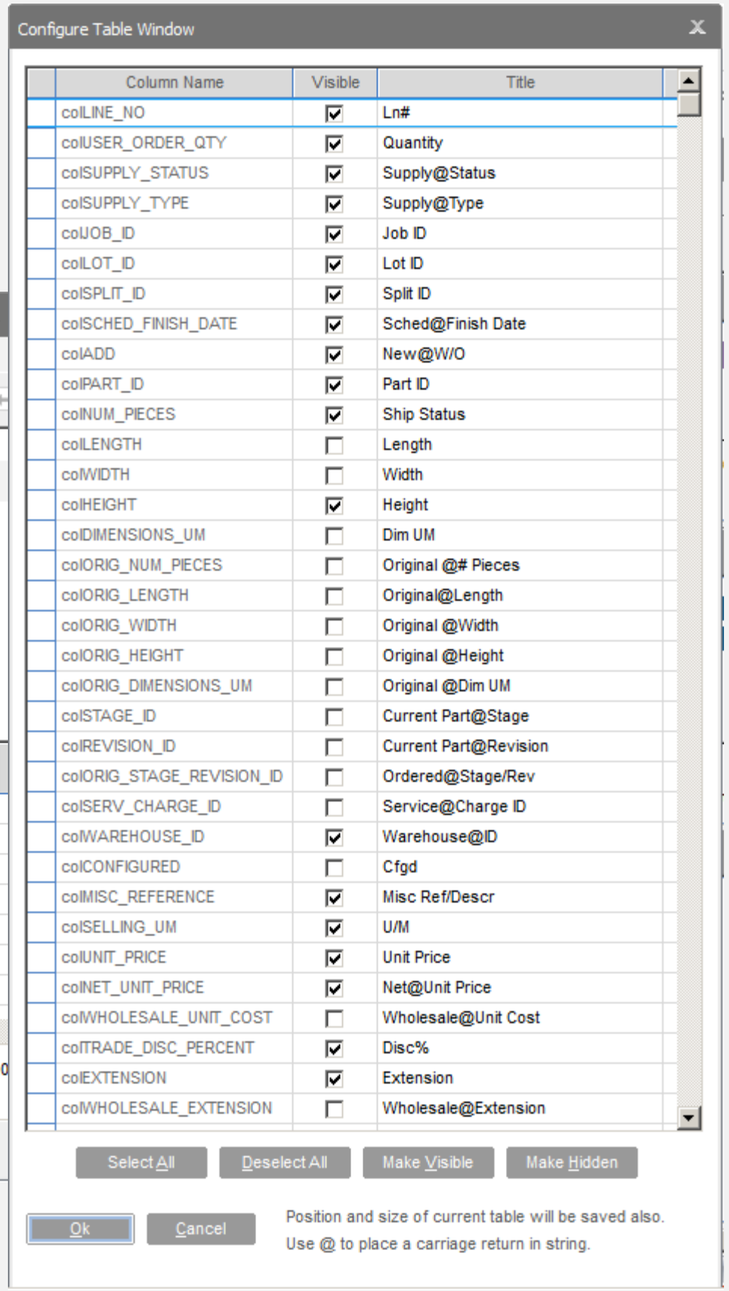
Feature

- Added checkbox view for clearer visibility and setup
- Can now expand the window

Benefit

- Easier to use and greater visibility during setup





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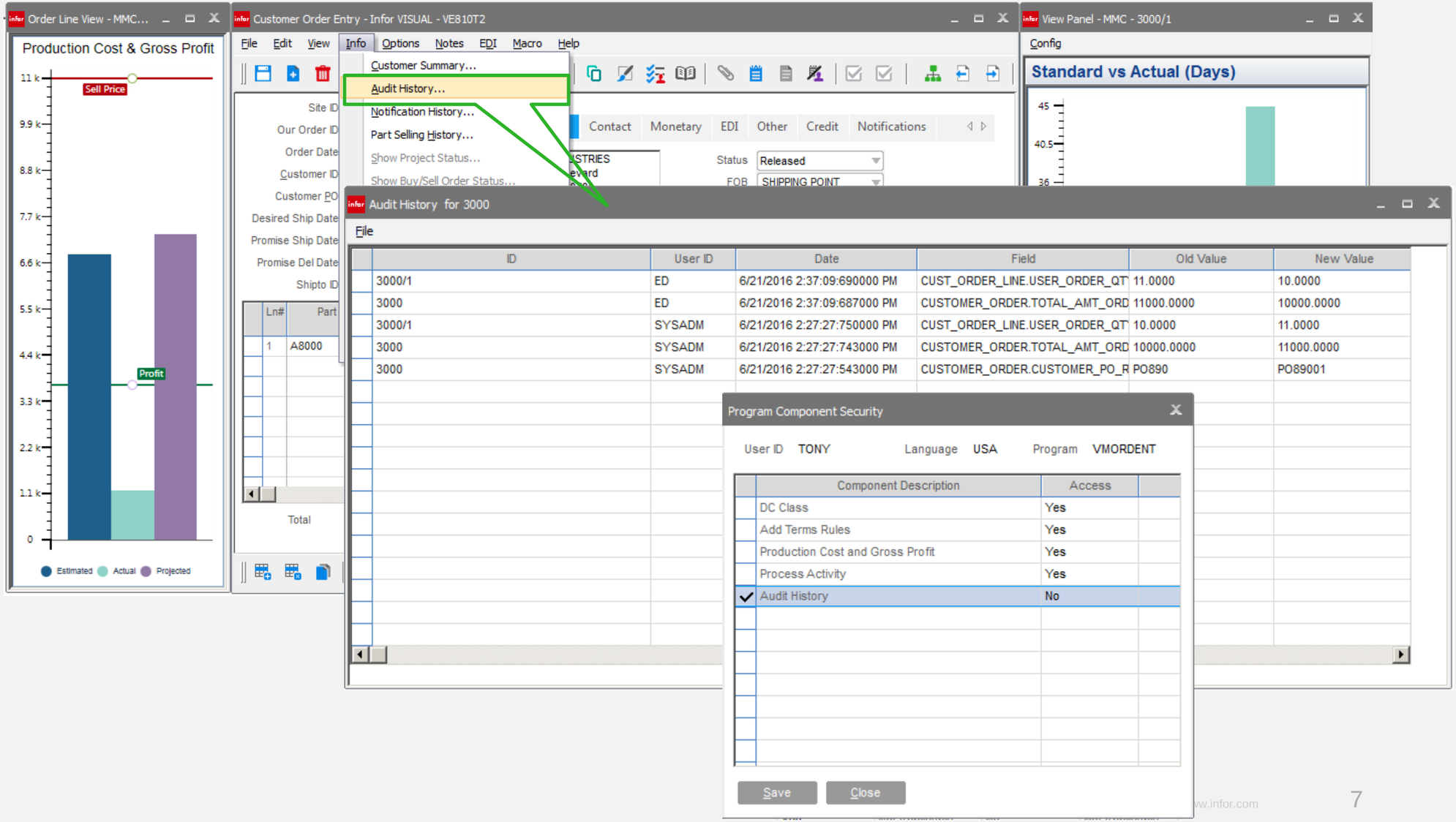
View Audit History

Features

- Ability to see audit log of changes made to a document.
- Ability to assign permissions

Benefits

From each VISUAL document easily determine changes made – who, what, when



Note: This requires turning on the VISUAL table audit functionality

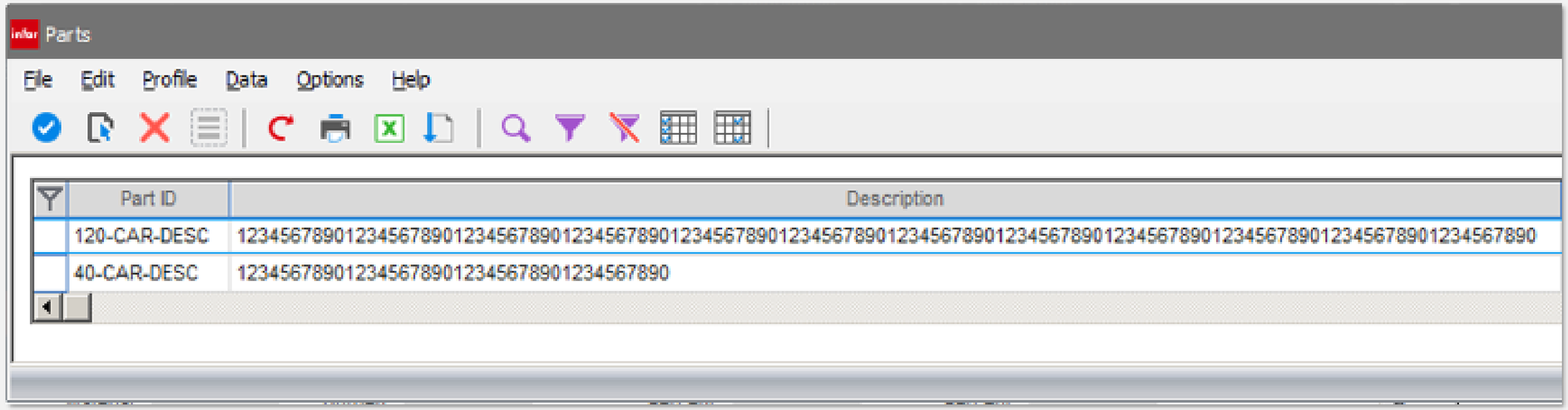
Part Maintenance

Feature

Description increased to 120 characters

Benefit

Allows for increased visibility and to better support supplier and customer related descriptions that exceeded the previous 40 characters



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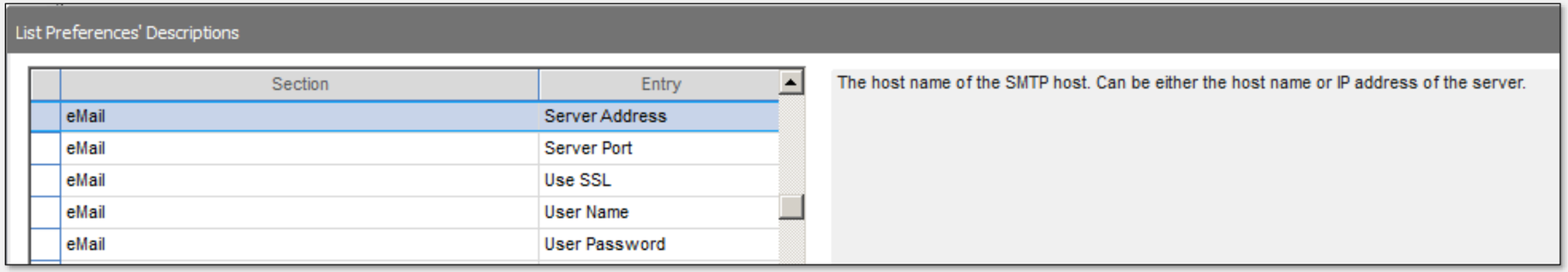
E-mail Management

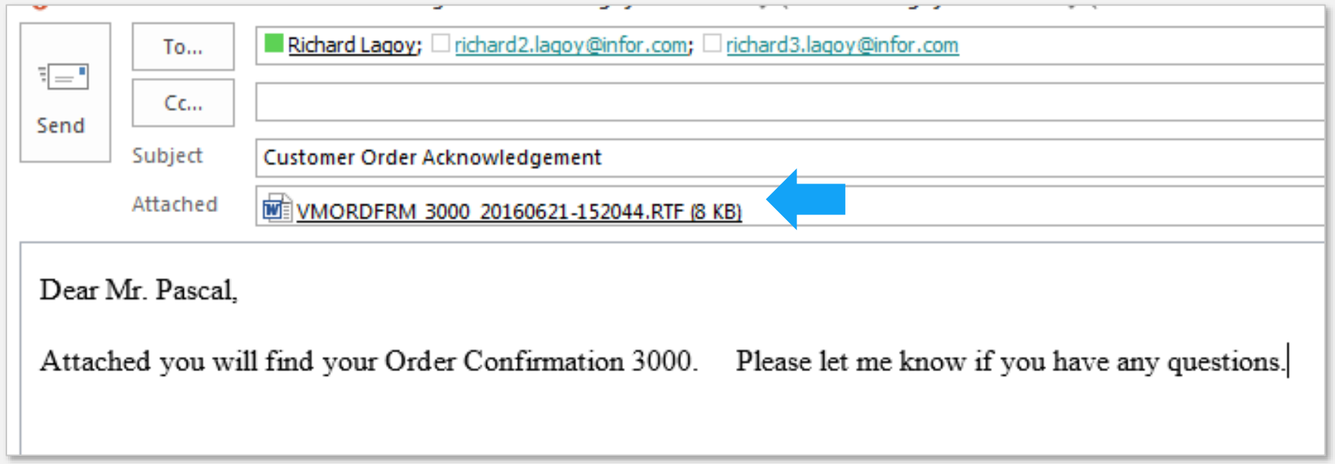
Features

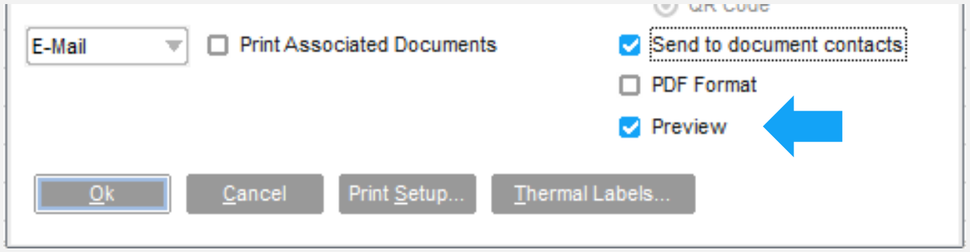
- Define your SMTP server
- Document files are now suffixed with document ID and date
- Can now preview e-mails before sending
- Enhanced e-mail format

Benefits

- Increased control over e-mail service to use
- Allows preview and edits before sending
- Improves document tracking and management
- Improved e-mail window







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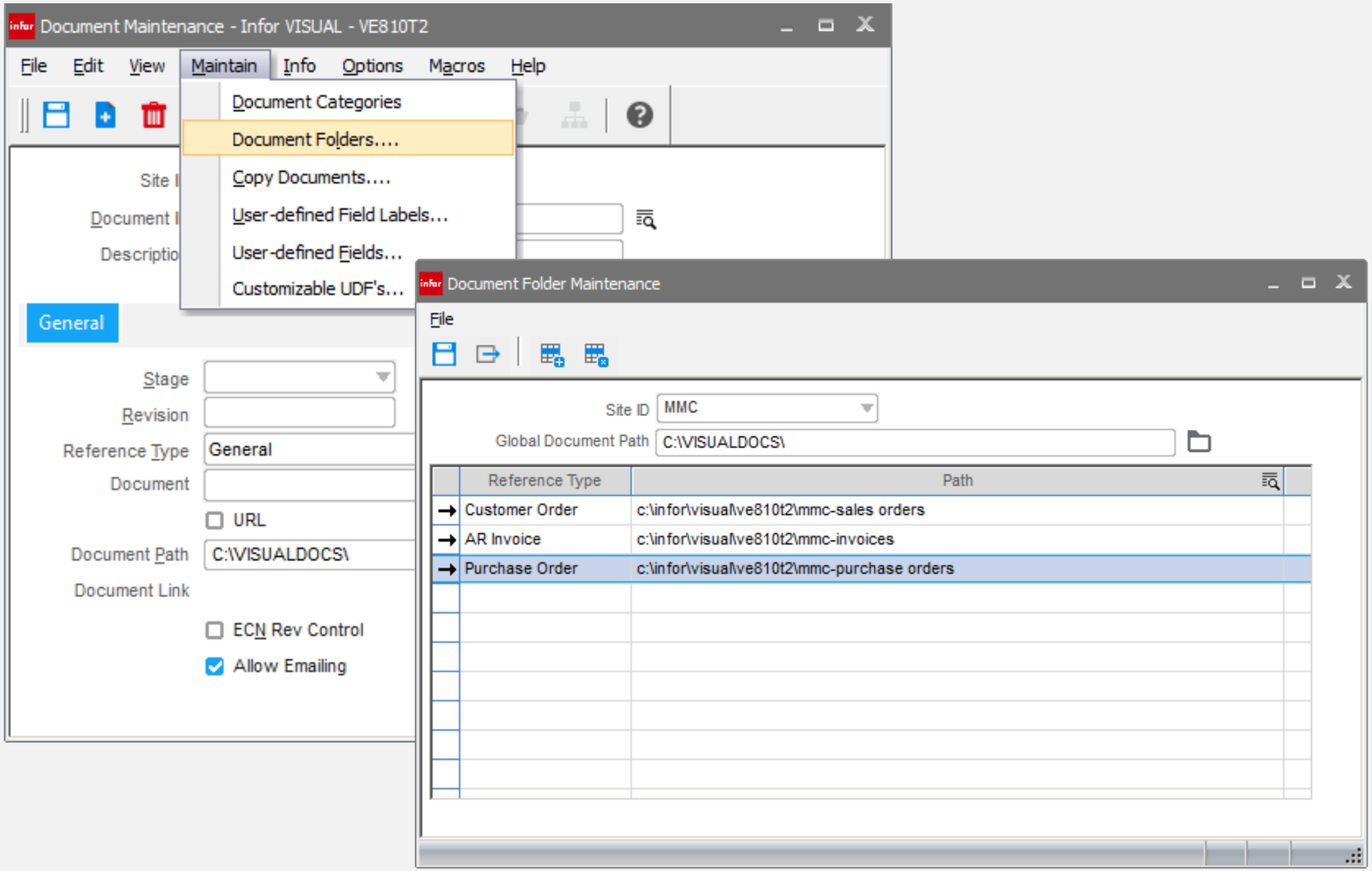
Document Management

Features

- Define document folders by site
- Define document folders by document type

Benefits

- Improved management of documents by site and document type.



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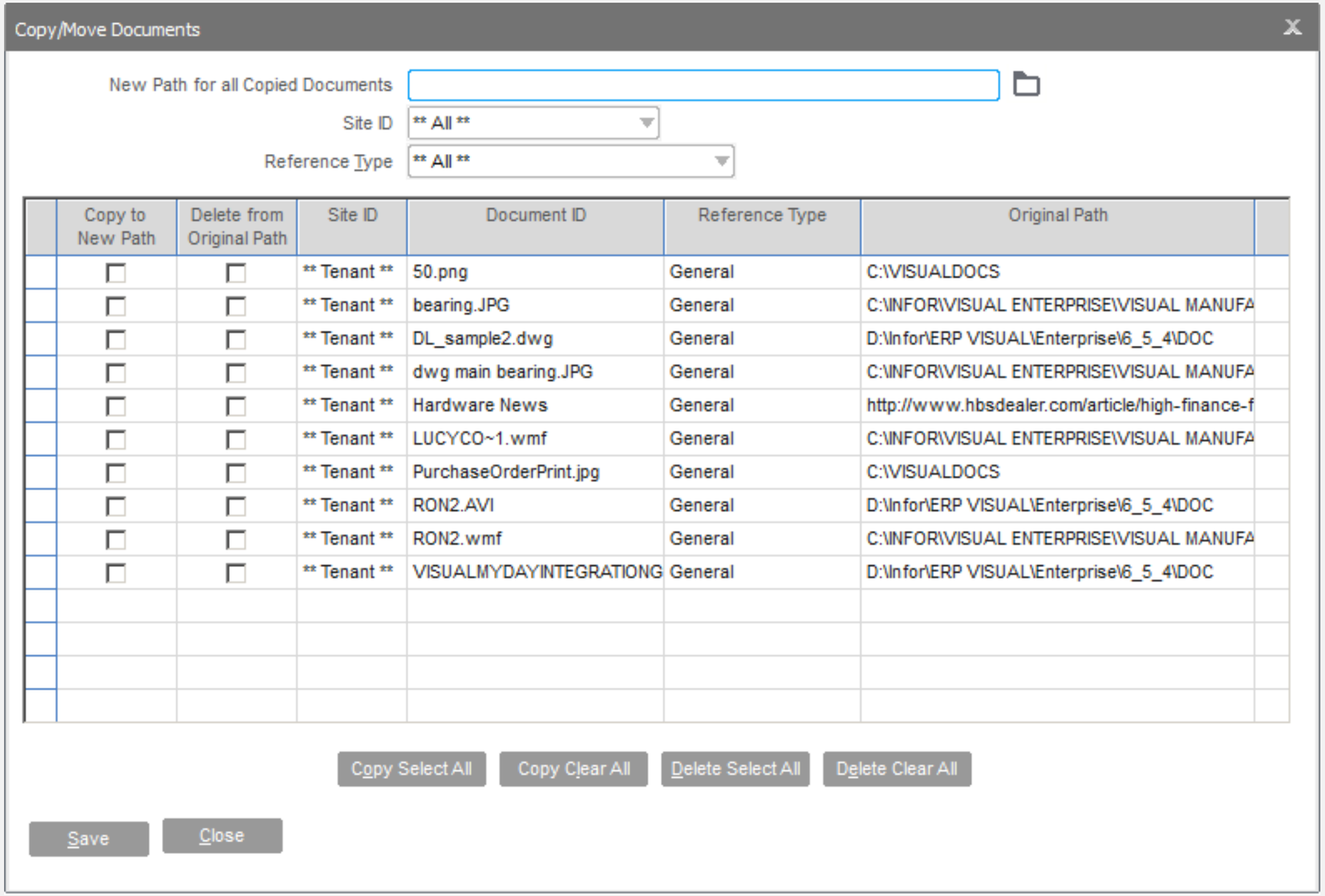
Document Management

Feature

Copy and move documents

Benefits

Globally move selected documents to a new location



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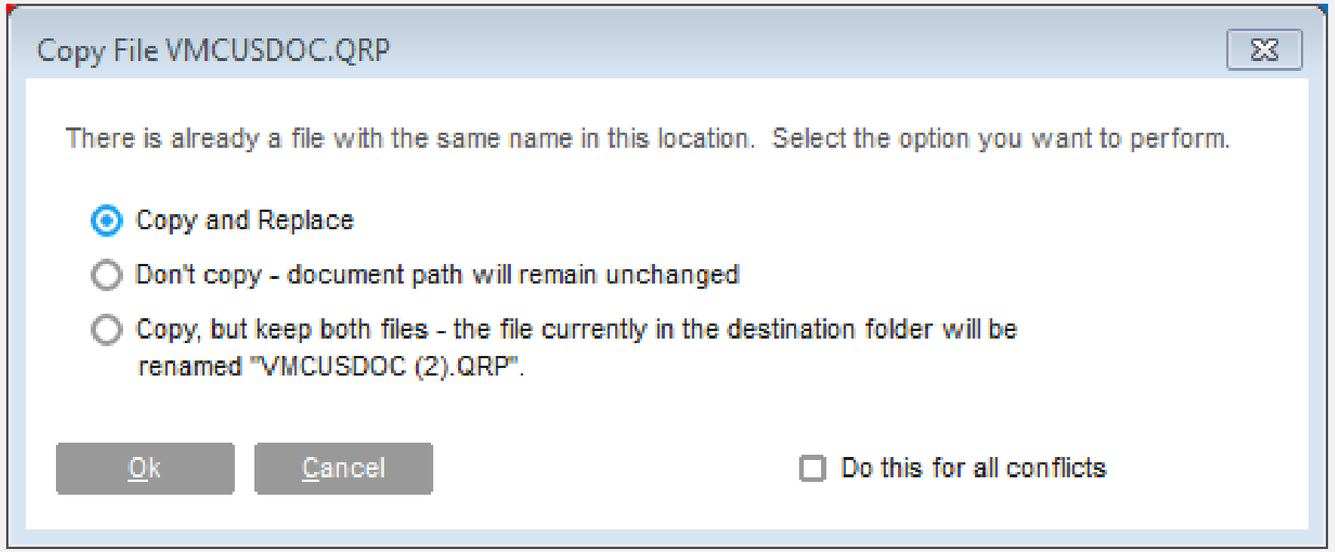
Document Management

Feature

File attachment action prompt when replacing file of the same name



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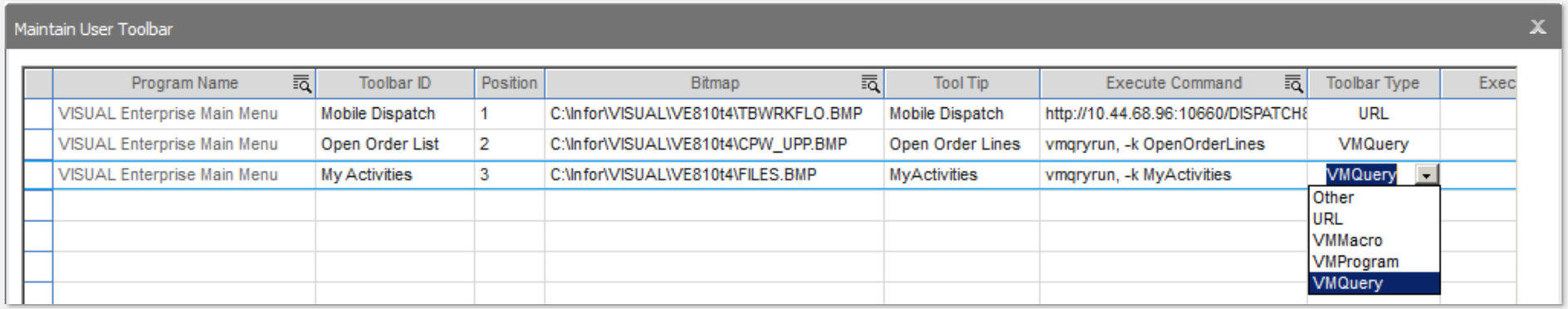
Toolbar Maintenance

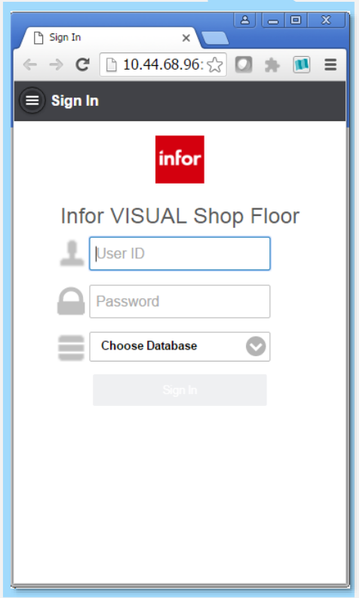
Feature

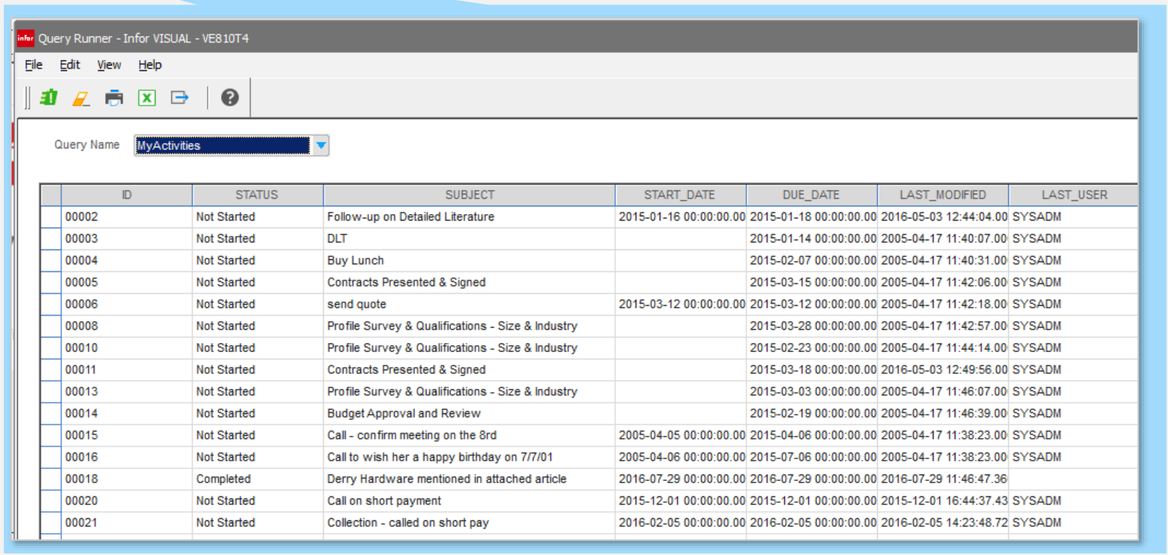
- Ability to launch a URL or query from the user toolbar

Benefits

- Easy access to external applications
- User specific queries saved in the database can now be published to the user for easy lookups







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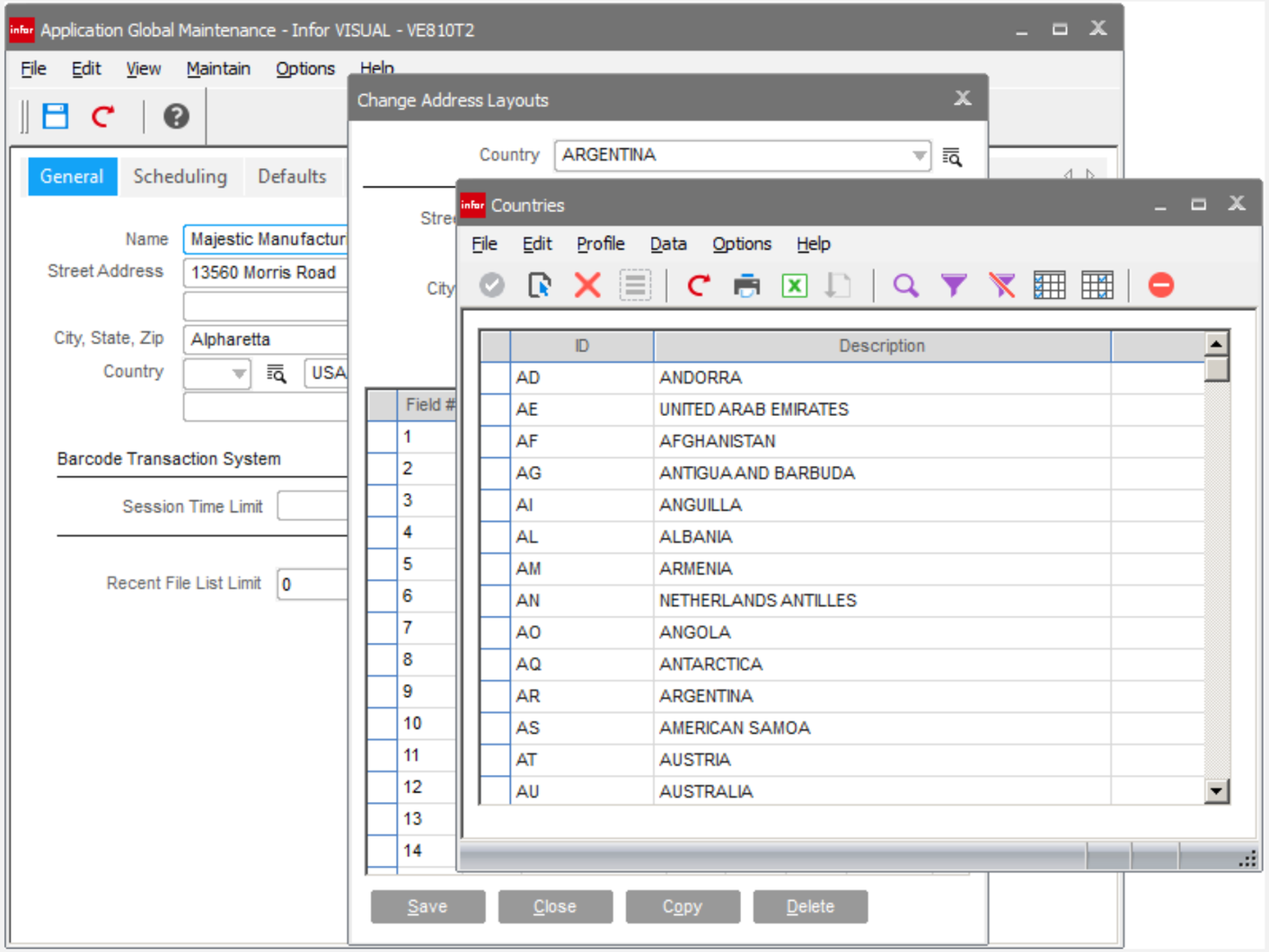
Address Maintenance

Features

- Add ISO country standards

Benefits

- No need to guess
- Supports integration to other solutions
- Eliminates errors



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Video Library

Feature:

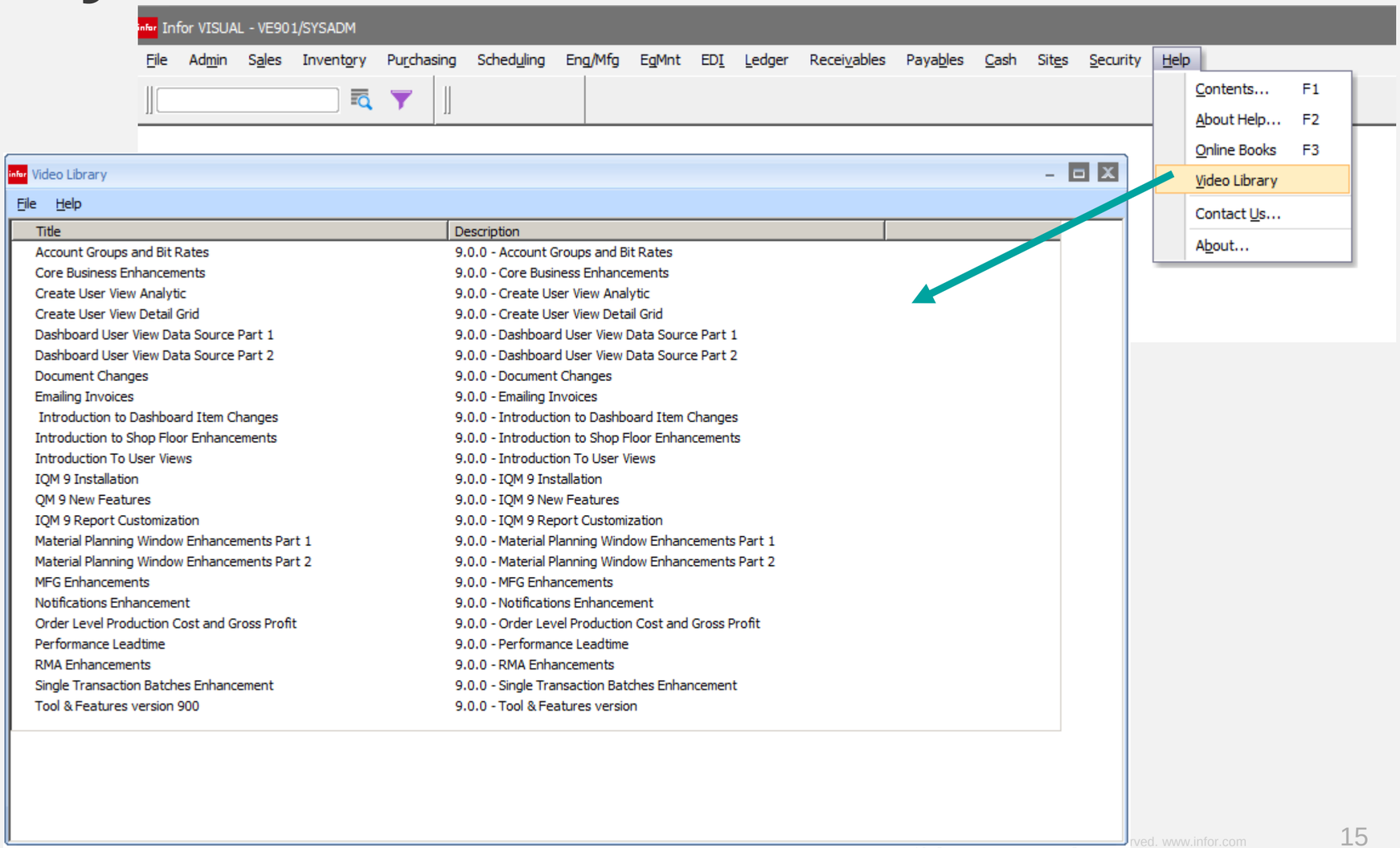
Provides access to new feature videos introduced with each release.

Benefits:

Quick way for users of the solution to learn about the new features contained in each release

Note:

For VISUAL 9.0.0 features and above only.



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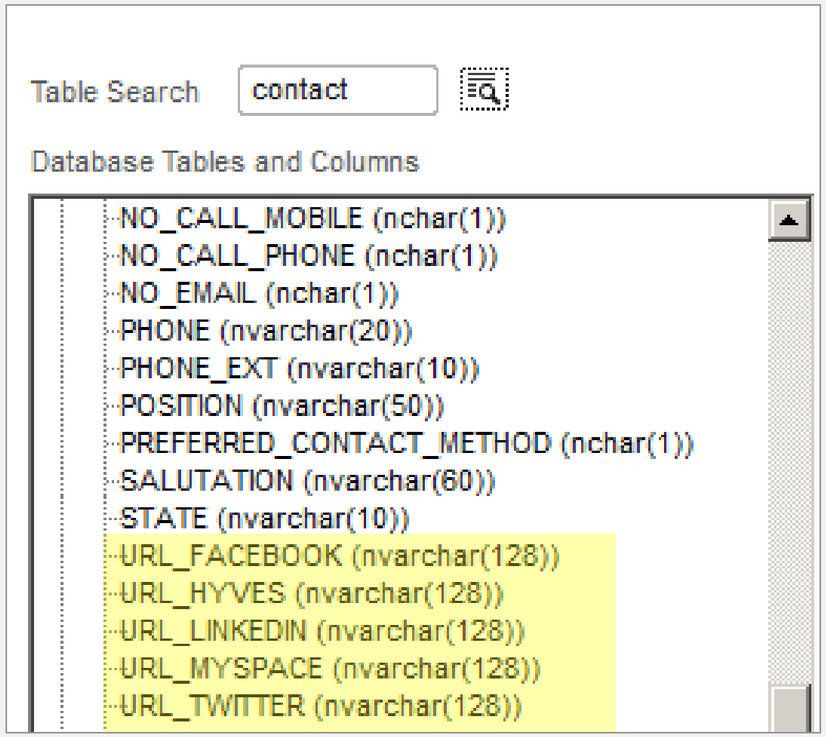
Increase URL path

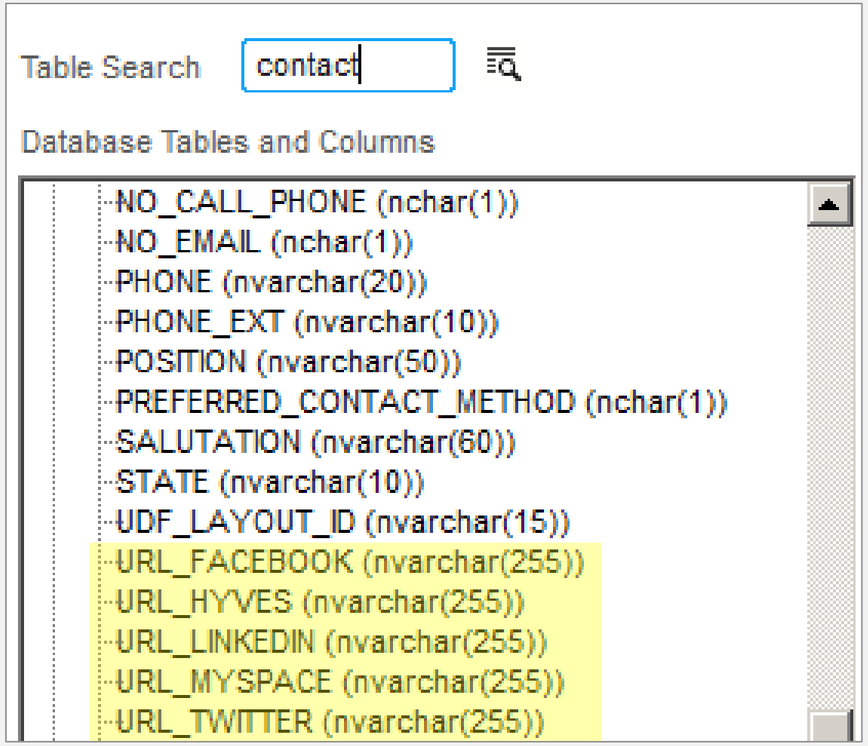
Feature:

Increased the url and document path to 255 where required

9.0.0



9.0.1



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Contact Maintenance

Feature

Contact maintenance has been redesigned for increased ease-of-use

Benefits

- Easy navigation – conforms to other master data forms
- Expanded search features

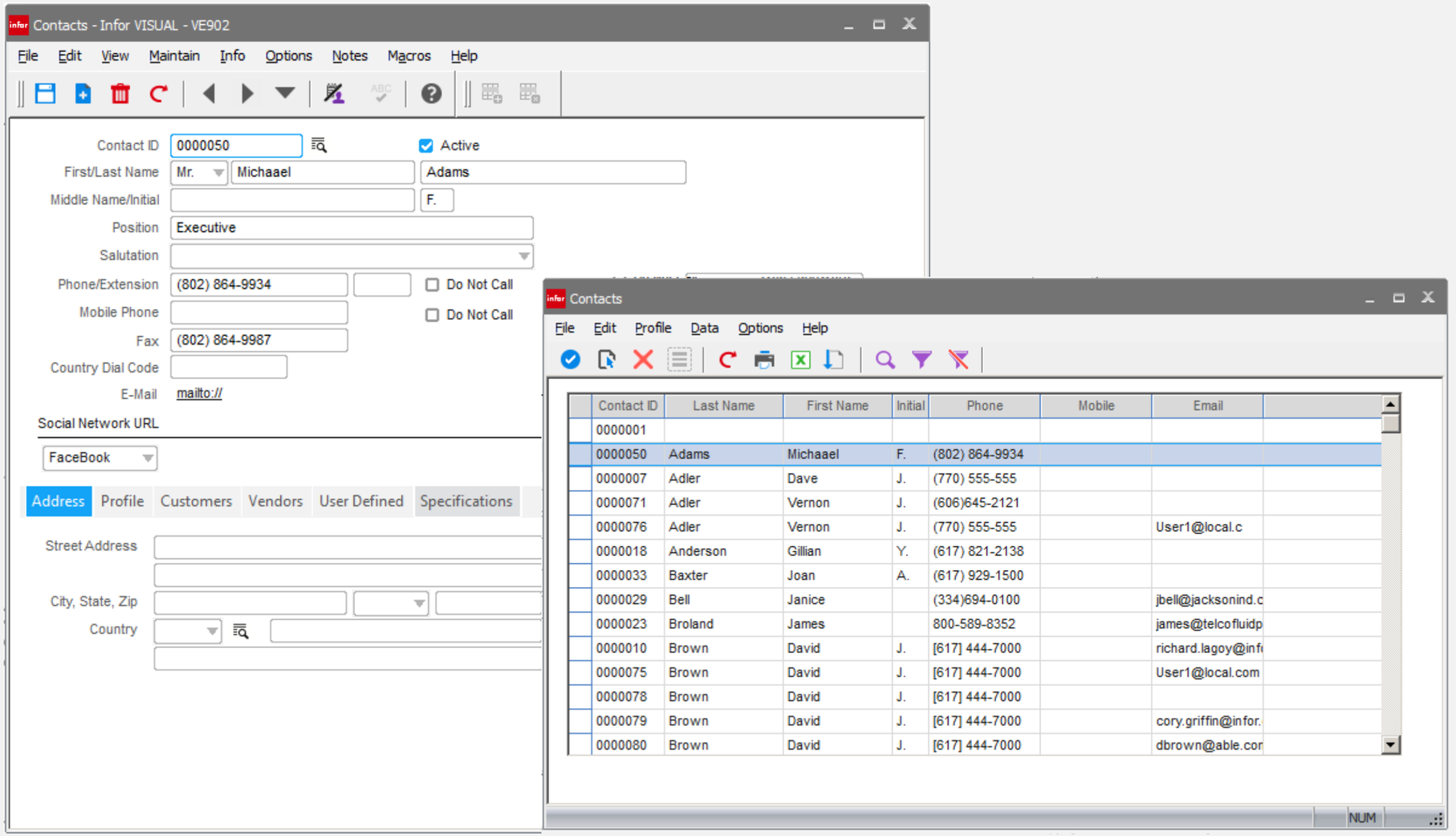


Table & Column Lookup

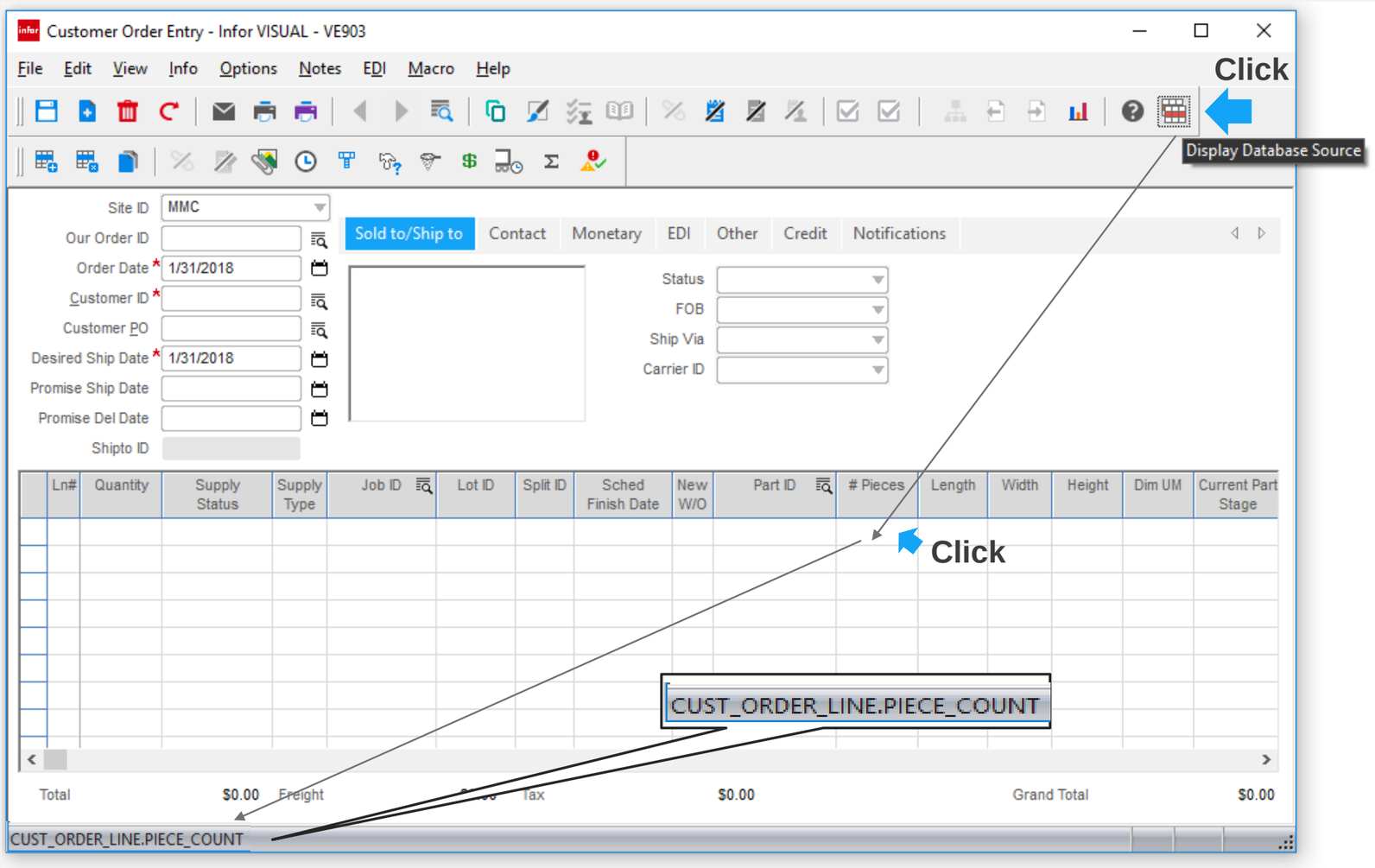
Note: This feature standard will be applied to individual VISUAL executables over time, with the focus being the primary order related forms.

Feature

The ability to determine what table and column contains the data being presented on the VISUAL document form

Benefit

- Makes learning the database schema easier
- Eliminates the need for a data dictionary
- Assist in building custom reports and extensions
- Only available to users with system administration access



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Amount column increase

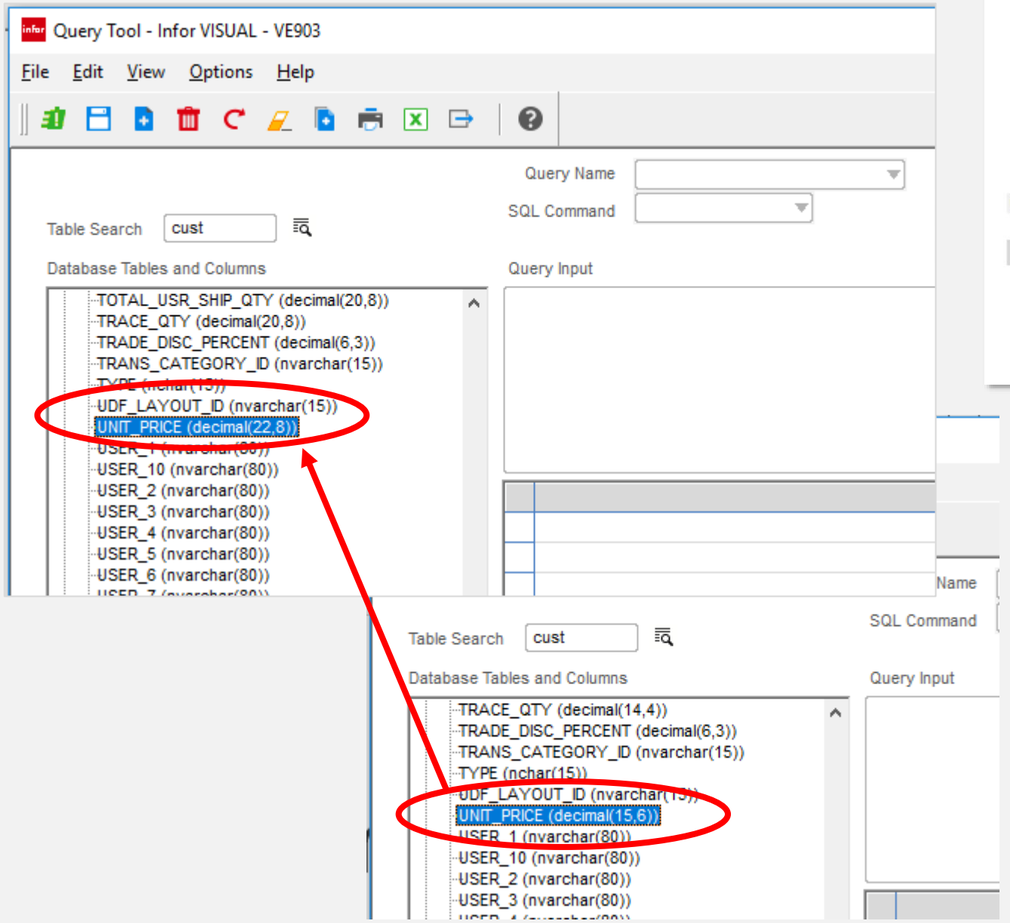
Feature

Increase the amount field throughout the VISUAL solution

Benefit

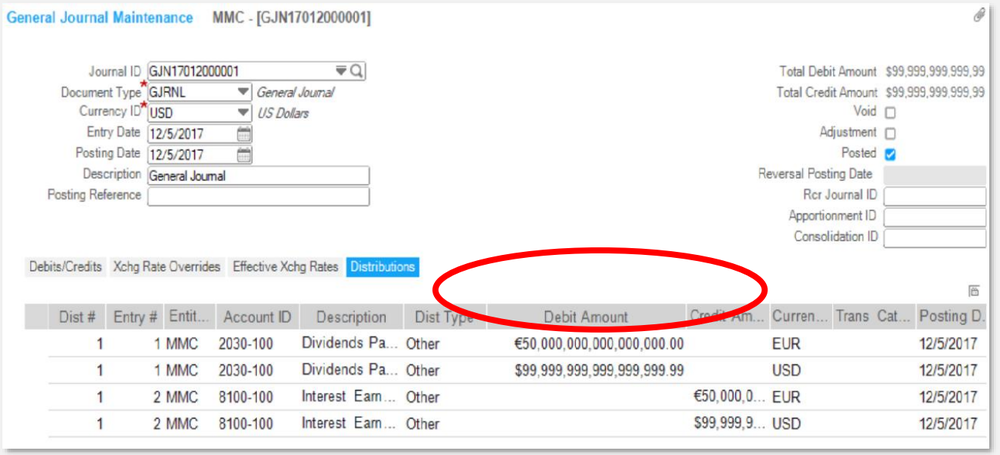
To accommodate global exchange rates, such as Indonesia.

VISUAL – 9.0.3



VISUAL – 9.0.2

Global Financials – 8.1.201802



VISUAL – 9.0.3

Ln#	Quantity	Misc Ref/Descr	Unit Price	Extension	Disc%
1	1	Very Expensive Item	1,234,567,890,123.12	$1,172,839,495,616.96	5.000

VISUAL – 9.0.2

Ln#	Quantity	Misc Ref/Descr	Unit Price	Extension	Disc%
→ 1	1	Less Expensive Item	123,456,789.00	$117,283,949.55	5.000

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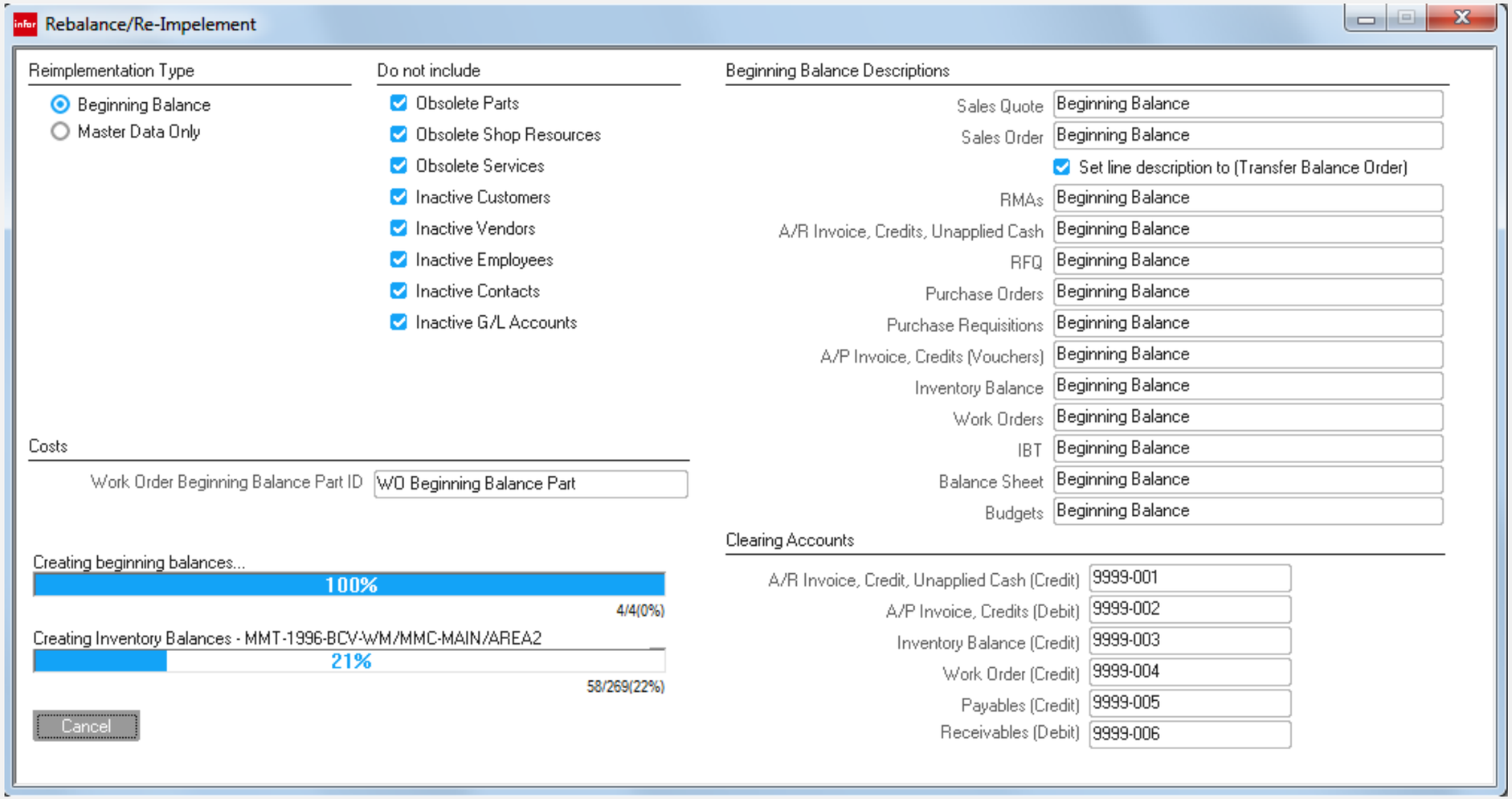
VISUAL Reset Utility

Feature

Deletes all inactive master records and transactional data from the database leaving open balances only

Benefit

- Can be used as a purge / re-implementation tool
- Can be used to create a transaction free test database



Note: Available after VE 9.0.3 only and by request only. Can only be used on versions 9.0.3 and above

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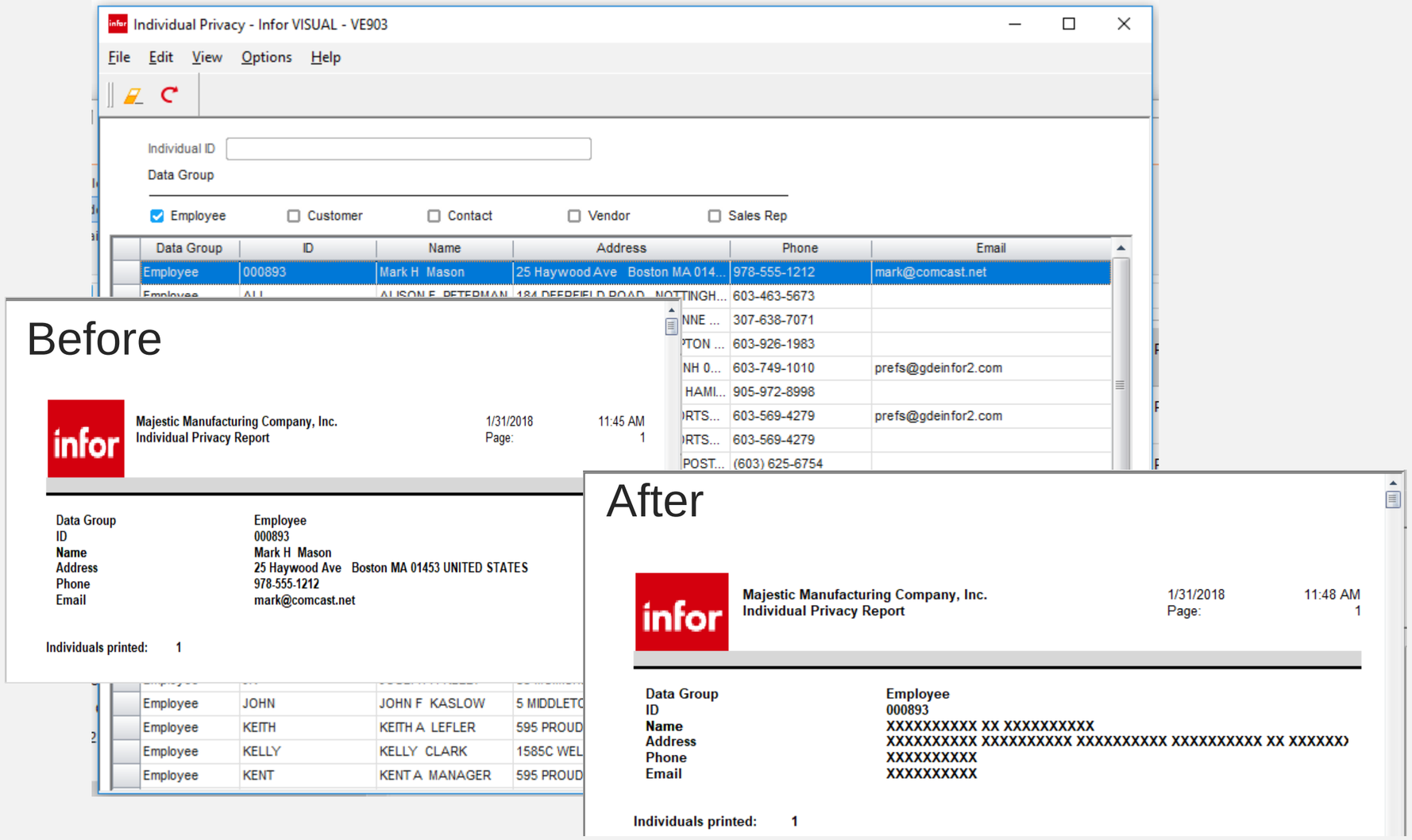
General Data Protection Regulation (GDPR)

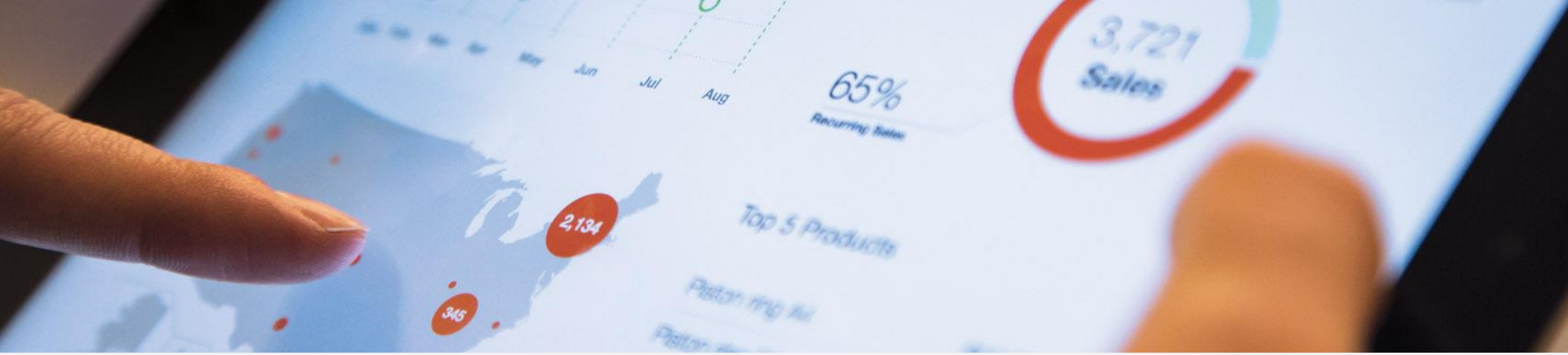
Feature

Utility that redacts information related to an individual, such as an employee & contact

Benefit

- Assist companies comply with the General Data Protection Regulation
- Eliminates the need to manual eliminate through the UI or programmatically delete from the database
- Keeps a record or who deleted what and when
- Security protected





Analytics & Performance Management

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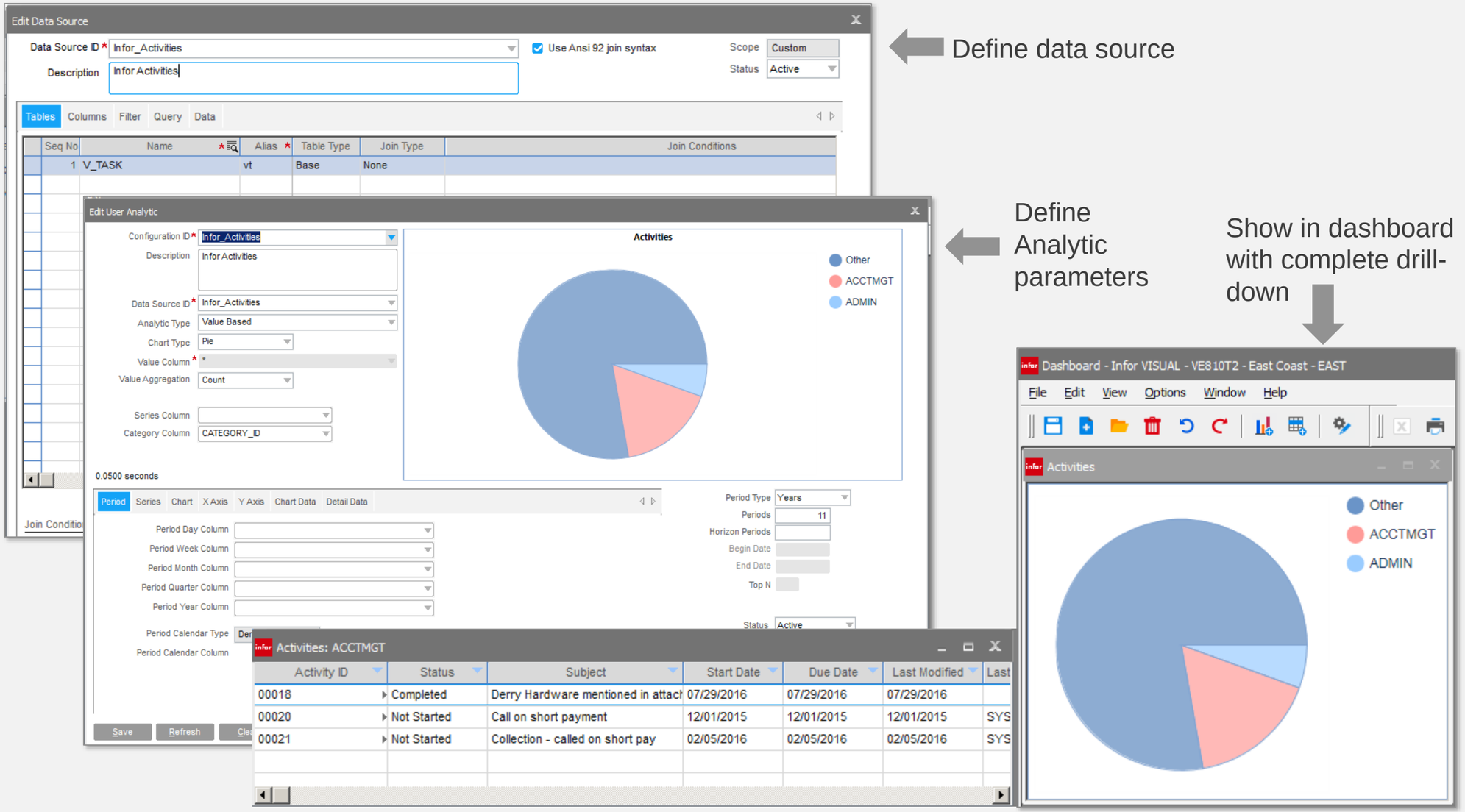
Dashboard - User defined Analytics

Features

- Define data source
- Define criteria
- Drill-to detail data
- Export to Excel
- Export & Import custom analytic definitions

Benefits

- Create your company specific analytics
- Improved performance – increased transparency with drill-down to details
- Share analytics created



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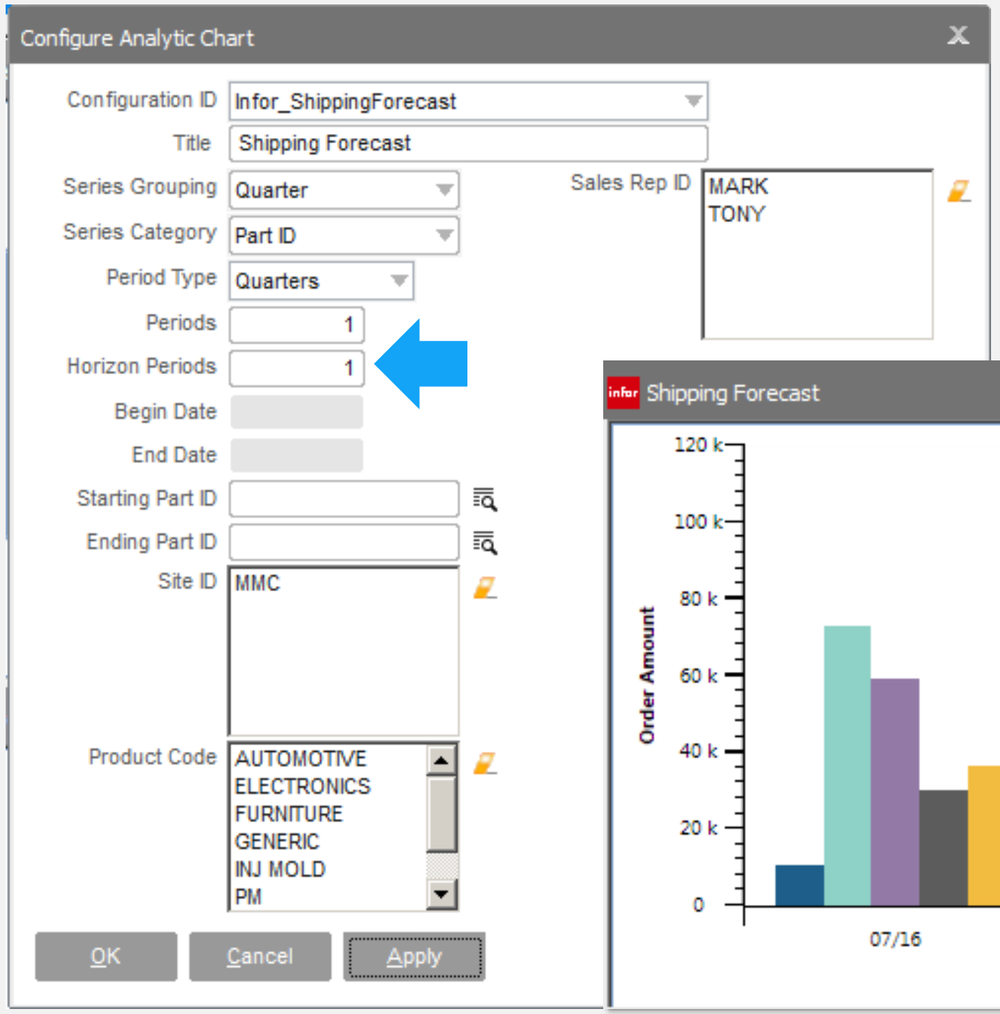
Dashboard
Horizon Parameter

Feature

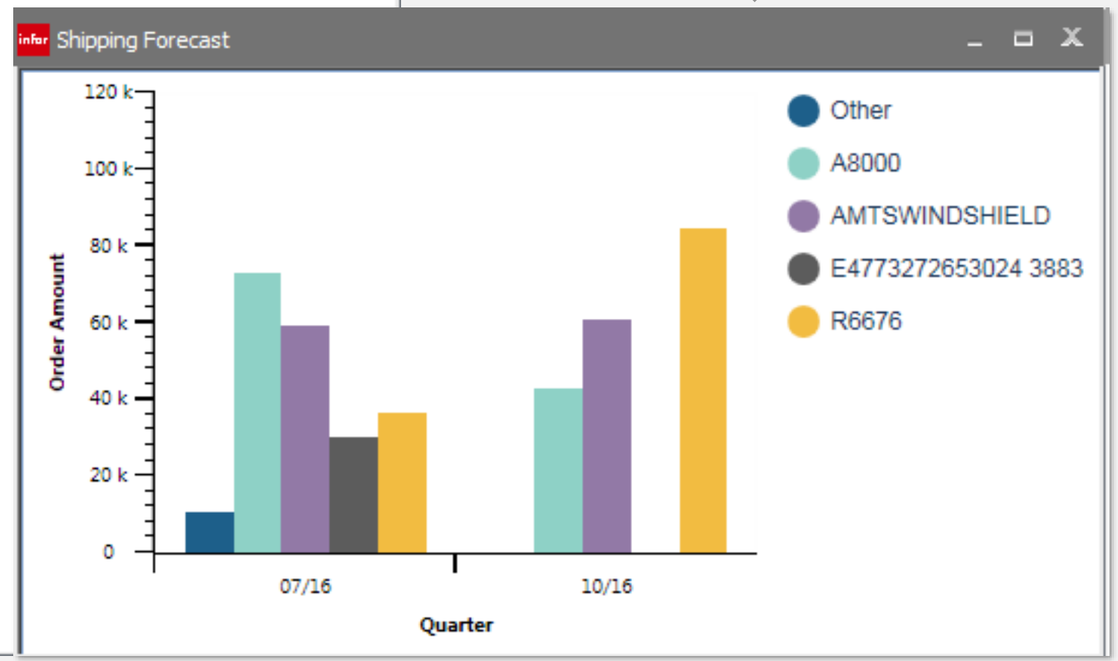
- Horizon parameter

Benefits

- Allows for predictive analytics
- Allows to look both backwards and forward from today



Custom (user defined) shipping forecast for the current and next quarter



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Dashboard

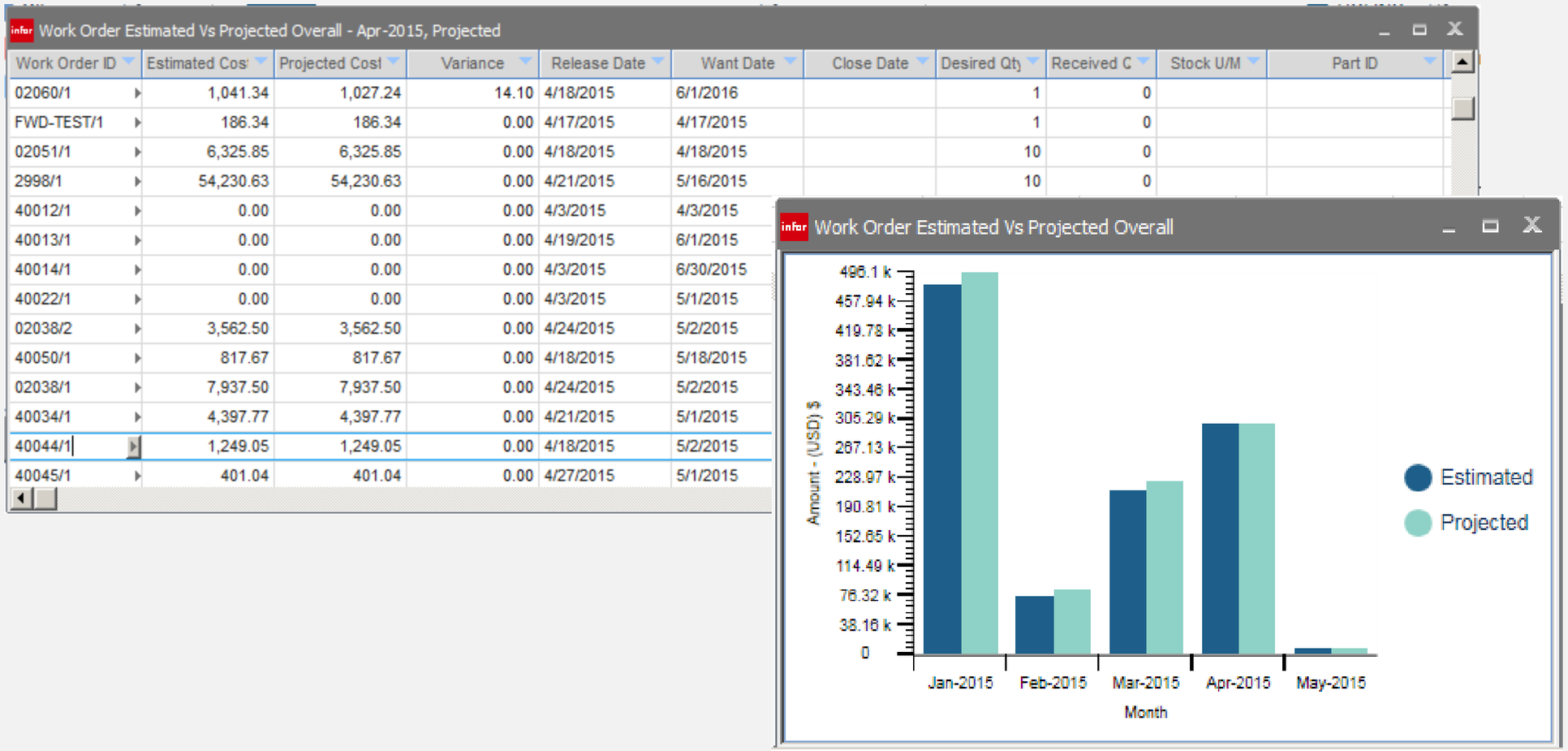
WO Estimate Vs Projected Overall

Feature

- Ability to place date range on x-axis

Benefits

- Analyze historic efficiencies
- Predict effect on future margins



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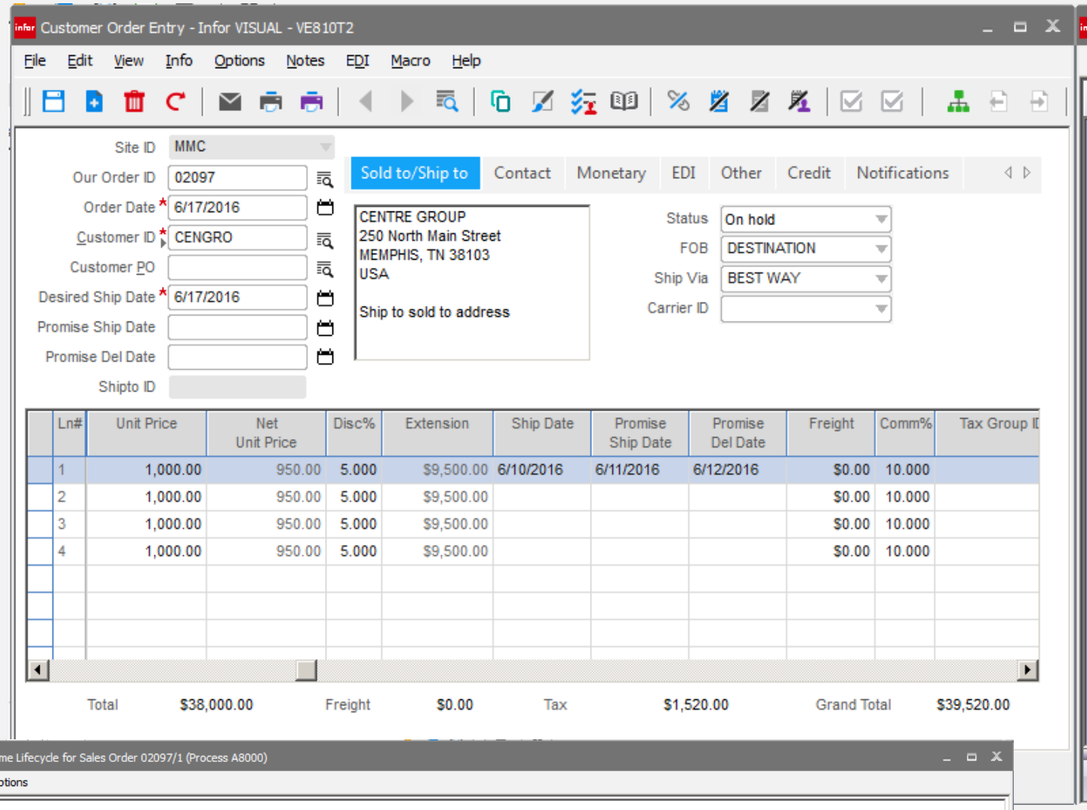
Lead-time Performance Management

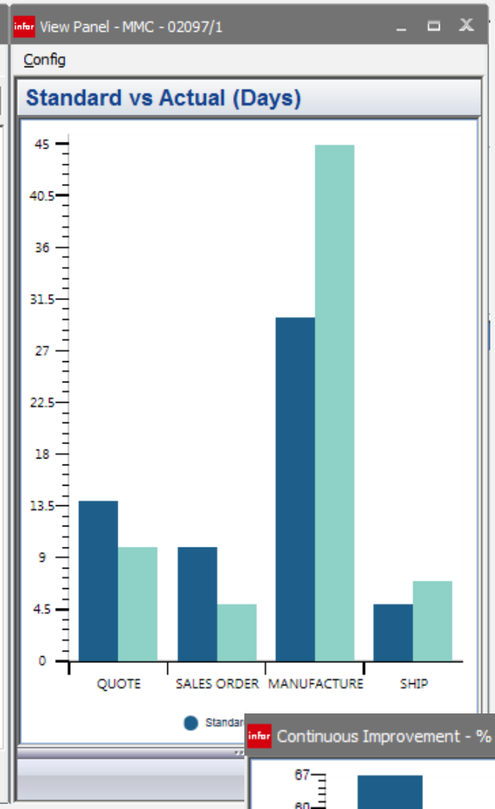
Features

- Define process standards
- Select products to measure
- Lead-times are automatically recorded based on VISUAL document lifecycle.
- Extend lead-time measurement points with macros
- Dashboard metrics by process and product

Benefits

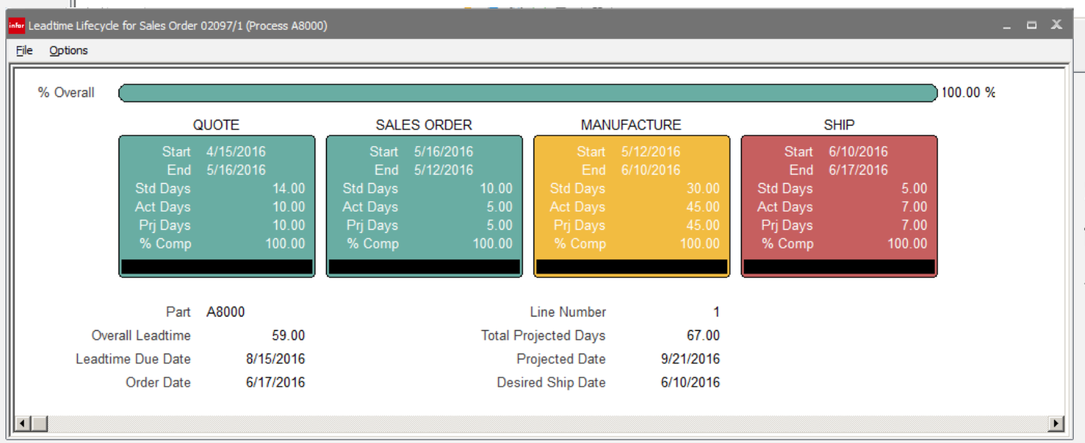
- Identify areas of improvement
- Implement controls
- Promotes increased customer satisfaction



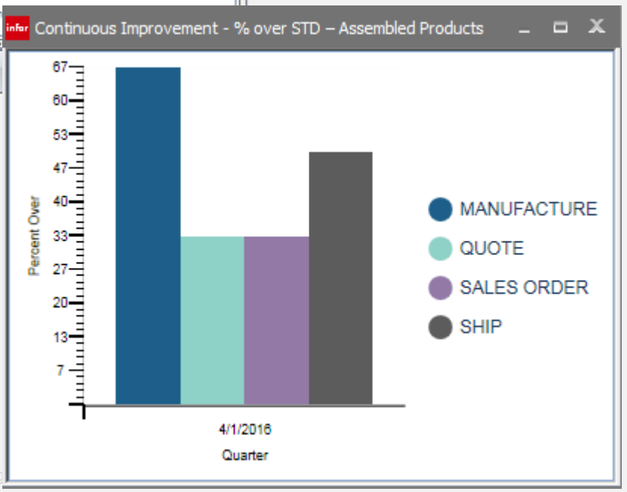


Sales Line Performance to Standard

Dashboard Analytics



Sales Line Lead-time Lifecycle



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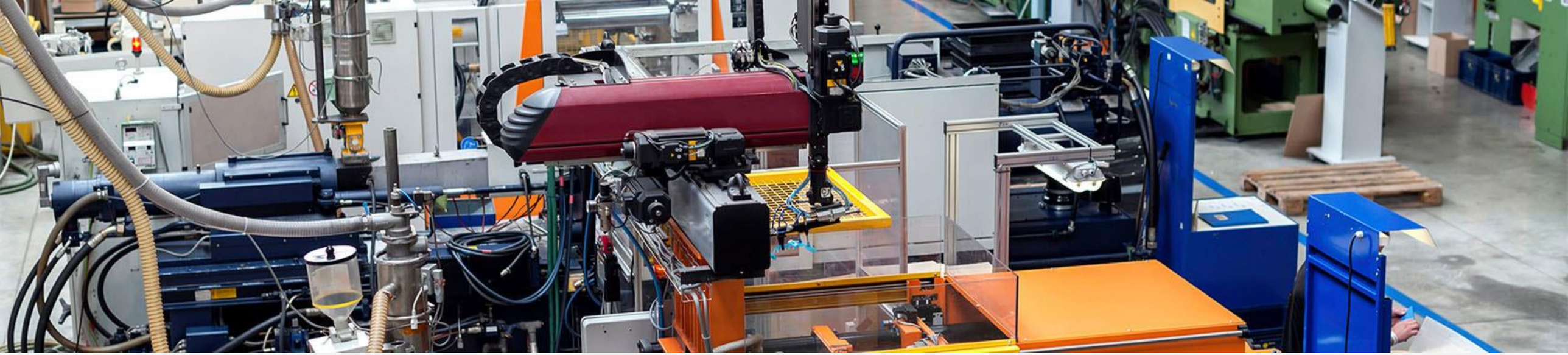

Scheduling

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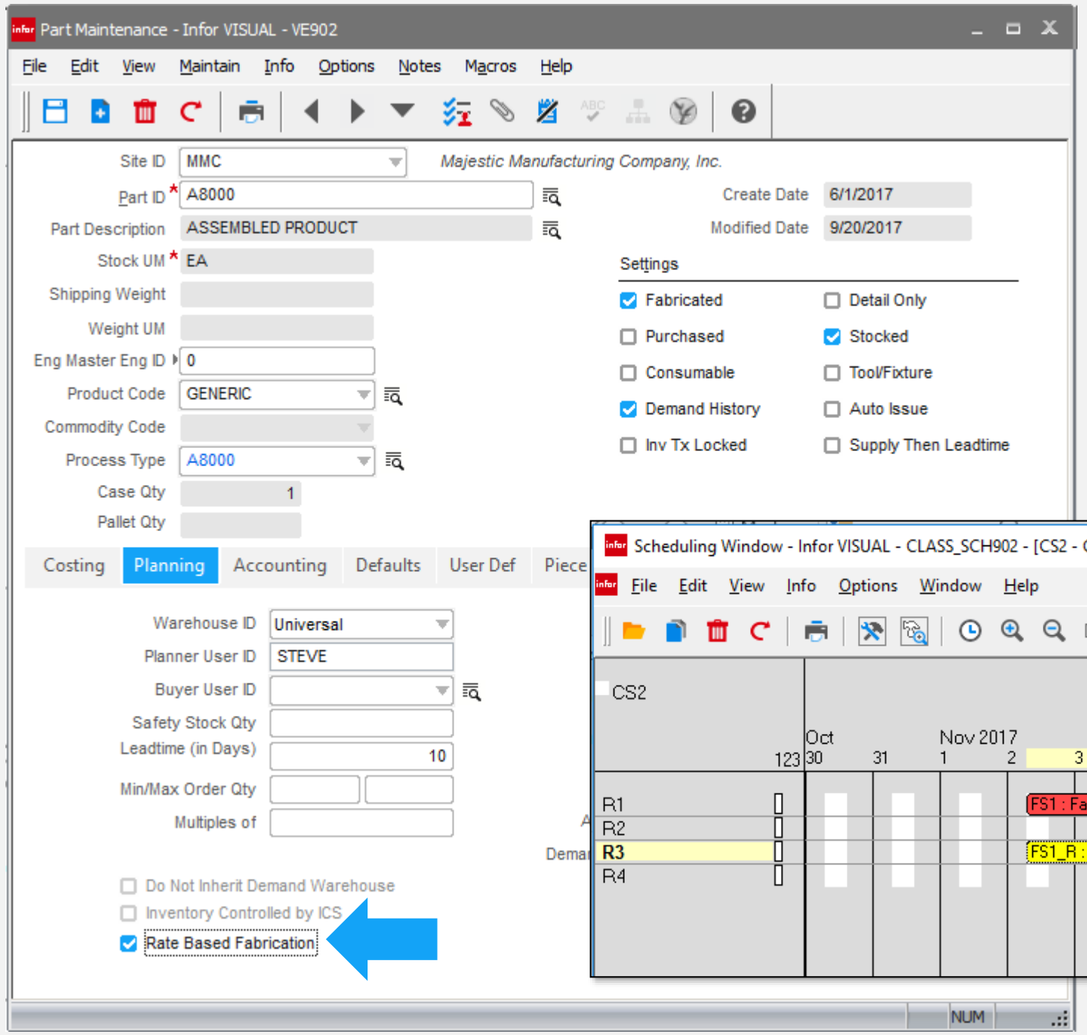
Scheduling – Rate based

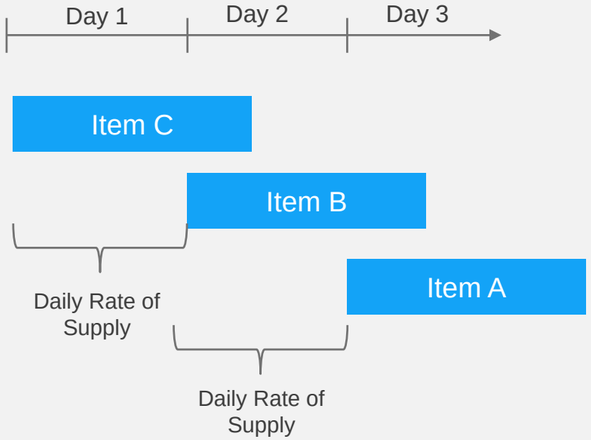
Feature

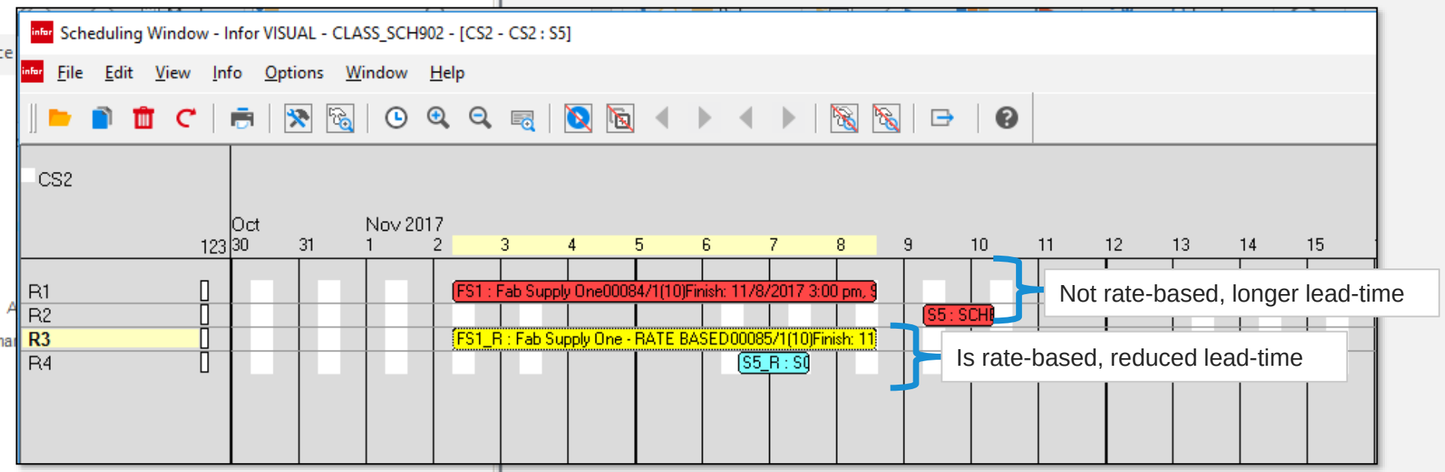
Daily production rates will be calculated to determine supply for independent demand.

Benefit

- Allows next level production order to start based on daily production rate
- Smooth out production for repetitive type environment
- Improves delivery accuracy







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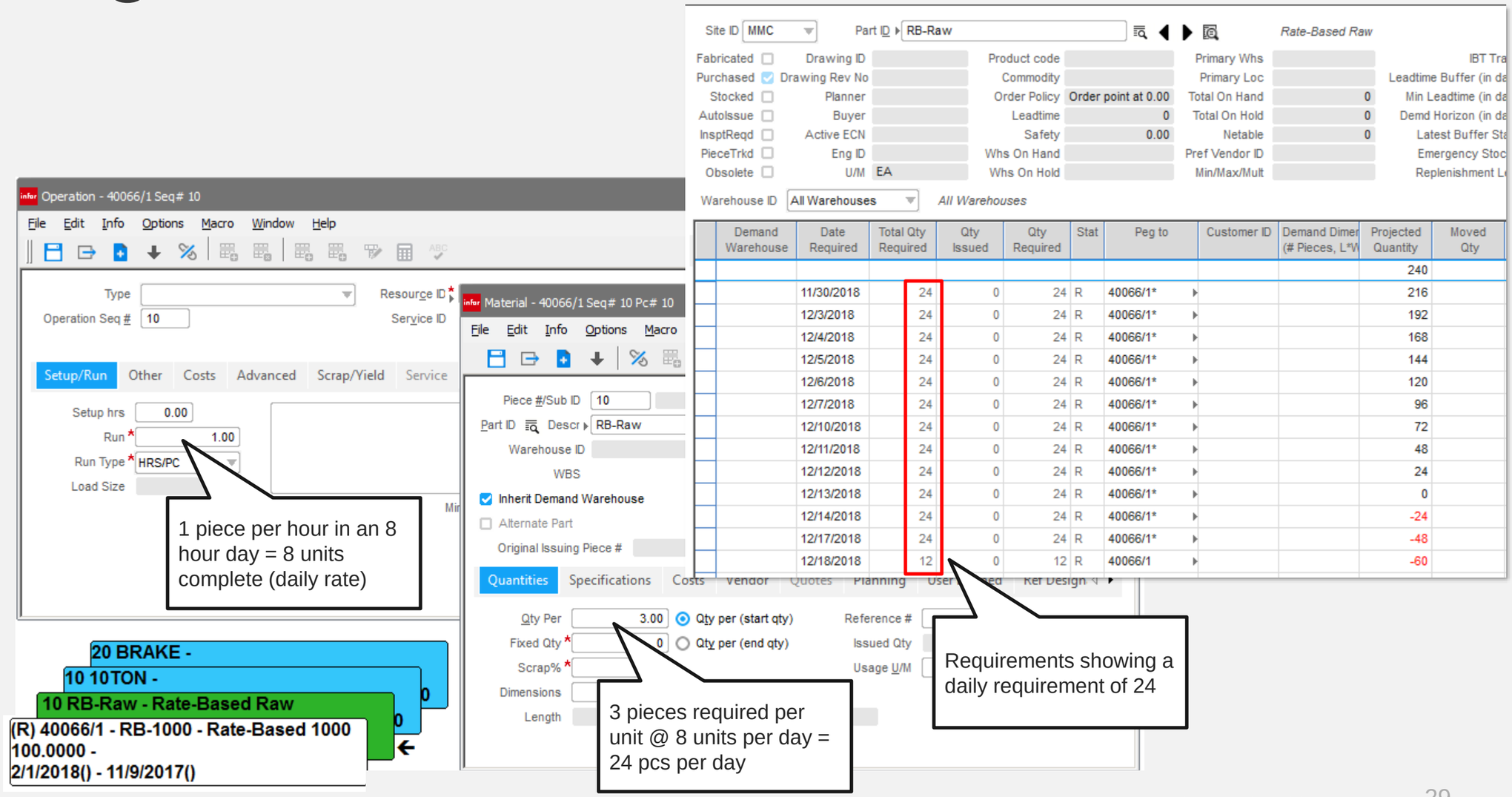
Planning – Rate-based

Feature

WO requirements and MRP planned orders are based on daily rate of production.

Benefit

- Provides visibility over the daily rate of required material and projected availability
- Helps to smooth out material supply chain to daily consumption



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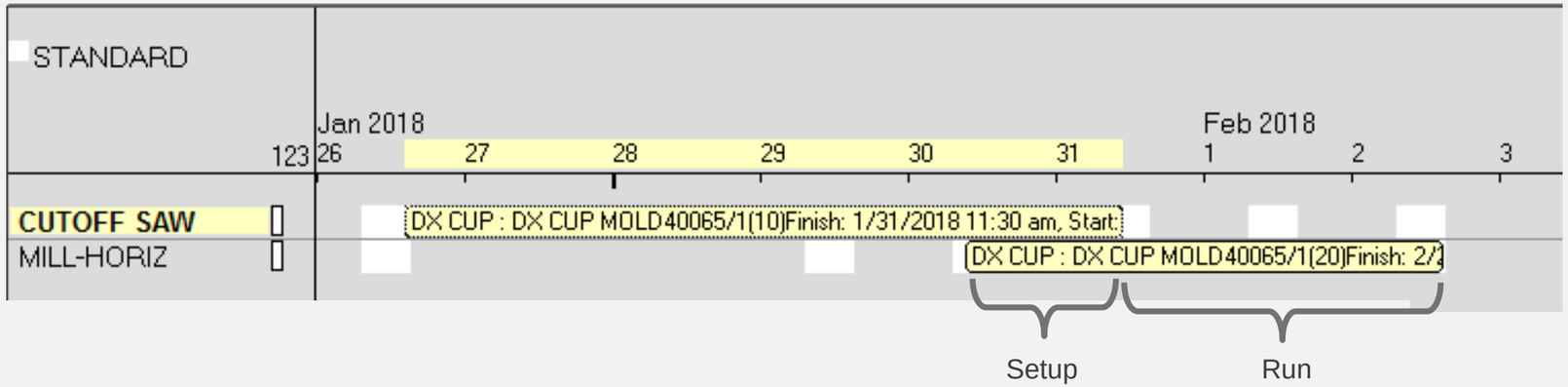
Scheduling – Overlap Setup

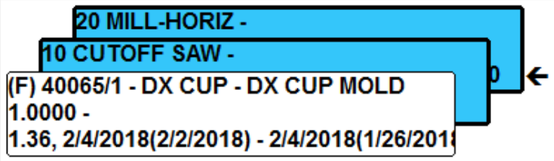
Feature

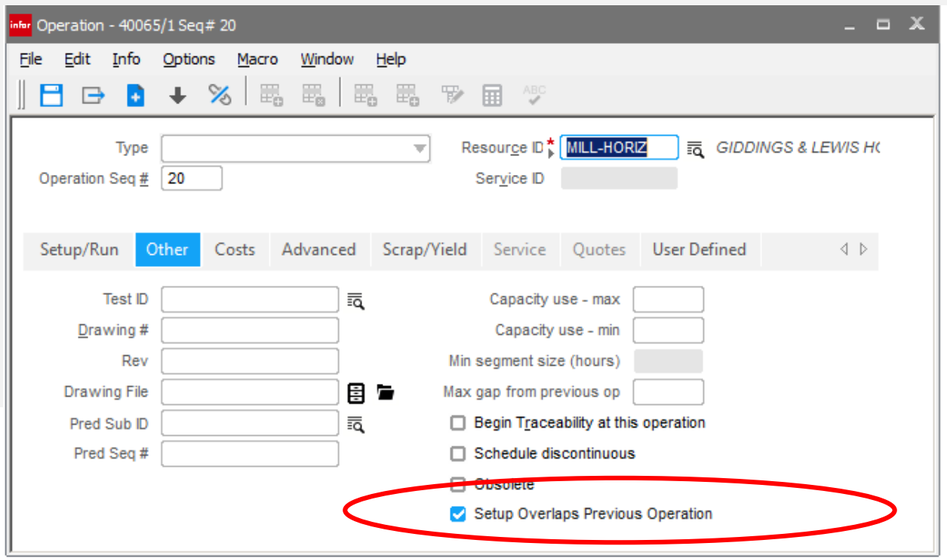
You can now schedule setup of the next operation to begin prior to piece availability from the previous operation.



Benefit

- Removes setup delays from the schedule
- Helps assure readiness of the downstream resource once product is completed at the previous operation.





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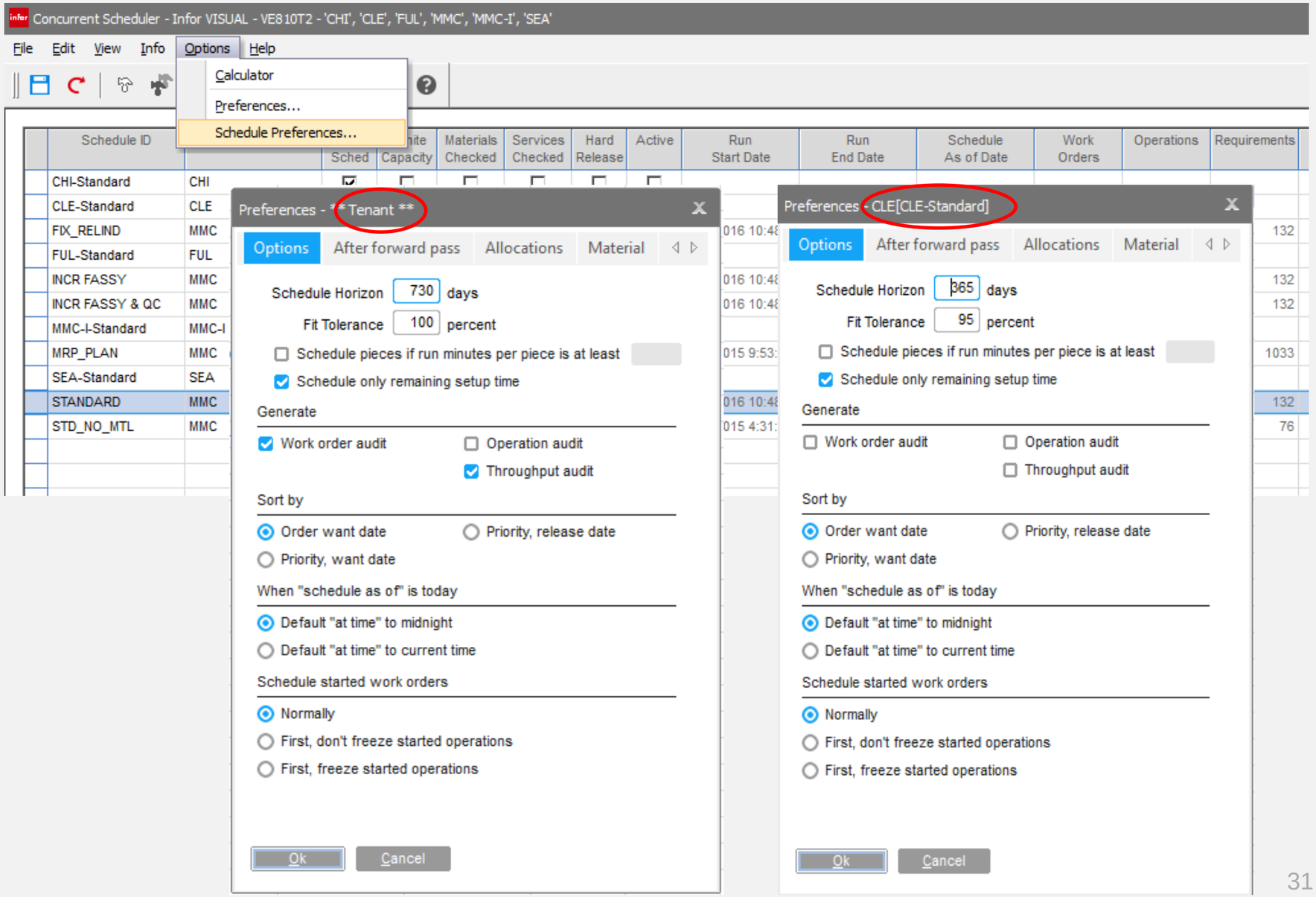
Concurrent Scheduler

Feature

Add scheduling preferences to the Schedule ID level

Benefit

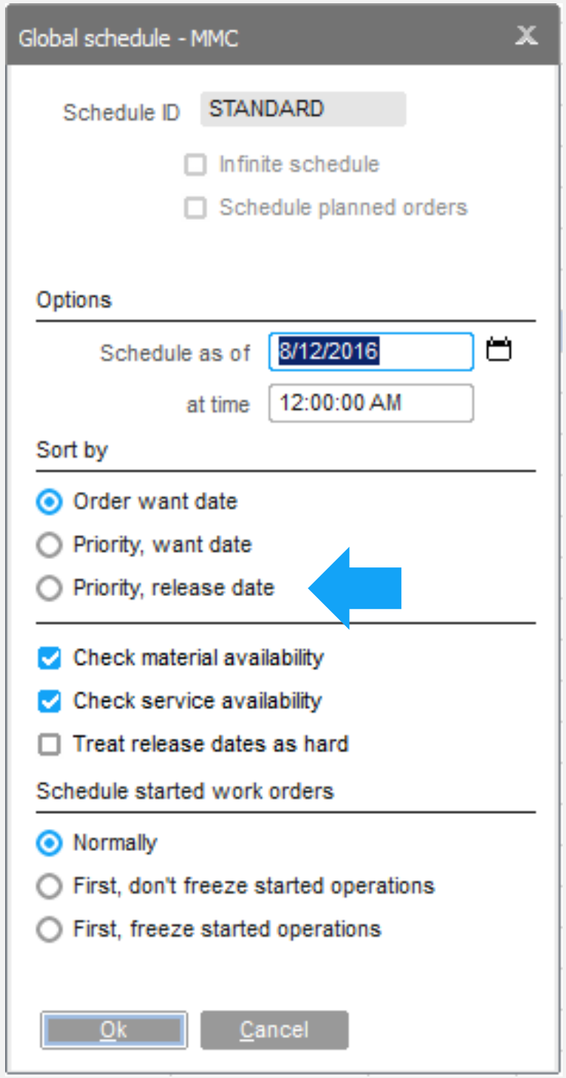
Provides an additional level of flexibility beyond the resource level, such as fit tolerance and priority



Concurrent Scheduler

Feature

Added **Priority, Release Date** option as sort option



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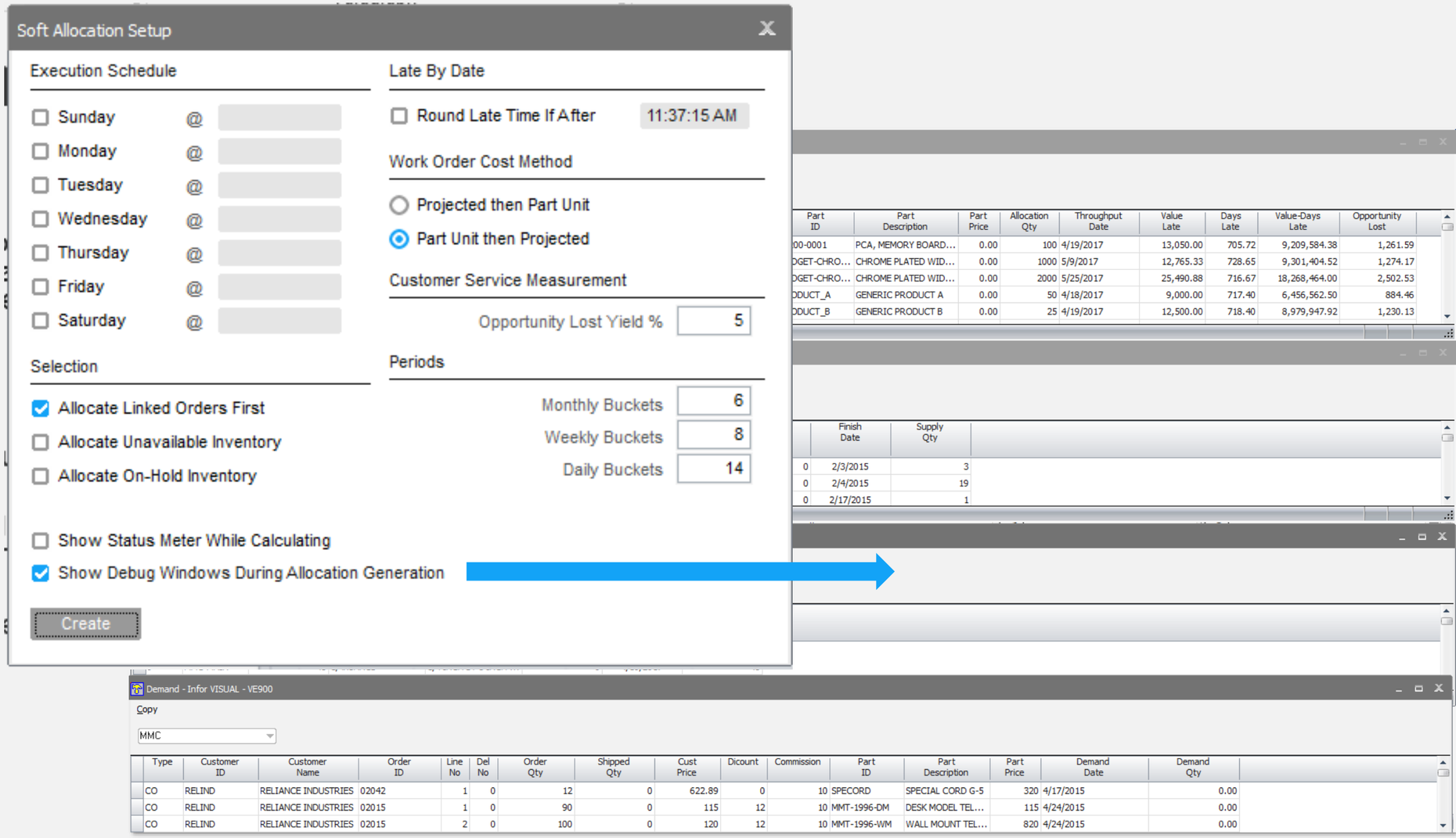
Throughput Window

Feature

- New soft allocation preference option to trigger allocation audit screens during the soft allocation run

Benefits

- Allows for greater visibility into the demand, supply, and inventory positioning used to create the soft allocations.
- Drill to the material planning window to investigate further
- See demand without supply



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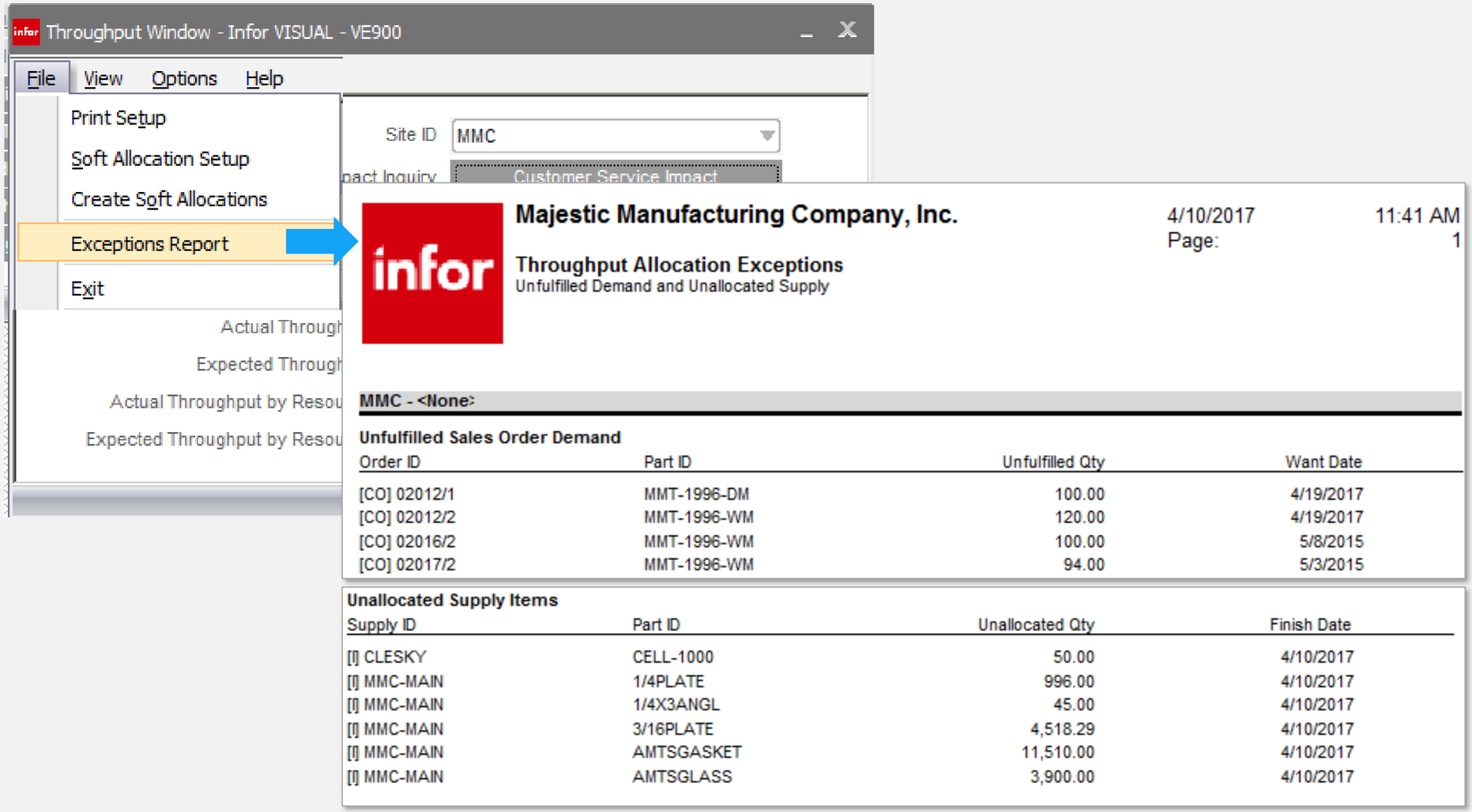
Throughput Window

Feature

- New soft allocation report

Benefits

- No longer need to access TXT file
- Instantly indicates demand that is not covered and supply that has no immediate demand
- Print by schedule ID



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Throughput Window

Feature

- Allocations now calculated maintained at the site and schedule ID
- Dates, days late, and values now stored during soft allocation run

Benefits

- Improved accuracy - Much more accuracy of soft allocations. Previously all allocations for what-if schedules used the soft allocations from the standard schedule

- Improved performance – Setting the allocation information during the allocation run improved performance within the Throughput Window.

```
ROWID               INTEGER       IDENTITY,
SITE_ID             NVARCHAR(15)  NOT NULL,
SCHEDULE_ID         NVARCHAR(15),

CUST_ID             NVARCHAR(15)  NOT NULL,
CUST_NAME           NVARCHAR(255),

DEMAND_KEY          NVARCHAR(100),
DEMAND_TYPE         NVARCHAR(15)  NOT NULL, -- CO, CD
ORDER_ID            NVARCHAR(15)  NOT NULL,
ORDER_LINE_NO       INTEGER       NOT NULL,
ORDER_DEL_NO        INTEGER       NOT NULL DEFAULT 0,
WANT_DATE           DATETIME      NOT NULL,
ORDER_QTY           DECIMAL(14,4) NOT NULL DEFAULT 0,
SHIPPED_QTY         DECIMAL(14,4) NOT NULL DEFAULT 0,

SUPPLY_KEY          NVARCHAR(100),
SUPPLY_TYPE         NVARCHAR(15)  NOT NULL, -- WO, CP, PO, PD
BASE_ID             NVARCHAR(30)  NOT NULL,
LOT_ID              NVARCHAR(3)   NOT NULL DEFAULT '',
SPLIT_ID            NVARCHAR(3)   NOT NULL DEFAULT '',
PURC_LINE_NO        INTEGER       NOT NULL DEFAULT 0,
PURC_DEL_NO         INTEGER       NOT NULL DEFAULT 0,
FINISH_DATE         DATETIME      NOT NULL,
DESIRED_QTY         DECIMAL(14,4) NOT NULL DEFAULT 0,
RECEIVED_QTY        DECIMAL(14,4) NOT NULL DEFAULT 0,

PART_ID             NVARCHAR(30)  NOT NULL,
PART_DESCRIPTION    NVARCHAR(255),

UNIT_PRICE          DECIMAL(15,6) NOT NULL DEFAULT 0,
MATERIAL_COST       DECIMAL(15,6) NOT NULL DEFAULT 0,
SERVICE_COST        DECIMAL(15,6) NOT NULL DEFAULT 0,

ALLOCATED_QTY       DECIMAL(14,4) NOT NULL DEFAULT 0,
THROUGHPUT_DATE     DATETIME      NOT NULL,

VALUE_LATE          DECIMAL(20,2) NOT NULL DEFAULT 0,
DAYS_LATE           DECIMAL(20,2) NOT NULL DEFAULT 0,
OPP_LOST            DECIMAL(20,2) NOT NULL DEFAULT 0
```

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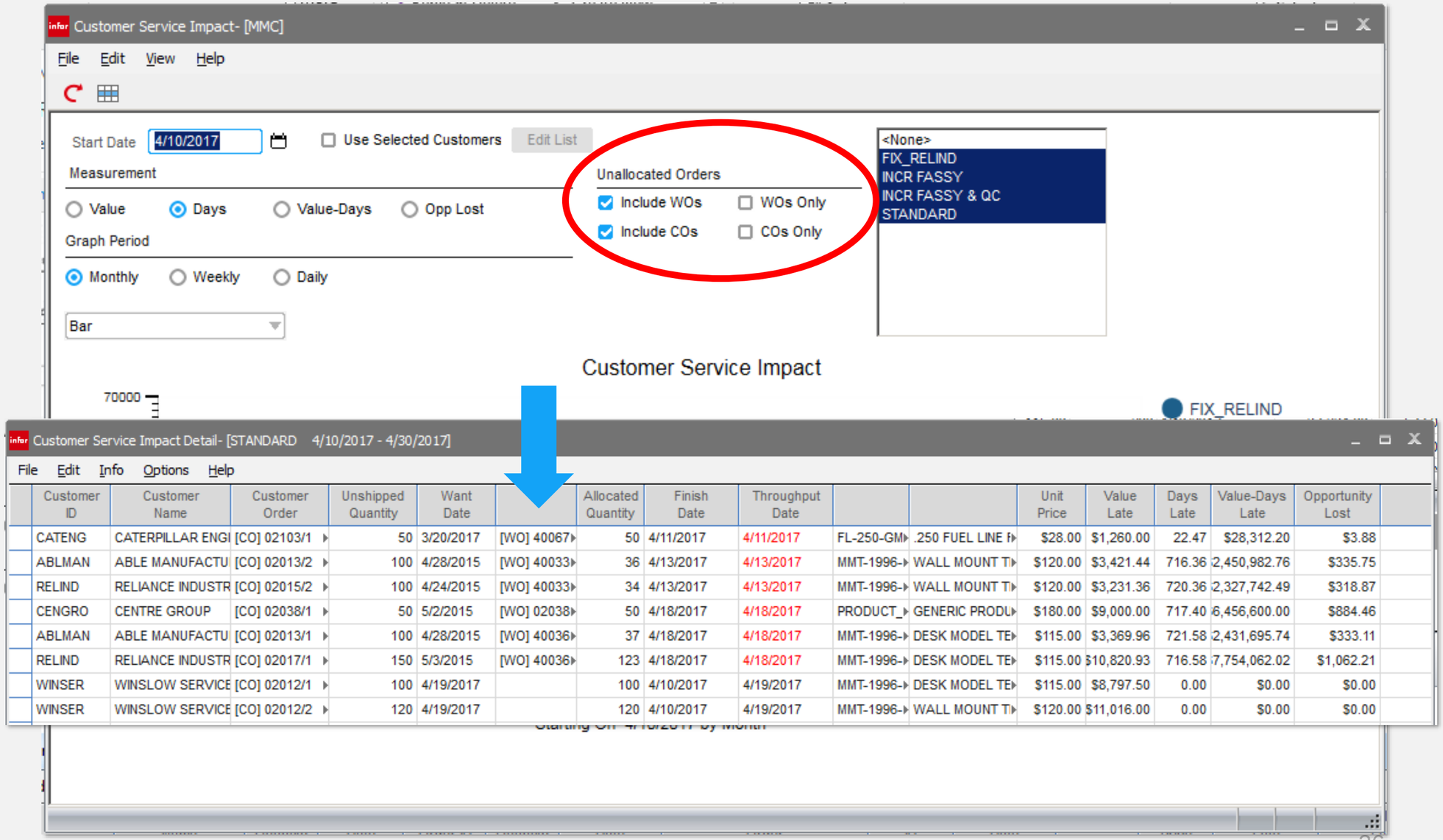
Throughput Window

Features

- Option to show unallocated work orders or customer orders on the customer impact window

Benefits

- Shows orders that can potentially add to throughput



Customer ID	Customer Name	Customer Order	Unshipped Quantity	Want Date		Allocated Quantity	Finish Date	Throughput Date			Unit Price	Value Late	Days Late	Value-Days Late	Opportunity Lost
CATENG	CATERPILLAR ENGI	[CO] 02103/1	50	3/20/2017	[WO] 40067	50	4/11/2017	4/11/2017	FL-250-GM	.250 FUEL LINE F	$28.00	$1,260.00	22.47	$28,312.20	$3.88
ABLMAN	ABLE MANUFACTU	[CO] 02013/2	100	4/28/2015	[WO] 40033	36	4/13/2017	4/13/2017	MMT-1996-	WALL MOUNT T	$120.00	$3,421.44	716.36	2,450,982.76	$335.75
RELIND	RELIANCE INDUSTR	[CO] 02015/2	100	4/24/2015	[WO] 40033	34	4/13/2017	4/13/2017	MMT-1996-	WALL MOUNT T	$120.00	$3,231.36	720.36	2,327,742.49	$318.87
CENGRO	CENTRE GROUP	[CO] 02038/1	50	5/2/2015	[WO] 02038	50	4/18/2017	4/18/2017	PRODUCT_	GENERIC PRODU	$180.00	$9,000.00	717.40	6,456,600.00	$884.46
ABLMAN	ABLE MANUFACTU	[CO] 02013/1	100	4/28/2015	[WO] 40036	37	4/18/2017	4/18/2017	MMT-1996-	DESK MODEL TE	$115.00	$3,369.96	721.58	2,431,695.74	$333.11
RELIND	RELIANCE INDUSTR	[CO] 02017/1	150	5/3/2015	[WO] 40036	123	4/18/2017	4/18/2017	MMT-1996-	DESK MODEL TE	$115.00	$10,820.93	716.58	7,754,062.02	$1,062.21
WINSER	WINSLOW SERVICE	[CO] 02012/1	100	4/19/2017		100	4/10/2017	4/19/2017	MMT-1996-	DESK MODEL TE	$115.00	$8,797.50	0.00	$0.00	$0.00
WINSER	WINSLOW SERVICE	[CO] 02012/2	120	4/19/2017		120	4/10/2017	4/19/2017	MMT-1996-	WALL MOUNT T	$120.00	$11,016.00	0.00	$0.00	$0.00

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Shop Floor Automation

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Shop Floor Automation

Features

- Assign users to material and or labor option
- Set preferences at the user login level
- Issue material to the WO through point & click
- Report labor to the WO through point and click
- View associated documents

Benefits

- Increase:
  - Productivity
  - Efficiency
  - Accuracy
  - Responsiveness
- Real-time view of the production floor
- Employees can validate labor times and quantities reported

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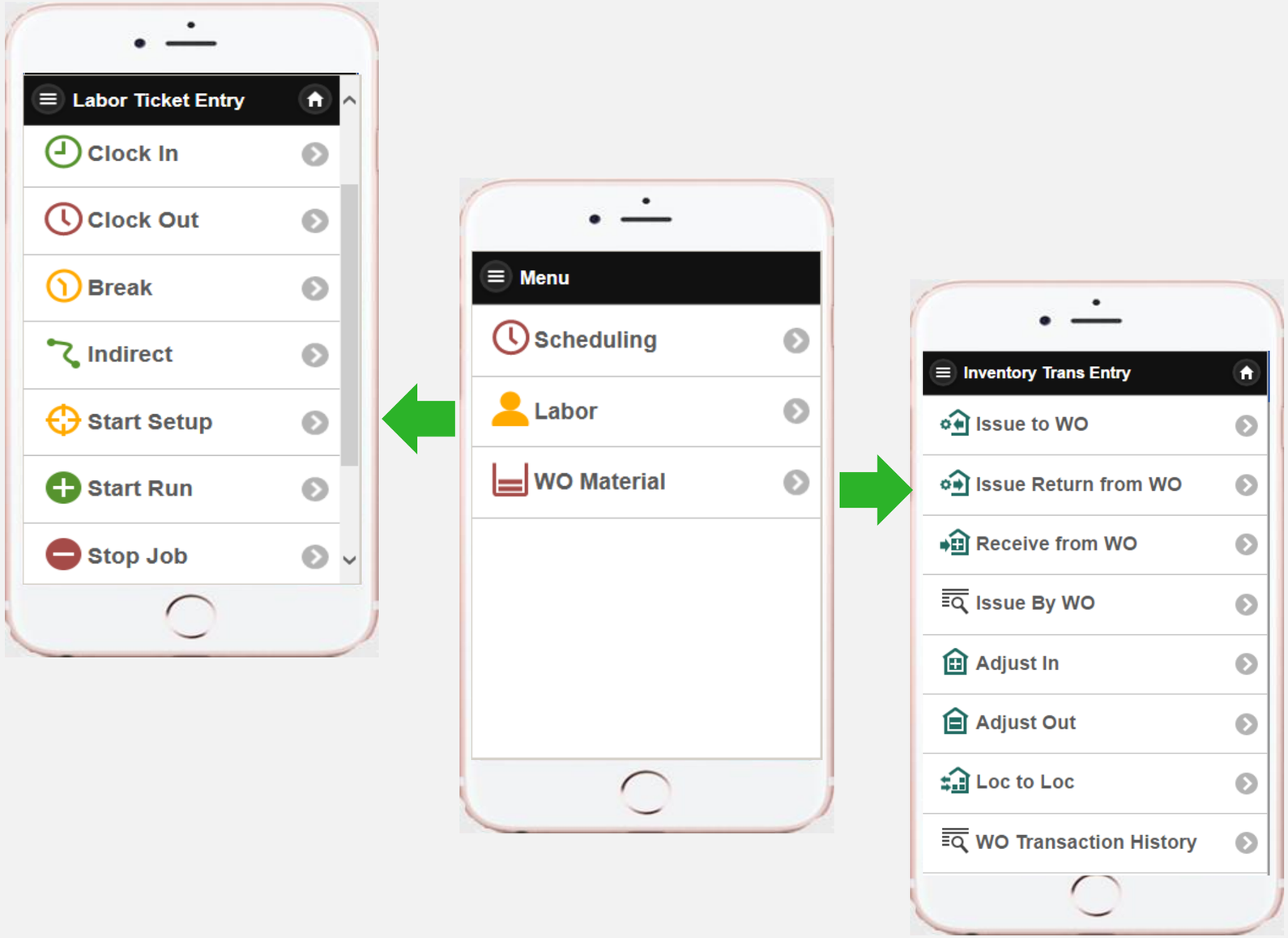
Shop Floor Automation – labor & material

Features

- New labor entry form
- New material entry form
- Scanning mode option for materials
- Compatible with any browser based device

Benefits

- Allows labor or material to be reported via any mobile device
- Can be used with compatible scanning devices
- Employees can verify their reported labor totals
- View material issued to a work order



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Shop Floor – Information & status icons

Operation Status

Late

Early

Material Status

No material required at operation

Material required at operation but shortages exist

Material required at operation and all is available

Tooling & Fixtures

Tooling and fixtures required

Operation Availability

Work is not available

Work is available

Labor Status

In-process labor ticket

No labor reported

Labor reported

Work Order / other

As scheduled WO is late

Focused operation on WO operation listing

Documents attached

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Labor Reporting

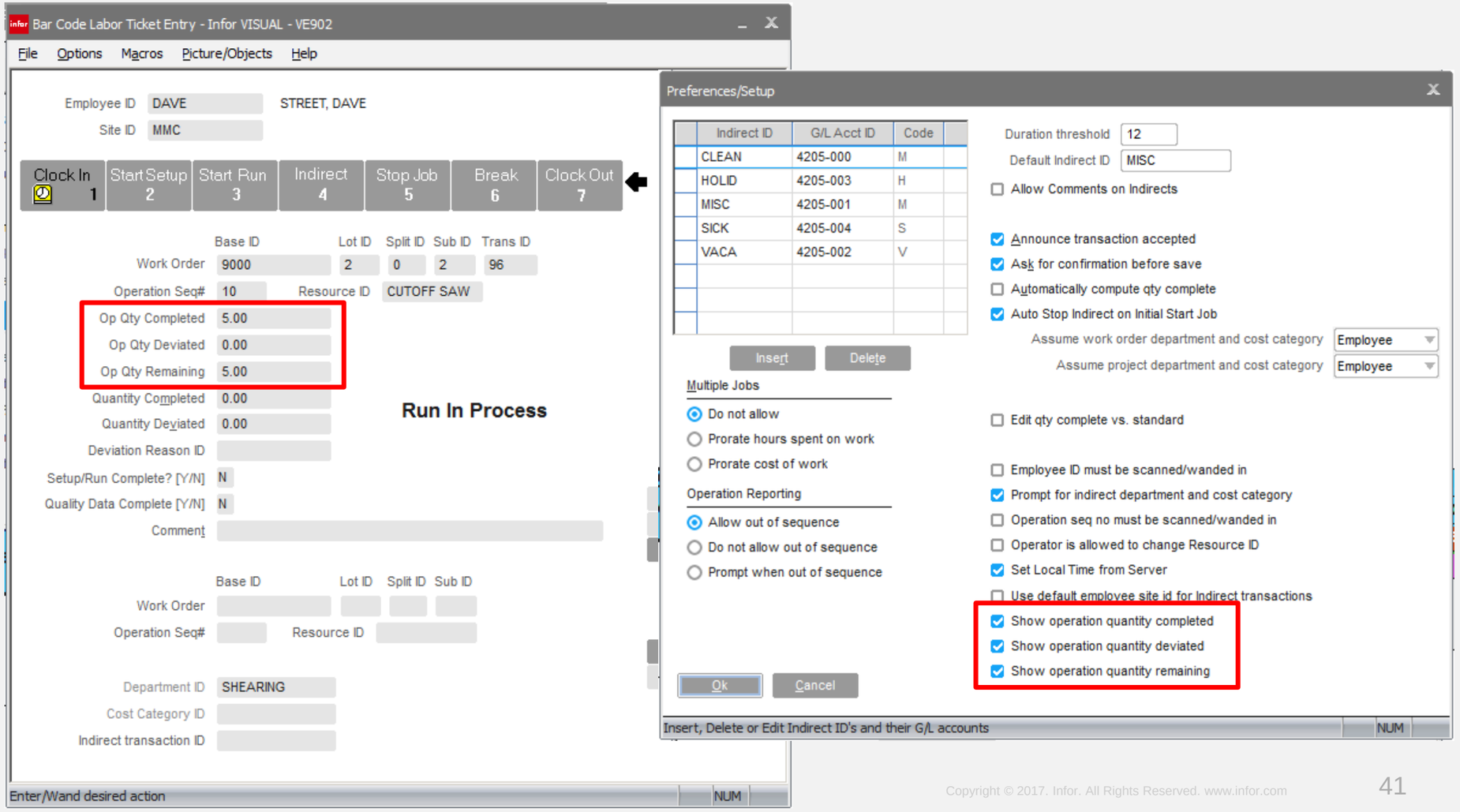
Quantity completed, remaining, & deviated

Feature

Add quantity completed, deviated, and remaining as an option to wedge labor and shop floor labor

Benefit

Allows the employee to perform verification whereby helping to eliminate error and assure accuracy when completing additional parts



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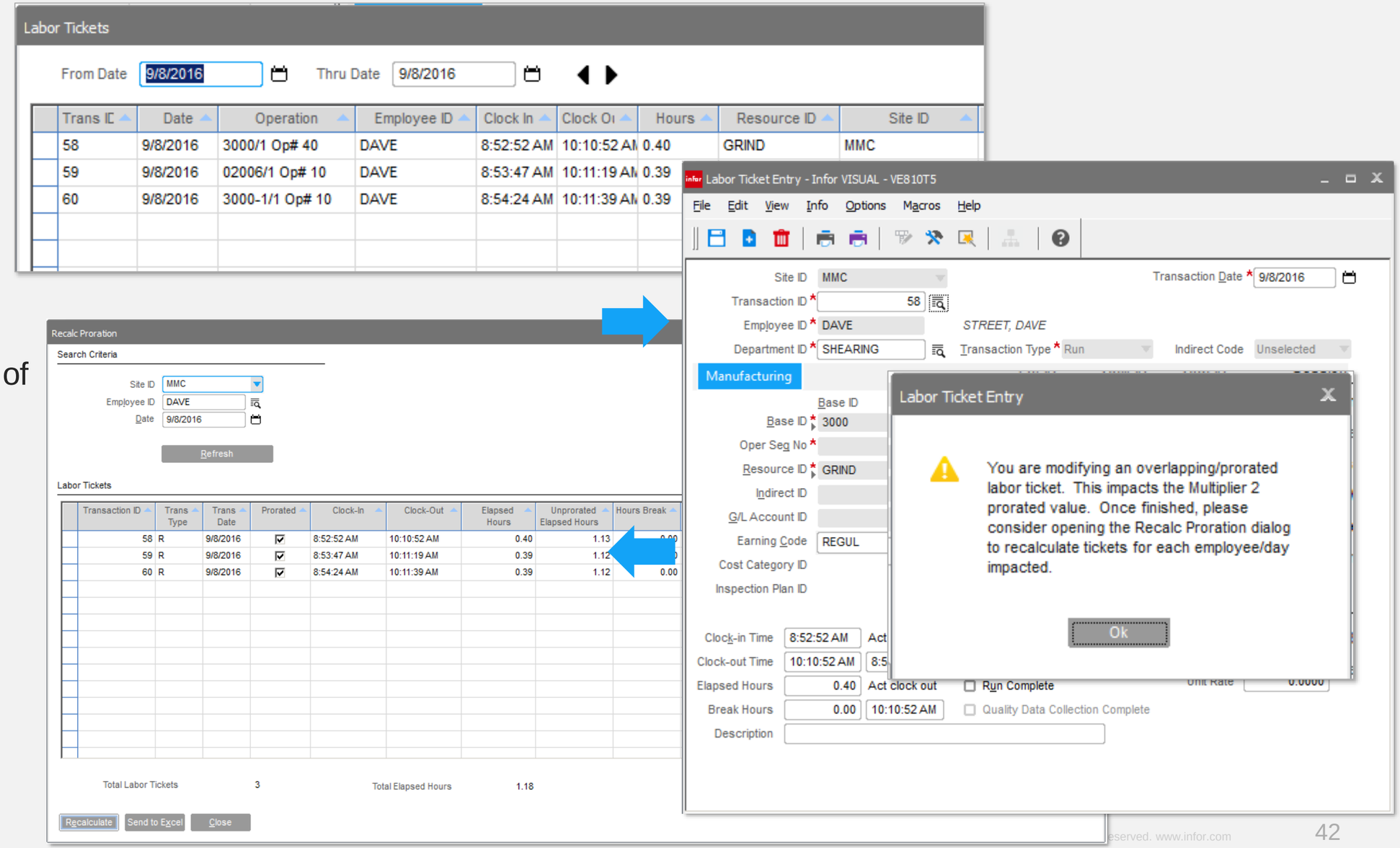
Labor Ticket Entry

Features

- Allow for the edit of overlapping labor tickets
- Add recalculation of prorated tickets after edit.

Benefits

- Allows for easy correction of overlapping labor tickets processed through shop floor labor solutions



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Engineering, Material, and Material Planning

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Advanced Planning

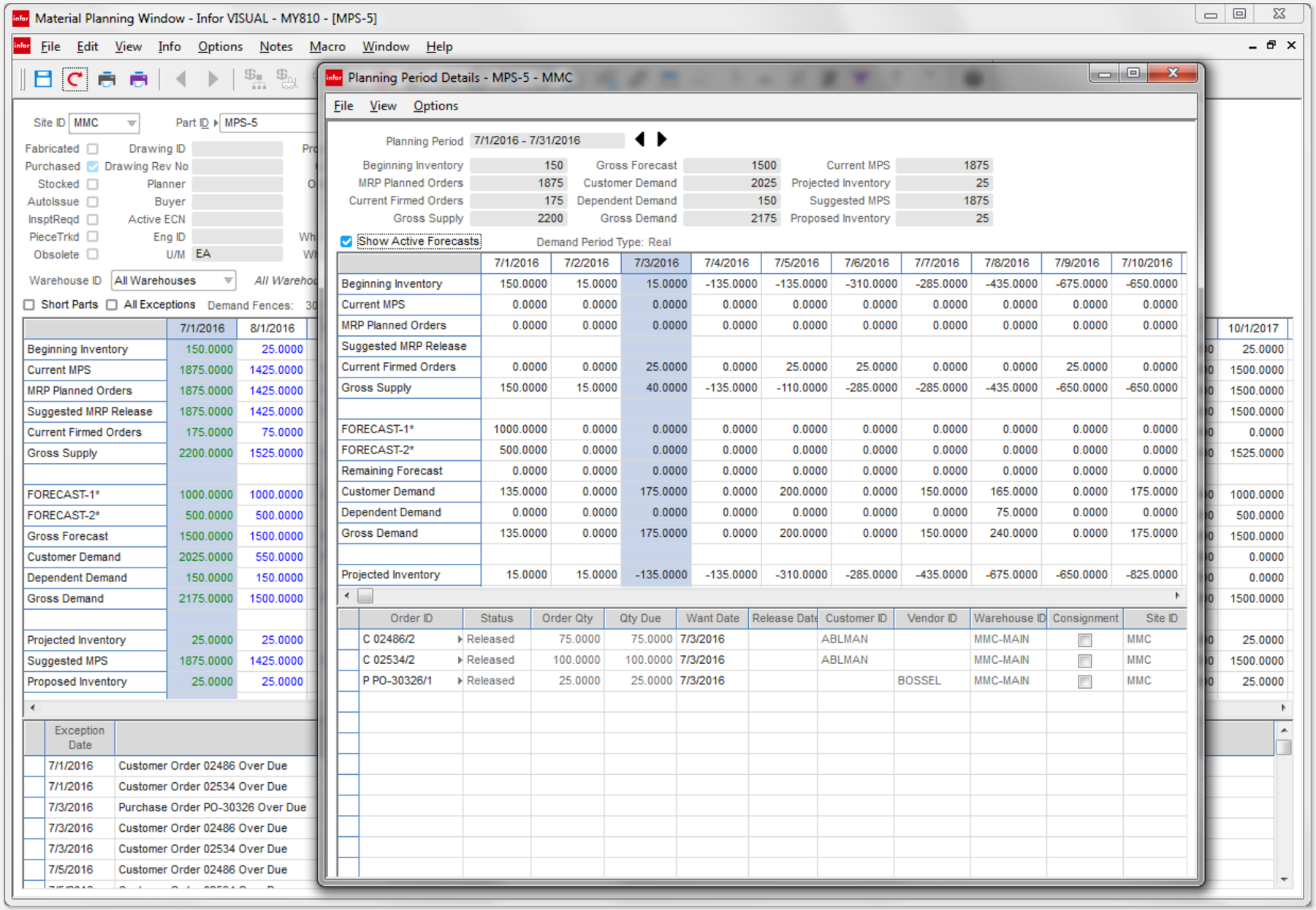
Planning views

Features

- New screen layout
- Screen segmented by supply, demand, and projected
- New rows – beginning Inventory, total supply, total demand, proposed inventory
- Drill to planning period details (daily view)
- Daily View – see supply and demand orders

Benefits

- Easier view of inventory position and suggested action
- Drill down to details to determine daily inventory position

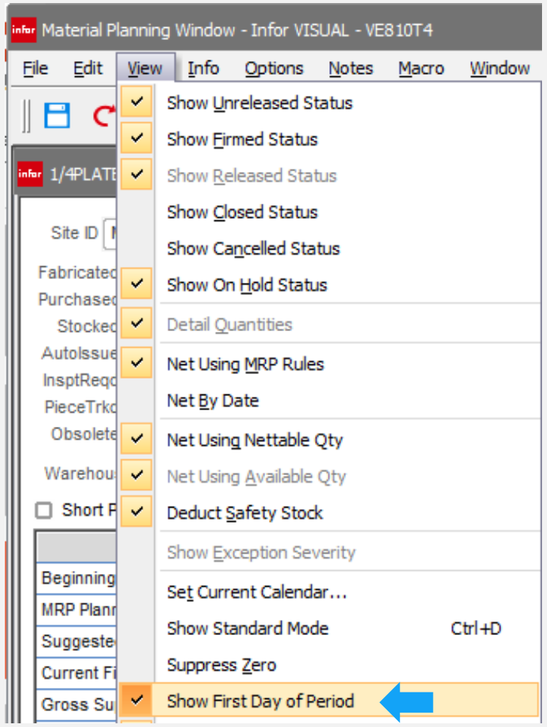


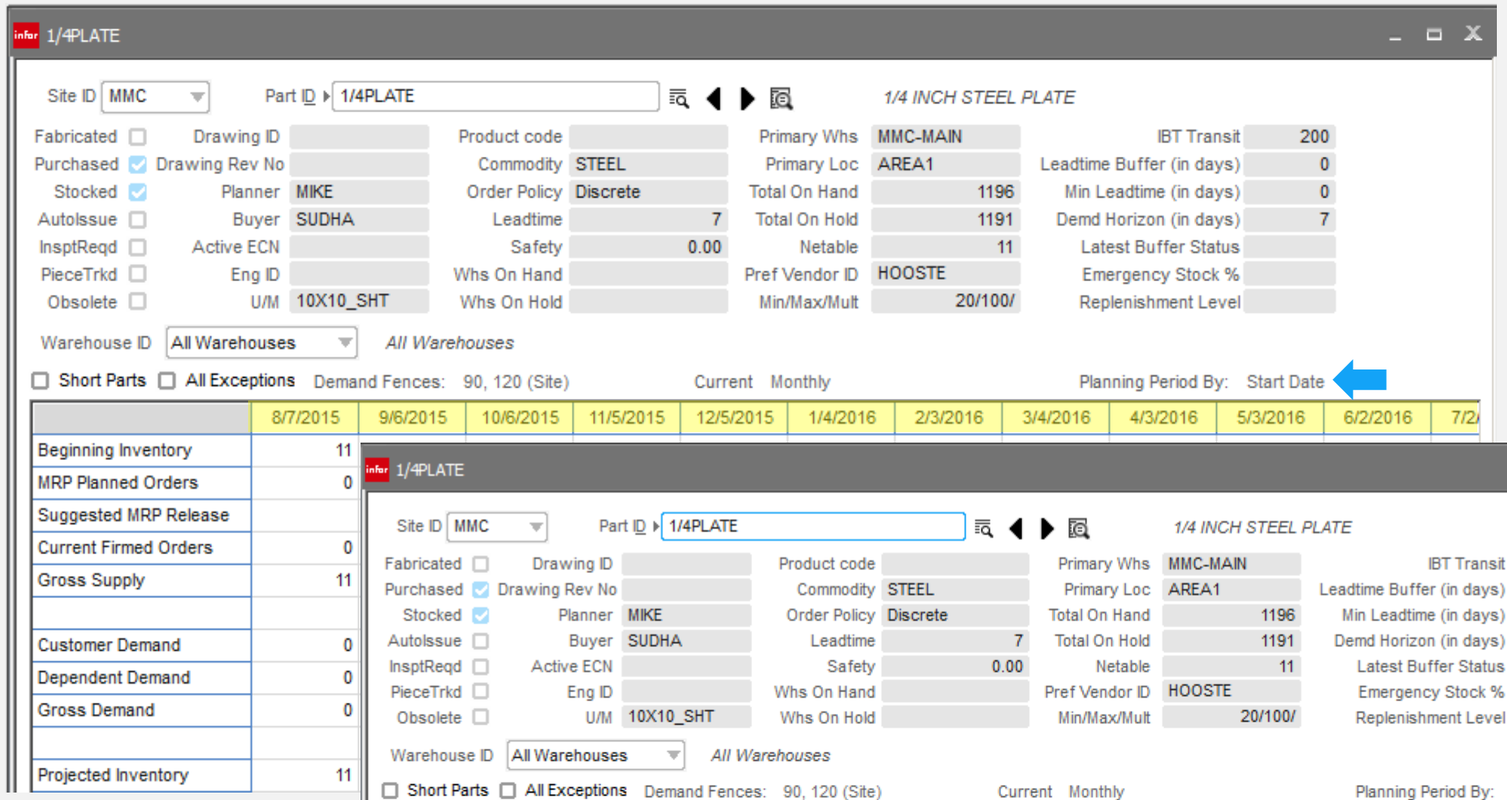
Advanced Planning

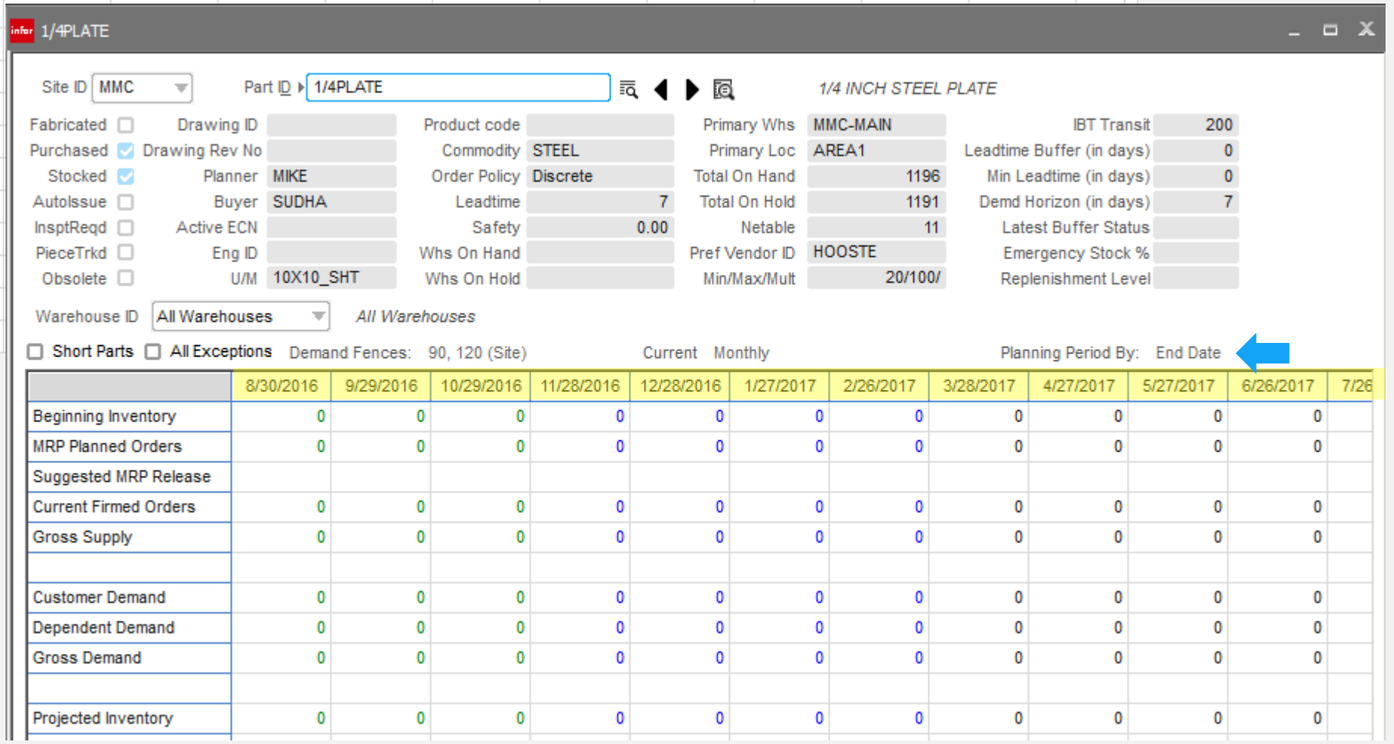
Date view

Feature

You now have the ability to change the planning bucket date to represent either the beginning or end of period.







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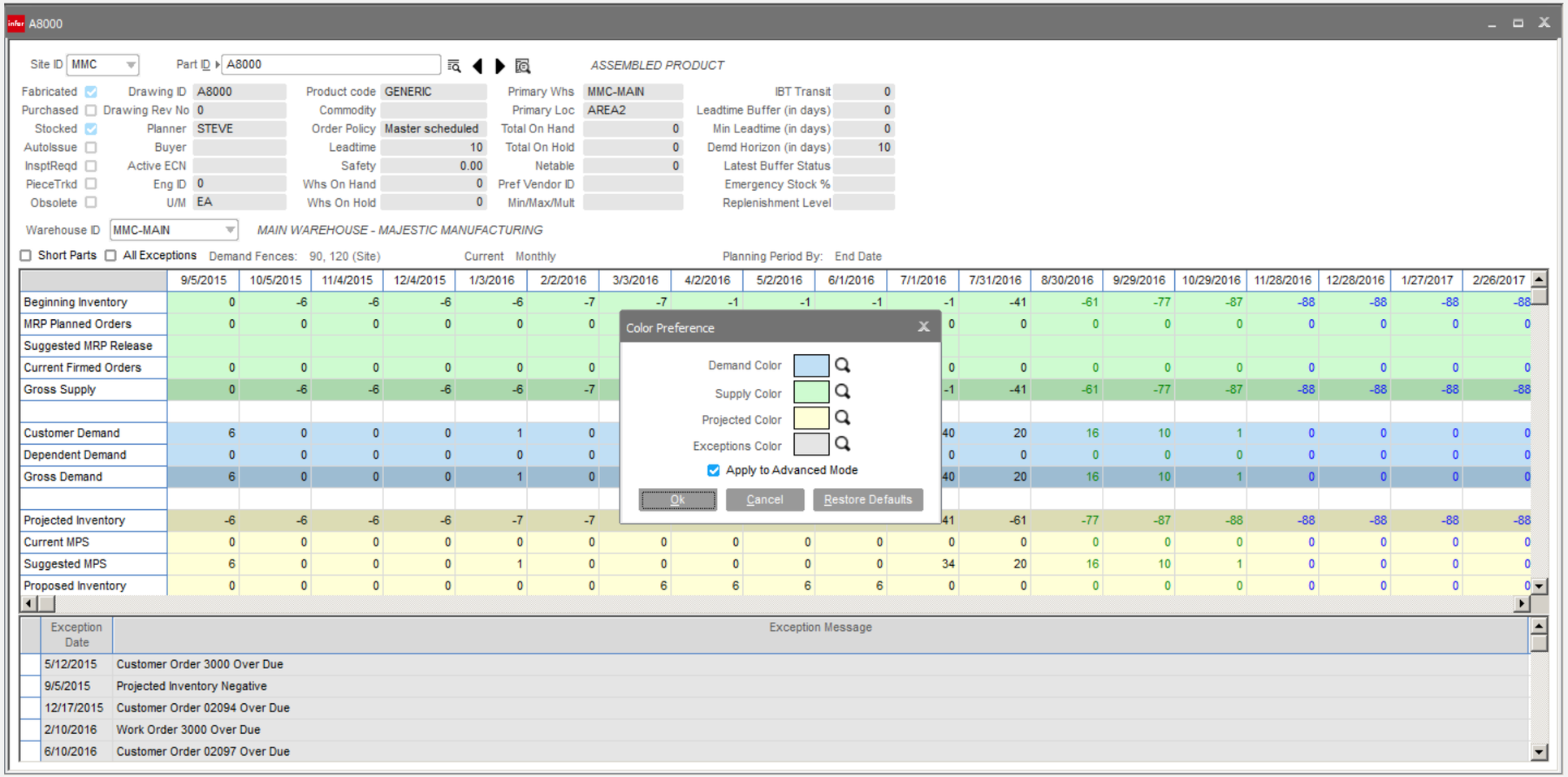
Advanced Planning

Color separation – Apply to advanced mode

Feature

In addition to the new layout that clearly represents demand, supply, and inventory projections, color separation has been added to this mode of operation



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Advanced Planning

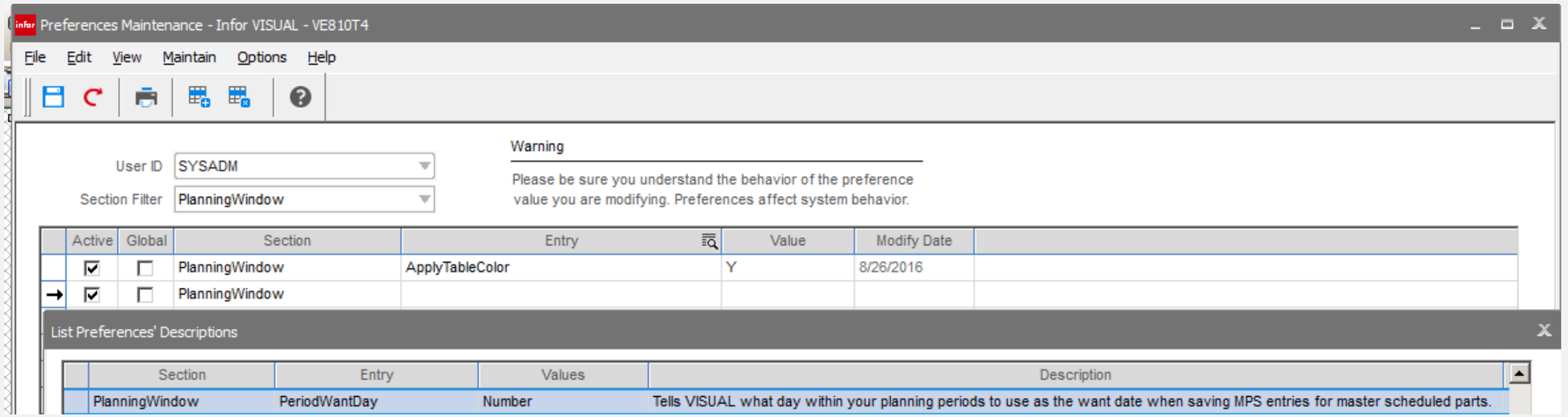
MPS Want Date

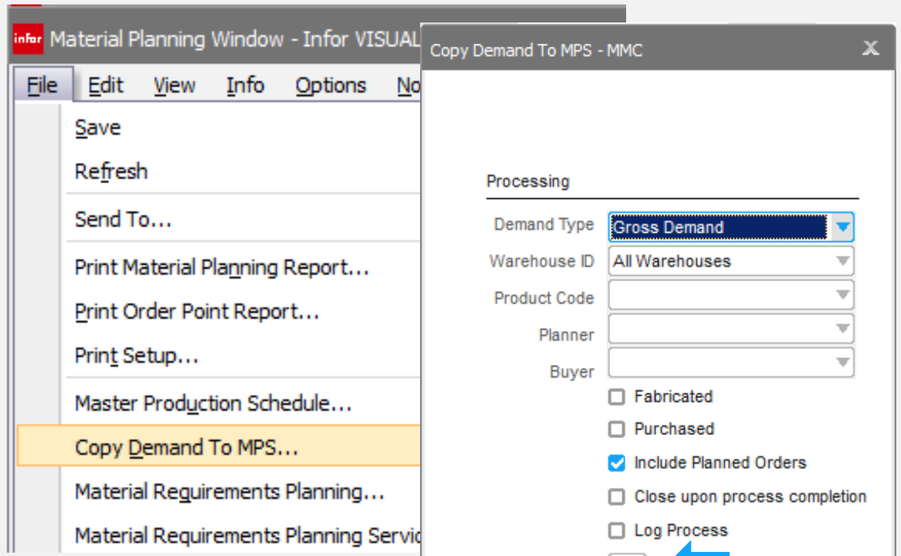
Feature

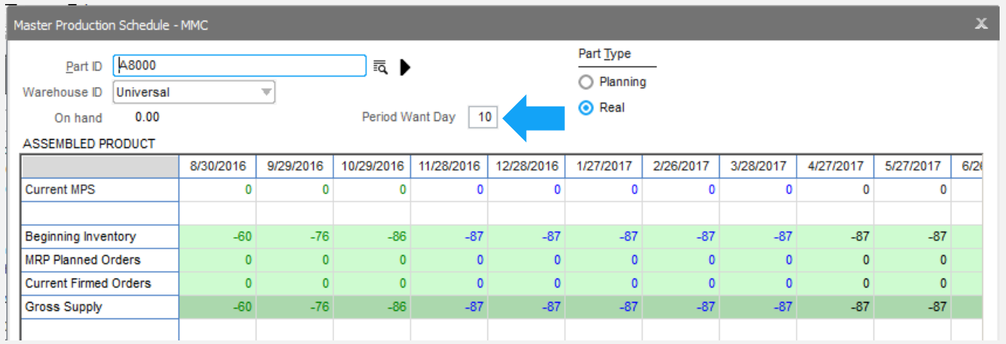
Added preference setting to retain the number of days from period start to set the master production schedule want date.

Benefits

- User no longer needs to re-enter this value when creating or copying to MPS
- Reduces planning want date errors







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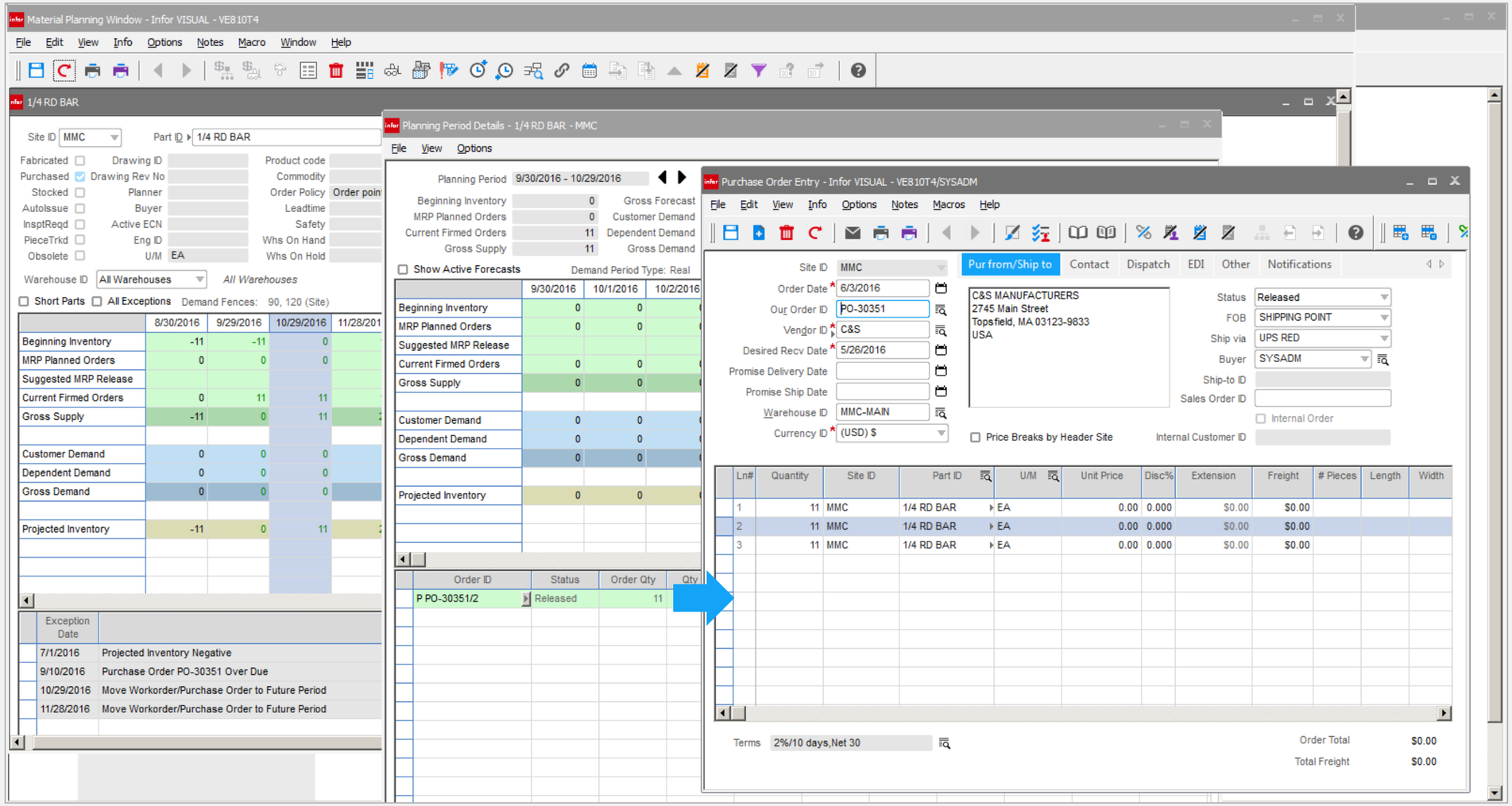
Advanced Planning

Drill-to Demand / Supply line

Feature

Drill-to from the new planning detail screen highlights the line on the demand / supply order.



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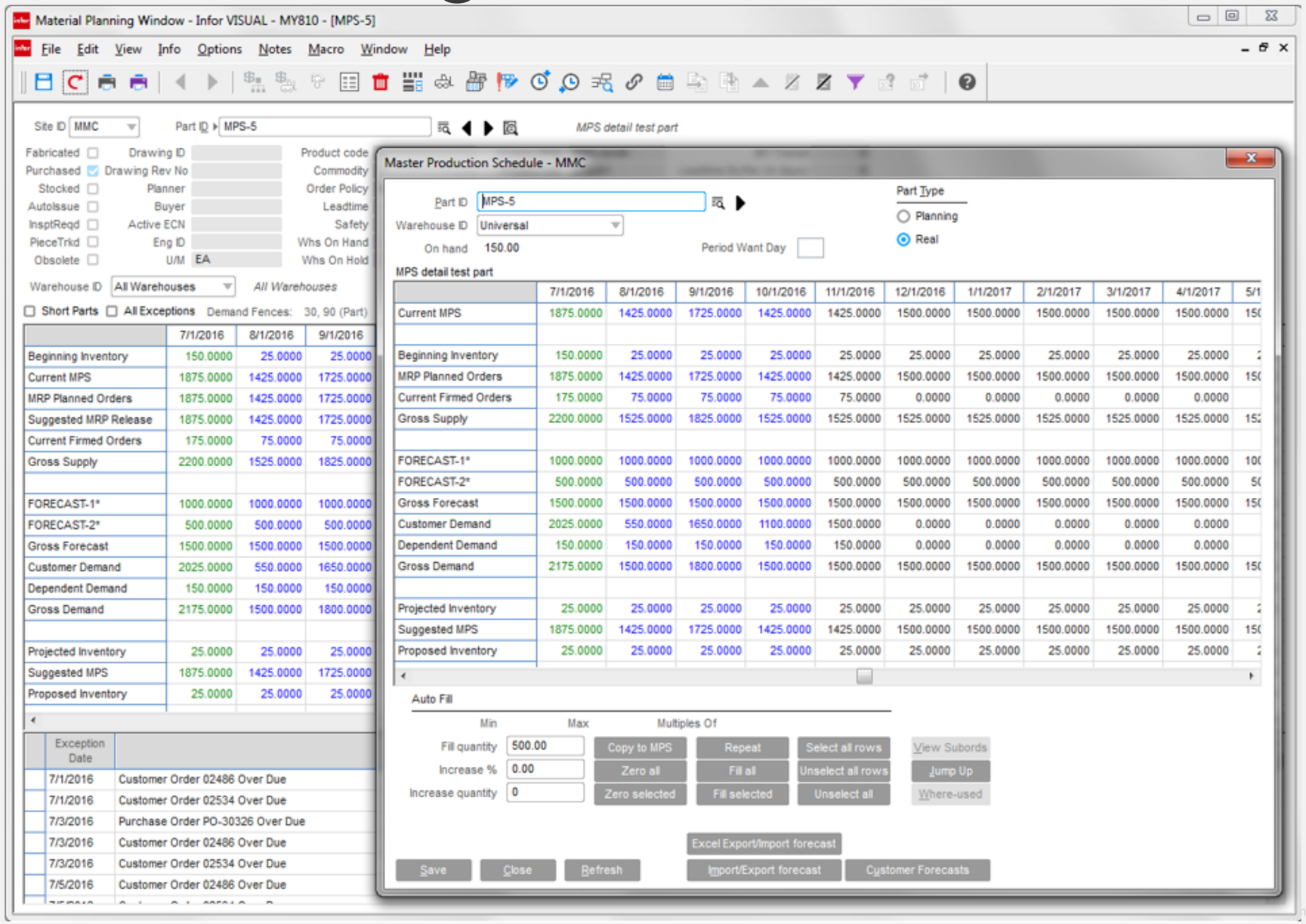
Master Scheduling

Feature

- New screen layout

Benefits

- Increase visibility of supply, demand and projections
- Now able to cross reference with Advanced Planning screen.



Material Planning Window

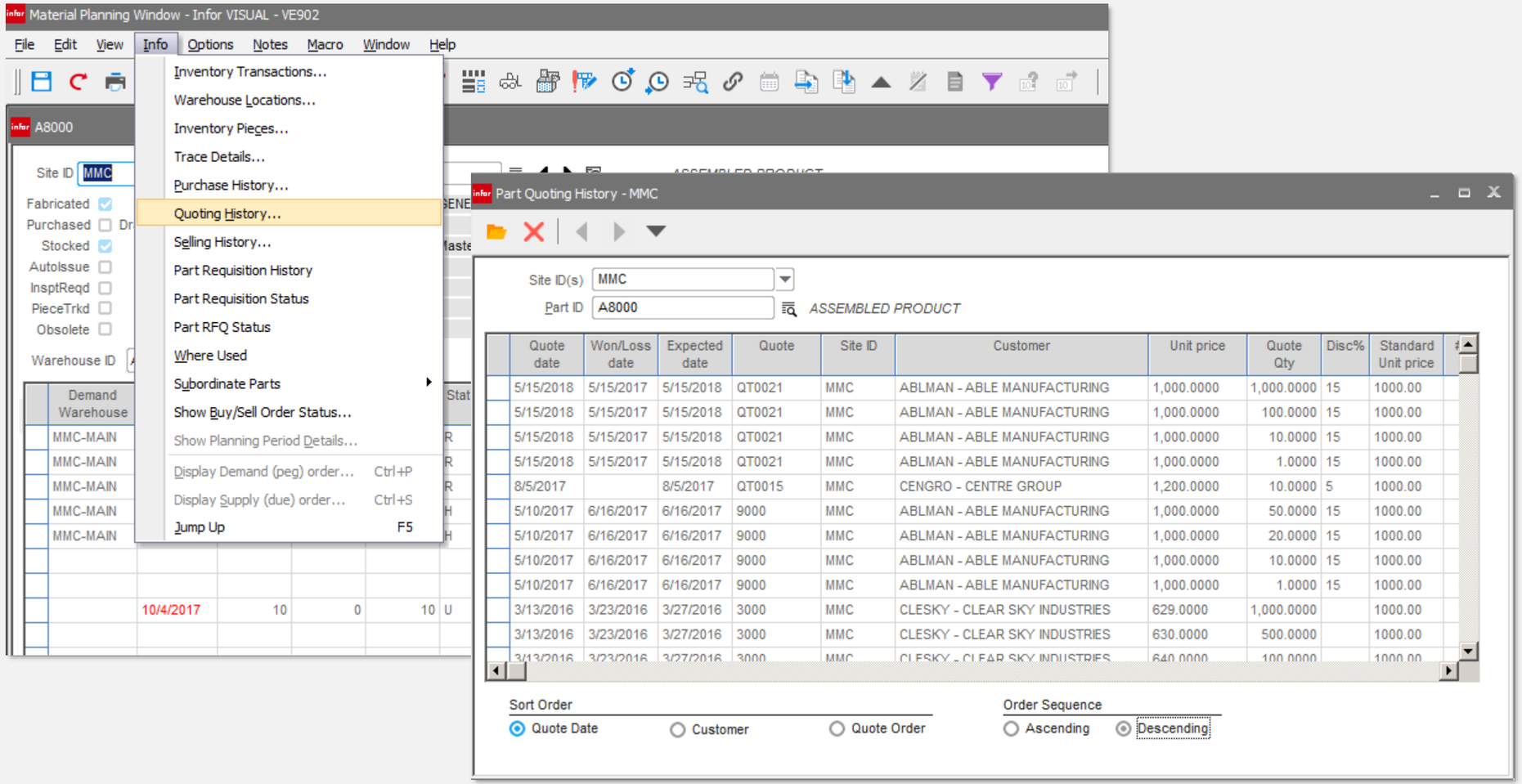
Quote History

Feature

Add the quoting history lookup from the Estimating Window to planning

Benefit

Completes the quoting, selling, and purchase history view.



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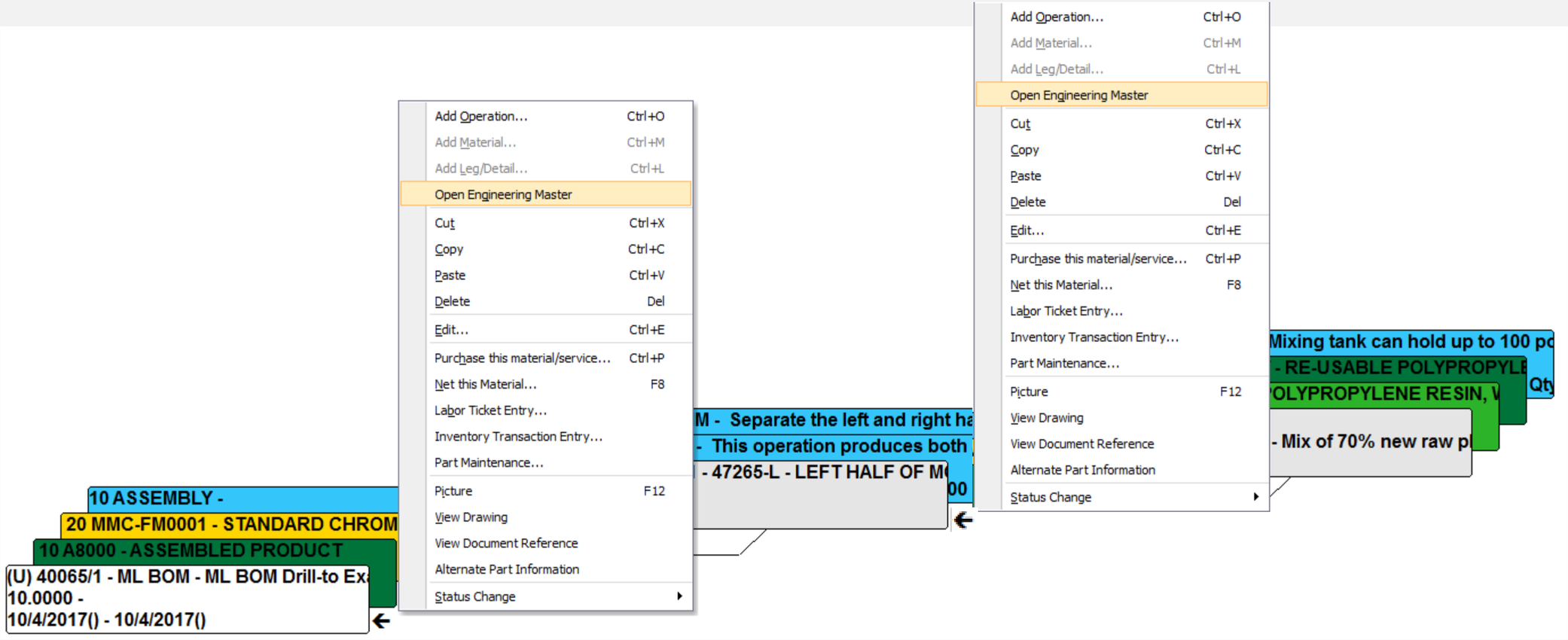
Drill-to EM from WO header or leg

Feature

You can now drill-to the engineering master of a item listed in the header or sub-id card on a WO

Benefit

Allows you to quickly compare the top level item or leg to the current engineering master without having to cut and paste item ID into new window.



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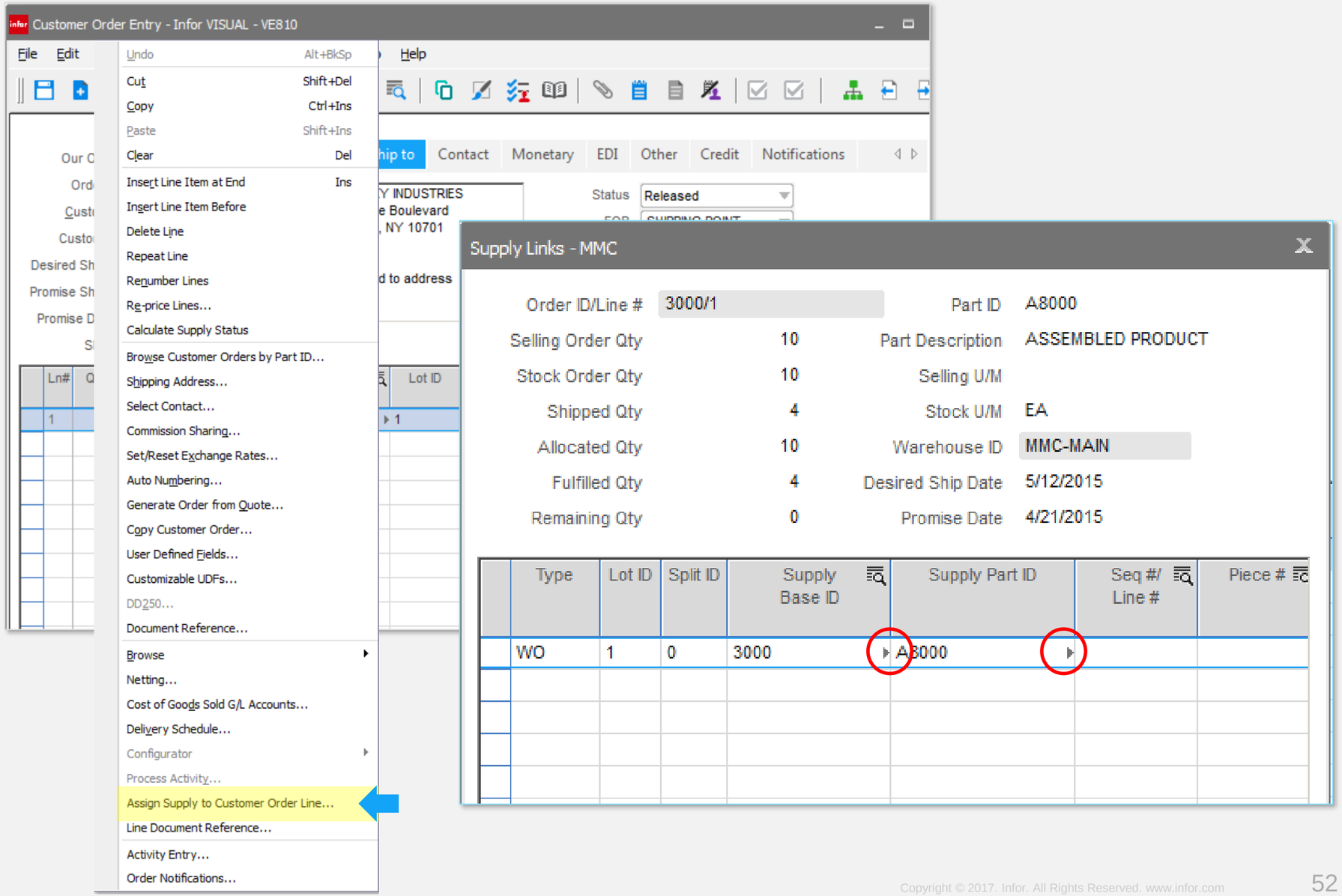
Material Allocation Drill-to

Feature

The material allocation (demand/supply link) dialog, which is accessible from a number of VISUAL windows, now has drill-to detail functionality.

Benefits

Continues to improve ease-of-use for increased productivity



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Item create & modify date

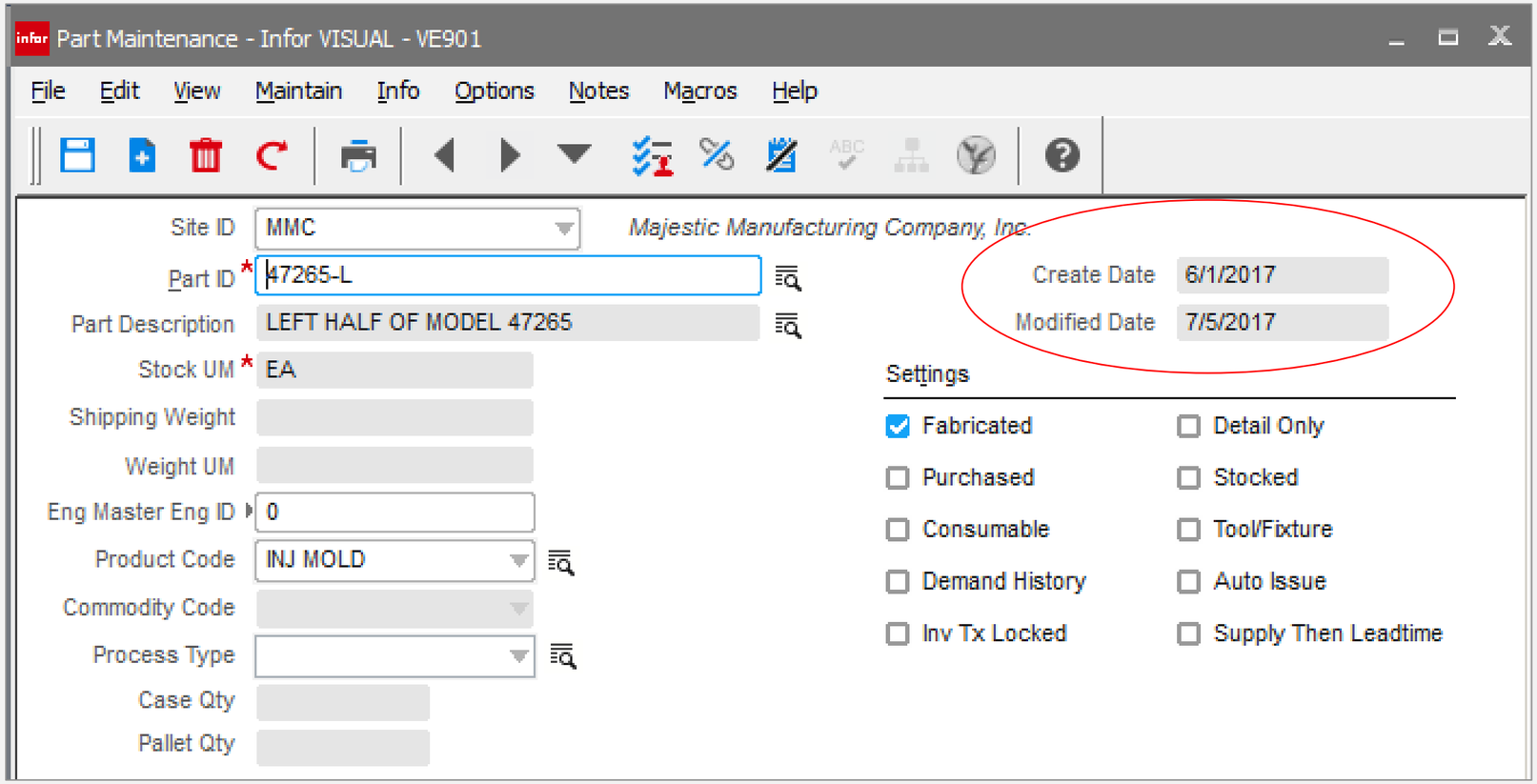
Feature:

Added create and modify date to the part site records

Benefits:

Can quickly determine when an item was entered for a site and when it was last updated.

Note: To capture further change details you should turn on auditing for these tables



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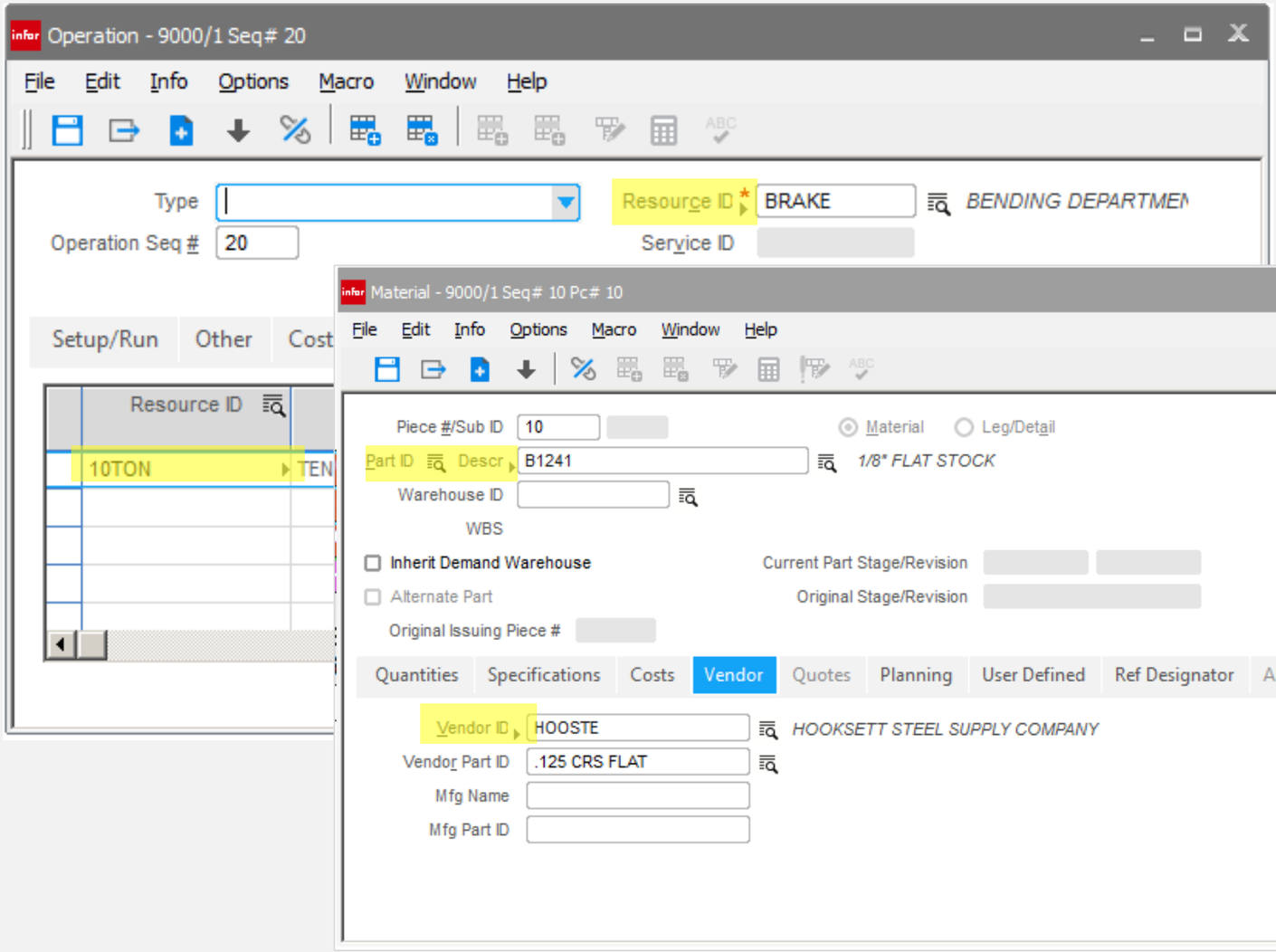
Manufacturing Window – drill-to

Feature:

Added increased drill-to functionality in the Manufacturing Window

Benefits:

Provides easy access to related master files and documents for increased productivity



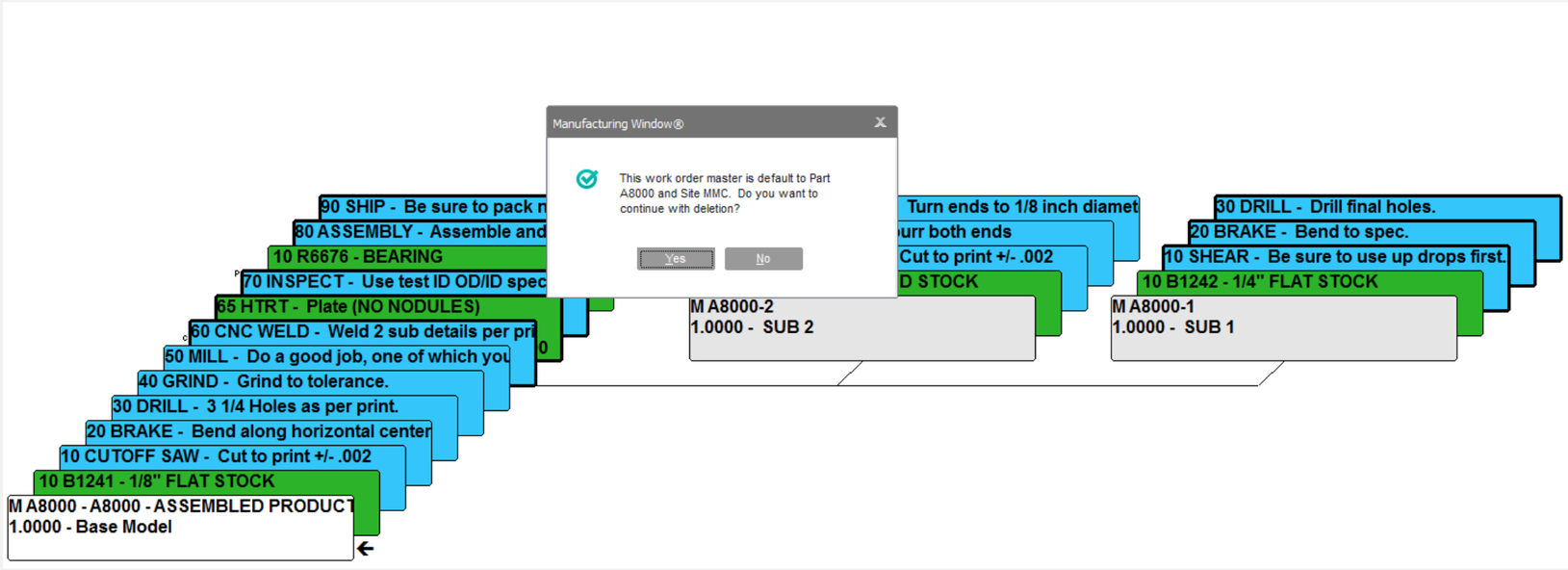
Manufacturing Window – Delete Warning

Feature:

Added warning when deleting and Engineering Master that is the current default Engineering Master for the item.

Benefits:

Prevents mistakenly deleting the wrong Engineering Master



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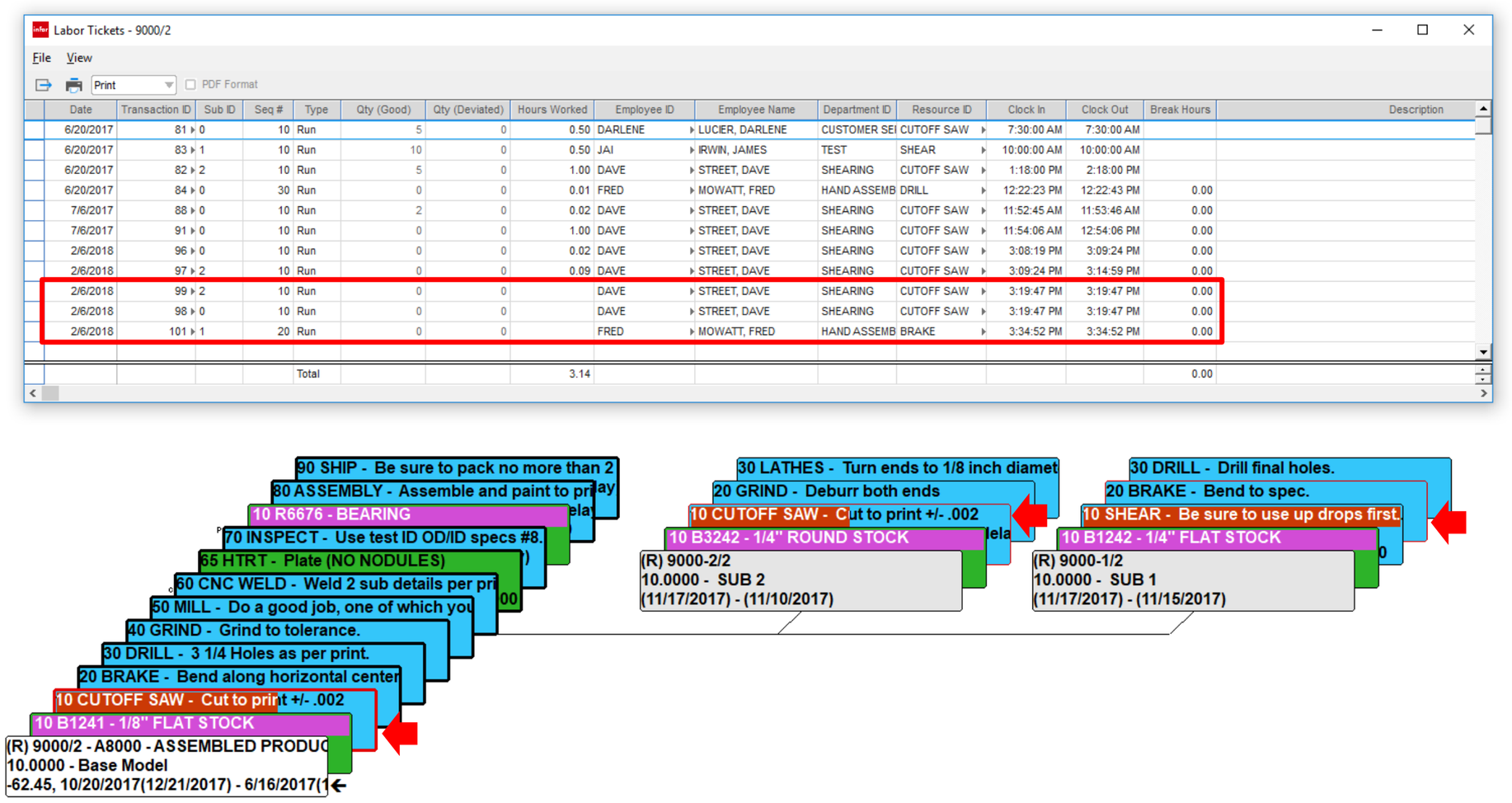
Manufacturing Window

Feature

Show in-process labor tickets

Benefit

Adds additional visual WO status indicators, answering the question, “who is working this job”, with further drill-down to the labor details



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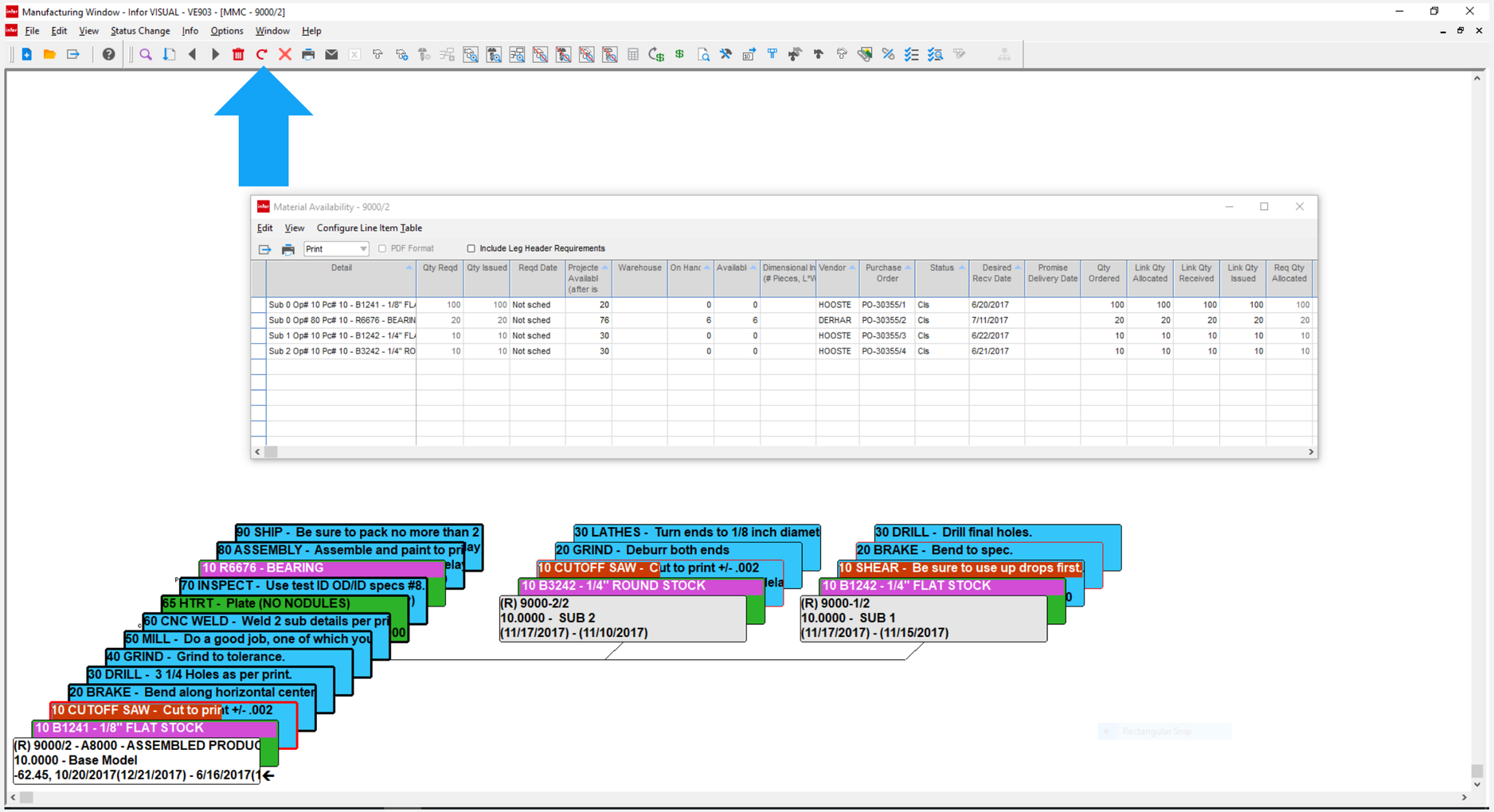
Material Availability Refresh

Feature

You can now refresh the material availability screen

Benefit

When editing long material lists users can now better gage where they are at in the ordering process by refreshing the screen



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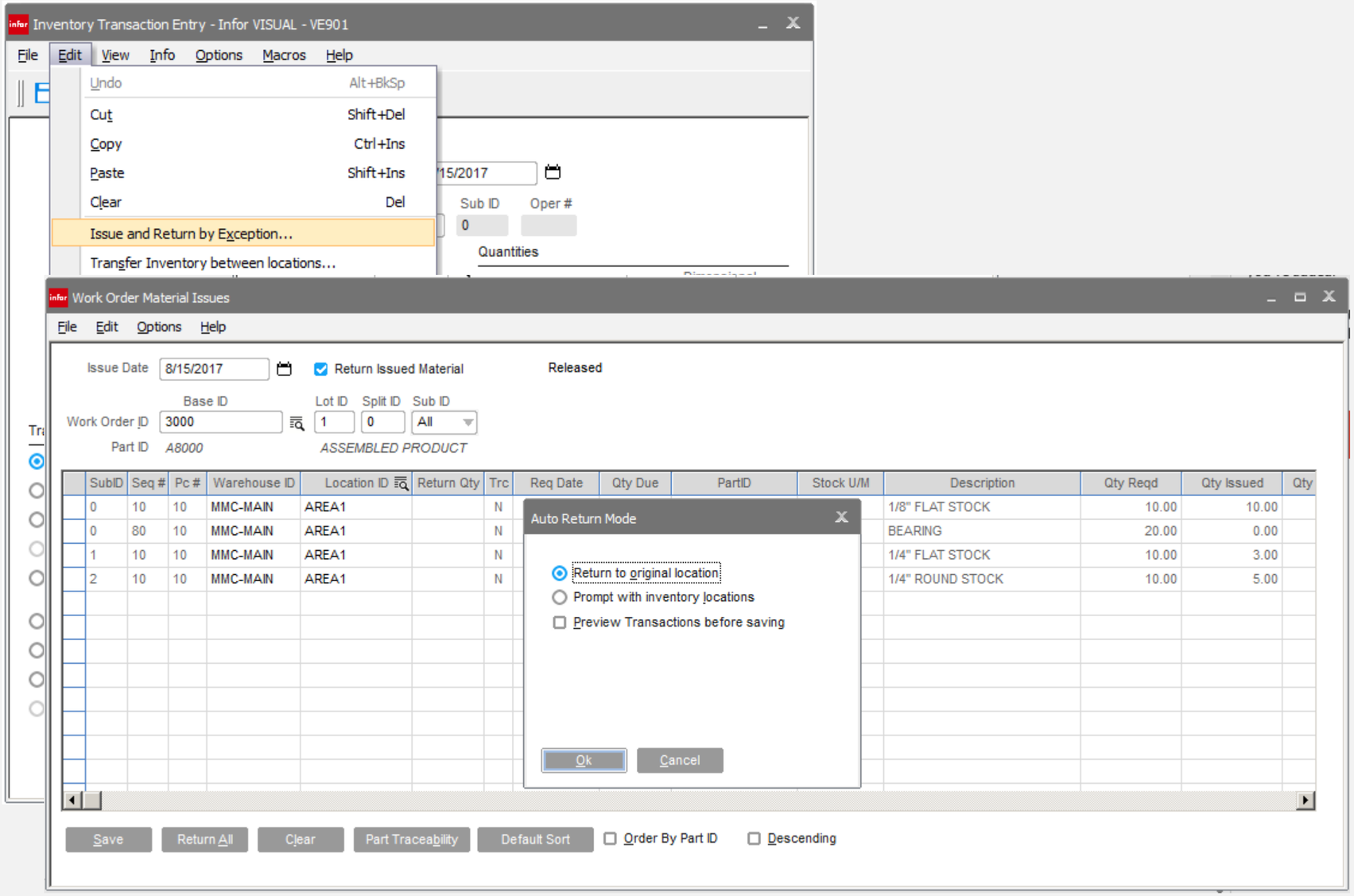
Automated Return of WO Material

Feature:

Mass inventory returns can be performed on work orders

Benefits:

- Allows for quick return of material on cancelled, delayed or mistakenly issued work orders increasing overall efficiency.



Utilities & Administration

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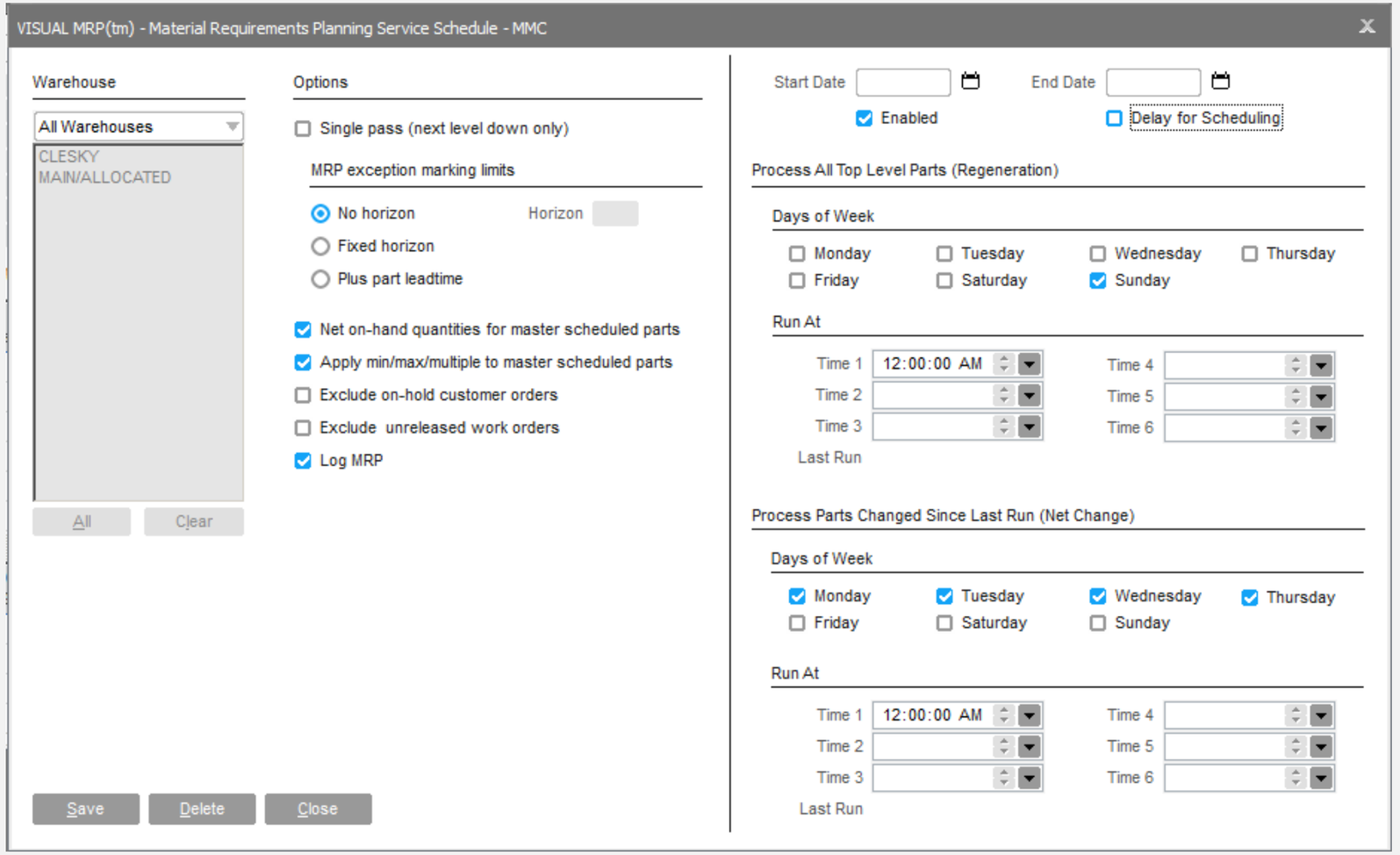
AutoRun Service - MRP

Feature

- Ability to setup net-change and full regen plan

Benefits

- Allows for different run options based on day / time
- Reduces process times



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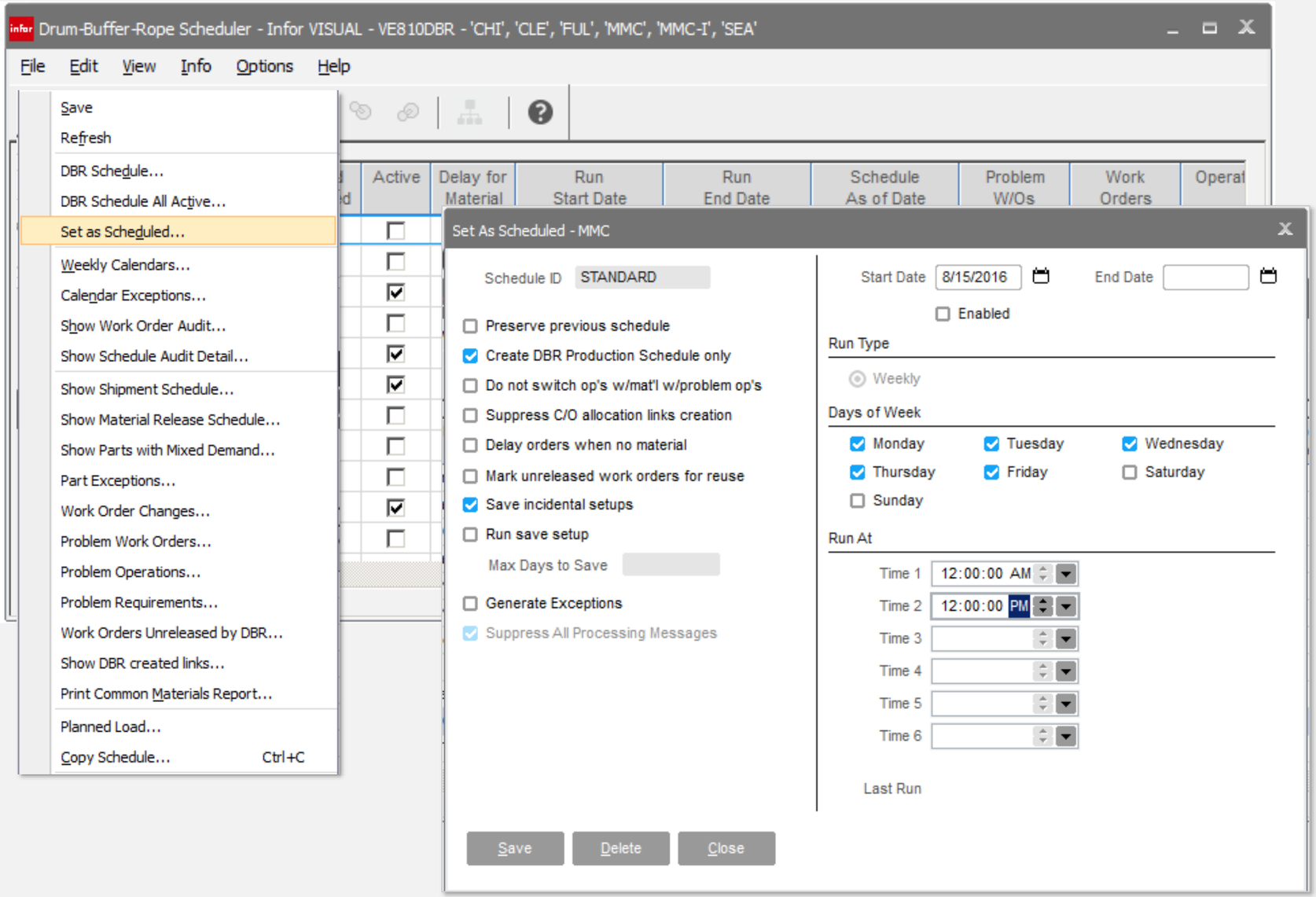
AutoRun Service - DBR

Feature

Add DBR scheduler to auto services

Benefit:

Hands off running of the scheduler as required



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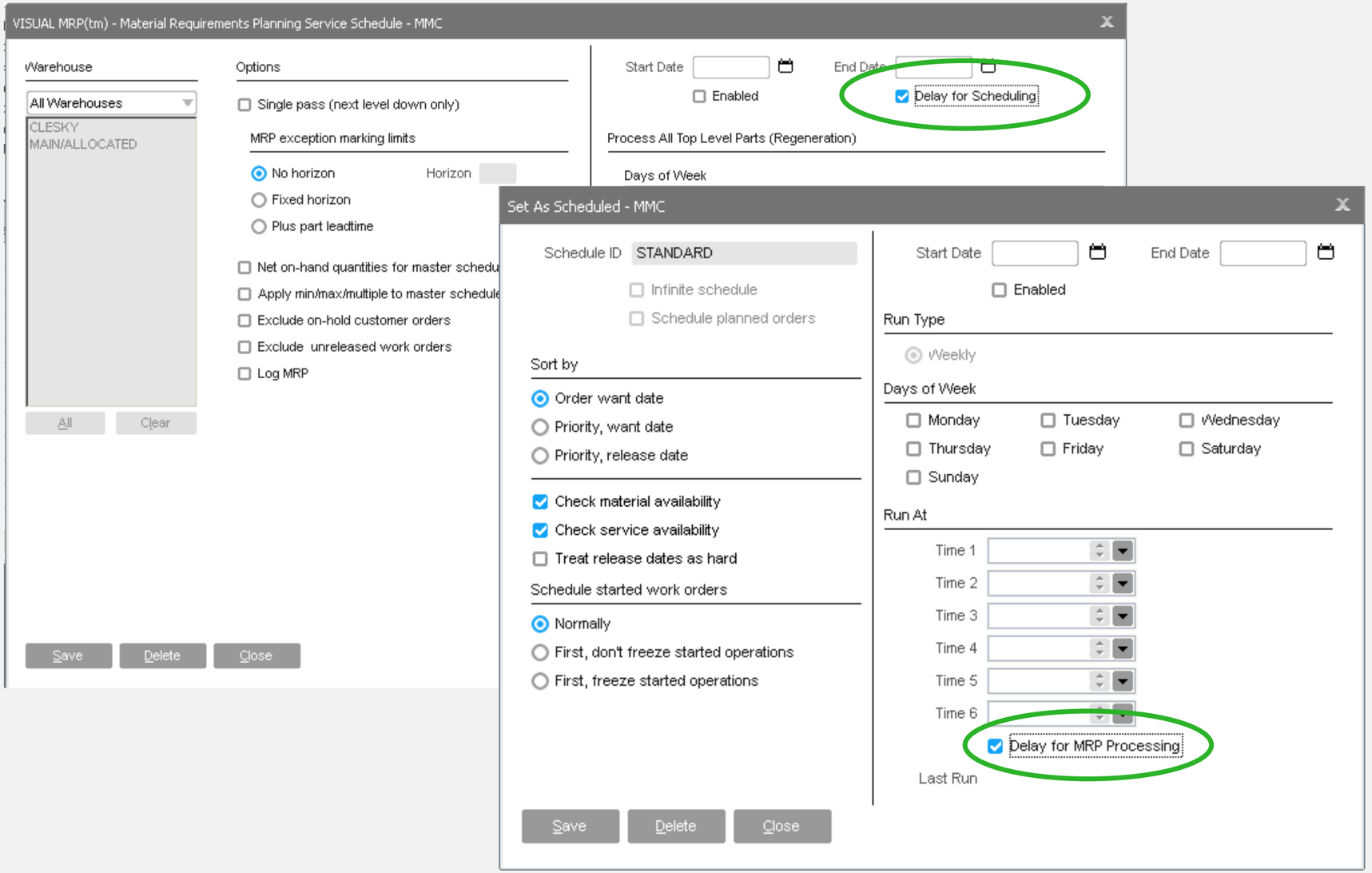
AutoRun Service

Feature:

Add delay for scheduling / MRP option so that one finishes before the other begins.

Benefit:

Assures that the information is as accurate as possible prior to the second solution running.



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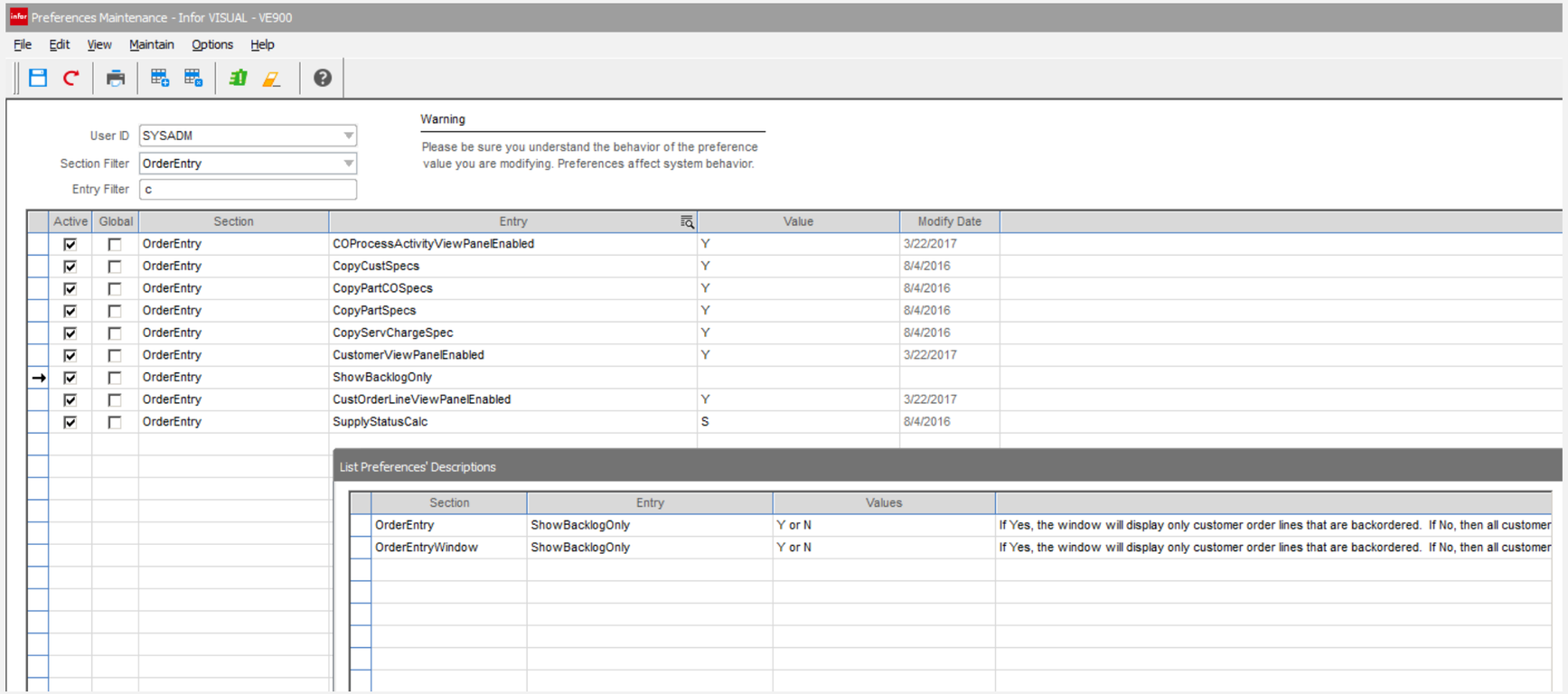
Preference Maintenance

Features

- An Active column in the main grid
- A Global column in the main grid, only visible for a User ID of ** Tenant **
- A Section Filter combo box
- A multi-line text control to display preference descriptions
- Section value can be used when searching in the preference list
- Ignore warning preferences for invalid section and entry values
- Color feedback for global and default values



Benefits

- Increased control and visibility over settings
- Global settings override all user settings
- All INI settings now stored in database

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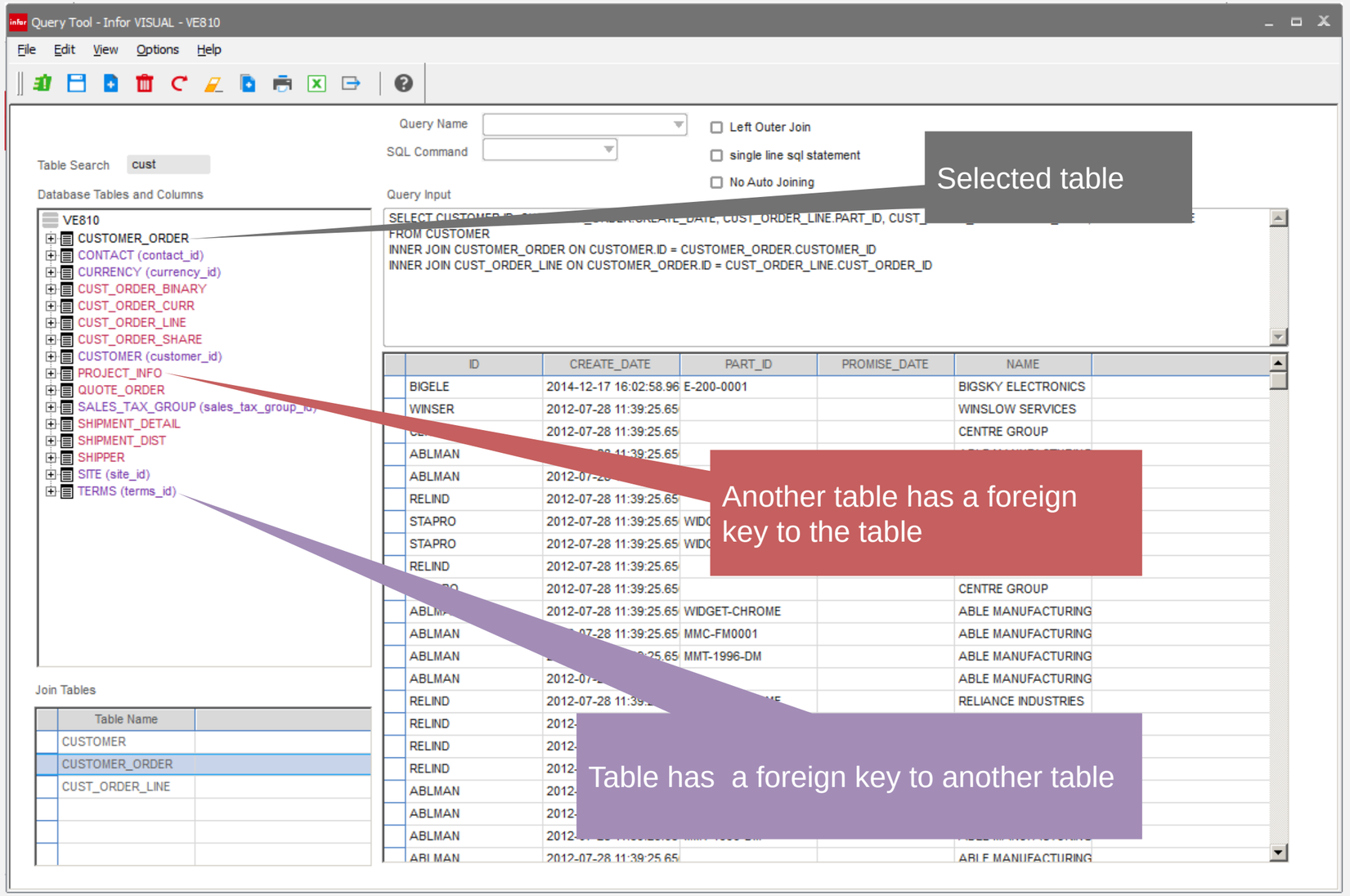
Query Tool enhancements

Features

- Shows table relationships
- Automatically joins tables
- Select columns from tables selected
- Complete drag & drop
- Hand modify query as required (turn auto joining off)

Benefits

- Assists in learning the database schema
- Assists in learning basic SQL
- Automatically joins the tables selected
- Deploy created queries to user toolbar



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Query Tool

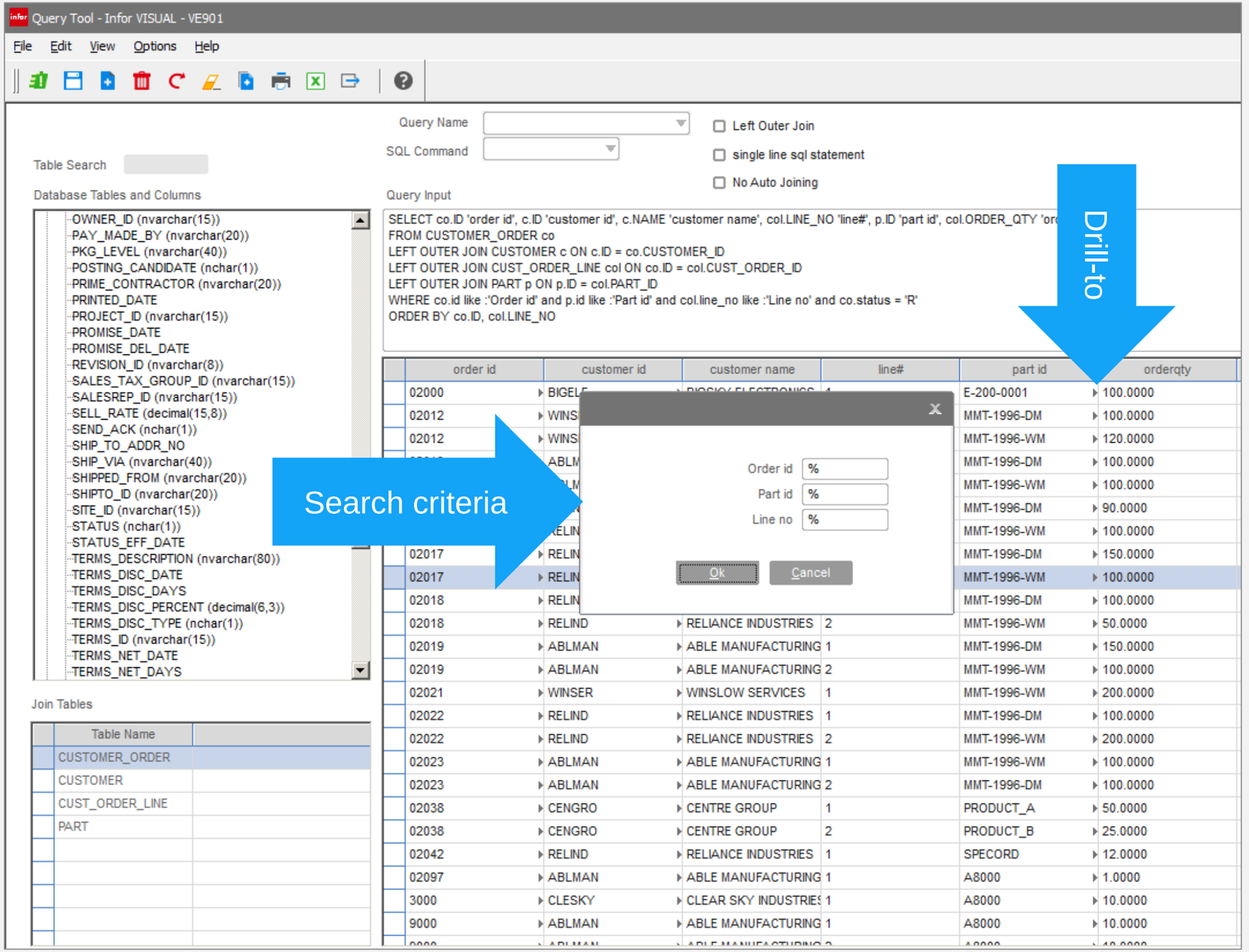
Feature:

Added query search criteria and grid drill-to functionality to the query tool.

Benefits:

- End user of the query are now able to filter based on the selection criteria

- Can drill down to detailed documents and master files for further information



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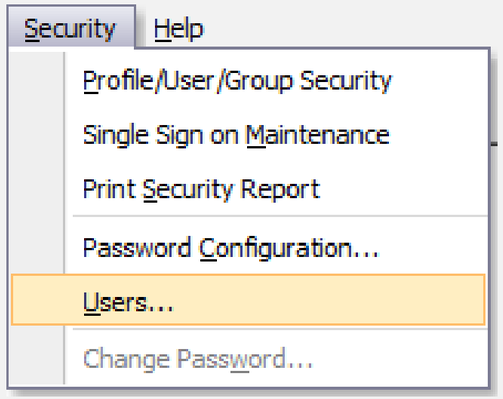
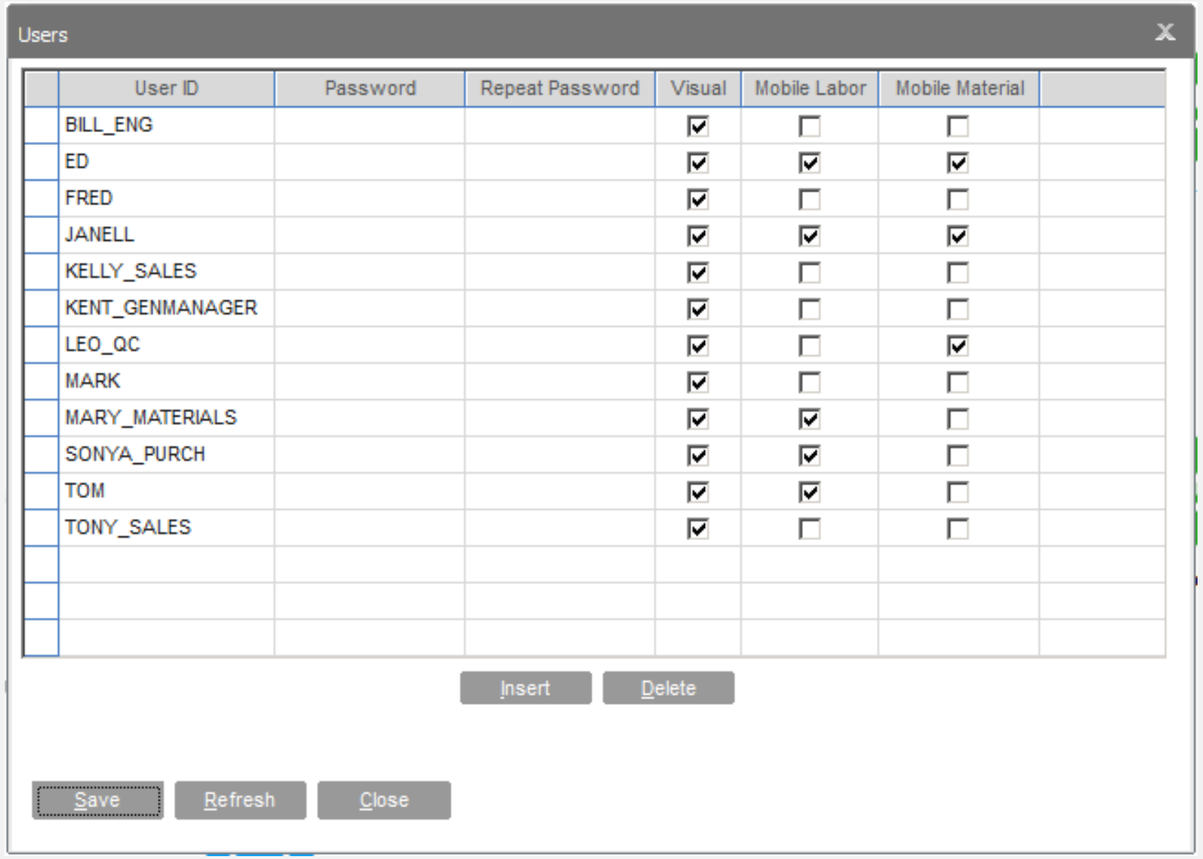
Add Users

Feature

- New layout
- Column appears to assign users to VISUAL modules





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Sales

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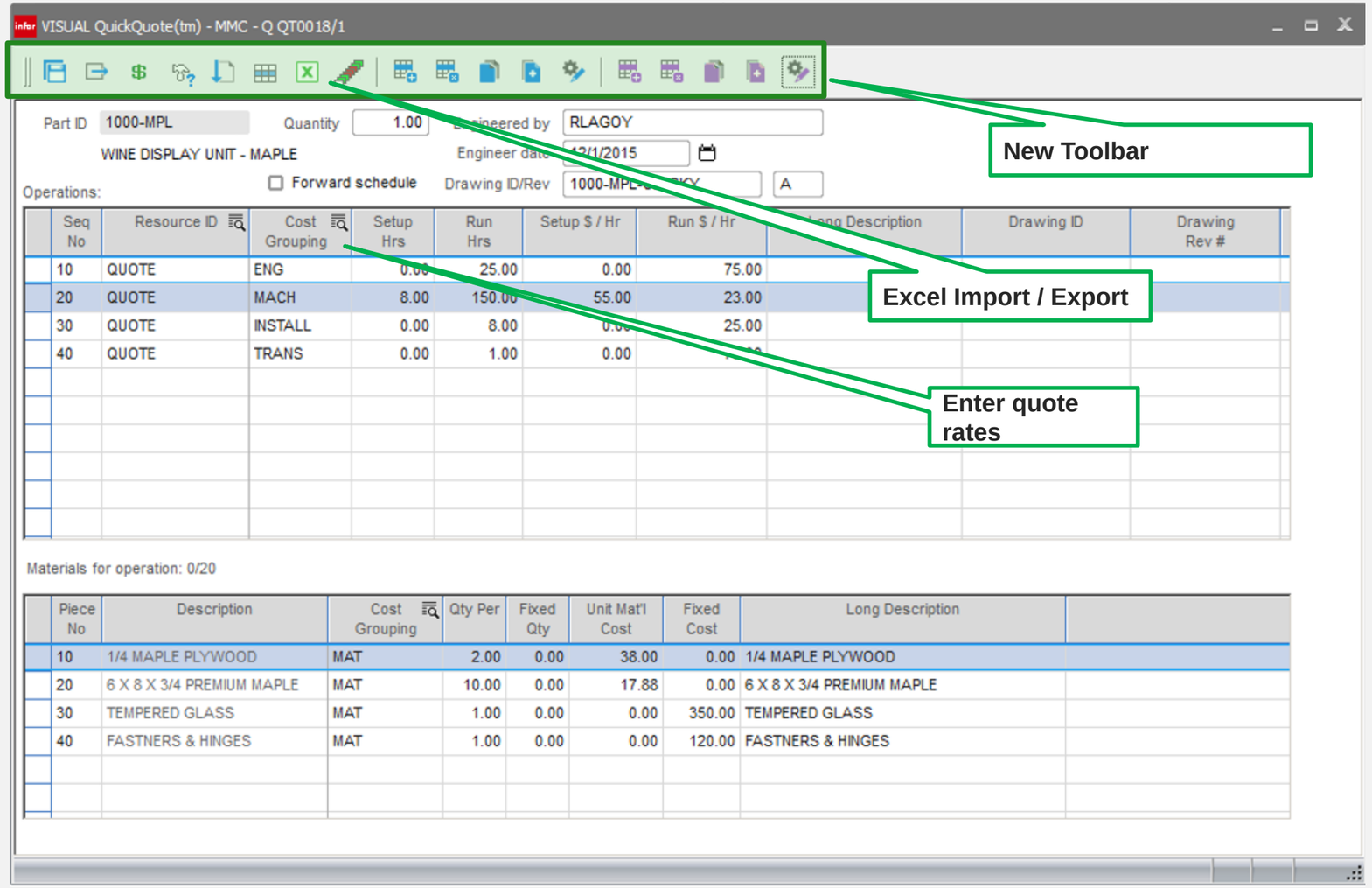
Quick Quote

Features

- New layout
- Assign bid rates to resources
- Import / Export to Excel
- Drill to source Excel
- Drill to Quote master icon

Benefits

- Companies that use Excel as a quoting tool can now import into VISUAL for quote / budget comparison.
- Compare budget to cost using bid rate categories
- Measure performance – budget to actual



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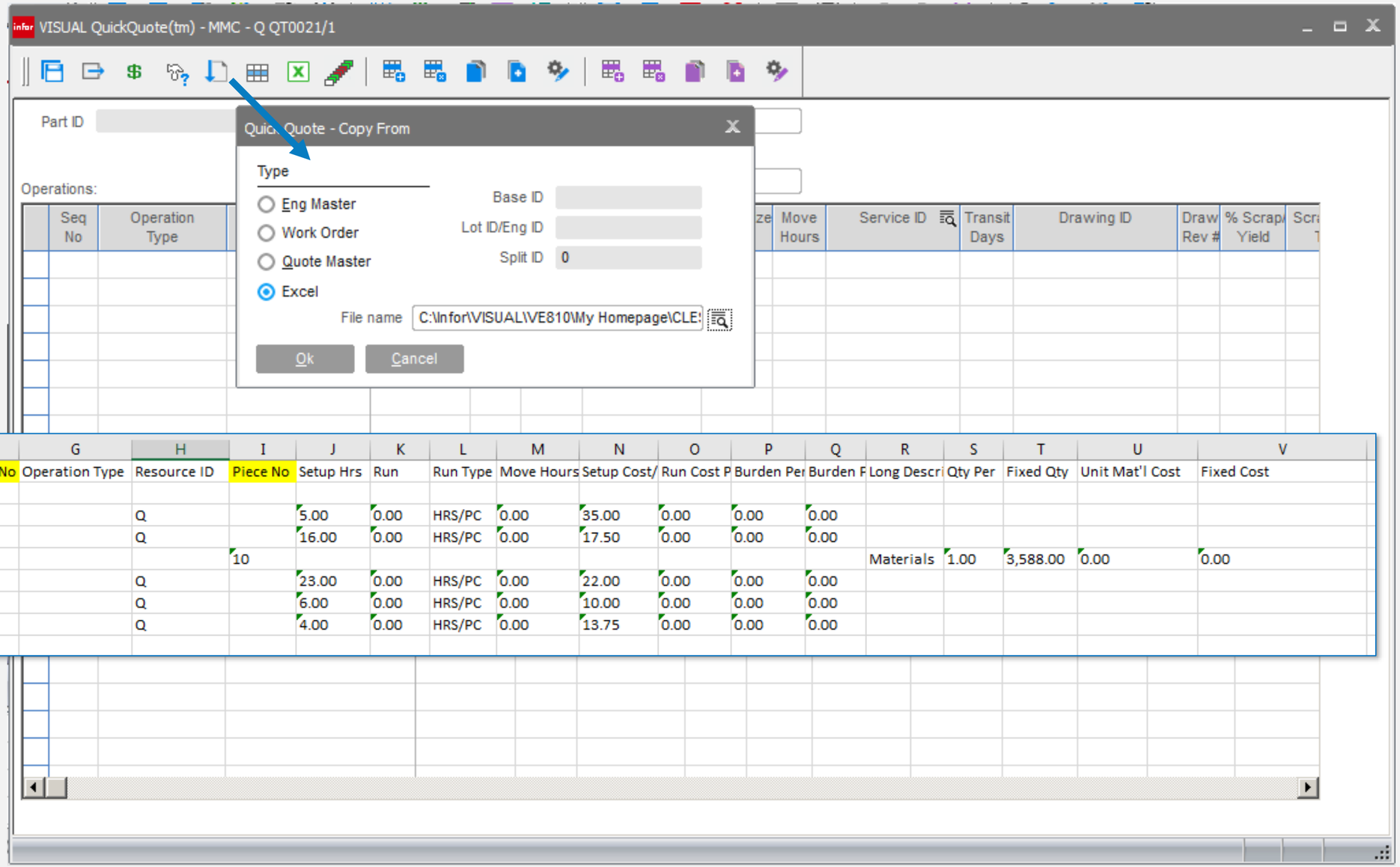
Quick Quote
Import Template

Steps

- Add quote header
- Add line with one quantity
- Import Excel



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	W/O Sub ID	Part ID	Quantities qu	Prices quote	Pieces	Seq No	Operation Type	Resource ID	Piece No	Setup Hrs	Run	Run Type	Move Hours	Setup Cost/	Run Cost P	Burden Per	Burden F	Long Descri	Qty Per	Fixed Qty	Unit Mat'l Cost	Fixed Cost
2			1;10;100	2500;2300;2100																		
3						10		Q		5.00	0.00	HRS/PC	0.00	35.00	0.00	0.00	0.00					
4						20		Q		16.00	0.00	HRS/PC	0.00	17.50	0.00	0.00	0.00					
5						20			10									Materials	1.00	3,588.00	0.00	0.00
6						30		Q		23.00	0.00	HRS/PC	0.00	22.00	0.00	0.00	0.00					
7						40		Q		6.00	0.00	HRS/PC	0.00	10.00	0.00	0.00	0.00					
8						50		Q		4.00	0.00	HRS/PC	0.00	13.75	0.00	0.00	0.00					
9																						

Required operation & material columns

Required price & quantity columns

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Estimating Window

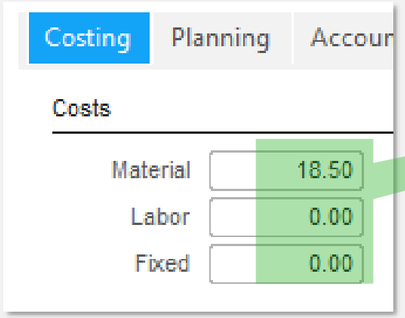
Features

When quoting by part allow price to be based on preferred vendor pricing

Benefits

Allows you to more accurately determine your selling price and margin based on your cost rather than standard cost

Standard Cost



Preferred vendor pricing

AMTSGASKET	Quantity	Price
Up To 1	1.00	17.5000
Up To 2	20.00	17.0000
Up To 3	100.00	16.8600
Up To 4	200.00	15.8000
Up To 5		

Quote Costs - QT0022/1 - AMTSGASKET

Category	1.00	25.00	200.00
Material	18.50	462.50	3,700.00
Labor	0.00	0.00	0.00
Burden	0.00	0.00	0.00
Service	0.00	0.00	0.00
Total cost	18.50	462.50	3,700.00
Unit cost	18.50	18.50	18.50
Total price	45.00	1,025.00	5,000.00
Unit price	45.00	41.00	25.00

Quote Costs - QT0022/1 - AMTSGASKET

Category	1.00	25.00	200.00
Material	17.50	421.50	3,160.00
Labor	0.00	0.00	0.00
Burden	0.00	0.00	0.00
Service	0.00	0.00	0.00
Total cost	17.50	421.50	3,160.00
Unit cost	17.50	16.86	15.80
Total price	45.00	1,025.00	5,000.00
Unit price	45.00	41.00	25.00
Total Gross Margin	27.50	603.50	1,840.00
Unit Gross Margin	27.50	24.14	9.20
Total Net Margin	27.50	603.50	1,840.00
Unit Net Margin	27.50	24.14	9.20

Qtys 1-5 Qtys 6-10 Qtys 11-15 Qtys 16-20 Qtys 21-25

Close Recalc Use qty breaks on purchases during recalc

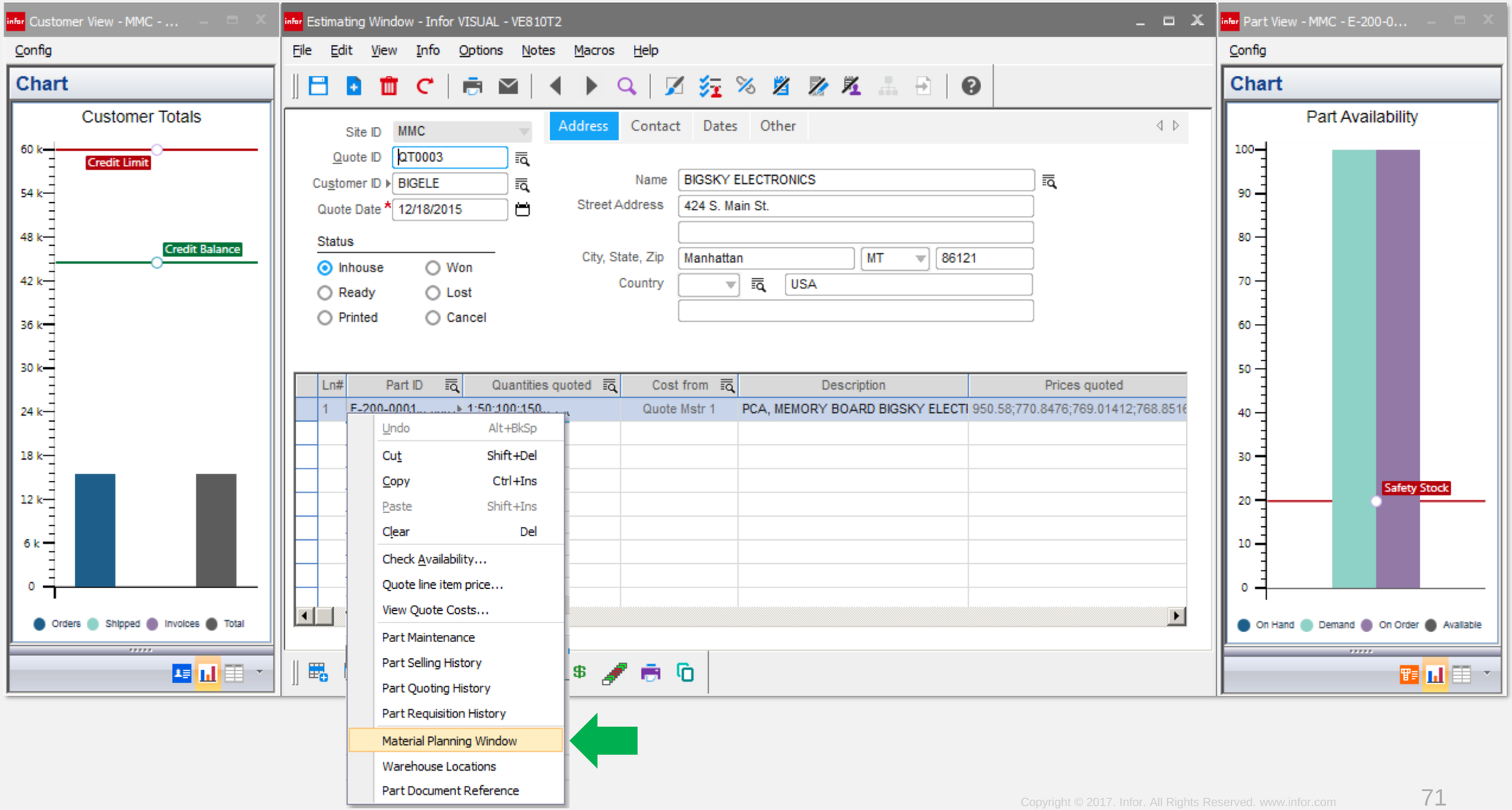
Estimating Window

Features

Add material planning link to the line item

Benefits

Quick access to the planning screen to check on detailed availability and status of supply orders



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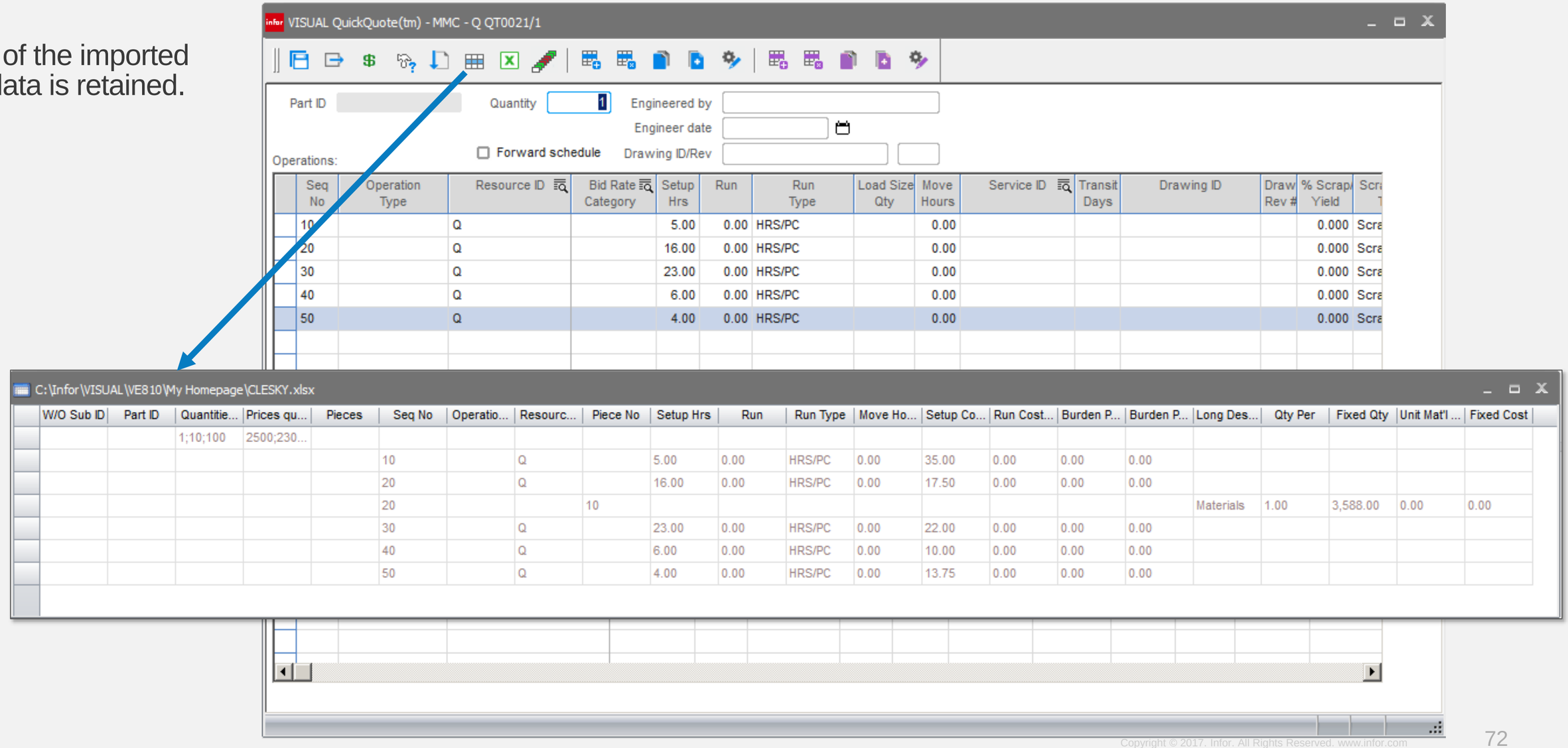
Quick Quote

View Excel import source

A copy of the imported Excel data is retained.



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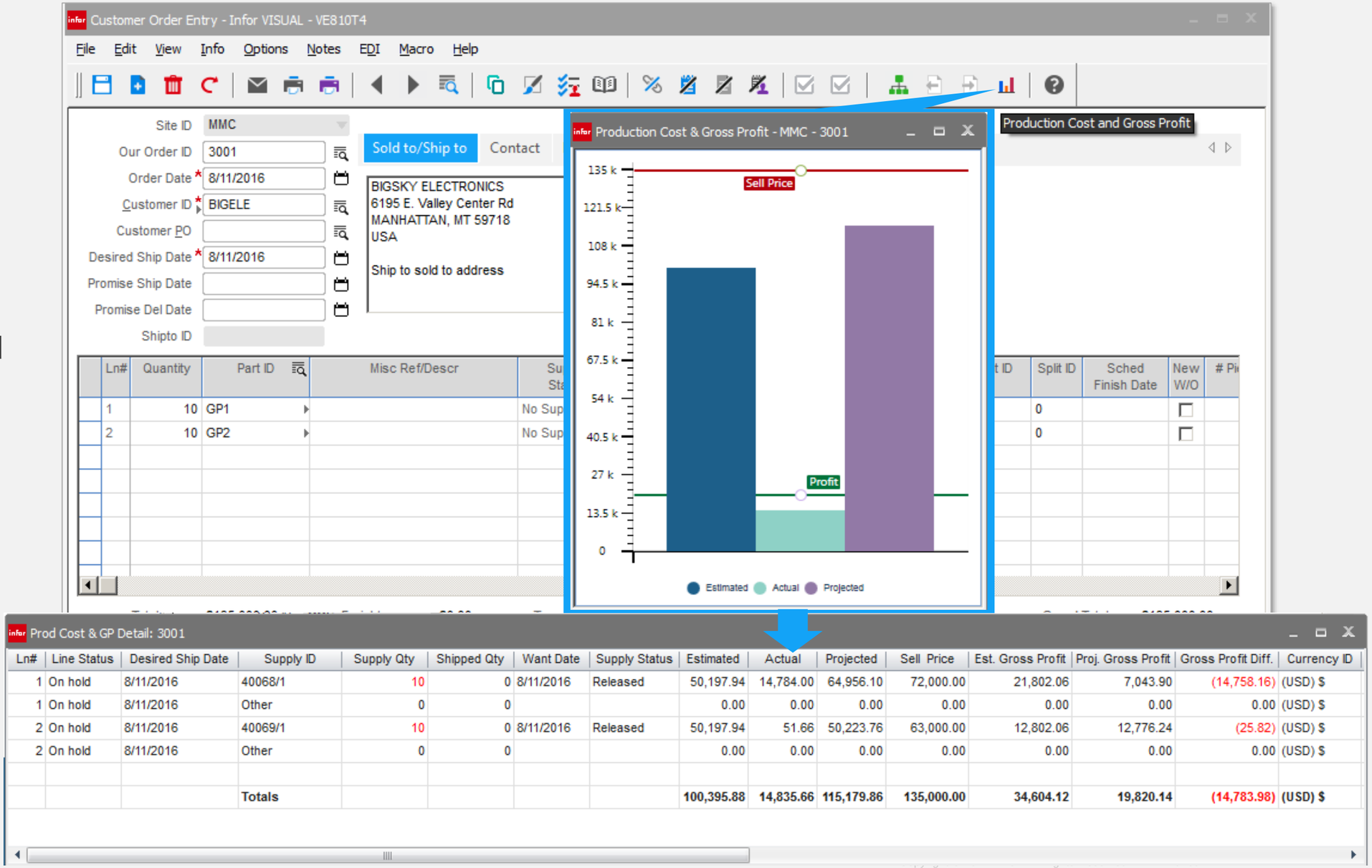
Sales Order Gross Profit View

Features

- Gross Profit view for entire sales order

Benefits

- Quickly determine estimated and projected (actual) gross profit for an entire sales order
- Visually see what lines are contributing most to profit margin
- Assists in pricing repeat orders



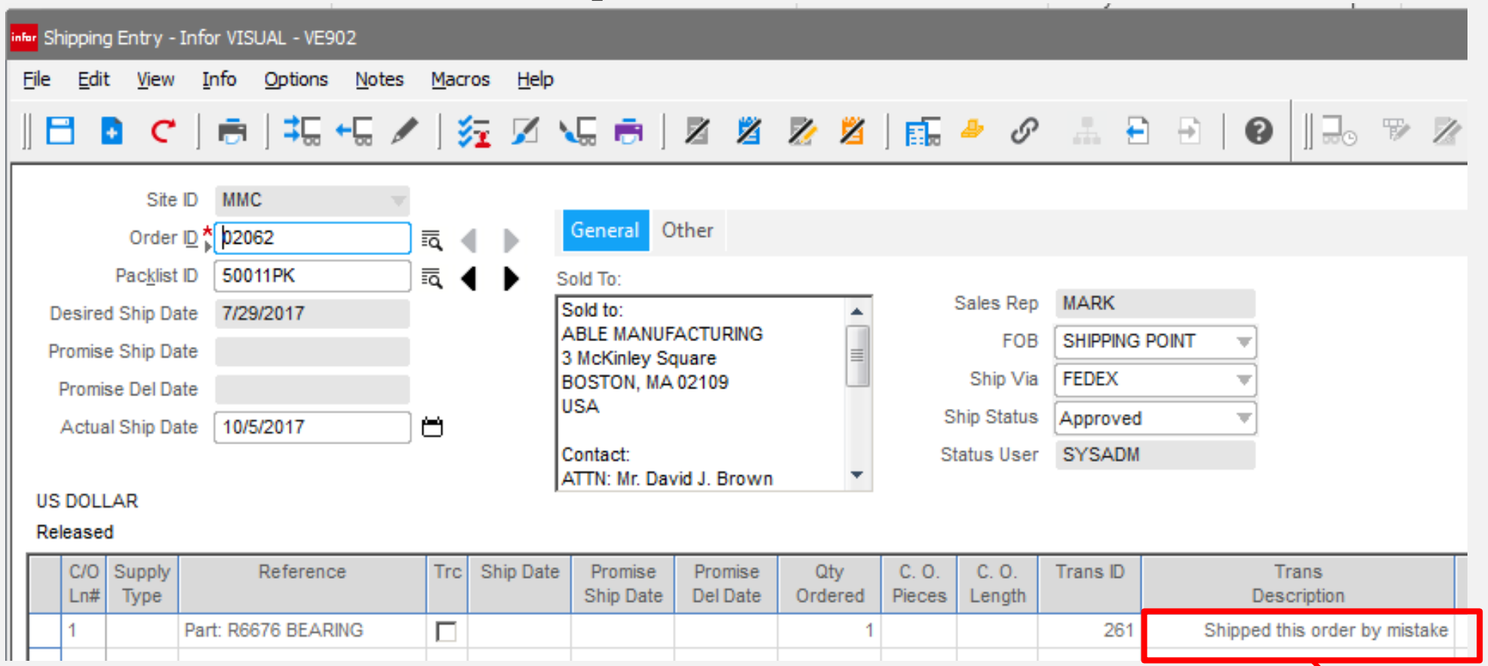
SO Return Description

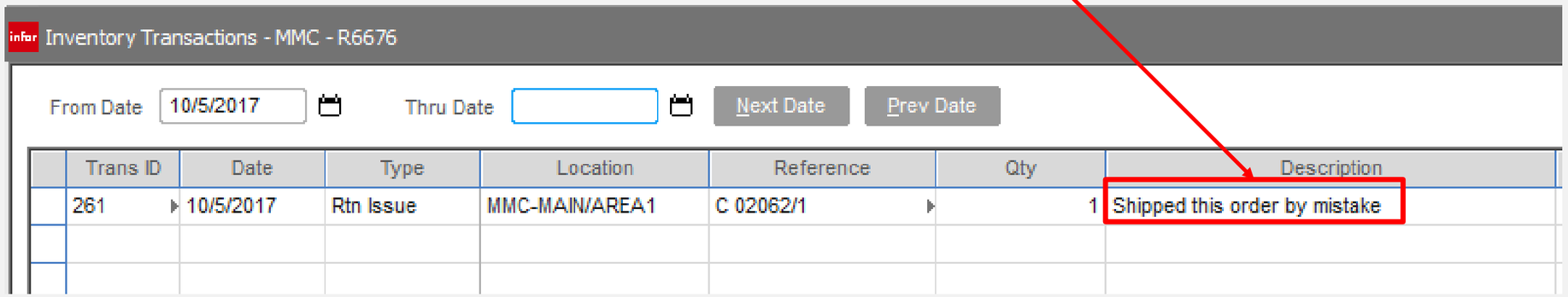
Feature

Return description field has been added to the SO return form.

Benefit

- Quickly determine the reason for the return transaction.
- Can be seen on the return document and inventory transaction





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Batch E-mailing A/R Invoices

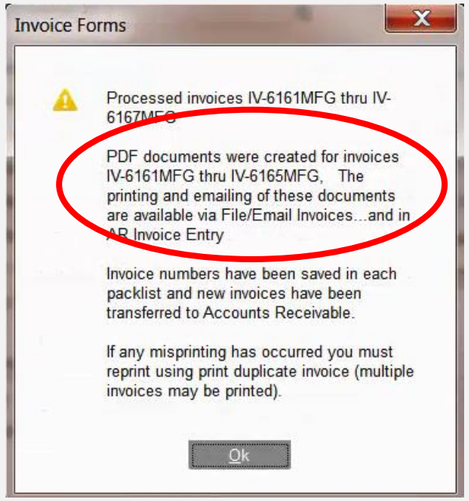
Feature

- Flag site, customer, and contact to receive invoice by e-mail
- Batch sends all invoices

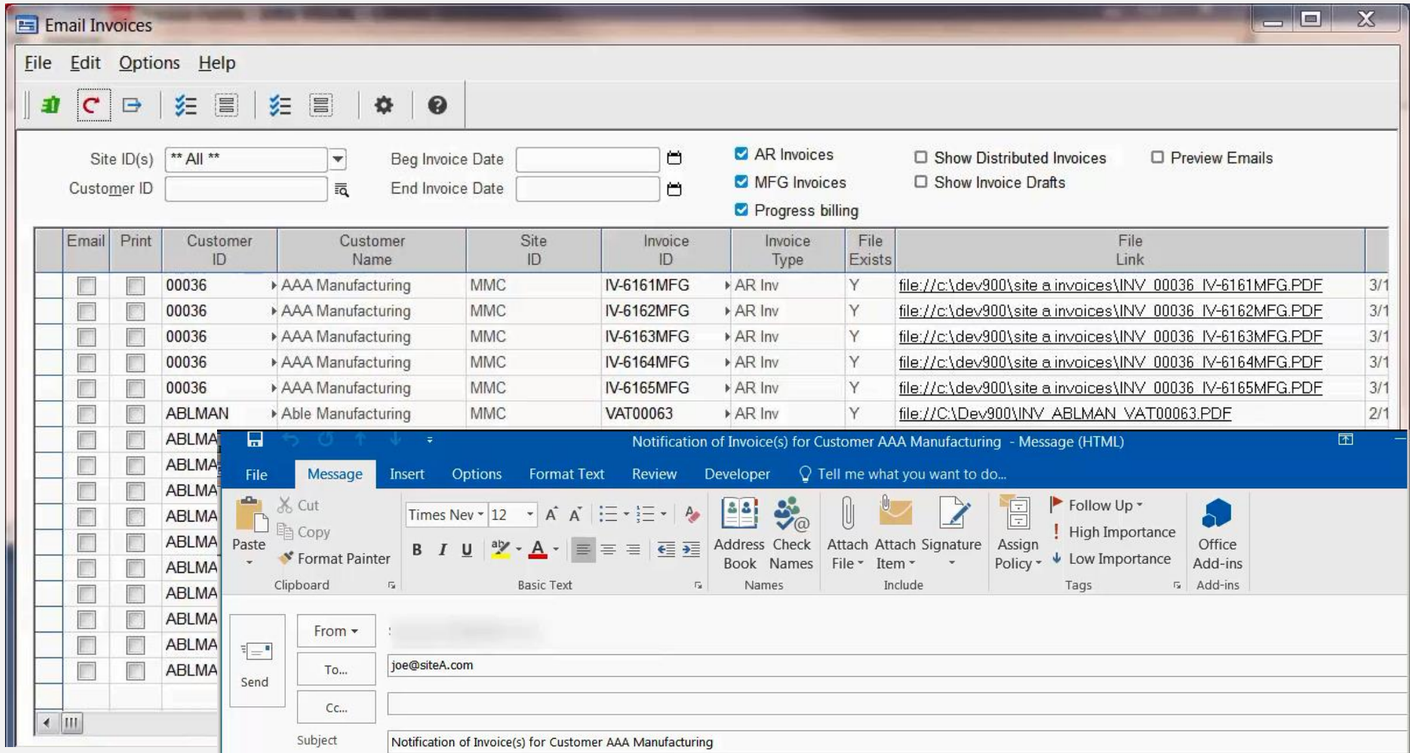
Benefits

- Eliminates printing invoices or e-mailing individually
- Maintains a copy of the e-mailed invoice as an attachment to the invoice
- Allows for edit prior to sending
- Groups all customer invoices on a single e-mail
- Reduces billing time.

Invoices are "queued up" when generating invoices from shipments



Lists all invoices waiting to be e-mails to the customer



E-mail shown with multiple invoices attached

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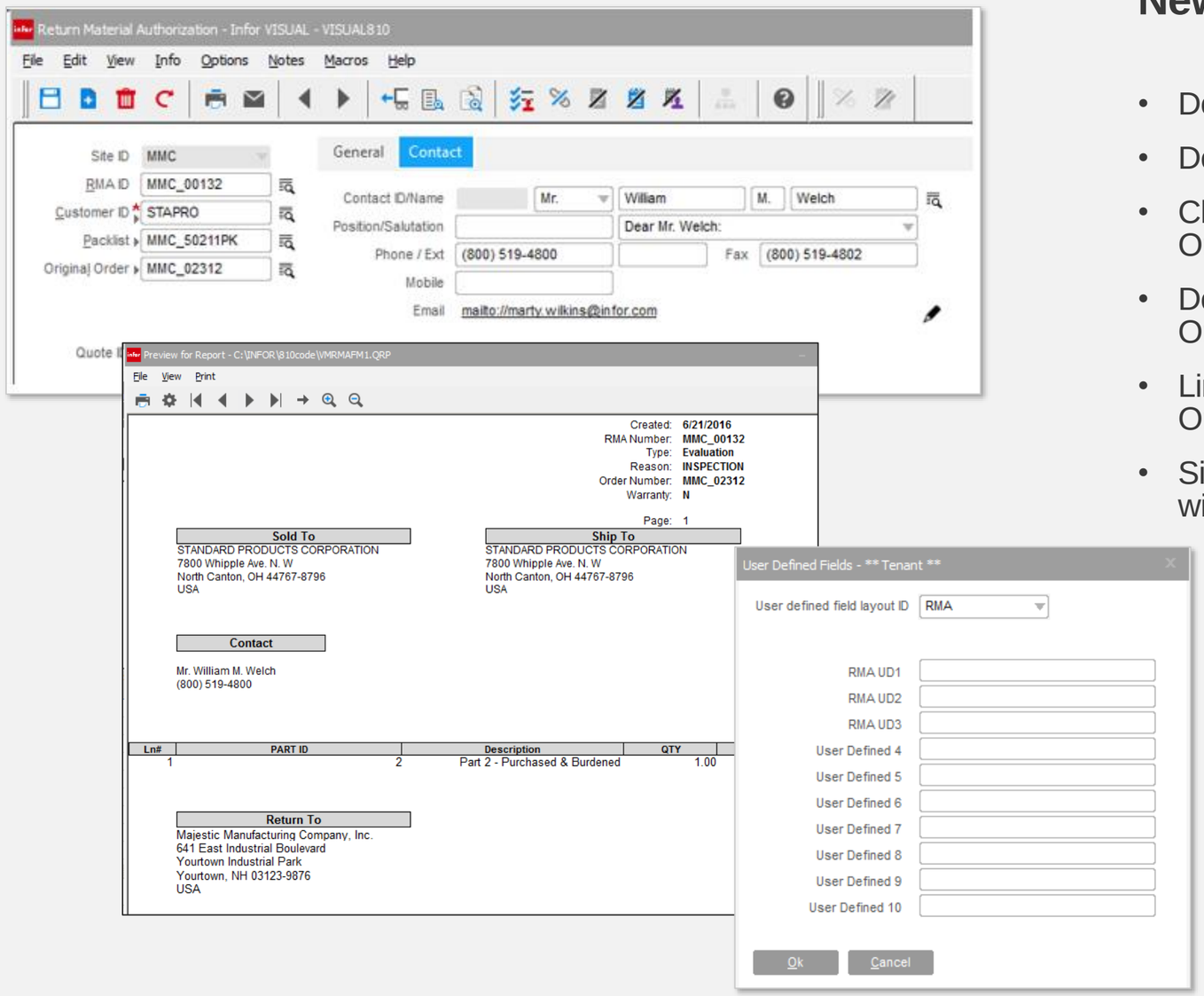
Return Material Authorization (RMA)

New Features

- Add RMA Contacts
- Add RMA User-Defined Fields
- Add RMA Acknowledgement Report

Changes to Current RMA Functionality

- Ability to Change Customer ID on New Customer Orders.
- New RMA Customer Orders having an option to cover multiple RMAs.
- Streamline Shipping Entry when only one RMA involved.
- RMA Entry to Allocate return to original work orders.
- Silence Location checks when receiving units for Evaluation.
- Use Evaluation Work Orders for Repair Type RMAs.
- Add status column to document lifecycle card



New Preference Settings

- Default RMA Type
- Default Reason Code
- Clear PO # on New Customer Orders
- Default Status for New Customer Orders
- Line numbering for New Customer Orders to use Next Number
- Silence multiple pop up messages with preferences

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Price Book

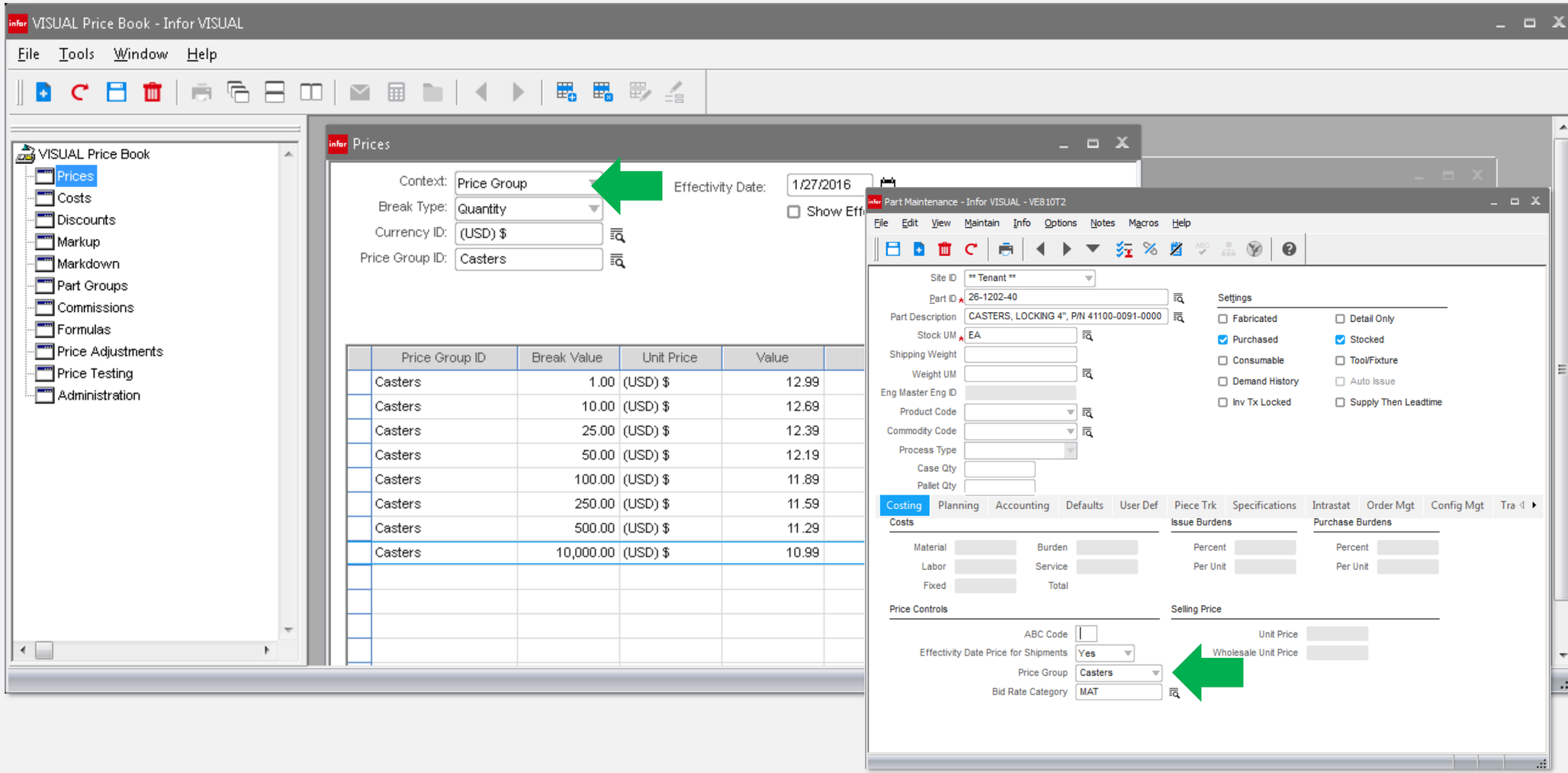
Pricing by Price Group

Feature

- Add price group option for price book

Benefit

- Allows for easy deployment of price changes across a groups of items.



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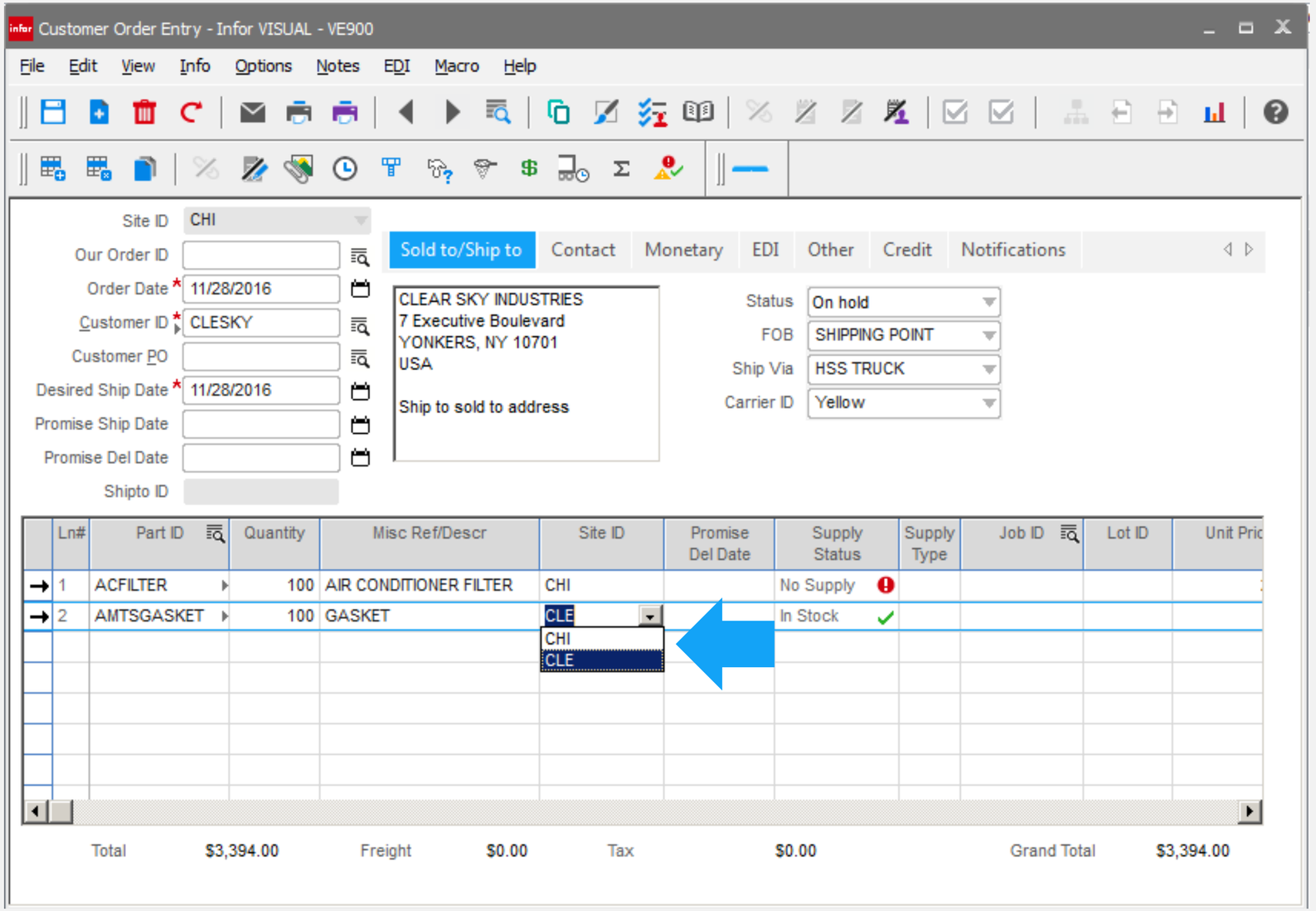
Sales Order – Multiple site ID's

Feature

The ability to specify different site ID's on the order line

Benefits

Allows for centralized order processing with demand placed on the site supplying the demand



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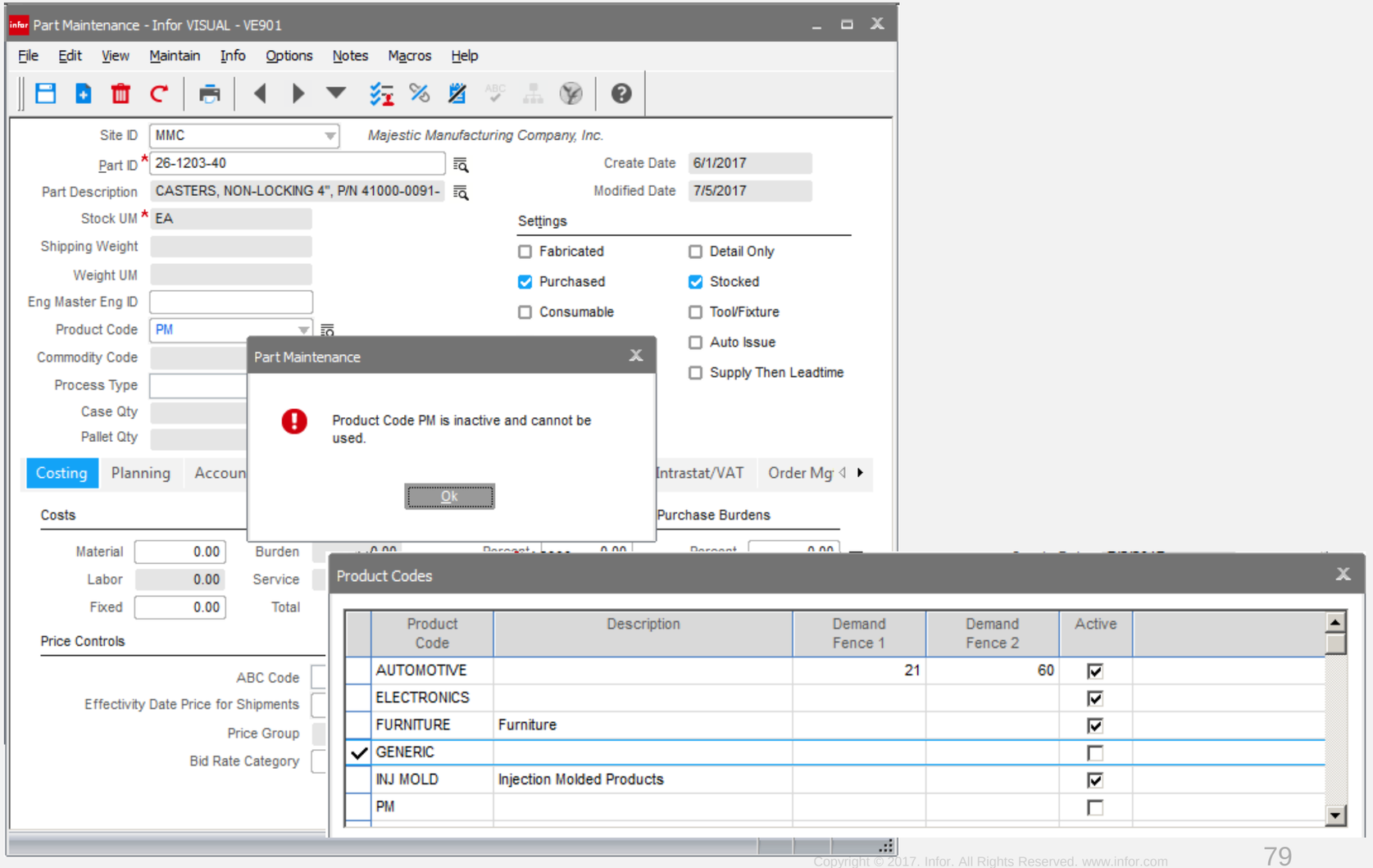
Product Code Status

Feature:

Added active status to the product codes

Benefits:

- Can’t add inactive product codes to an item
- Users can’t see inactive PC’s in sales order entry



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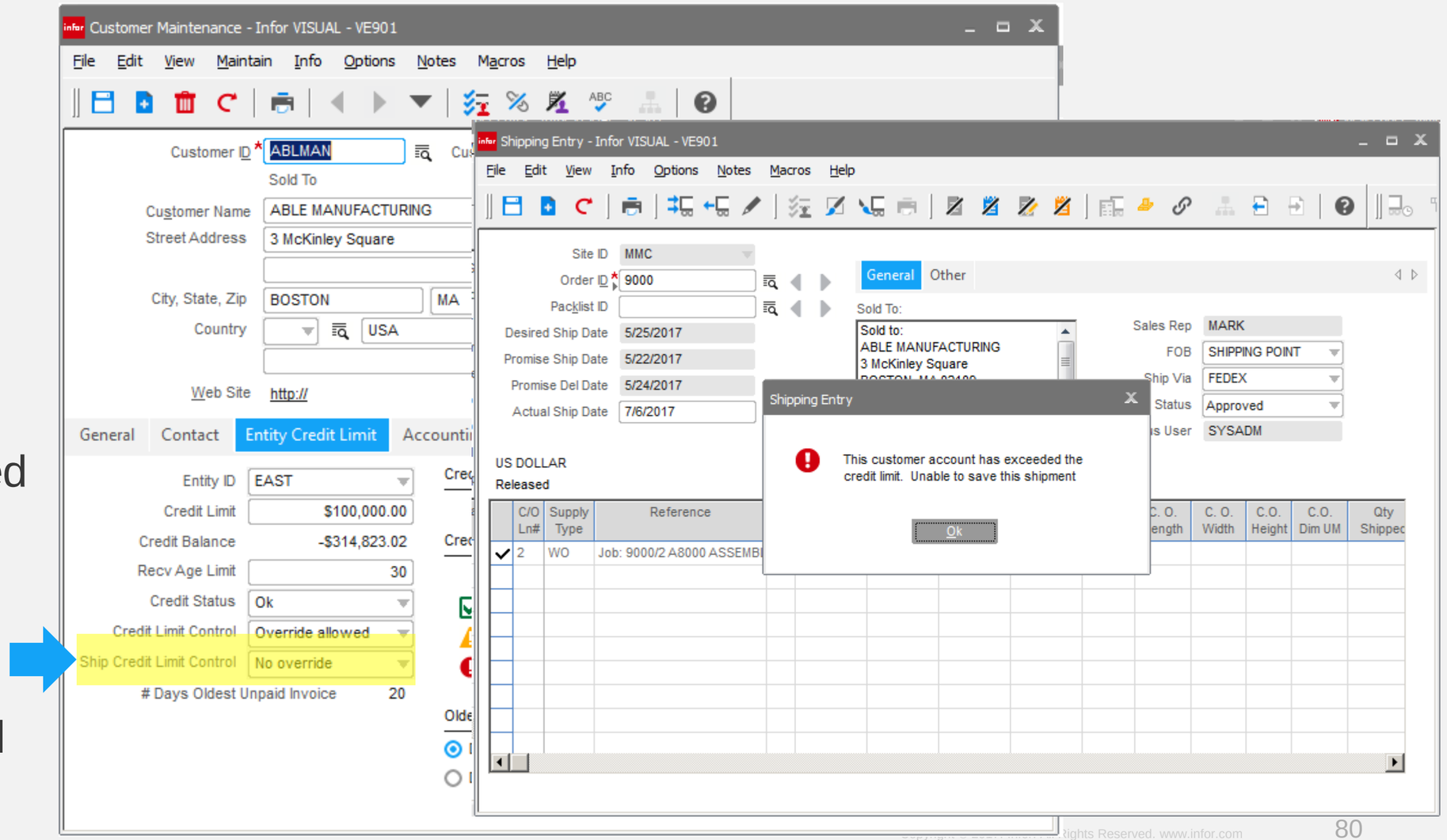
Credit Check on Shipment

Feature:

Credit checks by customer can now be done at time of shipment.

Benefits:

- Prevents shipping to a customer that has exceeded credit limit since time of order.
- Assists when order price is based on time and material



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Procurement

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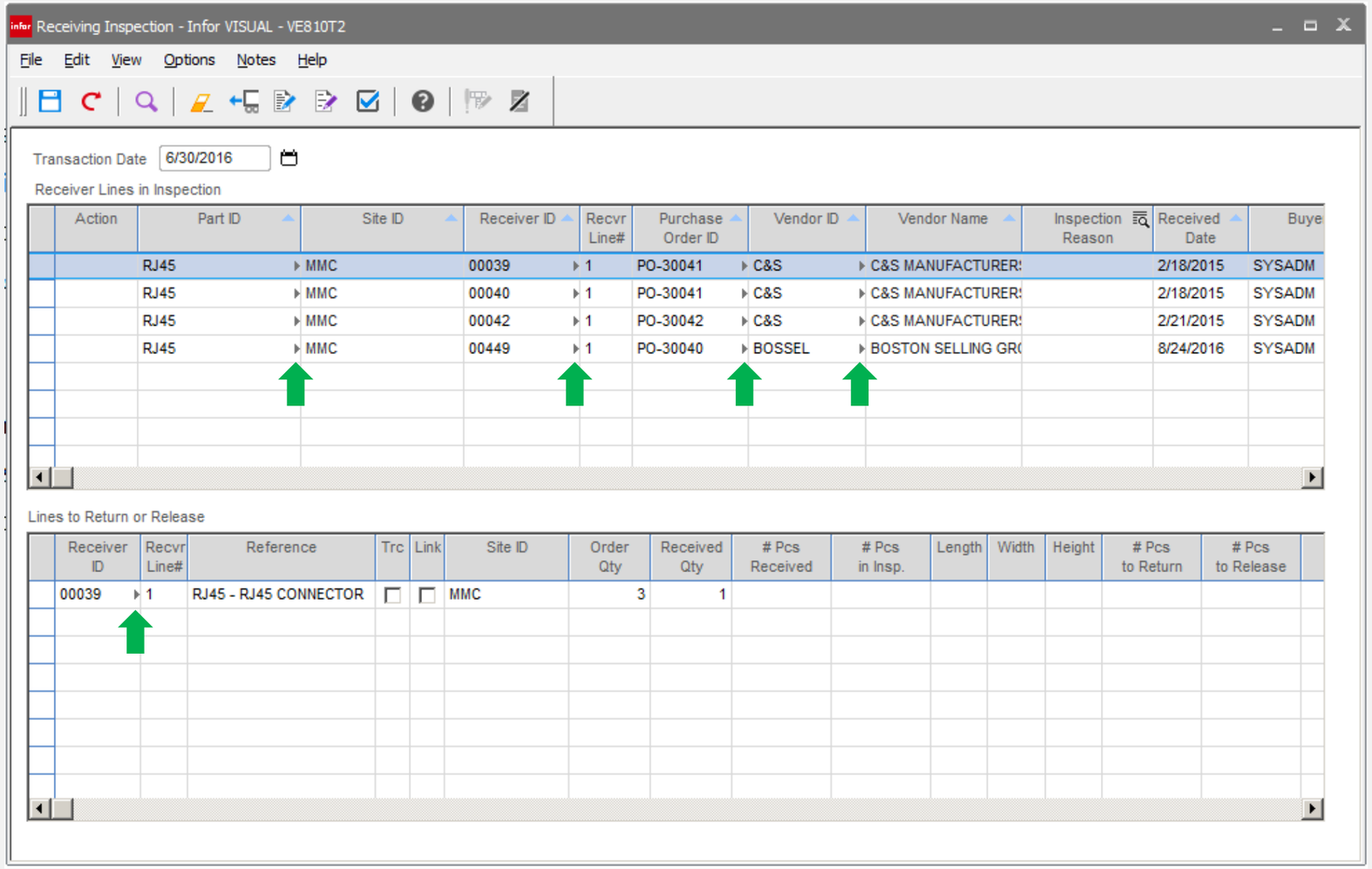
Receiving Inspection

Feature

- Add Go-to buttons

Benefit

- Ability to easily drill to supporting documents
- Increased productivity



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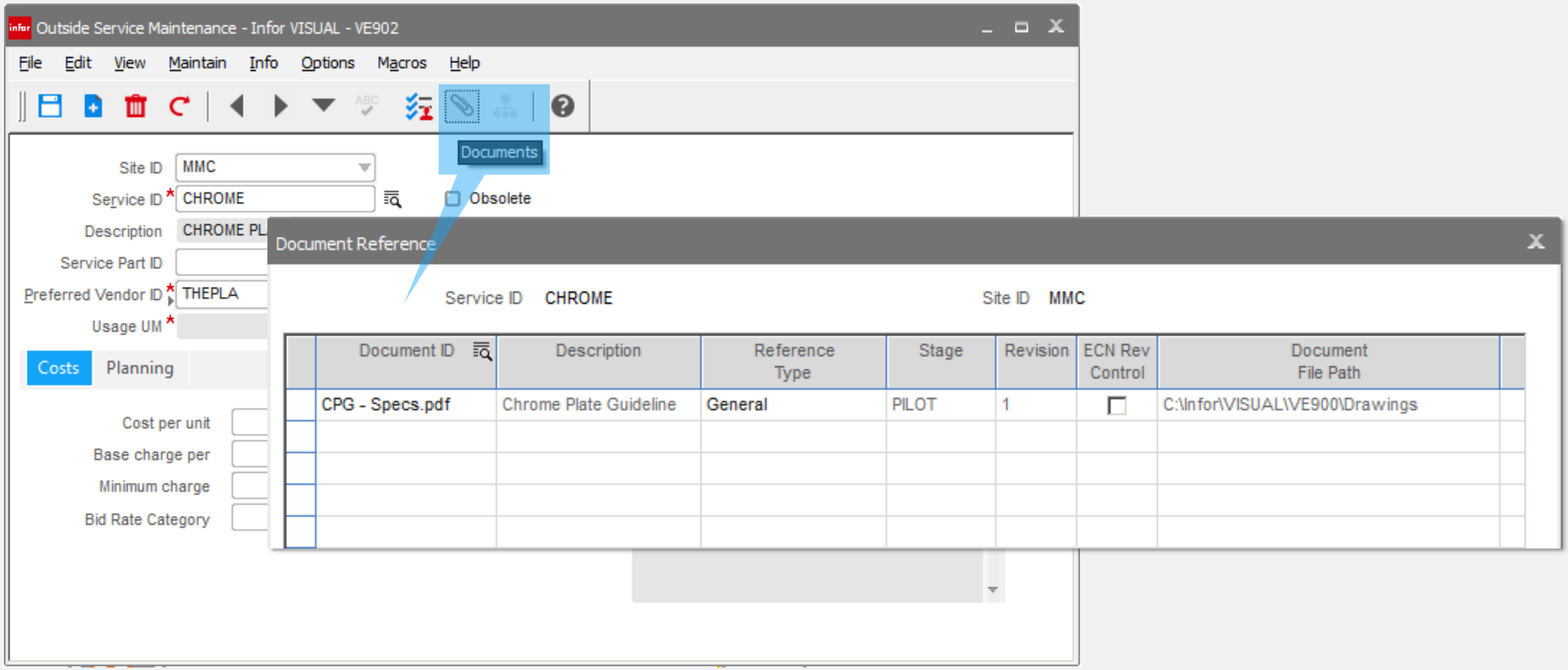
Outside Service Maintenance

Feature

Add document attachment functionality to service maintenance

Benefit

Ability to maintain all standard documents associated with the outside service



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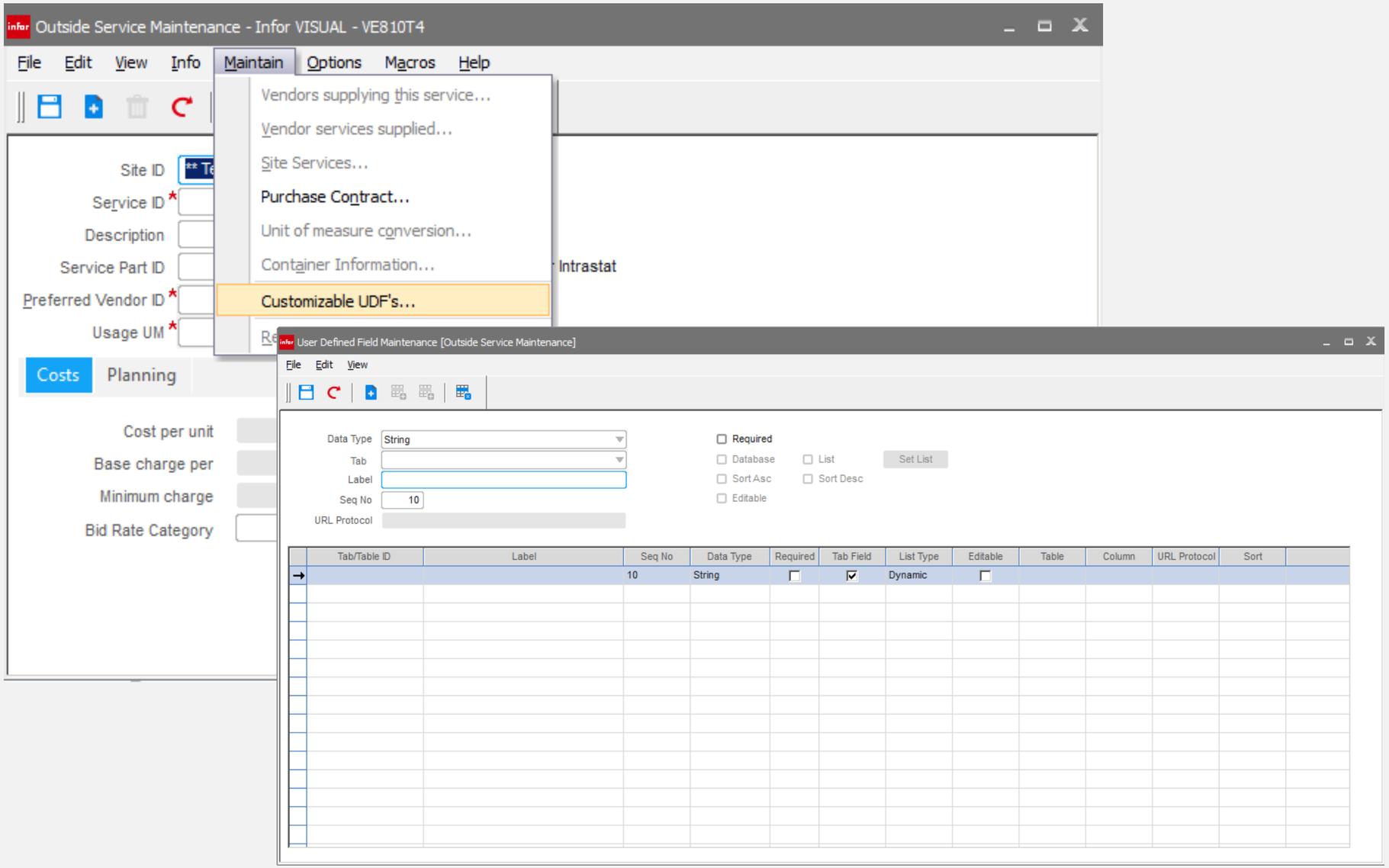
Outside Service Maintenance

Feature

Add customizable UDF’s



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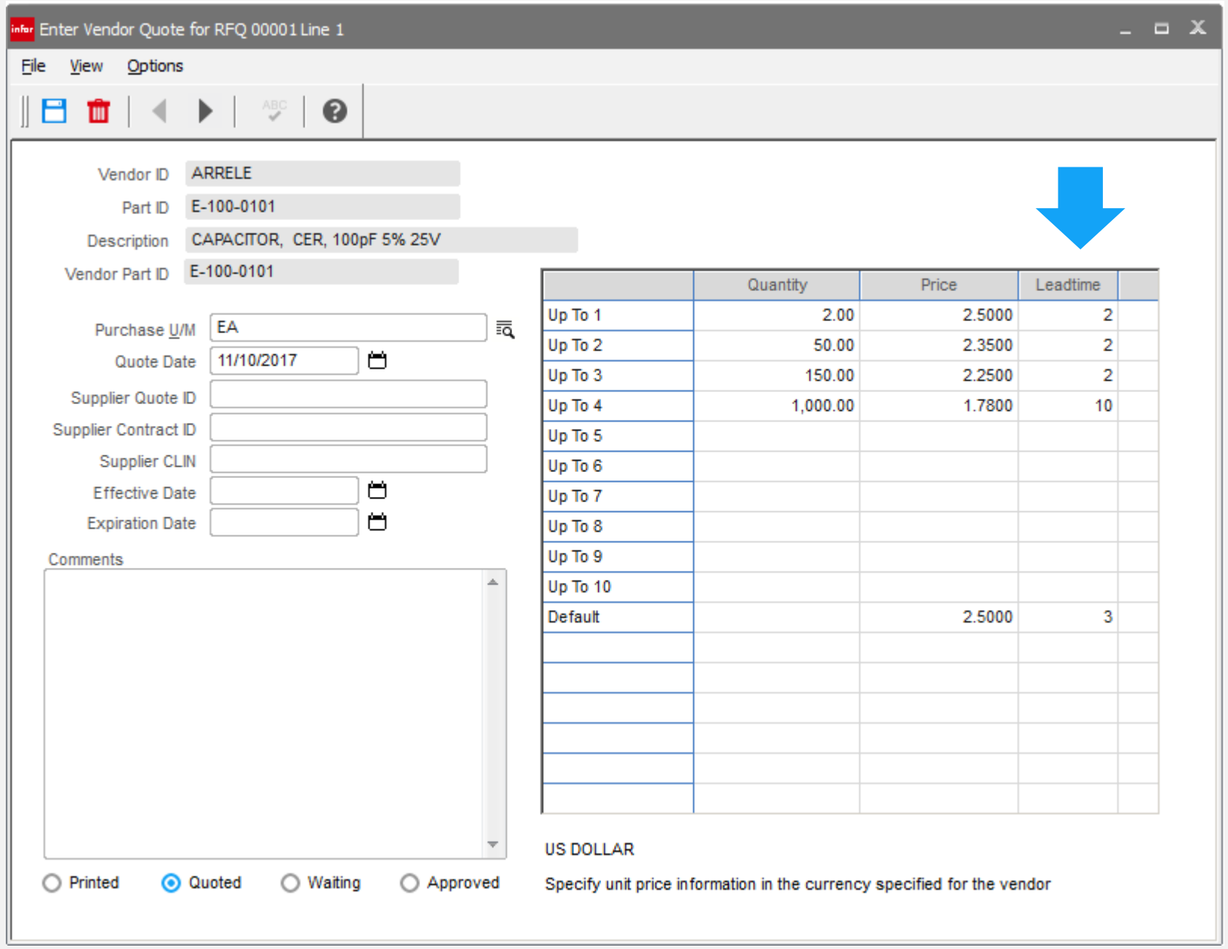
Supplier Lead-time

Feature

Quoted lead-time column has been added to RFQ functionality

Benefit

- Provides further information required to make buying decision and establish preferred supplier
- Copies to supplier / part related pricing tables for future reference



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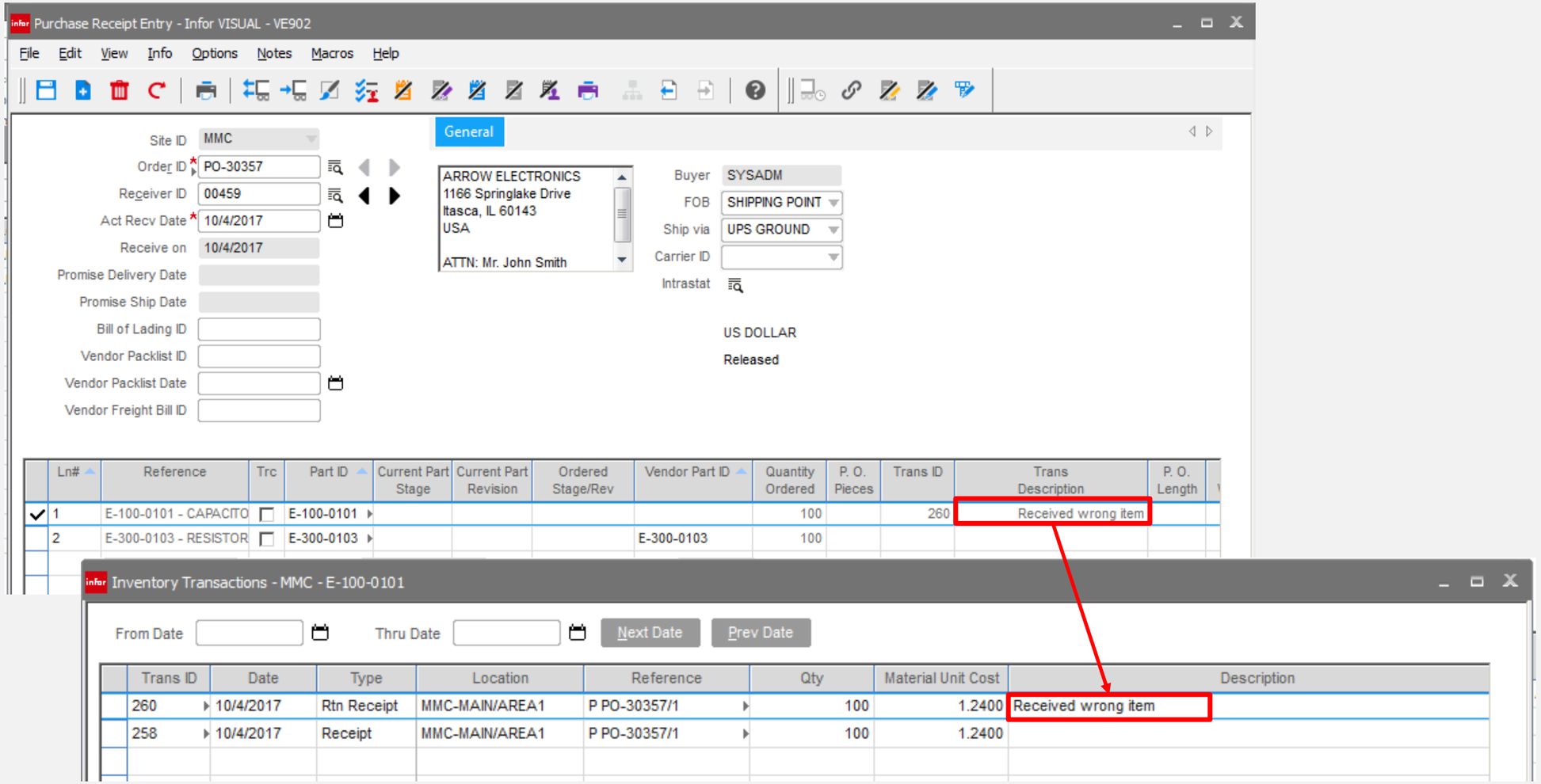
PO Return Description

Feature

Return description field has been added to the PO return form.

Benefit

- Quickly determine the reason for the return transaction.
- Can be seen on the return document and inventory transaction



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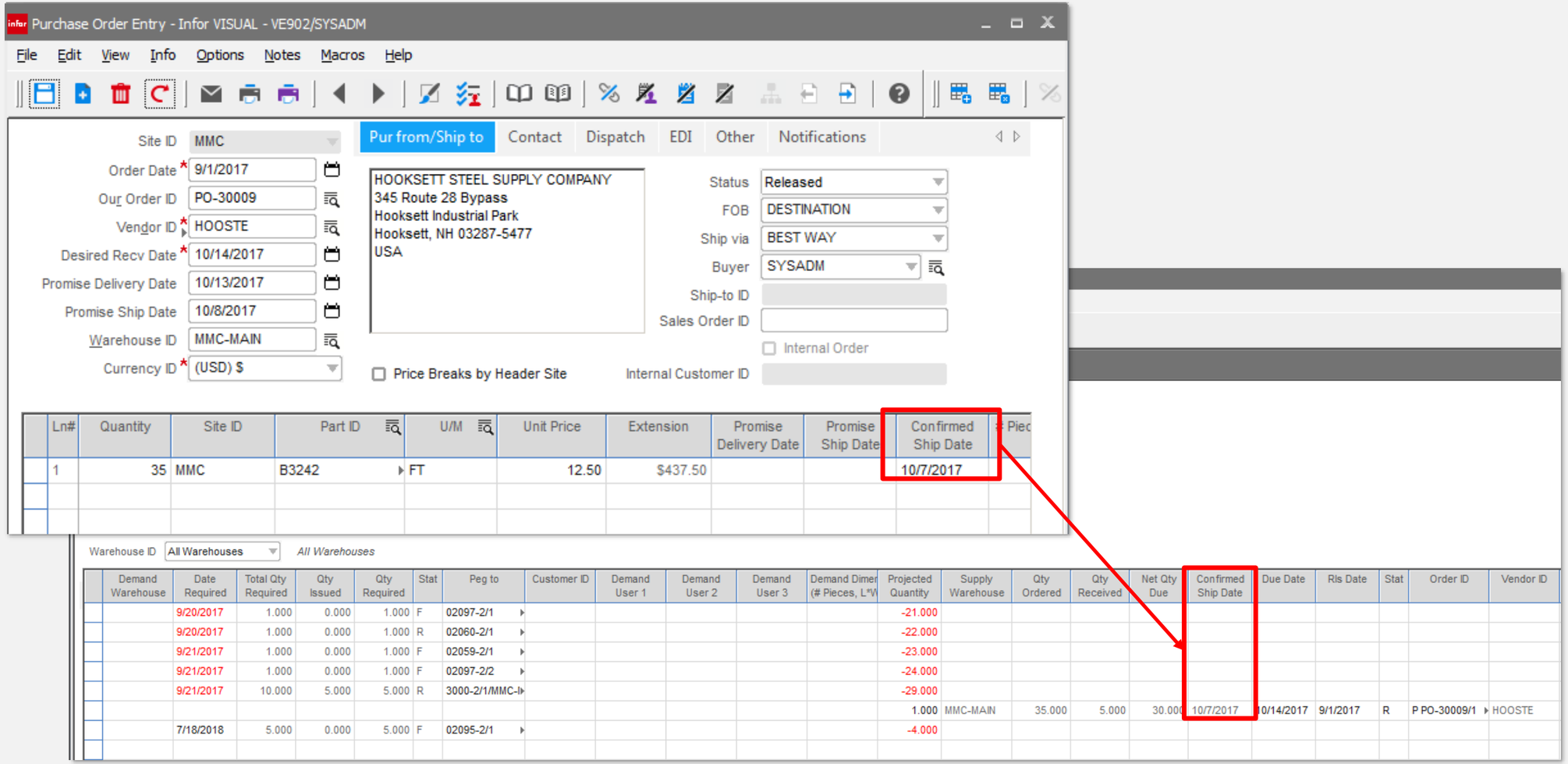
PO Entry – Confirmed ship date

Feature

Purchasing can now specify a confirmed shipping date on the PO header and line.

Benefit

- Allows for greater visibility of the delivery status in both purchasing and planning.
- Allows for increased performance metrics – Promised ship date verses actual ship date
- Allows for order adjustment as required



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PO Entry – Item ID Column

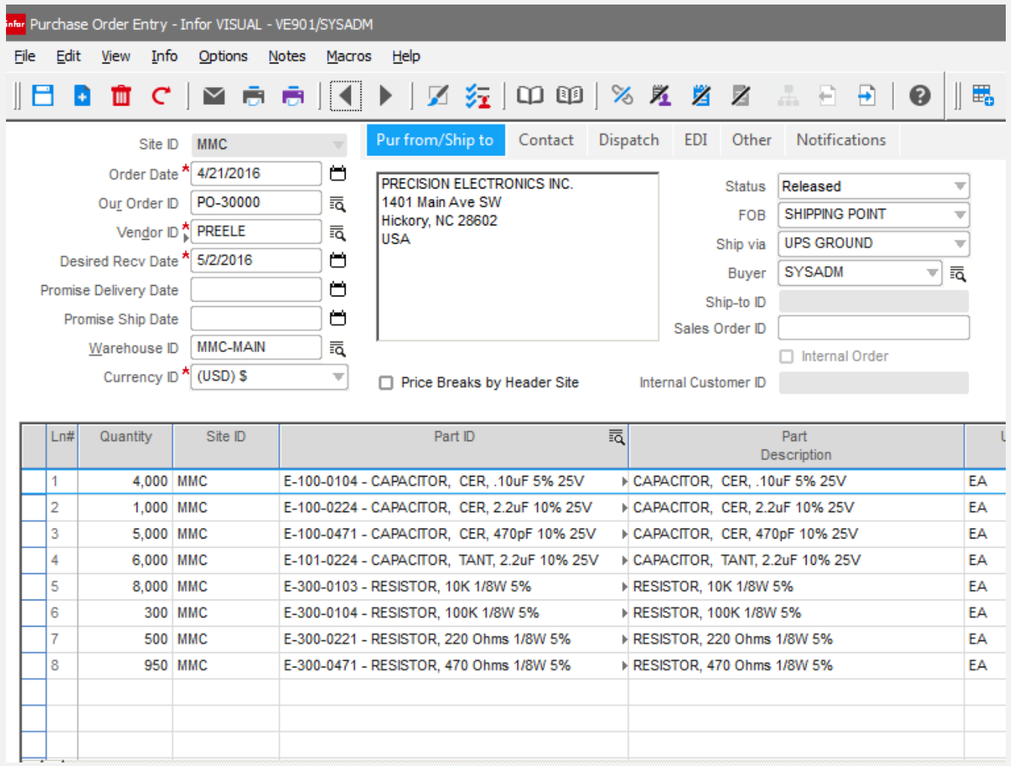
Feature

Eliminate the combined part id & description column

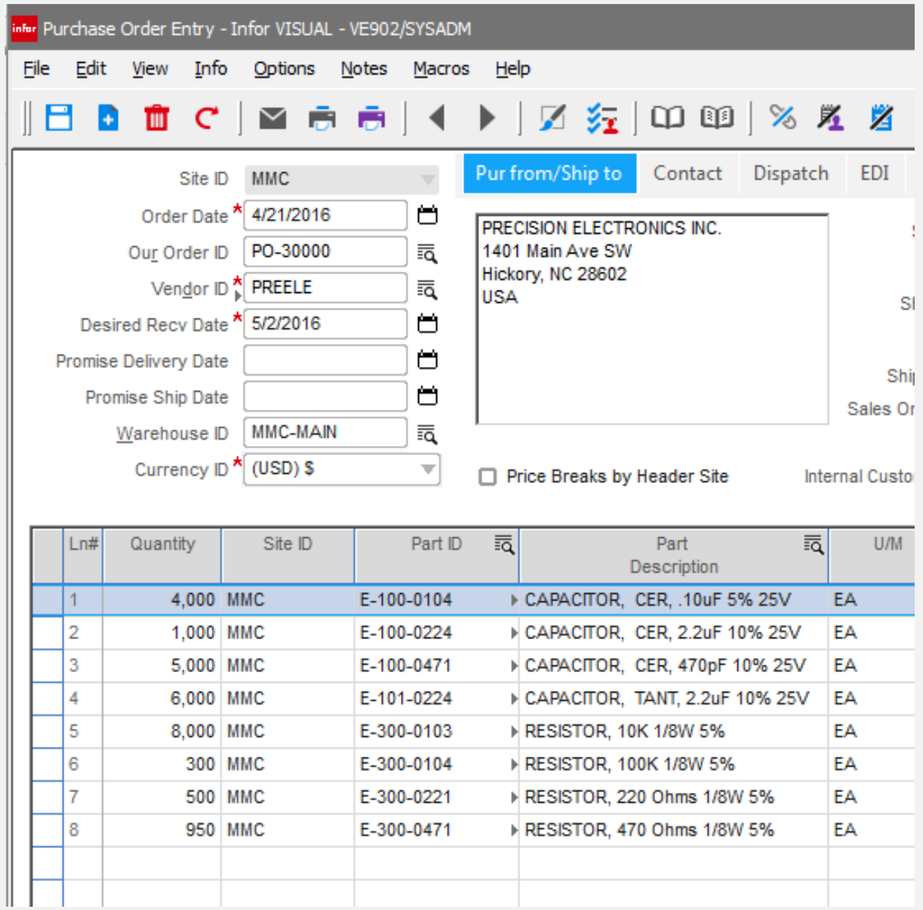
Benefit

- Allows entry & search by part and description
- Standardizes with other entry forms

VE 9.0.1



VE 9.0.2



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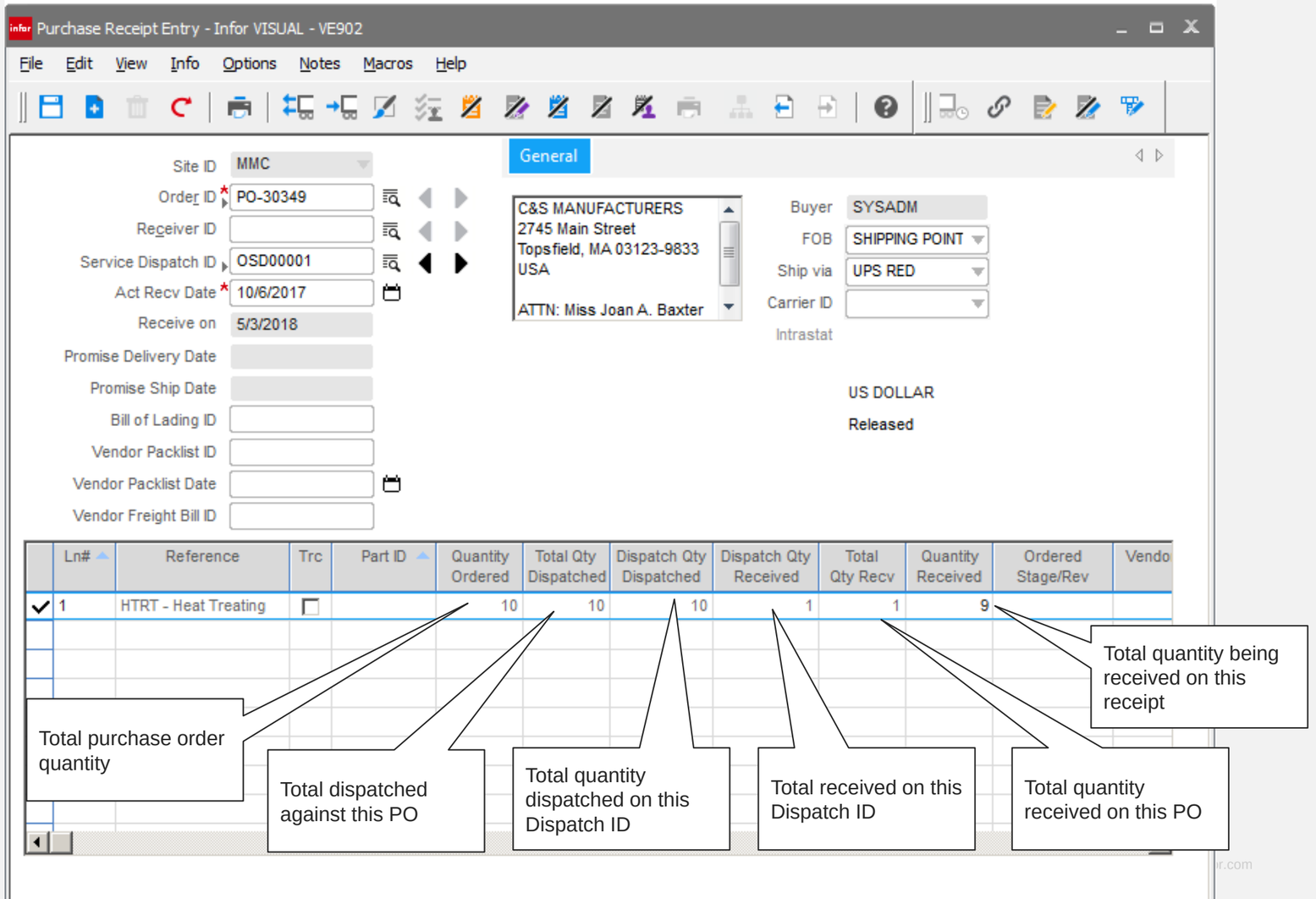
PO Receipt Entry – Dispatch ID

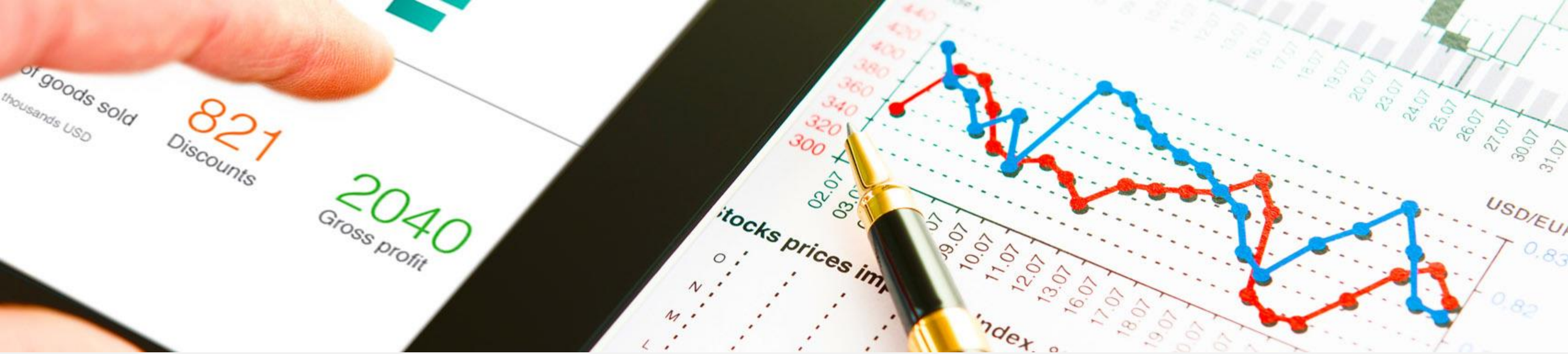
Feature

Receiving can now receive based on a specific service dispatch ID

Benefit

- Receive against the original dispatch ID for accuracy
- Provides complete PO and Dispatch totals





Accounting

(Standard Financials)

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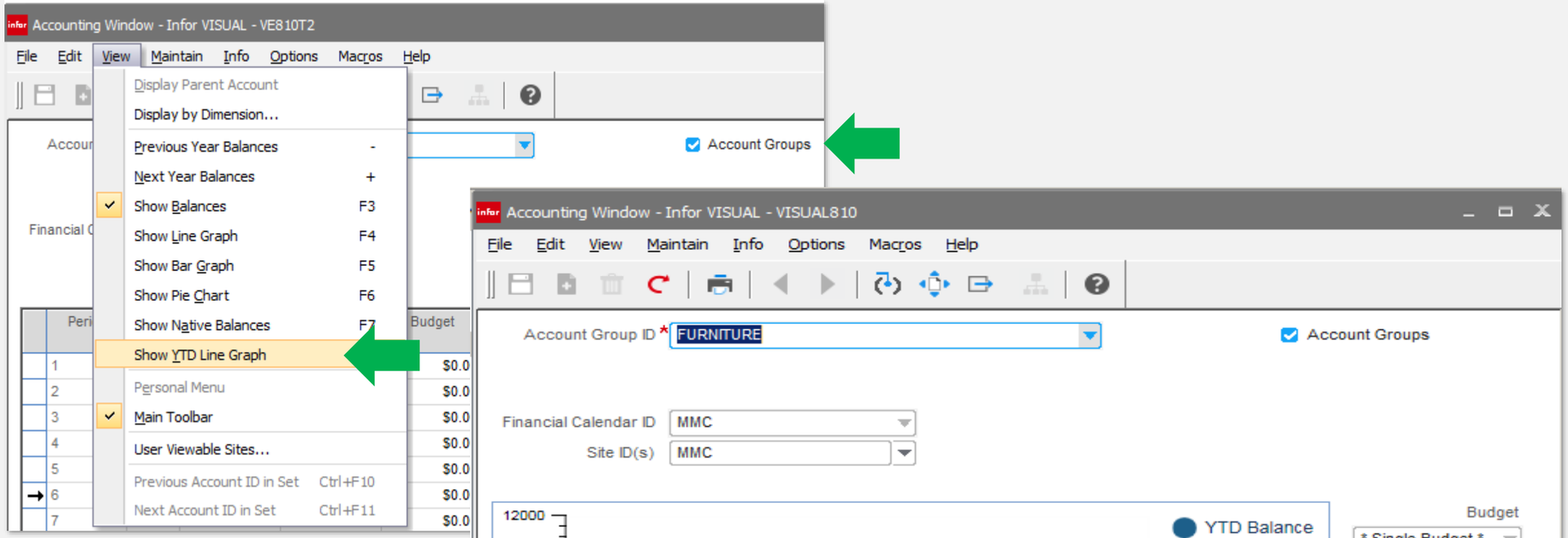
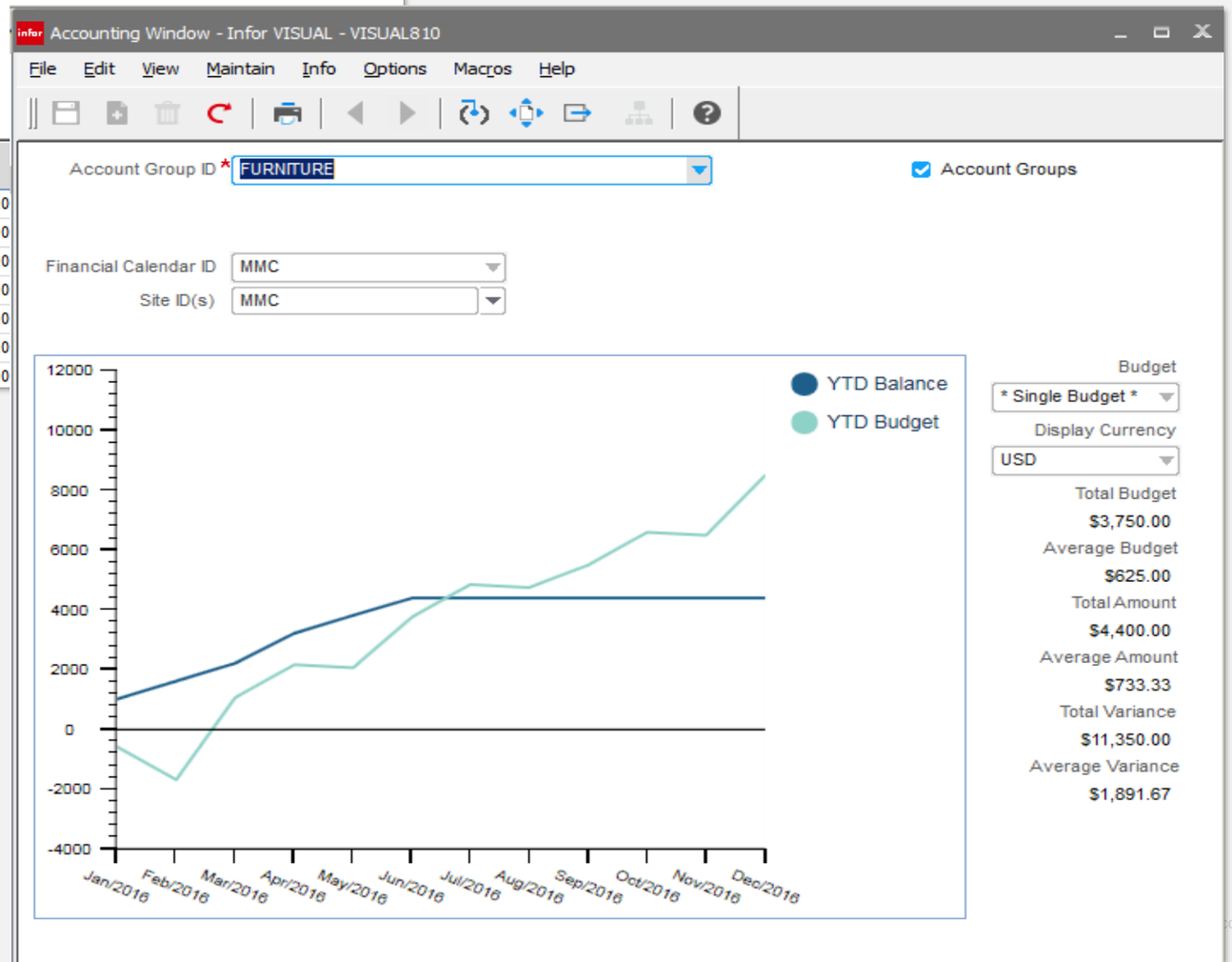
Accounting Window





Features

- Account Group view
- YTD Line Graph

Benefits

- Easily measure performance across both account level, account summary level, and business specific accounting groups

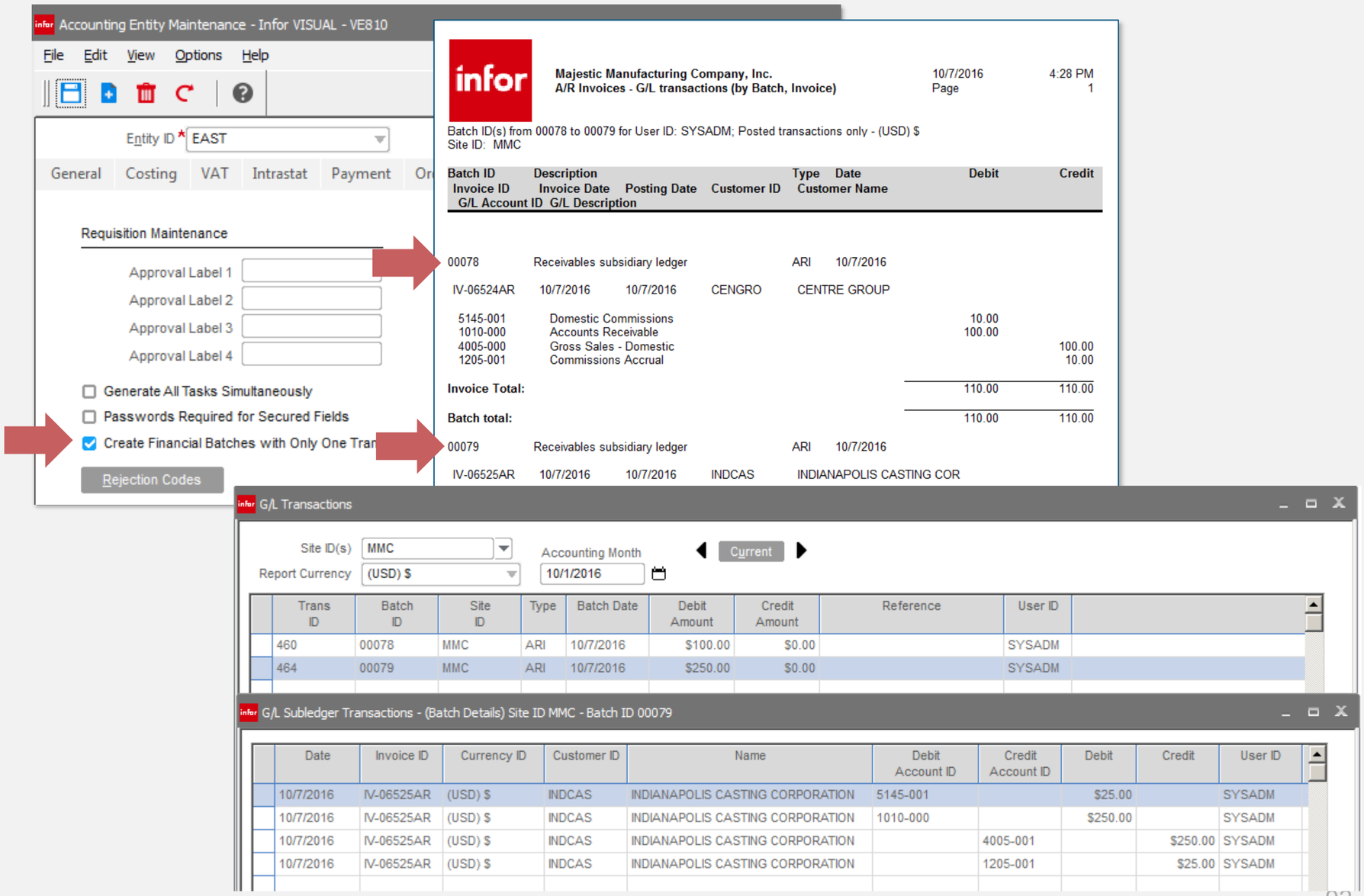
Single Document batch posting

Feature

A preference setting by entity where each document is posted in it's own batch

Benefits

- Provides detailed document posting to the G/L rather than combined document posting
- Simplifies auditing back to the individual document



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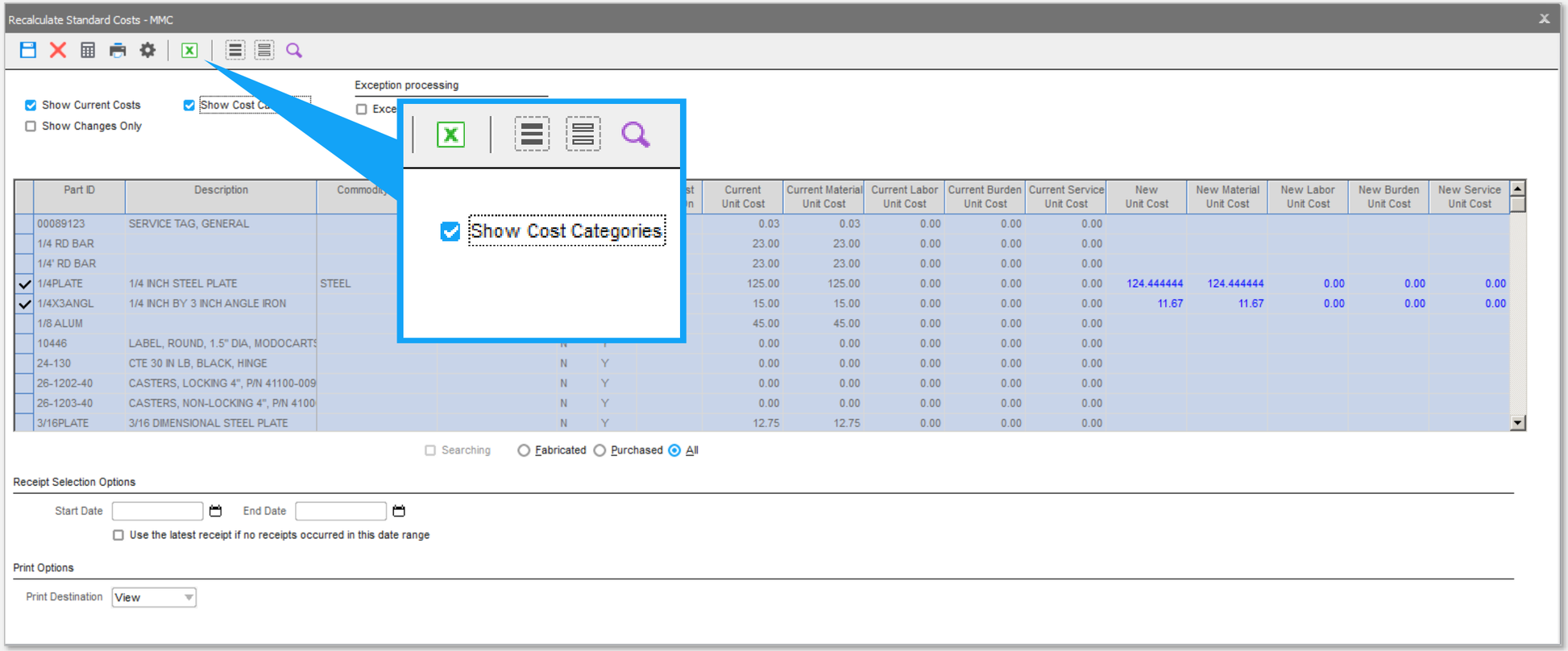
Recalculate Standard Costs

Feature

Export to Excel option added



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