



Infor VISUAL 9

Features & Benefits through VE 9 R3



Core Business Features

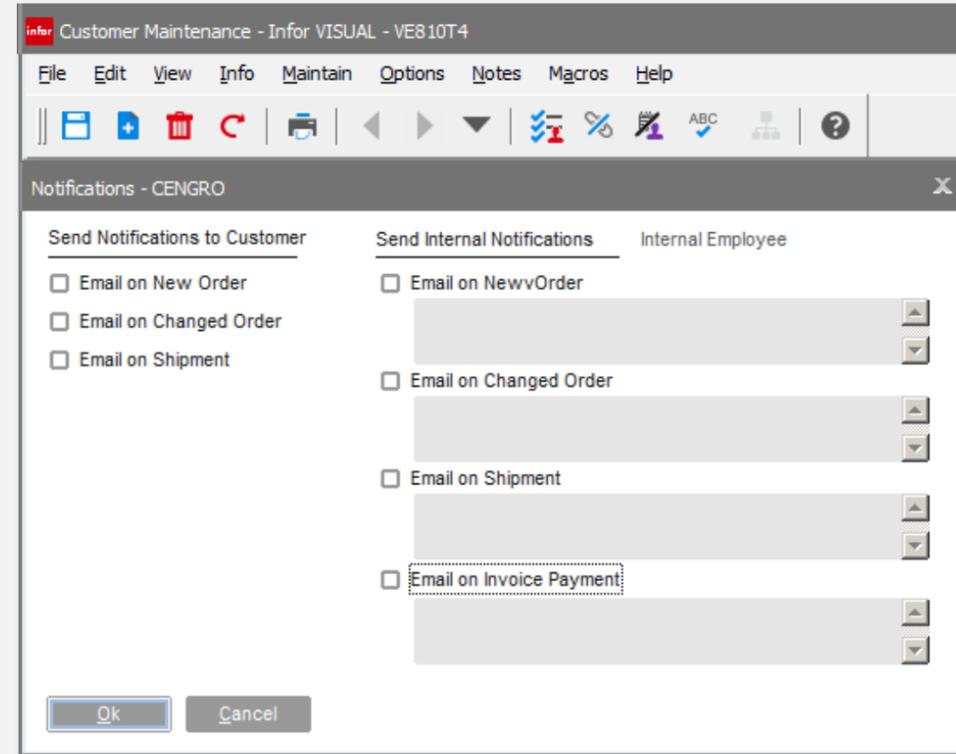
infor Lifecycle Notifications

Features

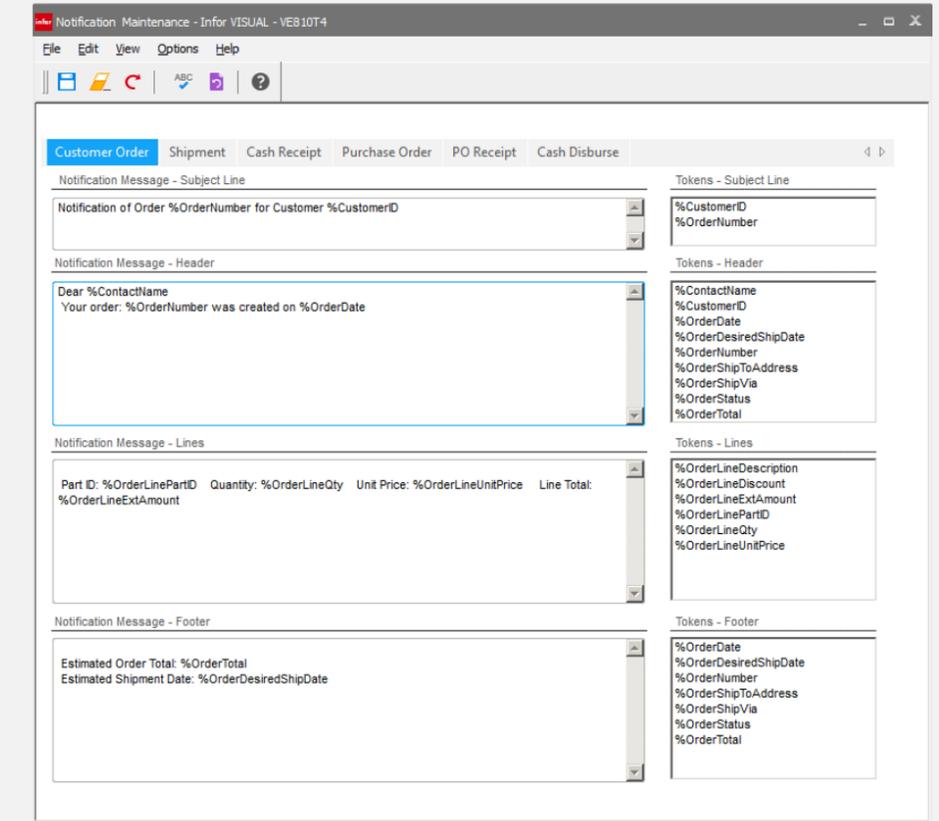
- Send e-mail notification when sales and purchasing events occur
- Determine notification points at the business partner level
- Override or begin notification points at the document level
- Define e-mail notification layout for each document type

Benefit examples

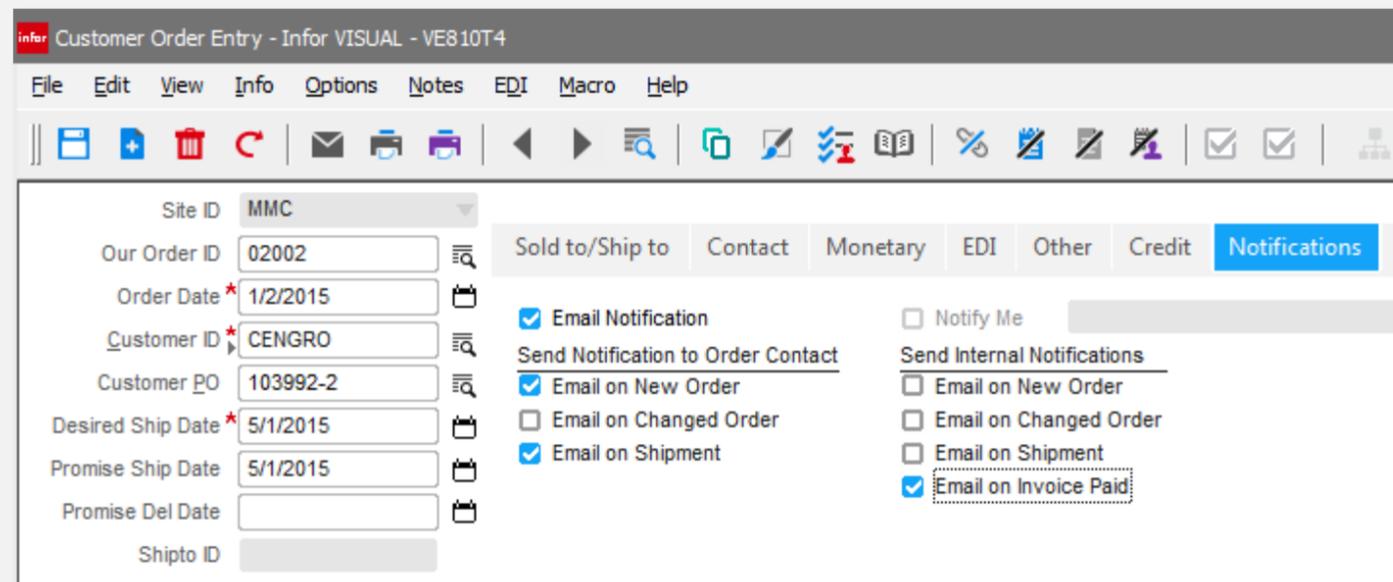
- Easy end-user setup
- Eliminates having to remember to alert someone when an event occurs
- Alert sales reps and dealers when steps in a customer order lifecycle changes
- Notify production when a late or urgent delivery is received



Define notification points at the business partner level



Specify e-mail format for notifications



Define or override notification points at the order level

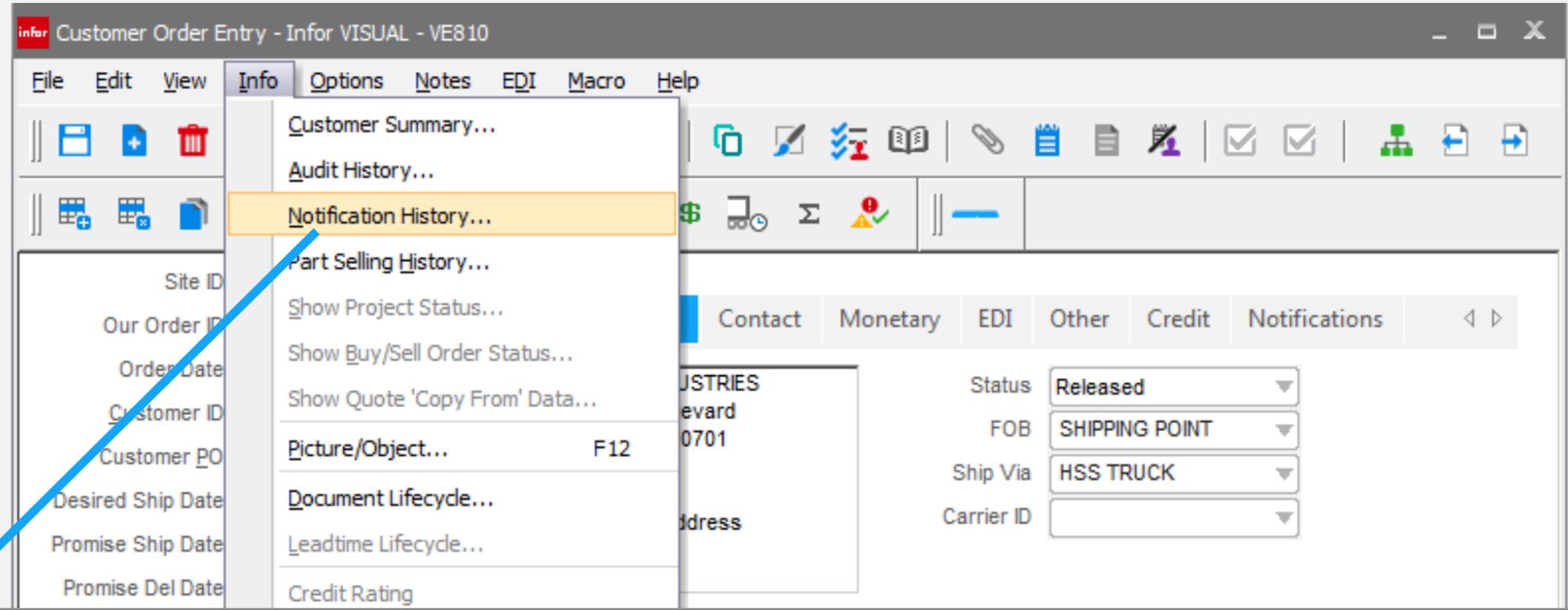
infor Notification Tracking

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



Notification History for 3000

Search Status: Searching

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

infor 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

Document Lifecycle Flowchart:

- QT 3000 (Status: Won, RMAID: <null, Quoted: 3/13/2015)
- SO 3000 (Status: Released, Ordered: 3/23/2015, Desired Ship Date: 5/12/2015)
- WO 3000/1
- PK 50009PK (Status: Approved, Cust Order: 3000, Shipped)
- PK 50010PK (Status: Approved)
- IV IV-6012MFG
- IV IV-6011MFG
- PY 8748 (Customer: CLESKY, Date: 12/1/2015, Amt: \$650.00)

Document Lifecycle Tree View:

- Quotes (1 item)
 - 3000
- Sales Orders (1 item)
 - 3000
- Work Orders (1 item)
 - 3000/1
- RMAAs (0 items)
- Shipments (2 items)
 - 50009PK
 - 50010PK
- Invoices (2 items)
 - IV-6011MFG
 - IV-6012MFG
- Payments (1 item)
 - CLESKY/8748

Table 1: Quote Summary

Quote ID	Customer ID	Status	Quote Date	Expiration Date	Sales Order ID	RMA ID
3000	CLESKY	Won	3/13/2015	4/1/2015	3000	

Table 2: Sales Order Summary

Sales Order ID	Customer ID	Status	Order Date	Desired Ship Date	Customer PO	Total Ordered
3000	CLESKY	Released	3/23/2015	5/12/2015	PO890	\$7,500.00

Table 3: Work Order Summary

Work Order ID	Sales Order ID	Status	Want Date	Quantity
3000/1	3000			

Table 4: RMA Summary

RMA ID	Shipment ID	Original Order	New Order	Type	Status

Table 5: Shipment Summary

Shipment ID	Sales Order ID	Status	Actual Ship Date
50009PK	3000	Approved	12/1/2015
50010PK	3000	Approved	12/5/2015

Table 6: Invoice Summary

Invoice ID	Customer ID	Shipment ID	Sales Order ID	Invoice Date	Invoice Total
IV-6011MFG		50009PK	3000		
IV-6012MFG		50010PK	3000		

Table 7: Payment Summary

Payment Ref ID	Payment ID	Customer ID	Payment Date	Payment Amount	Total Payment	Invoice ID
CLESKY	8748	CLESKY	12/1/2015	\$650.00	\$650.00	IV-6011MFG

infor 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

Customer Order Entry - Infor VISUAL - VE810T3

File Edit View Info Options Notes EDI Macro Help

Site ID: MMC

Our Order ID: []

Order Date: 7/6/2016

Customer ID: []

Customer PO: []

Desired Ship Date: 7/6/2016

Promise Ship Date: []

Promise Del Date: []

Shipto ID: []

Sold to/Ship to | Contact | Monetary | EDI | Other | Credit | Notifications

Status: []

FOB: []

Ship Via: []

Carrier ID: []

Ln#	Part ID	Quantity	Supply Status	Supply Type	Job ID	Lot ID	Split ID	Sched Finish Date	New W/O	Ship Status	Height
Total		\$0.00	Freight	\$0.00	Tax	\$0.00	Grand Total	\$0.00			

Configure Table Window

Column Name	Visible	Title
colLINE_NO	<input checked="" type="checkbox"/>	Ln#
colUSER_ORDER_QTY	<input checked="" type="checkbox"/>	Quantity
colSUPPLY_STATUS	<input checked="" type="checkbox"/>	Supply@Status
colSUPPLY_TYPE	<input checked="" type="checkbox"/>	Supply@Type
colJOB_ID	<input checked="" type="checkbox"/>	Job ID
colLOT_ID	<input checked="" type="checkbox"/>	Lot ID
colSPLIT_ID	<input checked="" type="checkbox"/>	Split ID
colSCHED_FINISH_DATE	<input checked="" type="checkbox"/>	Sched@Finish Date
colADD	<input checked="" type="checkbox"/>	New@W/O
colPART_ID	<input checked="" type="checkbox"/>	Part ID
colNUM_PIECES	<input checked="" type="checkbox"/>	Ship Status
colLENGTH	<input type="checkbox"/>	Length
colWIDTH	<input type="checkbox"/>	Width
colHEIGHT	<input checked="" type="checkbox"/>	Height
colDIMENSIONS_UM	<input type="checkbox"/>	Dim UM
colORIG_NUM_PIECES	<input type="checkbox"/>	Original @# Pieces
colORIG_LENGTH	<input type="checkbox"/>	Original@Length
colORIG_WIDTH	<input type="checkbox"/>	Original @Width
colORIG_HEIGHT	<input type="checkbox"/>	Original @Height
colORIG_DIMENSIONS_UM	<input type="checkbox"/>	Original @Dim UM
colSTAGE_ID	<input type="checkbox"/>	Current Part@Stage
colREVISION_ID	<input type="checkbox"/>	Current Part@Revision
colORIG_STAGE_REVISION_ID	<input type="checkbox"/>	Ordered@Stage/Rev
colSERV_CHARGE_ID	<input type="checkbox"/>	Service@Charge ID
colWAREHOUSE_ID	<input checked="" type="checkbox"/>	Warehouse@ID
colCONFIGURED	<input type="checkbox"/>	Cfgd
colMISC_REFERENCE	<input checked="" type="checkbox"/>	Misc Ref/Descr
colSELLING_UM	<input checked="" type="checkbox"/>	U/M
colUNIT_PRICE	<input checked="" type="checkbox"/>	Unit Price
colNET_UNIT_PRICE	<input checked="" type="checkbox"/>	Net@Unit Price
colWHOLESALE_UNIT_COST	<input type="checkbox"/>	Wholesale@Unit Cost
colTRADE_DISC_PERCENT	<input checked="" type="checkbox"/>	Disc%
colEXTENSION	<input checked="" type="checkbox"/>	Extension
colWHOLESALE_EXTENSION	<input type="checkbox"/>	Wholesale@Extension

Select All | Deselect All | Make Visible | Make Hidden

Ok | Cancel

Position and size of current table will be saved also.
Use @ to place a carriage return in string.



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

The screenshot displays the Infor VISUAL interface. On the left, a 'Production Cost & Gross Profit' chart shows 'Estimated', 'Actual', and 'Projected' values for 'Sell Price' and 'Profit'. The central window is 'Customer Order Entry - Infor VISUAL - VE810T2', with a menu highlighting 'Audit History...'. Below this, the 'Audit History for 3000' window shows a table of changes:

ID	User ID	Date	Field	Old Value	New Value
3000/1	ED	6/21/2016 2:37:09:690000 PM	CUST_ORDER_LINE.USER_ORDER_QT	11.0000	10.0000
3000	ED	6/21/2016 2:37:09:687000 PM	CUSTOMER_ORDER.TOTAL_AMT_ORD	11000.0000	10000.0000
3000/1	SYSADM	6/21/2016 2:27:27:750000 PM	CUST_ORDER_LINE.USER_ORDER_QT	10.0000	11.0000
3000	SYSADM	6/21/2016 2:27:27:743000 PM	CUSTOMER_ORDER.TOTAL_AMT_ORD	10000.0000	11000.0000
3000	SYSADM	6/21/2016 2:27:27:543000 PM	CUSTOMER_ORDER.CUSTOMER_PO_R PO890		PO89001

In the foreground, the 'Program Component Security' dialog box is open, showing the user 'TONY' and program 'VMORDENT'. The 'Audit History' component is selected with a checkmark and has 'No' access.

Note: This requires turning on the VISUAL table audit functionality

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

List Preferences' Descriptions

Section	Entry	
eMail	Server Address	The host name of the SMTP host. Can be either the host name or IP address of the server.
eMail	Server Port	
eMail	Use SSL	
eMail	User Name	
eMail	User Password	

Send To... Richard Laqoy; richard2.laqoy@infor.com; richard3.laqoy@infor.com

Cc...

Subject Customer Order Acknowledgement

Attached  VMORDFRM 3000 20160621-152044.RTF (8 KB) 

Dear Mr. Pascal,

Attached you will find your Order Confirmation 3000. Please let me know if you have any questions.

E-Mail Print Associated Documents Send to document contacts PDF Format Preview 



Document Management

Feature

Copy and move documents

Benefits

Globally move selected documents to a new location

Copy/Move Documents

New Path for all Copied Documents

Site ID **** All ****

Reference Type **** All ****

	Copy to New Path	Delete from Original Path	Site ID	Document ID	Reference Type	Original Path
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	50.png	General	C:\VISUALDOCS
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	bearing.JPG	General	C:\INFOR\VISUAL ENTERPRISE\VISUAL MANUFA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	DL_sample2.dwg	General	D:\Infor\ERP VISUAL\Enterprise\6_5_4\DOC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	dwg main bearing.JPG	General	C:\INFOR\VISUAL ENTERPRISE\VISUAL MANUFA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	Hardware News	General	http://www.hbsdealer.com/article/high-finance-f
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	LUCYCO~1.wmf	General	C:\INFOR\VISUAL ENTERPRISE\VISUAL MANUFA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	PurchaseOrderPrint.jpg	General	C:\VISUALDOCS
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	RON2.AVI	General	D:\Infor\ERP VISUAL\Enterprise\6_5_4\DOC
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	RON2.wmf	General	C:\INFOR\VISUAL ENTERPRISE\VISUAL MANUFA
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	** Tenant **	VISUALMYDAYINTEGRATIONG	General	D:\Infor\ERP VISUAL\Enterprise\6_5_4\DOC

Copy Select All Copy Clear All Delete Select All Delete Clear All

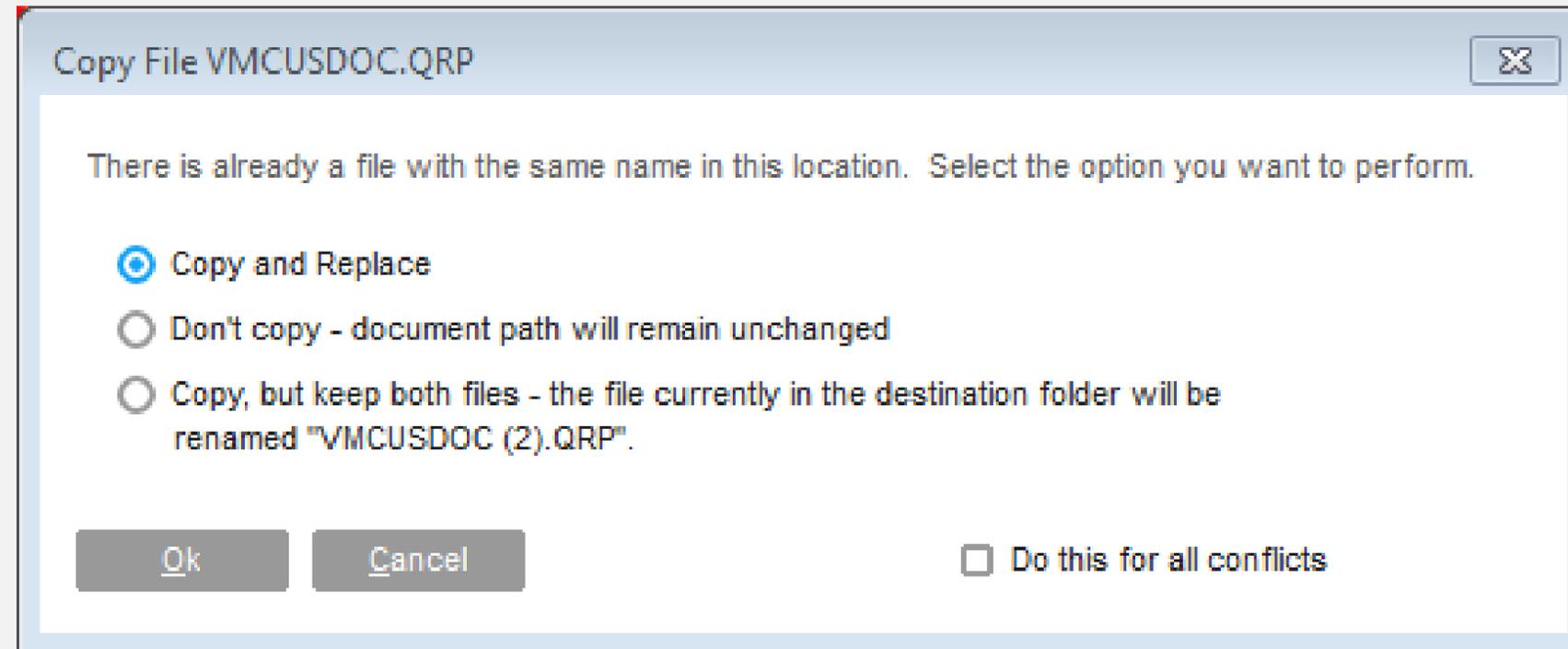
Save Close



Document Management

Feature

File attachment action prompt when replacing file of the same name



infor Toolbar Maintenance

Feature

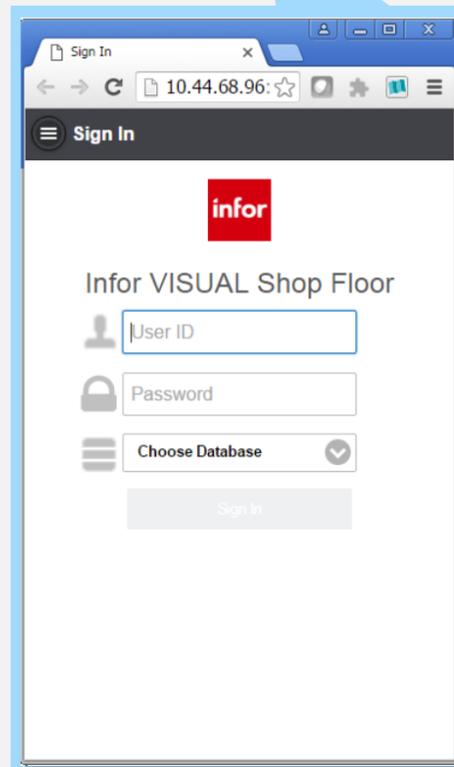
- Ability to launch a URL or query from the user toolbar

Benefits

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

Maintain User Toolbar

Program Name	Toolbar ID	Position	Bitmap	Tool Tip	Execute Command	Toolbar Type	Exec
VISUAL Enterprise Main Menu	Mobile Dispatch	1	C:\Infor\VISUAL\VE810t4\TBWRKFLO.BMP	Mobile Dispatch	http://10.44.68.96:10660/DISPATCH6	URL	
VISUAL Enterprise Main Menu	Open Order List	2	C:\Infor\VISUAL\VE810t4\CPW_UPP.BMP	Open Order Lines	vmqryrun, -k OpenOrderLines	VMQuery	
VISUAL Enterprise Main Menu	My Activities	3	C:\Infor\VISUAL\VE810t4\FILES.BMP	MyActivities	vmqryrun, -k MyActivities	VMQuery	



Query Runner - Infor VISUAL - VE810T4

File Edit View Help

Query Name: MyActivities

ID	STATUS	SUBJECT	START_DATE	DUE_DATE	LAST_MODIFIED	LAST_USER
00002	Not Started	Follow-up on Detailed Literature	2015-01-16 00:00:00.00	2015-01-18 00:00:00.00	2016-05-03 12:44:04.00	SYSADM
00003	Not Started	DLT		2015-01-14 00:00:00.00	2015-04-17 11:40:07.00	SYSADM
00004	Not Started	Buy Lunch		2015-02-07 00:00:00.00	2015-04-17 11:40:31.00	SYSADM
00005	Not Started	Contracts Presented & Signed		2015-03-15 00:00:00.00	2015-04-17 11:42:06.00	SYSADM
00006	Not Started	send quote	2015-03-12 00:00:00.00	2015-03-12 00:00:00.00	2015-04-17 11:42:18.00	SYSADM
00008	Not Started	Profile Survey & Qualifications - Size & Industry		2015-03-28 00:00:00.00	2015-04-17 11:42:57.00	SYSADM
00010	Not Started	Profile Survey & Qualifications - Size & Industry		2015-02-23 00:00:00.00	2015-04-17 11:44:14.00	SYSADM
00011	Not Started	Contracts Presented & Signed		2015-03-18 00:00:00.00	2016-05-03 12:49:56.00	SYSADM
00013	Not Started	Profile Survey & Qualifications - Size & Industry		2015-03-03 00:00:00.00	2015-04-17 11:46:07.00	SYSADM
00014	Not Started	Budget Approval and Review		2015-02-19 00:00:00.00	2015-04-17 11:46:39.00	SYSADM
00015	Not Started	Call - confirm meeting on the 8rd	2015-04-05 00:00:00.00	2015-04-06 00:00:00.00	2015-04-17 11:38:23.00	SYSADM
00016	Not Started	Call to wish her a happy birthday on 7/7/01	2015-04-06 00:00:00.00	2015-07-06 00:00:00.00	2015-04-17 11:38:23.00	SYSADM
00018	Completed	Derry Hardware mentioned in attached article	2016-07-29 00:00:00.00	2016-07-29 00:00:00.00	2016-07-29 11:46:47.36	
00020	Not Started	Call on short payment	2015-12-01 00:00:00.00	2015-12-01 00:00:00.00	2015-12-01 16:44:37.43	SYSADM
00021	Not Started	Collection - called on short pay	2016-02-05 00:00:00.00	2016-02-05 00:00:00.00	2016-02-05 14:23:48.72	SYSADM



Address Maintenance

Features

- Add ISO country standards

Benefits

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

The screenshot displays the Infor VISUAL interface for address maintenance. The main window, titled 'Application Global Maintenance - Infor VISUAL - VE810T2', shows a form with the following fields:

- Name: Majestic Manufactur
- Street Address: 13560 Morris Road
- City, State, Zip: Alpharetta
- Country: USA
- Barcode Transaction System: Session Time Limit
- Recent File List Limit: 0

Overlaid on this is a 'Change Address Layouts' dialog box with a 'Country' dropdown set to 'ARGENTINA'. A 'Countries' dialog box is also open, showing a list of countries with their ISO IDs:

Field #	ID	Description
1	AD	ANDORRA
2	AE	UNITED ARAB EMIRATES
3	AF	AFGHANISTAN
4	AG	ANTIGUA AND BARBUDA
5	AI	ANGUILLA
6	AL	ALBANIA
7	AM	ARMENIA
8	AN	NETHERLANDS ANTILLES
9	AO	ANGOLA
10	AQ	ANTARCTICA
11	AR	ARGENTINA
12	AS	AMERICAN SAMOA
13	AT	AUSTRIA
14	AU	AUSTRALIA

Buttons at the bottom of the 'Countries' dialog include Save, Close, Copy, and Delete.

Video Library

Feature:

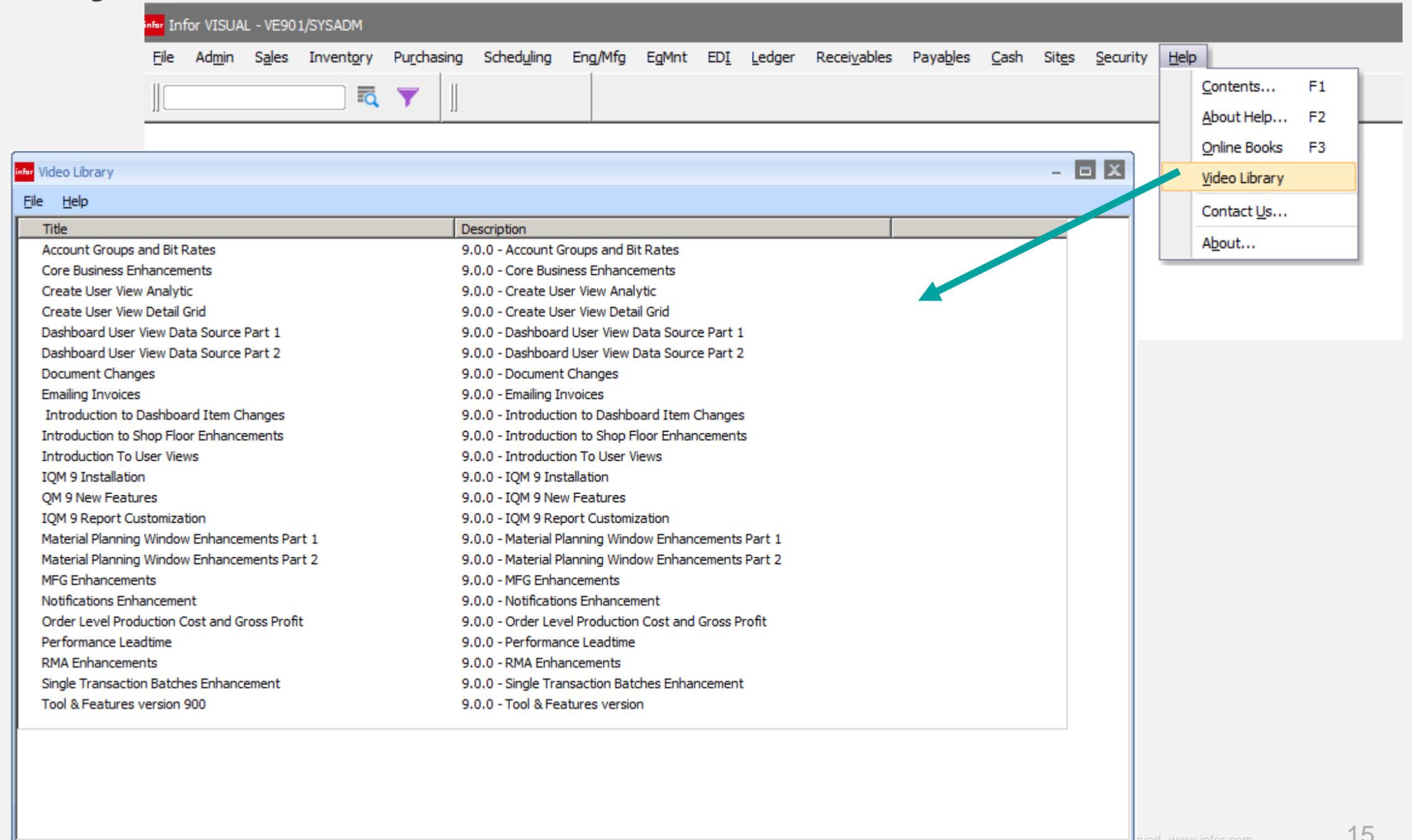
Provides access to new feature videos introduced with each release.

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.



The screenshot displays the Infor VISUAL software interface. The main window is titled "Infor VISUAL - VE901/SYSADM" and features a menu bar with options: File, Admin, Sales, Inventory, Purchasing, Scheduling, Eng/Mfg, EgMnt, EDI, Ledger, Receivables, Payables, Cash, Sites, Security, and Help. The Help menu is open, showing options: Contents... (F1), About Help... (F2), Online Books (F3), Video Library (highlighted), Contact Us..., and About... A red arrow points from the "Video Library" menu item to a separate window titled "infor Video Library". This window contains a table with two columns: "Title" and "Description".

Title	Description
Account Groups and Bit Rates	9.0.0 - Account Groups and Bit Rates
Core Business Enhancements	9.0.0 - Core Business Enhancements
Create User View Analytic	9.0.0 - Create User View Analytic
Create User View Detail Grid	9.0.0 - Create User View Detail Grid
Dashboard User View Data Source Part 1	9.0.0 - Dashboard User View Data Source Part 1
Dashboard User View Data Source Part 2	9.0.0 - Dashboard User View Data Source Part 2
Document Changes	9.0.0 - Document Changes
Emailing Invoices	9.0.0 - Emailing Invoices
Introduction to Dashboard Item Changes	9.0.0 - Introduction to Dashboard Item Changes
Introduction to Shop Floor Enhancements	9.0.0 - Introduction to Shop Floor Enhancements
Introduction To User Views	9.0.0 - Introduction To User Views
IQM 9 Installation	9.0.0 - IQM 9 Installation
QM 9 New Features	9.0.0 - IQM 9 New Features
IQM 9 Report Customization	9.0.0 - IQM 9 Report Customization
Material Planning Window Enhancements Part 1	9.0.0 - Material Planning Window Enhancements Part 1
Material Planning Window Enhancements Part 2	9.0.0 - Material Planning Window Enhancements Part 2
MFG Enhancements	9.0.0 - MFG Enhancements
Notifications Enhancement	9.0.0 - Notifications Enhancement
Order Level Production Cost and Gross Profit	9.0.0 - Order Level Production Cost and Gross Profit
Performance Leadtime	9.0.0 - Performance Leadtime
RMA Enhancements	9.0.0 - RMA Enhancements
Single Transaction Batches Enhancement	9.0.0 - Single Transaction Batches Enhancement
Tool & Features version 900	9.0.0 - Tool & Features version



Increase URL path

Feature:

Increased the url and document path to 255 where required

9.0.0

Table Search 🔍

Database Tables and Columns

- ..NO_CALL_MOBILE (nchar(1))
- ..NO_CALL_PHONE (nchar(1))
- ..NO_EMAIL (nchar(1))
- ..PHONE (nvarchar(20))
- ..PHONE_EXT (nvarchar(10))
- ..POSITION (nvarchar(50))
- ..PREFERRED_CONTACT_METHOD (nchar(1))
- ..SALUTATION (nvarchar(60))
- ..STATE (nvarchar(10))
- ..URL_FACEBOOK (nvarchar(128))
- ..URL_HYVES (nvarchar(128))
- ..URL_LINKEDIN (nvarchar(128))
- ..URL_MYSPACE (nvarchar(128))
- ..URL_TWITTER (nvarchar(128))

9.0.1

Table Search 🔍

Database Tables and Columns

- ..NO_CALL_PHONE (nchar(1))
- ..NO_EMAIL (nchar(1))
- ..PHONE (nvarchar(20))
- ..PHONE_EXT (nvarchar(10))
- ..POSITION (nvarchar(50))
- ..PREFERRED_CONTACT_METHOD (nchar(1))
- ..SALUTATION (nvarchar(60))
- ..STATE (nvarchar(10))
- ..UDF_LAYOUT_ID (nvarchar(15))
- ..URL_FACEBOOK (nvarchar(255))
- ..URL_HYVES (nvarchar(255))
- ..URL_LINKEDIN (nvarchar(255))
- ..URL_MYSPACE (nvarchar(255))
- ..URL_TWITTER (nvarchar(255))



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

The screenshot displays the Infor VISUAL - VE902 Contact Maintenance interface. The main window shows a contact form for 'Mr. Michael Adams' with contact ID 0000050. The form includes fields for First/Last Name, Middle Name/Initial, Position, Salutation, Phone/Extension, Mobile Phone, Fax, Country Dial Code, E-Mail, and Social Network URL. Below the form are tabs for Address, Profile, Customers, Vendors, User Defined, and Specifications. A second window shows a contact list with columns for Contact ID, Last Name, First Name, Initial, Phone, Mobile, and Email.

Contact ID	Last Name	First Name	Initial	Phone	Mobile	Email
0000001						
0000050	Adams	Michael	F.	(802) 864-9934		
0000007	Adler	Dave	J.	(770) 555-555		
0000071	Adler	Vernon	J.	(606)645-2121		
0000076	Adler	Vernon	J.	(770) 555-555		User1@local.c
0000018	Anderson	Gillian	Y.	(617) 821-2138		
0000033	Baxter	Joan	A.	(617) 929-1500		
0000029	Bell	Janice		(334)694-0100		jbell@jacksonind.c
0000023	Broland	James		800-589-8352		james@telcofluidp
0000010	Brown	David	J.	[617] 444-7000		richard.lagoy@infor
0000075	Brown	David	J.	[617] 444-7000		User1@local.com
0000078	Brown	David	J.	[617] 444-7000		
0000079	Brown	David	J.	[617] 444-7000		cory.griffin@infor
0000080	Brown	David	J.	[617] 444-7000		dbrown@able.com



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

The screenshot shows the 'Customer Order Entry - Infor VISUAL - VE903' window. The interface includes a menu bar (File, Edit, View, Info, Options, Notes, EDI, Macro, Help) and a toolbar with various icons. A 'Click' annotation points to a 'Display Database Source' icon in the toolbar. Below the form fields, there is a table with columns: Ln#, Quantity, Supply Status, Supply Type, Job ID, Lot ID, Split ID, Sched Finish Date, New W/O, Part ID, # Pieces, Length, Width, Height, Dim UM, and Current Part Stage. A 'Click' annotation points to the '# Pieces' column header. A callout box points to a cell in the table containing the text 'CUST_ORDER_LINE.PIECE_COUNT'. At the bottom of the window, a status bar also displays 'CUST_ORDER_LINE.PIECE_COUNT'. The form fields include Site ID (MMC), Our Order ID, Order Date (1/31/2018), Customer ID, Customer PO, Desired Ship Date (1/31/2018), Promise Ship Date, Promise Del Date, and Shipto ID. There are also dropdown menus for Status, FOB, Ship Via, and Carrier ID.



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

Query Tool - Infor VISUAL - VE903

Table Search: cust

Database Tables and Columns:

- ...TOTAL_USR_SHIP_QTY (decimal(20,8))
- ...TRACE_QTY (decimal(20,8))
- ...TRADE_DISC_PERCENT (decimal(6,3))
- ...TRANS_CATEGORY_ID (nvarchar(15))
- ...TYPE (nchar(15))
- ...UDF_LAYOUT_ID (nvarchar(15))
- UNIT_PRICE (decimal(22,8))**
- ...USER_1 (nvarchar(80))
- ...USER_10 (nvarchar(80))
- ...USER_2 (nvarchar(80))
- ...USER_3 (nvarchar(80))
- ...USER_4 (nvarchar(80))
- ...USER_5 (nvarchar(80))
- ...USER_6 (nvarchar(80))
- ...USER_7 (nvarchar(80))

Table Search: cust

Database Tables and Columns:

- ...TRACE_QTY (decimal(14,4))
- ...TRADE_DISC_PERCENT (decimal(6,3))
- ...TRANS_CATEGORY_ID (nvarchar(15))
- ...TYPE (nchar(15))
- ...UDF_LAYOUT_ID (nvarchar(15))
- UNIT_PRICE (decimal(15,6))**
- ...USER_1 (nvarchar(80))
- ...USER_10 (nvarchar(80))
- ...USER_2 (nvarchar(80))
- ...USER_3 (nvarchar(80))
- ...USER_4 (nvarchar(80))

VISUAL – 9.0.2

Global Financials – 8.1.201802

General Journal Maintenance MMC - [GJN17012000001]

Journal ID: GJN17012000001
 Document Type: GJRNL
 Currency ID: USD
 Entry Date: 12/5/2017
 Posting Date: 12/5/2017
 Description: General Journal

Dist #	Entry #	Entit...	Account ID	Description	Dist Type	Debit Amount	Credit Am...	Curren...	Trans	Cat...	Posting D.
1	1	MMC	2030-100	Dividends Pa...	Other	€50,000,000,000,000.00		EUR			12/5/2017
1	1	MMC	2030-100	Dividends Pa...	Other	\$99,999,999,999,999.99		USD			12/5/2017
1	2	MMC	8100-100	Interest Eam...	Other		€50,000,0...	EUR			12/5/2017
1	2	MMC	8100-100	Interest Eam...	Other		\$99,999,9...	USD			12/5/2017

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

infor 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

Reimplementation Type

Beginning Balance
 Master Data Only

Do not include

Obsolete Parts
 Obsolete Shop Resources
 Obsolete Services
 Inactive Customers
 Inactive Vendors
 Inactive Employees
 Inactive Contacts
 Inactive G/L Accounts

Beginning Balance Descriptions

Sales Quote
Sales Order
 Set line description to (Transfer Balance Order)
RMA's
A/R Invoice, Credits, Unapplied Cash
RFQ
Purchase Orders
Purchase Requisitions
A/P Invoice, Credits (Vouchers)
Inventory Balance
Work Orders
IBT
Balance Sheet
Budgets

Costs

Work Order Beginning Balance Part ID

Creating beginning balances...

4/4(0%)

Creating Inventory Balances - MMT-1996-BCV-WM/MMC-MAIN/AREA2

58/269(22%)

Clearing Accounts

A/R Invoice, Credit, Unapplied Cash (Credit)
A/P Invoice, Credits (Debit)
Inventory Balance (Credit)
Work Order (Credit)
Payables (Credit)
Receivables (Debit)



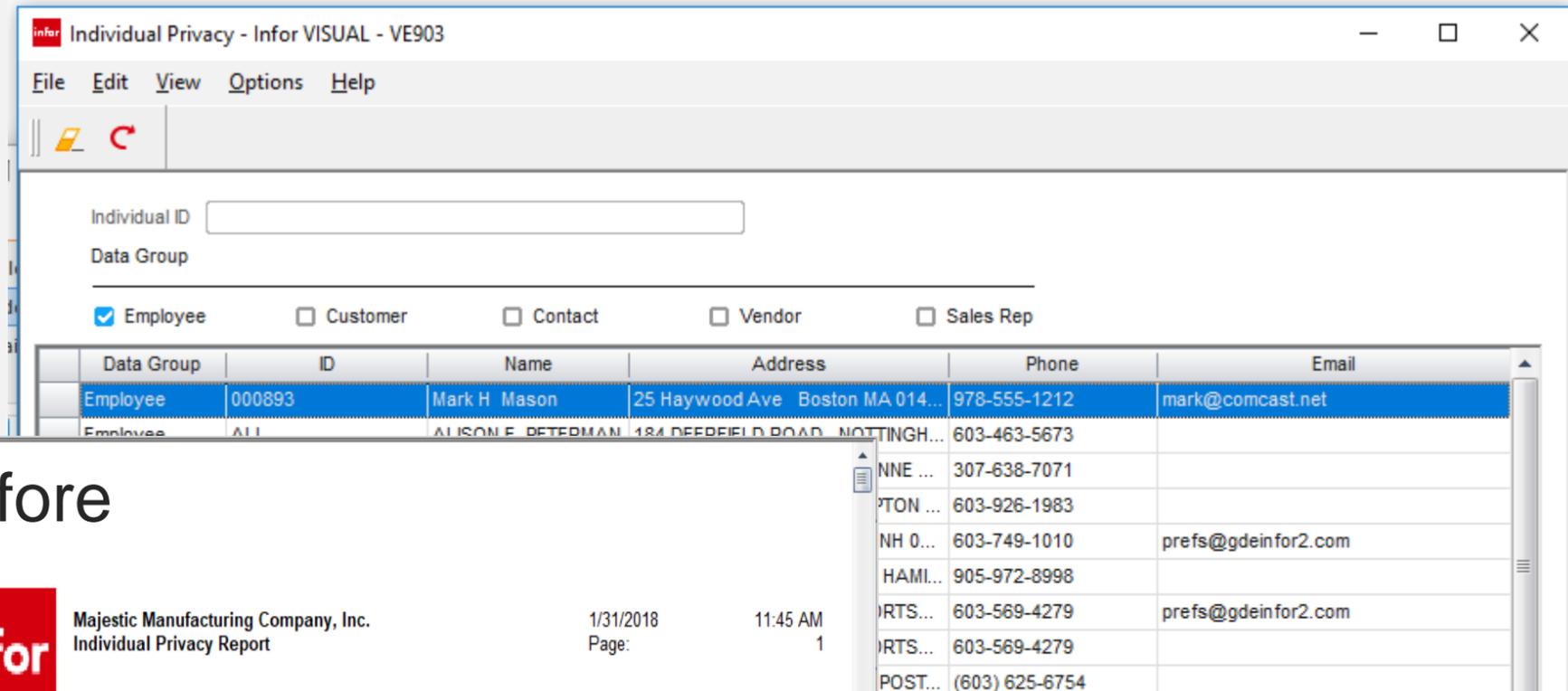
General Data Protection Regulation (GDPR)

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



Before

infor Majestic Manufacturing Company, Inc. Individual Privacy Report 1/31/2018 Page: 1 11:45 AM

Data Group	Employee
ID	000893
Name	Mark H. Mason
Address	25 Haywood Ave Boston MA 01453 UNITED STATES
Phone	978-555-1212
Email	mark@comcast.net

Individuals printed: 1

Employee	JOHN	JOHN F. KASLOW	5 MIDDLETO
Employee	KEITH	KEITH A. LEFLER	595 PROUD
Employee	KELLY	KELLY CLARK	1585C WEL
Employee	KENT	KENT A. MANAGER	595 PROUD

After

infor Majestic Manufacturing Company, Inc. Individual Privacy Report 1/31/2018 Page: 1 11:48 AM

Data Group	Employee
ID	000893
Name	XXXXXXXXXX XX XXXXXXXXXXXX
Address	XXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XX XXXXXX
Phone	XXXXXXXXXX
Email	XXXXXXXXXX

Individuals printed: 1



Analytics & Performance Management

infor 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

The image illustrates the workflow for creating user-defined analytics in Infor. It consists of three main windows:

- Edit Data Source:** Shows the configuration for a data source named 'Infor_Activities'. It includes fields for 'Data Source ID', 'Description', 'Scope' (set to Custom), and 'Status' (set to Active). A table below lists the data source's structure with columns for Seq No, Name, Alias, Table Type, Join Type, and Join Conditions.
- Edit User Analytic:** Shows the configuration for an analytic named 'Infor Activities'. It includes fields for 'Configuration ID', 'Description', 'Data Source ID', 'Analytic Type' (Value Based), 'Chart Type' (Pie), 'Value Column', 'Value Aggregation' (Count), 'Series Column', and 'Category Column' (CATEGORY_ID). A pie chart is displayed with a legend for 'Other' (blue), 'ACCTMGT' (red), and 'ADMIN' (light blue).
- Dashboard:** Shows the final dashboard view titled 'Dashboard - Infor VISUAL - VE810T2 - East Coast - EAST'. It features a menu bar (File, Edit, View, Options, Window, Help) and a toolbar. The main window displays the 'Activities' pie chart. A drill-down window titled 'Activities: ACCTMGT' is open, showing a table of activity details.

Annotations with arrows indicate the flow: 'Define data source' points to the 'Edit Data Source' window, 'Define Analytic parameters' points to the 'Edit User Analytic' window, and 'Show in dashboard with complete drill-down' points to the dashboard window.

Seq No	Name	Alias	Table Type	Join Type	Join Conditions
1	V_TASK	vt	Base	None	

Activity ID	Status	Subject	Start Date	Due Date	Last Modified	Last
00018	Completed	Derry Hardware mentioned in attach	07/29/2016	07/29/2016	07/29/2016	
00020	Not Started	Call on short payment	12/01/2015	12/01/2015	12/01/2015	SYS
00021	Not Started	Collection - called on short pay	02/05/2016	02/05/2016	02/05/2016	SYS

infor Dashboard

Horizon Parameter

Feature

- Horizon parameter

Benefits

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

Configure Analytic Chart

Configuration ID: Infor_ShippingForecast

Title: Shipping Forecast

Series Grouping: Quarter

Series Category: Part ID

Period Type: Quarters

Periods: 1

Horizon Periods: 1

Begin Date: []

End Date: []

Starting Part ID: []

Ending Part ID: []

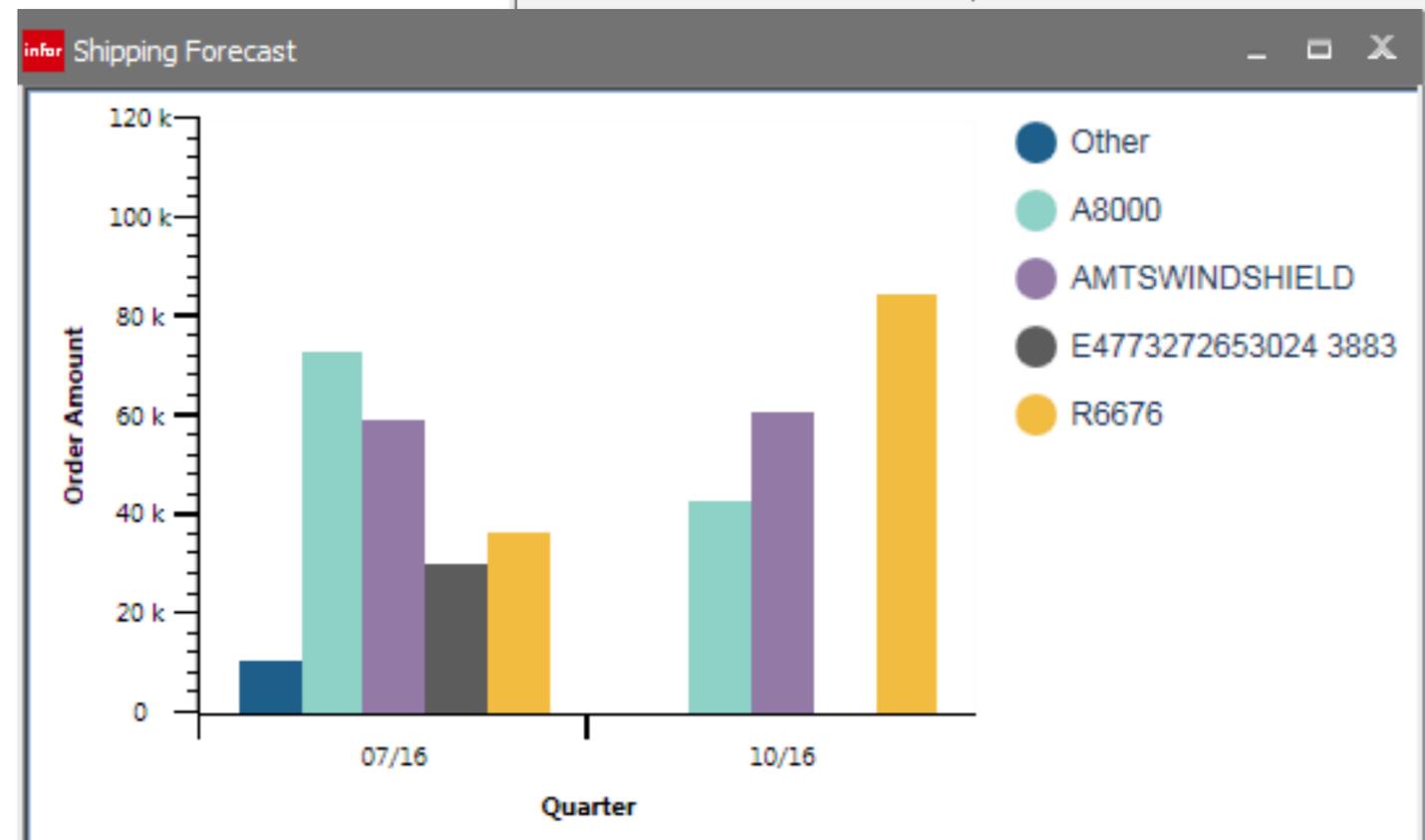
Site ID: MMC

Product Code: AUTOMOTIVE, ELECTRONICS, FURNITURE, GENERIC, INJ MOLD, PM

Sales Rep ID: MARK TONY

OK Cancel Apply

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





Dashboard

WO Estimate Vs Projected Overall

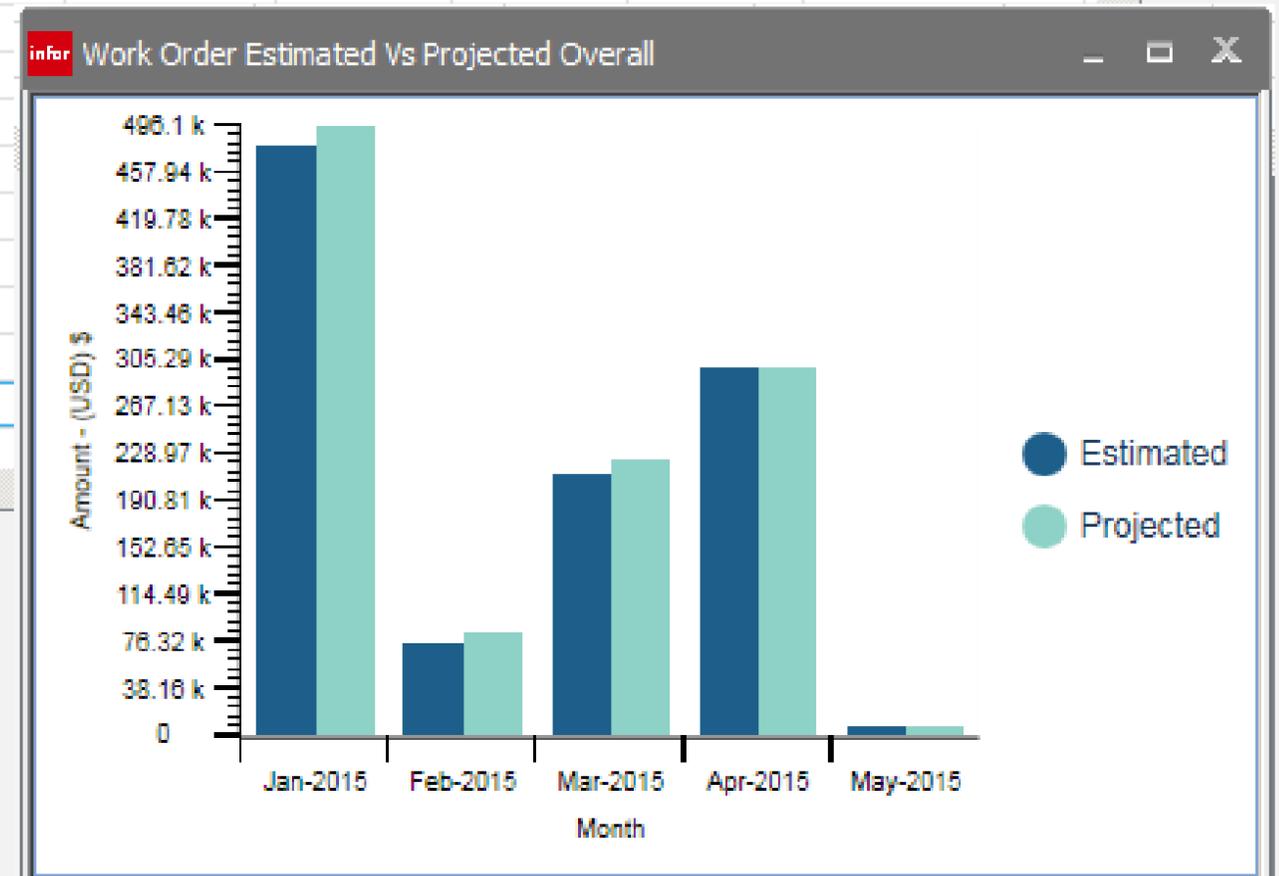
Feature

- Ability to place date range on x-axis

Benefits

- Analyze historic efficiencies
- Predict effect on future margins

Work Order ID	Estimated Cos'	Projected Cost	Variance	Release Date	Want Date	Close Date	Desired Qty	Received C	Stock U/M	Part ID
02060/1	1,041.34	1,027.24	14.10	4/18/2015	6/1/2016		1	0		
FWD-TEST/1	186.34	186.34	0.00	4/17/2015	4/17/2015		1	0		
02051/1	6,325.85	6,325.85	0.00	4/18/2015	4/18/2015		10	0		
2998/1	54,230.63	54,230.63	0.00	4/21/2015	5/16/2015		10	0		
40012/1	0.00	0.00	0.00	4/3/2015	4/3/2015					
40013/1	0.00	0.00	0.00	4/19/2015	6/1/2015					
40014/1	0.00	0.00	0.00	4/3/2015	6/30/2015					
40022/1	0.00	0.00	0.00	4/3/2015	5/1/2015					
02038/2	3,562.50	3,562.50	0.00	4/24/2015	5/2/2015					
40050/1	817.67	817.67	0.00	4/18/2015	5/18/2015					
02038/1	7,937.50	7,937.50	0.00	4/24/2015	5/2/2015					
40034/1	4,397.77	4,397.77	0.00	4/21/2015	5/1/2015					
40044/1	1,249.05	1,249.05	0.00	4/18/2015	5/2/2015					
40045/1	401.04	401.04	0.00	4/27/2015	5/1/2015					



infor 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

The screenshot shows the 'Customer Order Entry' window for Site ID MMC, Order ID 02097, dated 6/17/2016. The customer is CENGRO. The order is for 4 units of a product with a unit price of 1,000.00 and a net unit price of 950.00. The ship date is 6/10/2016, and the promise ship date is 6/11/2016. The status is 'On hold'. The chart shows lead-time performance for QUOTE, SALES ORDER, MANUFACTURE, and SHIP stages.

Ln#	Unit Price	Net Unit Price	Disc%	Extension	Ship Date	Promise Ship Date	Promise Del Date	Freight	Comm%	Tax Group ID
1	1,000.00	950.00	5.000	\$9,500.00	6/10/2016	6/11/2016	6/12/2016	\$0.00	10.000	
2	1,000.00	950.00	5.000	\$9,500.00				\$0.00	10.000	
3	1,000.00	950.00	5.000	\$9,500.00				\$0.00	10.000	
4	1,000.00	950.00	5.000	\$9,500.00				\$0.00	10.000	

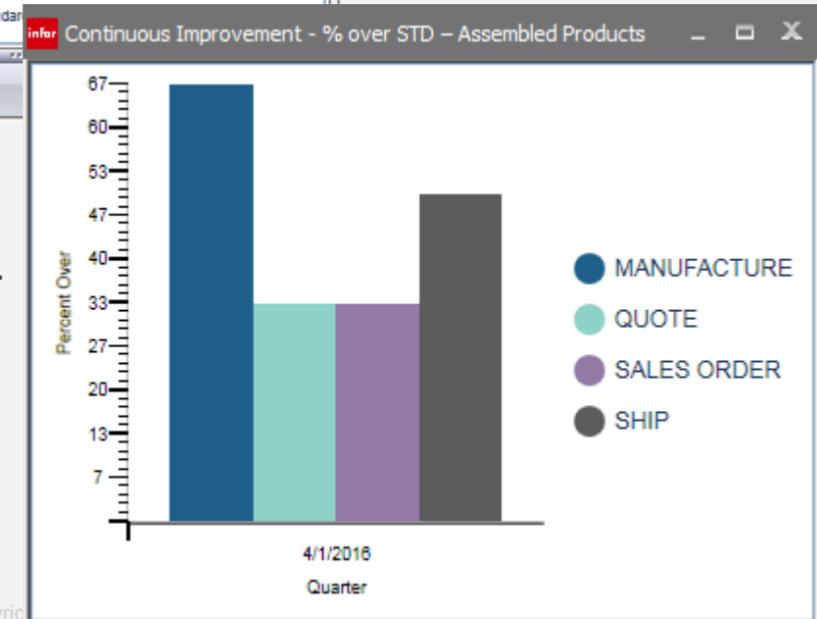
Sales Line Performance to Standard

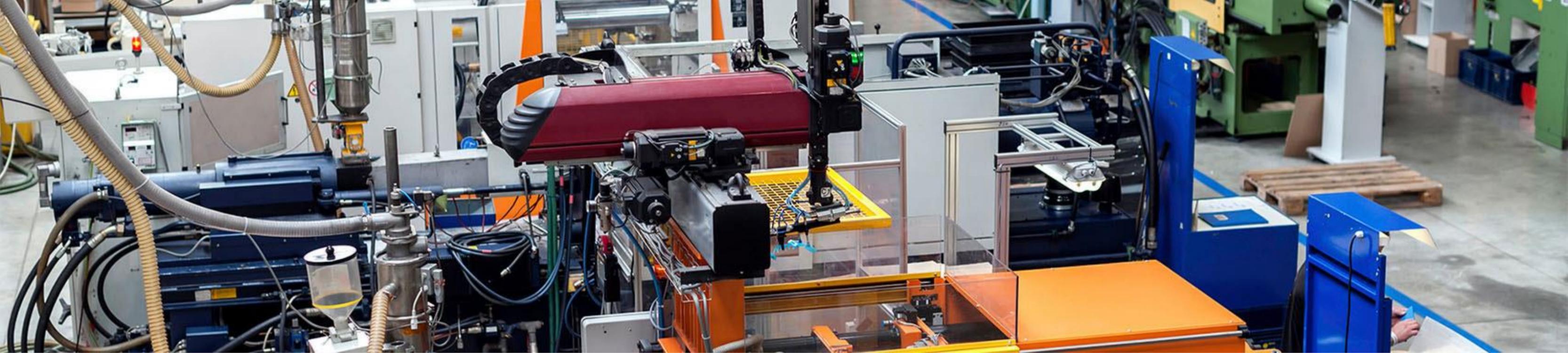
Dashboard Analytics

The screenshot shows the 'Leadtime Lifecycle' for Sales Order 02097/1 (Process A8000). It displays a progress bar for '% Overall' at 100.00%. The lifecycle is broken down into four stages: QUOTE, SALES ORDER, MANUFACTURE, and SHIP. Each stage shows start/end dates, standard/actual/project days, and completion percentage.

Stage	Start	End	Std Days	Act Days	Prj Days	% Comp
QUOTE	4/15/2016	5/16/2016	14.00	10.00	10.00	100.00
SALES ORDER	5/16/2016	5/12/2016	10.00	5.00	5.00	100.00
MANUFACTURE	5/12/2016	6/10/2016	30.00	45.00	45.00	100.00
SHIP	6/10/2016	6/17/2016	5.00	7.00	7.00	100.00

Sales Line Lead-time Lifecycle





Scheduling



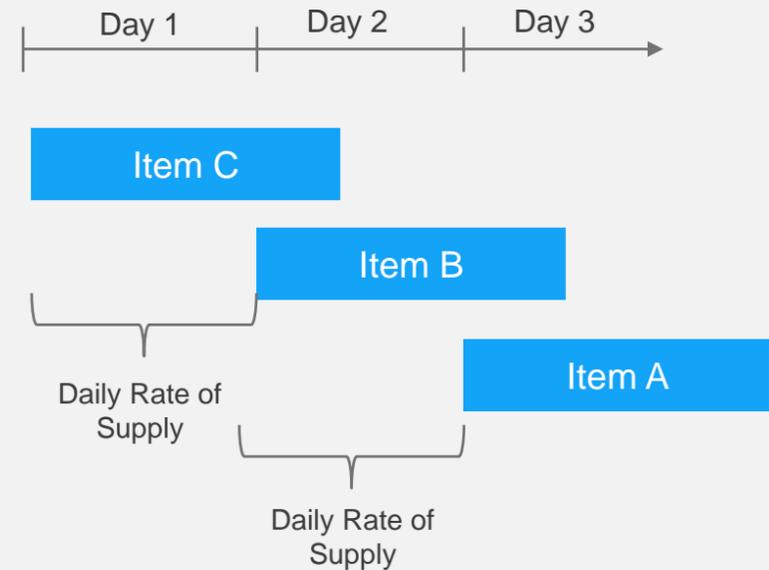
Scheduling – Rate based

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



Part Maintenance - Infor VISUAL - VE902

Site ID: MMC | Majestic Manufacturing Company, Inc.

Part ID: A8000 | Create Date: 6/1/2017

Part Description: ASSEMBLED PRODUCT | Modified Date: 9/20/2017

Stock UM: EA

Shipping Weight: | Weight UM: |

Eng Master Eng ID: 0

Product Code: GENERIC

Commodity Code: |

Process Type: A8000

Case Qty: 1 | Pallet Qty: |

Settings

- Fabricated
- Purchased
- Consumable
- Demand History
- Inv Tx Locked
- Detail Only
- Stocked
- Tool/Fixture
- Auto Issue
- Supply Then Leadtime

Costing | **Planning** | Accounting | Defaults | User Def | Piece

Warehouse ID: Universal

Planner User ID: STEVE

Buyer User ID: |

Safety Stock Qty: |

Leadtime (in Days): 10

Min/Max Order Qty: | |

Multiples of: |

- Do Not Inherit Demand Warehouse
- Inventory Controlled by ICS
- Rate Based Fabrication**

Scheduling Window - Infor VISUAL - CLASS_SCH902 - [CS2 - CS2 : S5]

File | Edit | View | Info | Options | Window | Help

	123	Oct 30	31	Nov 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
CS2																		
R1																		
R2																		
R3																		
R4																		

Annotations:

- FS1 : Fab Supply One00084/1(10)Finish: 11/8/2017 3:00 pm, 9
- FS1_R : Fab Supply One - RATE BASED00085/1(10)Finish: 11
- S5 : SCHI
- S5_R : S0

Callouts:

- Not rate-based, longer lead-time (points to FS1)
- Is rate-based, reduced lead-time (points to FS1_R)



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

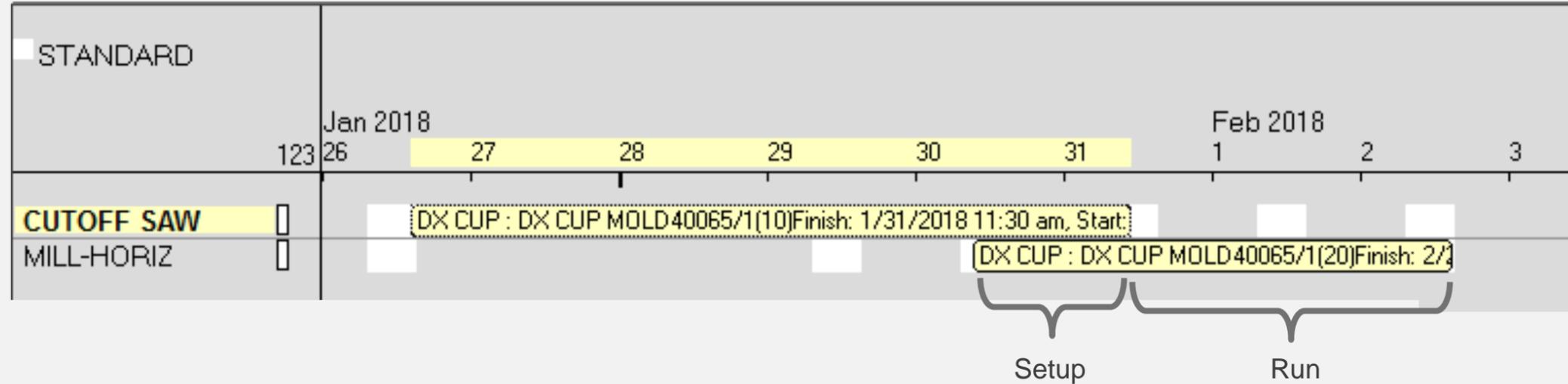
The screenshot displays the Infor software interface for rate-based planning. It includes a main window for 'Operation - 40066/1 Seq# 10' with fields for 'Type', 'Resource ID', and 'Operation Seq #'. A callout box explains: '1 piece per hour in an 8 hour day = 8 units complete (daily rate)'. Below this is a Gantt chart showing material requirements for '20 BRAKE -', '10 10TON -', and '10 RB-Raw - Rate-Based Raw'. A callout box for the RB-Raw bar states: '(R) 40066/1 - RB-1000 - Rate-Based 1000 100.0000 - 2/1/2018() - 11/9/2017()'. To the right, a 'Material - 40066/1 Seq# 10 Pc# 10' window shows 'Part ID RB-Raw' and 'Qty Per 3.00'. A callout box explains: '3 pieces required per unit @ 8 units per day = 24 pcs per day'. On the far right, a 'Rate-Based Raw' table shows daily requirements. A callout box points to the 'Total Qty Required' column, stating: 'Requirements showing a daily requirement of 24'.

Demand Warehouse	Date Required	Total Qty Required	Qty Issued	Qty Required	Stat	Peg to	Customer ID	Demand Dimer (# Pieces, L*V)	Projected Quantity	Moved Qty
									240	
	11/30/2018	24	0	24	R	40066/1*			216	
	12/3/2018	24	0	24	R	40066/1*			192	
	12/4/2018	24	0	24	R	40066/1*			168	
	12/5/2018	24	0	24	R	40066/1*			144	
	12/6/2018	24	0	24	R	40066/1*			120	
	12/7/2018	24	0	24	R	40066/1*			96	
	12/10/2018	24	0	24	R	40066/1*			72	
	12/11/2018	24	0	24	R	40066/1*			48	
	12/12/2018	24	0	24	R	40066/1*			24	
	12/13/2018	24	0	24	R	40066/1*			0	
	12/14/2018	24	0	24	R	40066/1*			-24	
	12/17/2018	24	0	24	R	40066/1*			-48	
	12/18/2018	12	0	12	R	40066/1			-60	

infor Scheduling – Overlap Setup

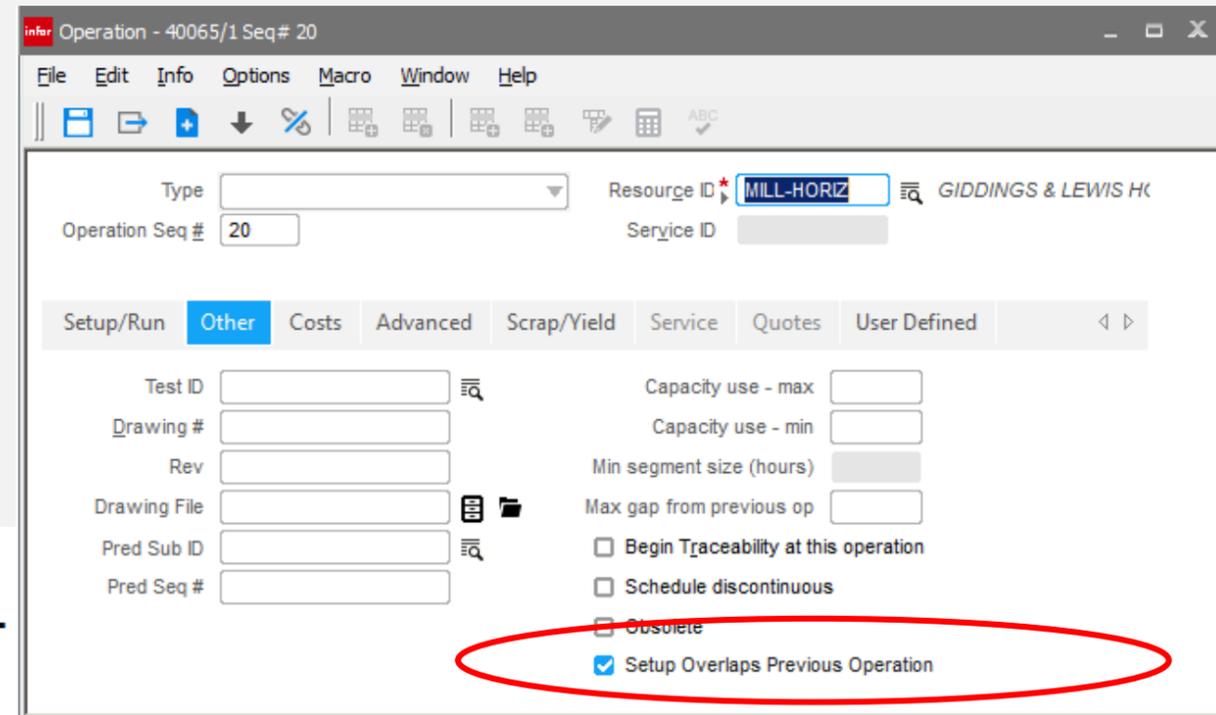
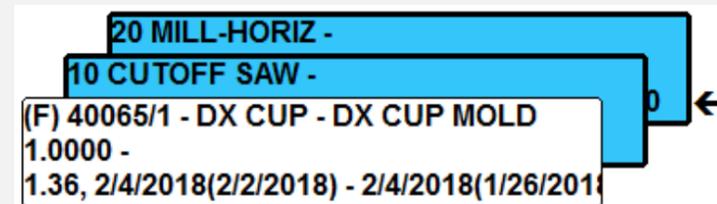
Feature

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.





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

The screenshot displays the Infor Concurrent Scheduler interface. At the top, the title bar reads "infor Concurrent Scheduler - Infor VISUAL - VE810T2 - 'CHI', 'CLE', 'FUL', 'MMC', 'MMC-I', 'SEA'". The menu bar includes File, Edit, View, Info, Options, and Help. A dropdown menu is open under "Options", showing "Calculator", "Preferences...", and "Schedule Preferences...".

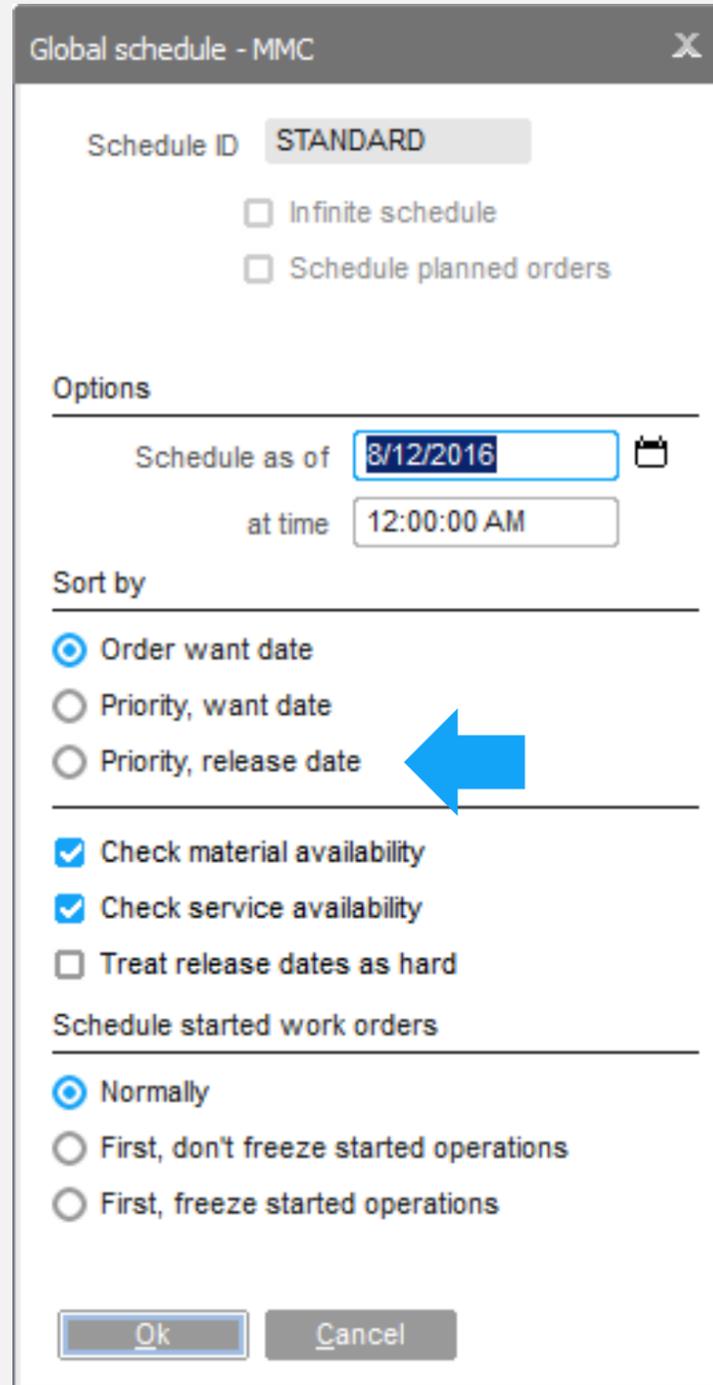
The main window contains a table with the following columns: Schedule ID, Sched, Capacity, Materials Checked, Services Checked, Hard Release, Active, Run Start Date, Run End Date, Schedule As of Date, Work Orders, Operations, and Requirements. The table lists various schedule IDs such as CHI-Standard, CLE-Standard, FIX_RELIND, FUL-Standard, INCR FASSY, INCR FASSY & QC, MMC-I-Standard, MRP_PLAN, SEA-Standard, STANDARD, and STD_NO_MTL.

Two "Preferences" dialog boxes are overlaid on the table. The first dialog, titled "Preferences - '** Tenant **", has a red circle around the title. It shows settings for "Schedule Horizon" (730 days), "Fit Tolerance" (100 percent), and "Schedule only remaining setup time" (checked). The second dialog, titled "Preferences - CLE[CLE-Standard]", also has a red circle around the title. It shows settings for "Schedule Horizon" (365 days), "Fit Tolerance" (95 percent), and "Schedule only remaining setup time" (checked). Both dialogs have "Ok" and "Cancel" buttons at the bottom.

Concurrent Scheduler

Feature

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



Global schedule - MMC

Schedule ID STANDARD

Infinite schedule

Schedule planned orders

Options

Schedule as of 8/12/2016

at time 12:00:00 AM

Sort by

Order want date

Priority, want date

Priority, release date

Check material availability

Check service availability

Treat release dates as hard

Schedule started work orders

Normally

First, don't freeze started operations

First, freeze started operations

Ok Cancel



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

Soft Allocation Setup

Execution Schedule

Sunday @

Monday @

Tuesday @

Wednesday @

Thursday @

Friday @

Saturday @

Late By Date

Round Late Time If After

Work Order Cost Method

Projected then Part Unit

Part Unit then Projected

Customer Service Measurement

Opportunity Lost Yield %

Selection

Allocate Linked Orders First

Allocate Unavailable Inventory

Allocate On-Hold Inventory

Show Status Meter While Calculating

Show Debug Windows During Allocation Generation

Periods

Monthly Buckets

Weekly Buckets

Daily Buckets

Part ID	Part Description	Part Price	Allocation Qty	Throughput Date	Value Late	Days Late	Value-Days Late	Opportunity Lost
00-0001	PCA, MEMORY BOARD...	0.00	100	4/19/2017	13,050.00	705.72	9,209,584.38	1,261.59
DGET-CHRO...	CHROME PLATED WID...	0.00	1000	5/9/2017	12,765.33	728.65	9,301,404.52	1,274.17
DGET-CHRO...	CHROME PLATED WID...	0.00	2000	5/25/2017	25,490.88	716.67	18,268,464.00	2,502.53
DDUCT_A	GENERIC PRODUCT A	0.00	50	4/18/2017	9,000.00	717.40	6,456,562.50	884.46
DDUCT_B	GENERIC PRODUCT B	0.00	25	4/19/2017	12,500.00	718.40	8,979,947.92	1,230.13

Finish Date	Supply Qty
0 2/3/2015	3
0 2/4/2015	19
0 2/17/2015	1

Demand - Infor VISUAL - VE900

Copy

MMC

Type	Customer ID	Customer Name	Order ID	Line No	Del No	Order Qty	Shipped Qty	Cust Price	Discount	Commission	Part ID	Part Description	Part Price	Demand Date	Demand Qty
CO	RELIND	RELIANCE INDUSTRIES	02042	1	0	12	0	622.89	0	10	SPECORD	SPECIAL CORD G-5	320	4/17/2015	0.00
CO	RELIND	RELIANCE INDUSTRIES	02015	1	0	90	0	115	12	10	MMT-1996-DM	DESK MODEL TEL...	115	4/24/2015	0.00
CO	RELIND	RELIANCE INDUSTRIES	02015	2	0	100	0	120	12	10	MMT-1996-WM	WALL MOUNT TEL...	820	4/24/2015	0.00

infor 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

Site ID: MMC

Customer Service Impact

Majestic Manufacturing Company, Inc. 4/10/2017 11:41 AM
Page: 1

Throughput Allocation Exceptions
Unfulfilled Demand and Unallocated Supply

MMC - <None>

Unfulfilled Sales Order Demand			
Order ID	Part ID	Unfulfilled Qty	Want Date
[CO] 02012/1	MMT-1996-DM	100.00	4/19/2017
[CO] 02012/2	MMT-1996-WM	120.00	4/19/2017
[CO] 02016/2	MMT-1996-WM	100.00	5/8/2015
[CO] 02017/2	MMT-1996-WM	94.00	5/3/2015

Unallocated Supply Items			
Supply ID	Part ID	Unallocated Qty	Finish Date
[] CLESKY	CELL-1000	50.00	4/10/2017
[] MMC-MAIN	1/4PLATE	996.00	4/10/2017
[] MMC-MAIN	1/4X3ANGL	45.00	4/10/2017
[] MMC-MAIN	3/16PLATE	4,518.29	4/10/2017
[] MMC-MAIN	AMTSGASKET	11,510.00	4/10/2017
[] MMC-MAIN	AMTSGGLASS	3,900.00	4/10/2017



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

infor 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	Throughput 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	\$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	\$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	\$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_	\$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	\$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	\$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	\$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	\$120.00	\$11,016.00	0.00	\$0.00	\$0.00



Shop Floor Automation

infor 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

Detail	Material	Labor	WO Specs	OP Specs
LEG - STANDARD 40213-2/1	9/11/2012 3/8/2016	1,000	1,000	0
BRACES 40213-4/1	9/11/2012 3/8/2016	300	300	0
LEG - STANDARD 40216-2/1	4/15/2015 3/31/2016	1,000	1,000	0
BRACES 40216-4/1	4/15/2015 3/31/2016	300	300	0
LEG - STANDARD 40217-2/1	5/18/2016	400	400	0
BRACES 40217-4/1	5/18/2016	200	200	0

Start Setup Start Run Stop Job Receive WO

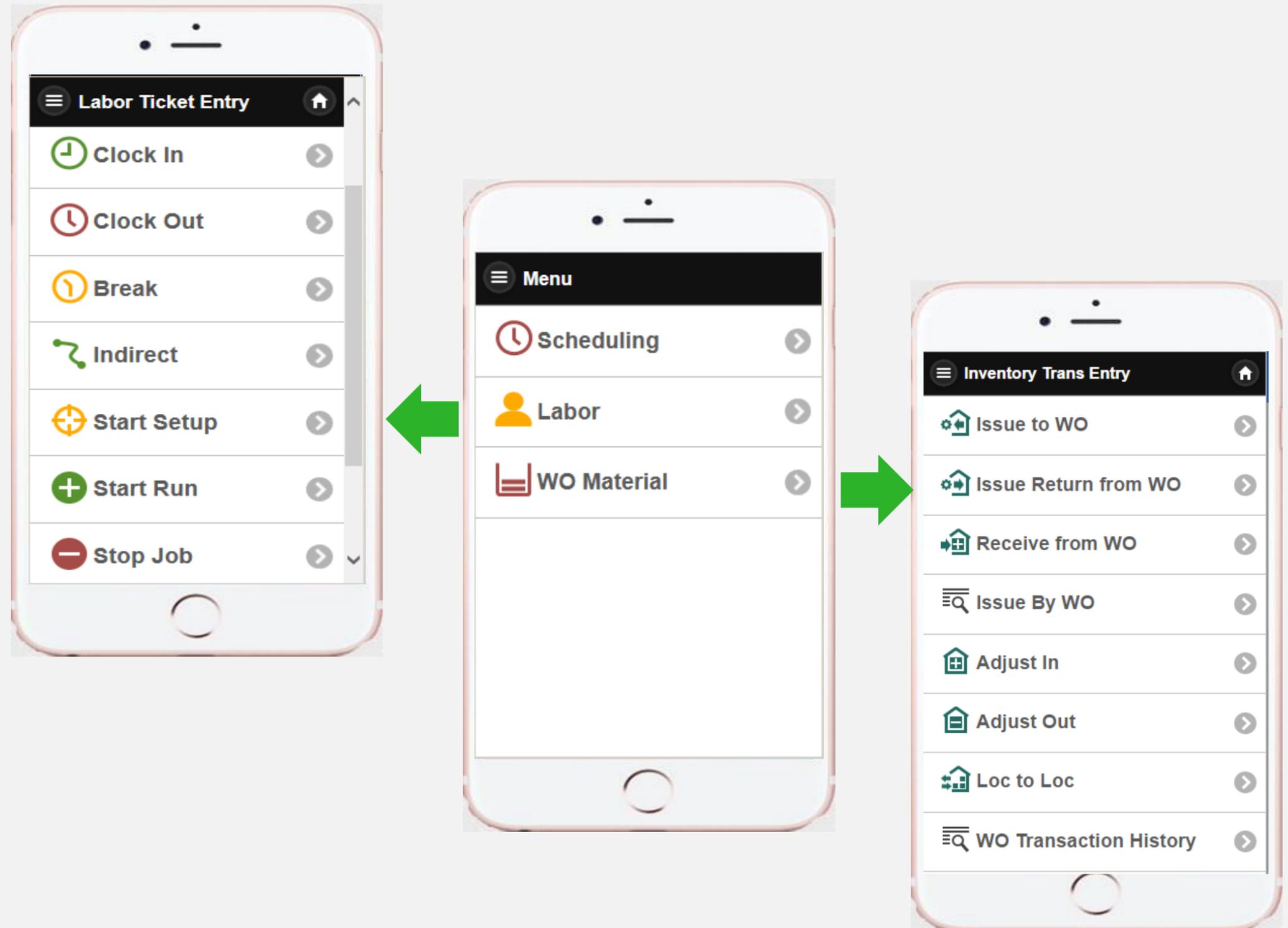
Shop Floor Automation – labor & material

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



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



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

The screenshot displays the 'Bar Code Labor Ticket Entry - Infor VISUAL - VE902' application. The main window shows employee information (DAVE STREET, DAVE), site ID (MMC), and a sequence of buttons for labor tracking: Clock In, Start Setup, Start Run, Indirect, Stop Job, Break, and Clock Out. Below these are fields for Work Order (9000), Lot ID (2), Split ID (0), Sub ID (2), and Trans ID (96). A red box highlights the 'Op Qty Completed' (5.00), 'Op Qty Deviated' (0.00), and 'Op Qty Remaining' (5.00) fields. The status 'Run In Process' is visible. A 'Preferences/Setup' window is open on the right, showing a table of indirect IDs and a list of checkboxes. A red box highlights the checkboxes for 'Show operation quantity completed', 'Show operation quantity deviated', and 'Show operation quantity remaining'. The bottom status bar indicates 'Enter/Wand desired action' and 'NUM'.

Indirect ID	G/L Acct ID	Code
CLEAN	4205-000	M
HOLID	4205-003	H
MISC	4205-001	M
SICK	4205-004	S
VACA	4205-002	V

- Show operation quantity completed
- Show operation quantity deviated
- Show operation quantity remaining



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

Labor Tickets

From Date Thru Date

Trans ID	Date	Operation	Employee ID	Clock In	Clock Out	Hours	Resource ID	Site ID
58	9/8/2016	3000/1 Op# 40	DAVE	8:52:52 AM	10:10:52 AM	0.40	GRIND	MMC
59	9/8/2016	02006/1 Op# 10	DAVE	8:53:47 AM	10:11:19 AM	0.39		
60	9/8/2016	3000-1/1 Op# 10	DAVE	8:54:24 AM	10:11:39 AM	0.39		

Recalc Proration

Search Criteria

Site ID Employee ID Date

Labor Tickets

Transaction ID	Trans Type	Trans Date	Prorated	Clock-In	Clock-Out	Elapsed Hours	Unprorated Elapsed Hours	Hours Break
58	R	9/8/2016	<input checked="" type="checkbox"/>	8:52:52 AM	10:10:52 AM	0.40	1.13	0.00
59	R	9/8/2016	<input checked="" type="checkbox"/>	8:53:47 AM	10:11:19 AM	0.39	1.12	0.00
60	R	9/8/2016	<input checked="" type="checkbox"/>	8:54:24 AM	10:11:39 AM	0.39	1.12	0.00

Total Labor Tickets 3 Total Elapsed Hours 1.18

Labor Ticket Entry - Infor VISUAL - VE810T5

File Edit View Info Options Macros Help

Site ID Transaction Date

Transaction ID

Employee ID STREET, DAVE

Department ID Transaction Type Indirect Code

Manufacturing

Base ID

Oper Seg No

Resource ID

Indirect ID

G/L Account ID

Earning Code

Cost Category ID

Inspection Plan ID

Clock-in Time Act

Clock-out Time 8:5

Elapsed Hours Act clock out Run Complete Unit Rate

Break Hours 10:10:52 AM Quality Data Collection Complete

Description

Labor Ticket Entry

You are modifying an overlapping/prorated labor ticket. This impacts the Multiplier 2 prorated value. Once finished, please consider opening the Recalc Proration dialog to recalculate tickets for each employee/day impacted.



Engineering, Material, and Material Planning



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

The screenshot displays the Infor Advanced Planning interface. The main window is titled 'Material Planning Window - Infor VISUAL - MY810 - [MPS-5]'. It features a menu bar (File, Edit, View, Info, Options, Notes, Macro, Window, Help) and a toolbar. The interface is segmented into several sections:

- Left Panel:** Contains filters for Site ID (MMC), Part ID (MPS-5), and various options like 'Fabricated', 'Purchased', 'Stocked', etc. It also shows a summary table for 7/1/2016 and 8/1/2016.
- Summary Table:**

	7/1/2016	8/1/2016
Beginning Inventory	150.0000	25.0000
Current MPS	1875.0000	1425.0000
MRP Planned Orders	1875.0000	1425.0000
Suggested MRP Release	1875.0000	1425.0000
Current Firmed Orders	175.0000	75.0000
Gross Supply	2200.0000	1525.0000
FORECAST-1*	1000.0000	1000.0000
FORECAST-2*	500.0000	500.0000
Gross Forecast	1500.0000	1500.0000
Customer Demand	2025.0000	550.0000
Dependent Demand	150.0000	150.0000
Gross Demand	2175.0000	1500.0000
Projected Inventory	25.0000	25.0000
Suggested MPS	1875.0000	1425.0000
Proposed Inventory	25.0000	25.0000
- Planning Period Details - MMC:** A sub-window showing a detailed view for the period 7/1/2016 - 7/31/2016. It includes summary statistics and a daily forecast table.
- Daily Forecast Table:**

	7/1/2016	7/2/2016	7/3/2016	7/4/2016	7/5/2016	7/6/2016	7/7/2016	7/8/2016	7/9/2016	7/10/2016
Beginning Inventory	150.0000	15.0000	15.0000	-135.0000	-135.0000	-310.0000	-285.0000	-435.0000	-675.0000	-650.0000
Current MPS	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
MRP Planned Orders	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Suggested MRP Release										
Current Firmed Orders	0.0000	0.0000	25.0000	0.0000	25.0000	25.0000	0.0000	0.0000	25.0000	0.0000
Gross Supply	150.0000	15.0000	40.0000	-135.0000	-110.0000	-285.0000	-285.0000	-435.0000	-650.0000	-650.0000
FORECAST-1*	1000.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
FORECAST-2*	500.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Remaining Forecast	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Customer Demand	135.0000	0.0000	175.0000	0.0000	200.0000	0.0000	150.0000	165.0000	0.0000	175.0000
Dependent Demand	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	75.0000	0.0000	0.0000
Gross Demand	135.0000	0.0000	175.0000	0.0000	200.0000	0.0000	150.0000	240.0000	0.0000	175.0000
Projected Inventory	15.0000	15.0000	-135.0000	-135.0000	-310.0000	-285.0000	-435.0000	-675.0000	-650.0000	-825.0000
- Order List:** A table showing order details:

Order ID	Status	Order Qty	Qty Due	Want Date	Release Date	Customer ID	Vendor ID	Warehouse ID	Consignment	Site ID
C 02486/2	Released	75.0000	75.0000	7/3/2016		ABLMAN		MMC-MAIN	<input type="checkbox"/>	MMC
C 02534/2	Released	100.0000	100.0000	7/3/2016		ABLMAN		MMC-MAIN	<input type="checkbox"/>	MMC
P PO-30326/1	Released	25.0000	25.0000	7/3/2016			BOSSEL	MMC-MAIN	<input type="checkbox"/>	MMC
- Exception List:** A table showing dates and descriptions of exceptions:

Exception Date	Description
7/1/2016	Customer Order 02486 Over Due
7/1/2016	Customer Order 02534 Over Due
7/3/2016	Purchase Order PO-30326 Over Due
7/3/2016	Customer Order 02486 Over Due
7/3/2016	Customer Order 02534 Over Due
7/5/2016	Customer Order 02486 Over Due



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.

Material Planning Window - Infor VISUAL - VE810T4

File Edit View Info Options Notes Macro Window

- Show Unreleased Status
- Show Firmed Status
- Show Released Status
- Show Closed Status
- Show Cancelled Status
- Show On Hold Status
- Detail Quantities
- Net Using MRP Rules
- Net By Date
- Net Using Nettable Qty
- Net Using Available Qty
- Deduct Safety Stock
- Show Exception Severity
- Set Current Calendar...
- Show Standard Mode Ctrl+D
- Suppress Zero
- Show First Day of Period

1/4PLATE

Site ID **MMC** Part ID **1/4PLATE** **1/4 INCH STEEL PLATE**

Fabricated Drawing ID Product code Primary Whs **MMC-MAIN** IBT Transit **200**

Purchased Drawing Rev No Commodity **STEEL** Primary Loc **AREA1** Leadtime Buffer (in days) **0**

Stocked Planner **MIKE** Order Policy **Discrete** Total On Hand **1196** Min Leadtime (in days) **0**

Autolssue Buyer **SUDHA** Leadtime **7** Total On Hold **1191** Demd Horizon (in days) **7**

InsptReqd Active ECN Safety **0.00** Netable **11** Latest Buffer Status

PieceTrkd Eng ID Whs On Hand Pref Vendor ID **HOOSTE** Emergency Stock %

Obsolete U/M **10X10_SHT** Whs On Hold Min/Max/Mult **20/100/** Replenishment Level

Warehouse ID **All Warehouses** *All Warehouses*

Short Parts All Exceptions Demand Fences: 90, 120 (Site) Current Monthly Planning Period By: **Start Date**

	8/7/2015	9/6/2015	10/6/2015	11/5/2015	12/5/2015	1/4/2016	2/3/2016	3/4/2016	4/3/2016	5/3/2016	6/2/2016	7/2/2016
Beginning Inventory	11											
MRP Planned Orders	0											
Suggested MRP Release												
Current Firmed Orders	0											
Gross Supply	11											
Customer Demand	0											
Dependent Demand	0											
Gross Demand	0											
Projected Inventory	11											

1/4PLATE

Site ID **MMC** Part ID **1/4PLATE** **1/4 INCH STEEL PLATE**

Fabricated Drawing ID Product code Primary Whs **MMC-MAIN** IBT Transit **200**

Purchased Drawing Rev No Commodity **STEEL** Primary Loc **AREA1** Leadtime Buffer (in days) **0**

Stocked Planner **MIKE** Order Policy **Discrete** Total On Hand **1196** Min Leadtime (in days) **0**

Autolssue Buyer **SUDHA** Leadtime **7** Total On Hold **1191** Demd Horizon (in days) **7**

InsptReqd Active ECN Safety **0.00** Netable **11** Latest Buffer Status

PieceTrkd Eng ID Whs On Hand Pref Vendor ID **HOOSTE** Emergency Stock %

Obsolete U/M **10X10_SHT** Whs On Hold Min/Max/Mult **20/100/** Replenishment Level

Warehouse ID **All Warehouses** *All Warehouses*

Short Parts All Exceptions Demand Fences: 90, 120 (Site) Current Monthly Planning Period By: **End Date**

	8/30/2016	9/29/2016	10/29/2016	11/28/2016	12/28/2016	1/27/2017	2/26/2017	3/28/2017	4/27/2017	5/27/2017	6/26/2017	7/26/2017
Beginning Inventory	0	0	0	0	0	0	0	0	0	0	0	0
MRP Planned Orders	0	0	0	0	0	0	0	0	0	0	0	0
Suggested MRP Release												
Current Firmed Orders	0	0	0	0	0	0	0	0	0	0	0	0
Gross Supply	0	0	0	0	0	0	0	0	0	0	0	0
Customer Demand	0	0	0	0	0	0	0	0	0	0	0	0
Dependent Demand	0	0	0	0	0	0	0	0	0	0	0	0
Gross Demand	0	0	0	0	0	0	0	0	0	0	0	0
Projected Inventory	0	0	0	0	0	0	0	0	0	0	0	0



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

infor A8000

Site ID: MMC Part ID: A8000 ASSEMBLED PRODUCT

Fabricated Drawing ID: A8000 Product code: GENERIC Primary Whs: MMC-MAIN IBT Transit: 0
 Purchased Drawing Rev No: 0 Commodity: Primary Loc: AREA2 Leadtime Buffer (in days): 0
 Stocked Planner: STEVE Order Policy: Master scheduled Total On Hand: 0 Min Leadtime (in days): 0
 Autolssue Buyer: Leadtime: 10 Total On Hold: 0 Demd Horizon (in days): 10
 InsptReqd Active ECN: Safety: 0.00 Netable: 0 Latest Buffer Status:
 PieceTrkd Eng ID: 0 Whs On Hand: 0 Pref Vendor ID: Emergency Stock %:
 Obsolete U/M: EA Whs On Hold: 0 Min/Max/Mult: Replenishment Level:

Warehouse ID: MMC-MAIN MAIN WAREHOUSE - MAJESTIC MANUFACTURING

Short Parts All Exceptions Demand Fences: 90, 120 (Site) Current Monthly Planning Period By: End Date

	9/5/2015	10/5/2015	11/4/2015	12/4/2015	1/3/2016	2/2/2016	3/3/2016	4/2/2016	5/2/2016	6/1/2016	7/1/2016	7/31/2016	8/30/2016	9/29/2016	10/29/2016	11/28/2016	12/28/2016	1/27/2017	2/26/2017	
Beginning Inventory	0	-6	-6	-6	-6	-7	-7	-1	-1	-1	-1	-1	-41	-61	-77	-87	-88	-88	-88	-88
MRP Planned Orders	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Suggested MRP Release																				
Current Firmed Orders	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Supply	0	-6	-6	-6	-6	-7	-7	-1	-1	-1	-1	-1	-41	-61	-77	-87	-88	-88	-88	-88
Customer Demand	6	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Dependent Demand	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Gross Demand	6	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Projected Inventory	-6	-6	-6	-6	-7	-7	-7	-1	-1	-1	-1	-1	-41	-61	-77	-87	-88	-88	-88	-88
Current MPS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Suggested MPS	6	0	0	0	0	1	0	0	0	0	0	34	20	16	10	1	0	0	0	0
Proposed Inventory	0	0	0	0	0	0	0	6	6	6	6	0	0	0	0	0	0	0	0	0

Color Preference dialog box:

- Demand Color: (Blue)
- Supply Color: (Green)
- Projected Color: (Yellow)
- Exceptions Color: (Grey)
- Apply to Advanced Mode

Buttons: Ok, Cancel, Restore Defaults

Exception Date	Exception Message
5/12/2015	Customer Order 3000 Over Due
9/5/2015	Projected Inventory Negative
12/17/2015	Customer Order 02094 Over Due
2/10/2016	Work Order 3000 Over Due
6/10/2016	Customer Order 02097 Over Due



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

Warning
Please be sure you understand the behavior of the preference value you are modifying. Preferences affect system behavior.

Active	Global	Section	Entry	Value	Modify Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PlanningWindow	ApplyTableColor	Y	8/26/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	PlanningWindow			

List Preferences' Descriptions

Section	Entry	Values	Description
PlanningWindow	PeriodWantDay	Number	Tells VISUAL what day within your planning periods to use as the want date when saving MPS entries for master scheduled parts.

Processing

Demand Type: **Gross Demand**

Warehouse ID: All Warehouses

Product Code: []

Planner: []

Buyer: []

Fabricated

Purchased

Include Planned Orders

Close upon process completion

Log Process

Period Want Day: **10**

Start Stop Close

Part ID: A8000

Warehouse ID: Universal

On hand: 0.00

Part Type: Real

Period Want Day: **10**

ASSEMBLED PRODUCT	8/30/2016	9/29/2016	10/29/2016	11/28/2016	12/28/2016	1/27/2017	2/26/2017	3/28/2017	4/27/2017	5/27/2017	6/27/2017
Current MPS	0	0	0	0	0	0	0	0	0	0	0
Beginning Inventory	-60	-76	-86	-87	-87	-87	-87	-87	-87	-87	-87
MRP Planned Orders	0	0	0	0	0	0	0	0	0	0	0
Current Firm Orders	0	0	0	0	0	0	0	0	0	0	0
Gross Supply	-60	-76	-86	-87	-87	-87	-87	-87	-87	-87	-87



Advanced Planning

Drill-to Demand / Supply line

Feature

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

The screenshot displays three overlapping windows in the Infor VISUAL interface:

- Material Planning Window - Infor VISUAL - VE810T4:** Shows a demand/supply grid for Part ID 1/4 RD BAR at Site ID MMC. The grid includes columns for dates (8/30/2016, 9/29/2016, 10/29/2016, 11/28/2016) and rows for Beginning Inventory, MRP Planned Orders, Suggested MRP Release, Current Firmed Orders, Gross Supply, Customer Demand, Dependent Demand, Gross Demand, and Projected Inventory. A blue arrow points from the 'Gross Demand' row on 10/29/2016 to the PO-30351/2 line in the Purchase Order Entry window.
- Planning Period Details - 1/4 RD BAR - MMC:** A summary window showing planning period 9/30/2016 - 10/29/2016. It lists Beginning Inventory (0), MRP Planned Orders (0), Current Firmed Orders (11), and Gross Supply (11). It also shows Customer Demand (0), Dependent Demand (0), and Gross Demand (0).
- Purchase Order Entry - Infor VISUAL - VE810T4/SYSADM:** Shows a purchase order for Site ID MMC, Order Date 6/3/2016, and Vendor ID C&S. The order is for 11 units of Part ID 1/4 RD BAR. The status is 'Released'. A table below the order details shows three lines, each for 11 units of Part ID 1/4 RD BAR at Site ID MMC.



Master Scheduling

Feature

- New screen layout

Benefits

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

The screenshot displays the Infor Visual Master Scheduling interface. The main window is titled "Material Planning Window - Infor VISUAL - MY810 - [MPS-5]". It features a menu bar (File, Edit, View, Info, Options, Notes, Macro, Window, Help) and a toolbar with various icons. The interface is divided into several sections:

- Header:** Site ID: MMC, Part ID: MPS-5, Product code: MPS detail test part.
- Attributes:** Fabricated, Purchased, Stocked, Autolssue, InsptrReqd, PieceTrkd, Obsolete, Drawing ID, Drawing Rev No, Planner, Buyer, Active ECN, Eng ID, U/M, Product code, Commodity, Order Policy, Leadtime, Safety, Whs On Hand, Whs On Hold.
- Warehouse ID:** All Warehouses.
- Short Parts / All Exceptions:** Demand Fences: 30, 90 (Part).
- Table 1 (Summary):**

	7/1/2016	8/1/2016	9/1/2016
Beginning Inventory	150.0000	25.0000	25.0000
Current MPS	1875.0000	1425.0000	1725.0000
MRP Planned Orders	1875.0000	1425.0000	1725.0000
Suggested MRP Release	1875.0000	1425.0000	1725.0000
Current Firmed Orders	175.0000	75.0000	75.0000
Gross Supply	2200.0000	1525.0000	1825.0000
FORECAST-1*	1000.0000	1000.0000	1000.0000
FORECAST-2*	500.0000	500.0000	500.0000
Gross Forecast	1500.0000	1500.0000	1500.0000
Customer Demand	2025.0000	550.0000	1650.0000
Dependent Demand	150.0000	150.0000	150.0000
Gross Demand	2175.0000	1500.0000	1800.0000
Projected Inventory	25.0000	25.0000	25.0000
Suggested MPS	1875.0000	1425.0000	1725.0000
Proposed Inventory	25.0000	25.0000	25.0000
- Table 2 (Detailed):**

	7/1/2016	8/1/2016	9/1/2016	10/1/2016	11/1/2016	12/1/2016	1/1/2017	2/1/2017	3/1/2017	4/1/2017	5/1/2017
Current MPS	1875.0000	1425.0000	1725.0000	1425.0000	1425.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000
Beginning Inventory	150.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000
MRP Planned Orders	1875.0000	1425.0000	1725.0000	1425.0000	1425.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000
Current Firmed Orders	175.0000	75.0000	75.0000	75.0000	75.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Gross Supply	2200.0000	1525.0000	1825.0000	1525.0000	1525.0000	1525.0000	1525.0000	1525.0000	1525.0000	1525.0000	1525.0000
FORECAST-1*	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000	1000.0000
FORECAST-2*	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000	500.0000
Gross Forecast	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000
Customer Demand	2025.0000	550.0000	1650.0000	1100.0000	1500.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Dependent Demand	150.0000	150.0000	150.0000	150.0000	150.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Gross Demand	2175.0000	1500.0000	1800.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000
Projected Inventory	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000
Suggested MPS	1875.0000	1425.0000	1725.0000	1425.0000	1425.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000	1500.0000
Proposed Inventory	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000	25.0000
- Exception Table:**

Exception Date	Description
7/1/2016	Customer Order 02486 Over Due
7/1/2016	Customer Order 02534 Over Due
7/3/2016	Purchase Order PO-30326 Over Due
7/3/2016	Customer Order 02486 Over Due
7/3/2016	Customer Order 02534 Over Due
7/5/2016	Customer Order 02486 Over Due
- Master Production Schedule - MMC (Pop-up Window):**
 - Part ID: MPS-5, Warehouse ID: Universal, On hand: 150.00, Period Want Day: []
 - Part Type: Planning, Real
 - Buttons: Save, Close, Refresh, Excel Export/Import forecast, Import/Export forecast, Customer Forecasts.



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.

The screenshot displays the Infor VISUAL interface. The 'Material Planning Window' is active, showing a menu with 'Quoting History...' highlighted. A 'Part Quoting History' dialog is open, showing a table of quoting history for Part ID A8000 at Site ID MMC. The table includes columns for Quote date, Won/Loss date, Expected date, Quote, Site ID, Customer, Unit price, Quote Qty, Disc%, and Standard Unit price.

Quote date	Won/Loss date	Expected date	Quote	Site ID	Customer	Unit price	Quote Qty	Disc%	Standard Unit price
5/15/2018	5/15/2017	5/15/2018	QT0021	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	1,000.0000	15	1000.00
5/15/2018	5/15/2017	5/15/2018	QT0021	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	100.0000	15	1000.00
5/15/2018	5/15/2017	5/15/2018	QT0021	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	10.0000	15	1000.00
5/15/2018	5/15/2017	5/15/2018	QT0021	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	1.0000	15	1000.00
8/5/2017		8/5/2017	QT0015	MMC	CENGRO - CENTRE GROUP	1,200.0000	10.0000	5	1000.00
5/10/2017	6/16/2017	6/16/2017	9000	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	50.0000	15	1000.00
5/10/2017	6/16/2017	6/16/2017	9000	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	20.0000	15	1000.00
5/10/2017	6/16/2017	6/16/2017	9000	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	10.0000	15	1000.00
5/10/2017	6/16/2017	6/16/2017	9000	MMC	ABLMAN - ABLE MANUFACTURING	1,000.0000	1.0000	15	1000.00
3/13/2016	3/23/2016	3/27/2016	3000	MMC	CLESKY - CLEAR SKY INDUSTRIES	629.0000	1,000.0000		1000.00
3/13/2016	3/23/2016	3/27/2016	3000	MMC	CLESKY - CLEAR SKY INDUSTRIES	630.0000	500.0000		1000.00
3/13/2016	3/23/2016	3/27/2016	3000	MMC	CLESKY - CLEAR SKY INDUSTRIES	640.0000	100.0000		1000.00

Sort Order: Quote Date Customer Quote Order
 Order Sequence: Ascending Descending

infor 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.

The screenshot shows a software interface with a menu open. The menu items are:

- Add Operation... Ctrl+O
- Add Material... Ctrl+M
- Add Leg/Detail... Ctrl+L
- Open Engineering Master**
- Cut Ctrl+X
- Copy Ctrl+C
- Paste Ctrl+V
- Delete Del
- Edit... Ctrl+E
- Purchase this material/service... Ctrl+P
- Net this Material... F8
- Labor Ticket Entry...
- Inventory Transaction Entry...
- Part Maintenance...
- Picture F12
- View Drawing
- View Document Reference
- Alternate Part Information
- Status Change

Callouts and BOM items:

- Callout: **M - Separate the left and right ha**
- Callout: **- This operation produces both**
- Callout: **- 47265-L - LEFT HALF OF M**
- Callout: **Mixing tank can hold up to 100 pc**
- Callout: **- RE-USABLE POLYPROPYLE**
- Callout: **POLYPROPYLENE RESIN, V**
- Callout: **- Mix of 70% new raw p**
- BOM Item: **10 ASSEMBLY -**
- BOM Item: **20 MMC-FM0001 - STANDARD CHROM**
- BOM Item: **10 A8000 - ASSEMBLED PRODUCT**
- BOM Item: **(U) 40065/1 - ML BOM - ML BOM Drill-to Ex**
- BOM Item: **10.0000 -**
- BOM Item: **10/4/2017() - 10/4/2017()**

infor 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

The screenshot shows the Infor VISUAL interface. The main window is titled 'Customer Order Entry - Infor VISUAL - VE8 10'. A 'Supply Links - MMC' dialog box is open, displaying the following data:

Order ID/Line #	3000/1	Part ID	A8000
Selling Order Qty	10	Part Description	ASSEMBLED PRODUCT
Stock Order Qty	10	Selling U/M	
Shipped Qty	4	Stock U/M	EA
Allocated Qty	10	Warehouse ID	MMC-MAIN
Fulfilled Qty	4	Desired Ship Date	5/12/2015
Remaining Qty	0	Promise Date	4/21/2015

Below the dialog box, a table of supply links is visible:

Type	Lot ID	Split ID	Supply Base ID	Supply Part ID	Seq #/ Line #	Piece #
WO	1	0	3000	A8000		

A blue arrow points to the 'Assign Supply to Customer Order Line...' option in the main application's menu.



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

The screenshot shows the 'Part Maintenance' window in Infor VISUAL. The window title is 'Part Maintenance - Infor VISUAL - VE901'. The menu bar includes File, Edit, View, Maintain, Info, Options, Notes, Macros, and Help. The toolbar contains various icons for file operations and navigation. The main area displays the following fields:

- Site ID: MMC (dropdown)
- Part ID: 47265-L (text input, highlighted with a blue border)
- Part Description: LEFT HALF OF MODEL 47265 (text input)
- Stock UM: EA (text input)
- Shipping Weight: (text input)
- Weight UM: (text input)
- Eng Master Eng ID: 0 (text input)
- Product Code: INJ MOLD (dropdown)
- Commodity Code: (dropdown)
- Process Type: (dropdown)
- Case Qty: (text input)
- Pallet Qty: (text input)

On the right side, the 'Majestic Manufacturing Company, Inc.' is listed. Below this, the 'Create Date' is 6/1/2017 and the 'Modified Date' is 7/5/2017. These two date fields are circled in red. Below the dates is a 'Settings' section with the following options:

- Fabricated
- Purchased
- Consumable
- Demand History
- Inv Tx Locked
- Detail Only
- Stocked
- Tool/Fixture
- Auto Issue
- Supply Then Leadtime



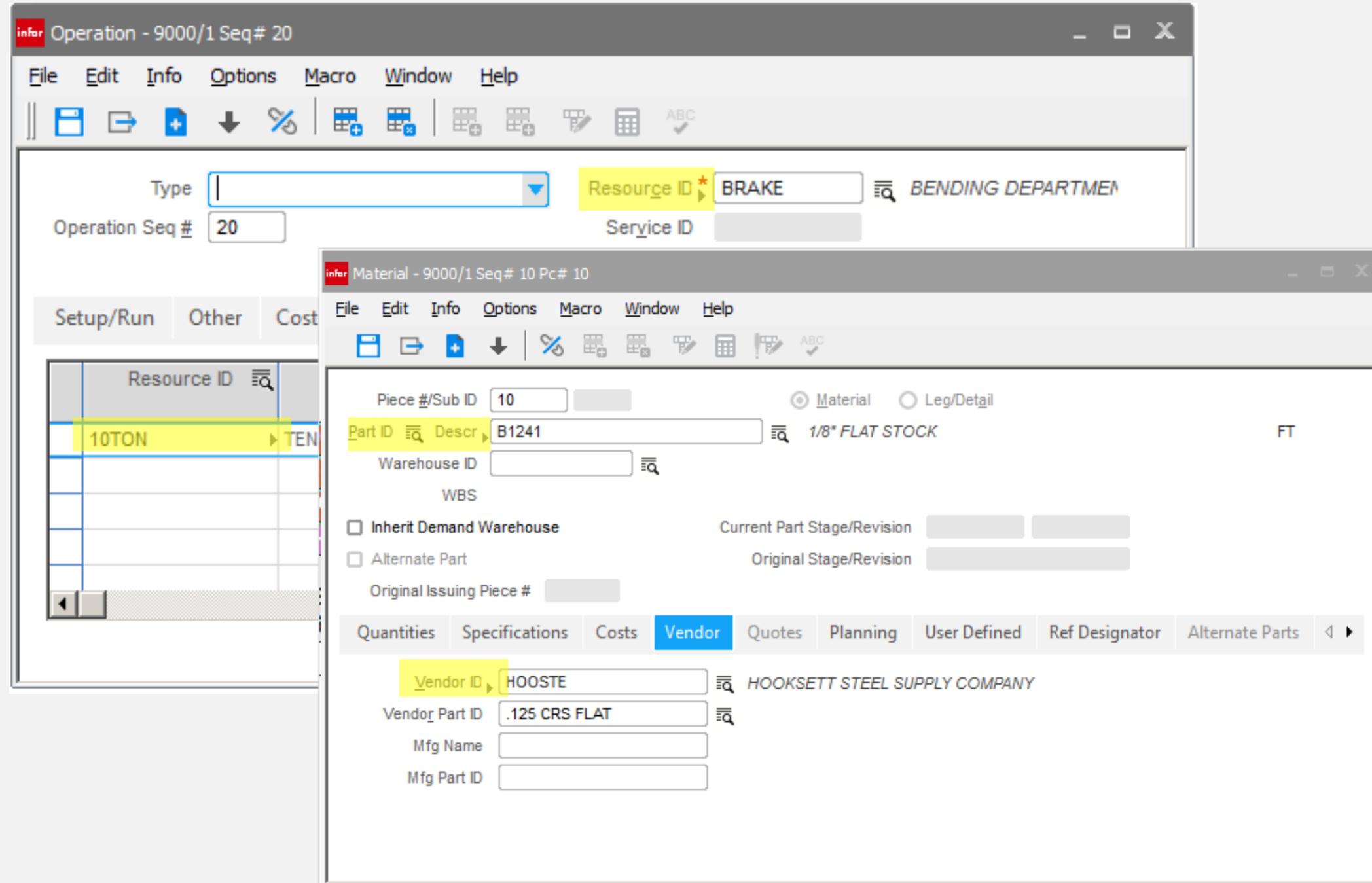
Manufacturing Window – drill-to

Feature:

Added increased drill-to functionality in the Manufacturing Window

Benefits:

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





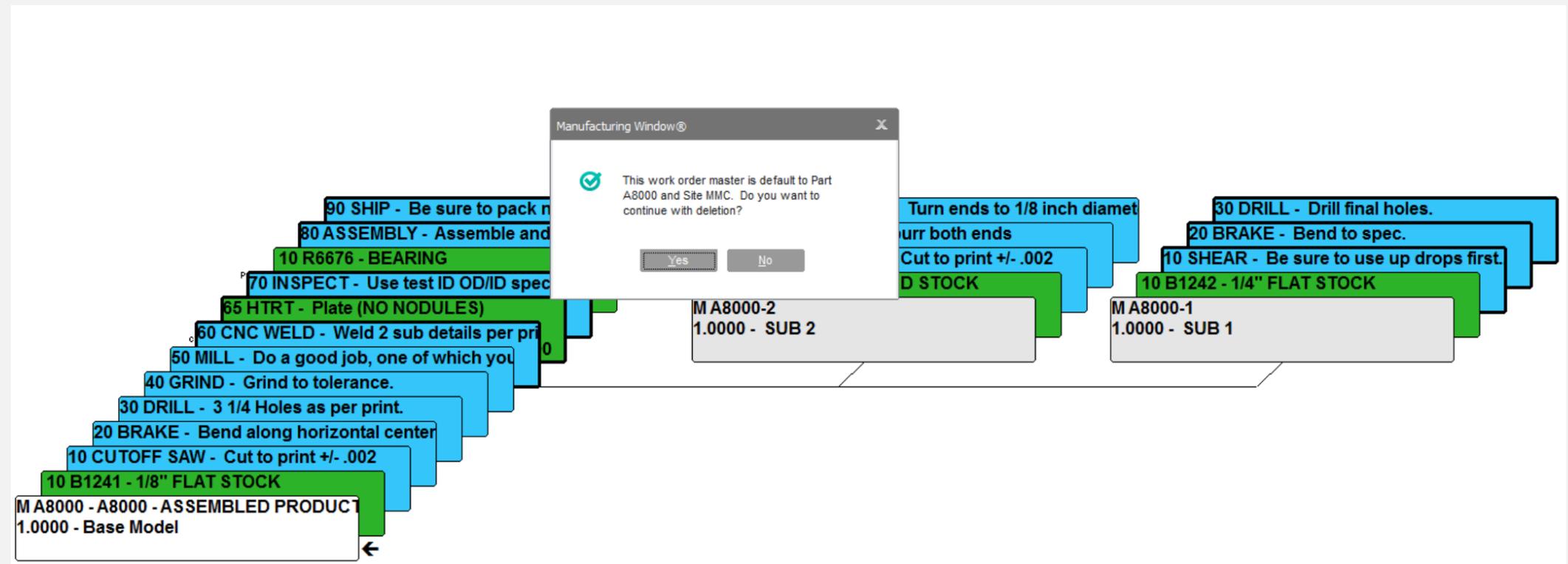
Manufacturing Window – Delete Warning

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





Manufacturing Window

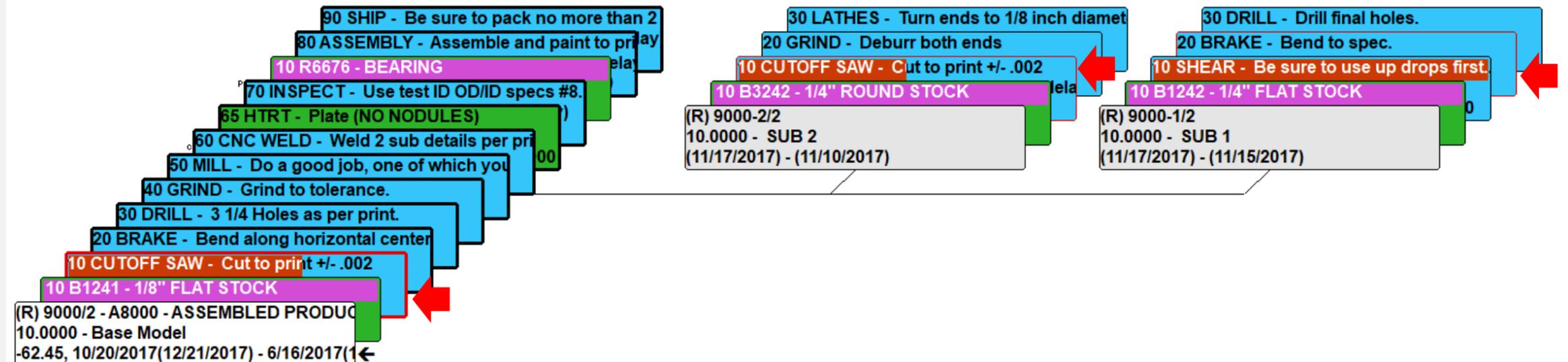
Feature

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

Date	Transaction ID	Sub ID	Seq #	Type	Qty (Good)	Qty (Deviated)	Hours Worked	Employee ID	Employee Name	Department ID	Resource ID	Clock In	Clock Out	Break Hours	Description
6/20/2017	81	0	10	Run	5	0	0.50	DARLENE	LUCIER, DARLENE	CUSTOMER SEI	CUTOFF SAW	7:30:00 AM	7:30:00 AM		
6/20/2017	83	1	10	Run	10	0	0.50	JAI	IRWIN, JAMES	TEST	SHEAR	10:00:00 AM	10:00:00 AM		
6/20/2017	82	2	10	Run	5	0	1.00	DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	1:18:00 PM	2:18:00 PM		
6/20/2017	84	0	30	Run	0	0	0.01	FRED	MOWATT, FRED	HAND ASSEMB	DRILL	12:22:23 PM	12:22:43 PM	0.00	
7/6/2017	88	0	10	Run	2	0	0.02	DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	11:52:45 AM	11:53:46 AM	0.00	
7/6/2017	91	0	10	Run	0	0	1.00	DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	11:54:06 AM	12:54:06 PM	0.00	
2/6/2018	96	0	10	Run	0	0	0.02	DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	3:08:19 PM	3:09:24 PM	0.00	
2/6/2018	97	2	10	Run	0	0	0.09	DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	3:09:24 PM	3:14:59 PM	0.00	
2/6/2018	99	2	10	Run	0	0		DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	3:19:47 PM	3:19:47 PM	0.00	
2/6/2018	98	0	10	Run	0	0		DAVE	STREET, DAVE	SHEARING	CUTOFF SAW	3:19:47 PM	3:19:47 PM	0.00	
2/6/2018	101	1	20	Run	0	0		FRED	MOWATT, FRED	HAND ASSEMB	BRAKE	3:34:52 PM	3:34:52 PM	0.00	
							Total					3.14			0.00





Material Availability Refresh

Feature

You can now refresh the material availability screen

Benefit

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

The screenshot shows the Infor VISUAL Manufacturing Window interface. A blue arrow points to a refresh icon in the toolbar. An inset window titled 'Material Availability - 9000/2' displays a table with the following data:

Detail	Qty Reqd	Qty Issued	Reqd Date	Projecte Availabl (after is)	Warehouse	On Hand	Availabl	Dimensional In (# Pieces, L*V)	Vendor	Purchase Order	Status	Desired Recv Date	Promise Delivery Date	Qty Ordered	Link Qty Allocated	Link Qty Received	Link Qty Issued	Req Qty Allocated
Sub 0 Op# 10 Pc# 10 - B1241 - 1/8" FL	100	100	Not sched	20		0	0		HOOSTE	PO-30355/1	Cls	6/20/2017		100	100	100	100	100
Sub 0 Op# 80 Pc# 10 - R6676 - BEARIN	20	20	Not sched	76		6	6		DERHAR	PO-30355/2	Cls	7/11/2017		20	20	20	20	20
Sub 1 Op# 10 Pc# 10 - B1242 - 1/4" FL	10	10	Not sched	30		0	0		HOOSTE	PO-30355/3	Cls	6/22/2017		10	10	10	10	10
Sub 2 Op# 10 Pc# 10 - B3242 - 1/4" RO	10	10	Not sched	30		0	0		HOOSTE	PO-30355/4	Cls	6/21/2017		10	10	10	10	10

Below the table is a detailed manufacturing process flow diagram with the following steps:

- 90 SHIP - Be sure to pack no more than 2
- 90 ASSEMBLY - Assemble and paint to primary
- 10 R6676 - BEARING
- 70 INSPECT - Use test ID OD/ID specs #8.
- 65 HTRT - Plate (NO NODULES)
- 60 CNC WELD - Weld 2 sub details per print
- 50 MILL - Do a good job, one of which you
- 40 GRIND - Grind to tolerance.
- 30 DRILL - 3 1/4 Holes as per print.
- 20 BRAKE - Bend along horizontal center
- 10 CUTOFF SAW - Cut to print +/- .002
- 10 B1241 - 1/8" FLAT STOCK
- (R) 9000/2 - A8000 - ASSEMBLED PRODUCT
- 10.0000 - Base Model
- 62.45, 10/20/2017(12/21/2017) - 6/16/2017(1)
- 30 LATHES - Turn ends to 1/8 inch diamet
- 20 GRIND - Deburr both ends
- 10 CUTOFF SAW - Cut to print +/- .002
- 10 B3242 - 1/4" ROUND STOCK
- (R) 9000-2/2
- 10.0000 - SUB 2
- (11/17/2017) - (11/10/2017)
- 30 DRILL - Drill final holes.
- 20 BRAKE - Bend to spec.
- 10 SHEAR - Be sure to use up drops first.
- 10 B1242 - 1/4" FLAT STOCK
- (R) 9000-1/2
- 10.0000 - SUB 1
- (11/17/2017) - (11/15/2017)



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.

The screenshot shows two overlapping windows from the Infor VISUAL software. The top window is 'Inventory Transaction Entry - Infor VISUAL - VE901' with a menu open showing options like 'Issue and Return by Exception...'. The bottom window is 'Work Order Material Issues' with the following details:

- Issue Date: 8/15/2017
- Return Issued Material:
- Released:
- Work Order ID: 3000
- Part ID: A8000
- ASSEMBLED PRODUCT

SubID	Seq #	Pc #	Warehouse ID	Location ID	Return Qty	Trc	Req Date	Qty Due	PartID	Stock U/M	Description	Qty Reqd	Qty Issued	Qty
0	10	10	MMC-MAIN	AREA1		N					1/8" FLAT STOCK	10.00	10.00	
0	80	10	MMC-MAIN	AREA1		N					BEARING	20.00	0.00	
1	10	10	MMC-MAIN	AREA1		N					1/4" FLAT STOCK	10.00	3.00	
2	10	10	MMC-MAIN	AREA1		N					1/4" ROUND STOCK	10.00	5.00	

The 'Auto Return Mode' dialog box is open, showing the following options:

- Return to original location
- Prompt with inventory locations
- Preview Transactions before saving

Buttons: Ok, Cancel

Bottom bar: Save, Return All, Clear, Part Traceability, Default Sort, Order By Part ID, Descending



Utilities & Administration

infor 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

VISUAL MRP(tm) - Material Requirements Planning Service Schedule - MMC

Warehouse:
 CLESKY MAIN/ALLOCATED

Options

Single pass (next level down only)

MRP exception marking limits

No horizon Horizon

Fixed horizon

Plus part leadtime

Net on-hand quantities for master scheduled parts

Apply min/max/multiple to master scheduled parts

Exclude on-hold customer orders

Exclude unreleased work orders

Log MRP

Start Date End Date

Enabled Delay for Scheduling

Process All Top Level Parts (Regeneration)

Days of Week

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Run At

Time 1 Time 4

Time 2 Time 5

Time 3 Time 6

Last Run

Process Parts Changed Since Last Run (Net Change)

Days of Week

Monday Tuesday Wednesday Thursday

Friday Saturday Sunday

Run At

Time 1 Time 4

Time 2 Time 5

Time 3 Time 6

Last Run

infor AutoRun Service - DBR

Feature

Add DBR scheduler to auto services

Benefit:

Hands off running of the scheduler as required

The screenshot displays the Infor Drum-Buffer-Rope Scheduler interface. The main window title is "Drum-Buffer-Rope Scheduler - Infor VISUAL - VE8 10DBR - 'CHI', 'CLE', 'FUL', 'MMC', 'MMC-I', 'SEA'". The menu bar includes File, Edit, View, Info, Options, and Help. A context menu is open, listing various actions such as Save, Refresh, DBR Schedule..., and Set as Scheduled... (highlighted). The background shows a table with columns: Active, Delay for Material, Run Start Date, Run End Date, Schedule As of Date, Problem W/Os, Work Orders, and Operat. A "Set As Scheduled - MMC" dialog box is overlaid, showing configuration options for a schedule ID "STANDARD". The dialog includes fields for Start Date (8/15/2016) and End Date, an "Enabled" checkbox, and a "Run Type" section set to "Weekly". The "Days of Week" section has checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday, with Monday through Friday selected. The "Run At" section has six time slots, with Time 1 set to 12:00:00 AM and Time 2 set to 12:00:00 PM. Other options include "Create DBR Production Schedule only", "Save incidental setups", and "Suppress All Processing Messages". The dialog has Save, Delete, and Close buttons at the bottom.

infor 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.

The image displays two overlapping software windows from the Infor AutoRun Service. The background window is titled "VISUAL MRP(tm) - Material Requirements Planning Service Schedule - MMC". It features a "Warehouse" dropdown menu set to "All Warehouses", a list of warehouses including "CLESKY" and "MAIN/ALLOCATED", and a "Options" section with various checkboxes. A green circle highlights the "Delay for Scheduling" checkbox, which is checked. The foreground window is titled "Set As Scheduled - MMC" and contains settings for a "Schedule ID" (STANDARD), "Run Type" (Weekly), and "Days of Week". A green circle highlights the "Delay for MRP Processing" checkbox, which is also checked. Both windows include "Save", "Delete", and "Close" buttons at the bottom.

infor 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

Active	Global	Section	Entry	Value	Modify Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	COPProcessActivityViewPanelEnabled	Y	3/22/2017
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CopyCustSpecs	Y	8/4/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CopyPartCOSpecs	Y	8/4/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CopyPartSpecs	Y	8/4/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CopyServChargeSpec	Y	8/4/2016
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CustomerViewPanelEnabled	Y	3/22/2017
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	ShowBacklogOnly		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	CustOrderLineViewPanelEnabled	Y	3/22/2017
<input checked="" type="checkbox"/>	<input type="checkbox"/>	OrderEntry	SupplyStatusCalc	S	8/4/2016

Section	Entry	Values	
OrderEntry	ShowBacklogOnly	Y or N	If Yes, the window will display only customer order lines that are backordered. If No, then all customer
OrderEntryWindow	ShowBacklogOnly	Y or N	If Yes, the window will display only customer order lines that are backordered. If No, then all customer

Benefits

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

infor 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

The screenshot shows the Infor Query Tool interface. At the top, there's a menu bar (File, Edit, View, Options, Help) and a toolbar. Below that, there's a 'Query Name' dropdown and a 'SQL Command' dropdown. To the right, there are checkboxes for 'Left Outer Join', 'single line sql statement', and 'No Auto Joining'. A callout box labeled 'Selected table' points to the 'CUST_ORDER_LINE' table in the 'Database Tables and Columns' list.

The 'Database Tables and Columns' list on the left includes tables like CUSTOMER_ORDER, CONTACT, CURRENCY, CUST_ORDER_BINARY, CUST_ORDER_CURR, CUST_ORDER_LINE, CUST_ORDER_SHARE, CUSTOMER, PROJECT_INFO, QUOTE_ORDER, SALES_TAX_GROUP, SHIPMENT_DETAIL, SHIPMENT_DIST, SHIPPER, SITE, and TERMS. A callout box labeled 'Another table has a foreign key to the table' points to the 'PROJECT_INFO' table.

The 'Query Input' area contains the following SQL query:


```
SELECT CUSTOMER.ID, CUSTOMER.CREATE_DATE, CUST_ORDER_LINE.PART_ID, CUST_ORDER_LINE.PROMISE_DATE, CUST_ORDER_LINE.NAME
FROM CUSTOMER
INNER JOIN CUSTOMER_ORDER ON CUSTOMER.ID = CUSTOMER_ORDER.CUSTOMER_ID
INNER JOIN CUST_ORDER_LINE ON CUSTOMER_ORDER.ID = CUST_ORDER_LINE.CUST_ORDER_ID
```

The 'Join Tables' section at the bottom left shows a table with columns 'Table Name' and 'Join Type'. The 'Join Tables' list at the bottom right shows a grid of data with columns: ID, CREATE_DATE, PART_ID, PROMISE_DATE, NAME. A callout box labeled 'Table has a foreign key to another table' points to the 'RELIND' row in this grid.

ID	CREATE_DATE	PART_ID	PROMISE_DATE	NAME
BIGELE	2014-12-17 16:02:58.96	E-200-0001		BIGSKY ELECTRONICS
WINSER	2012-07-28 11:39:25.65			WINSLOW SERVICES
...
ABLMAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING
RELIND	2012-07-28 11:39:25.65			RELIANCE INDUSTRIES
STAPRO	2012-07-28 11:39:25.65	WIDC		...
RELIND	2012-07-28 11:39:25.65			...
ABLMAN	2012-07-28 11:39:25.65	WIDGET-CHROME		ABLE MANUFACTURING
ABLMAN	2012-07-28 11:39:25.65	MMC-FM0001		ABLE MANUFACTURING
ABLMAN	2012-07-28 11:39:25.65	MMT-1996-DM		ABLE MANUFACTURING
ABLMAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING
RELIND	2012-07-28 11:39:25.65			RELIANCE INDUSTRIES
RELIND	2012-07-28 11:39:25.65			...
RELIND	2012-07-28 11:39:25.65			...
ABLMAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING
ABLMAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING
ABLMAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING
ABL MAN	2012-07-28 11:39:25.65			ABLE MANUFACTURING

infor 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

The screenshot shows the Infor Query Tool interface. At the top, there is a menu bar (File, Edit, View, Options, Help) and a toolbar with various icons. Below the menu bar, there are fields for 'Query Name' and 'SQL Command'. To the right of these fields are three checkboxes: 'Left Outer Join', 'single line sql statement', and 'No Auto Joining'. Below the 'SQL Command' field is the 'Query Input' area, which contains a SQL query:


```
SELECT co.ID 'order id', c.ID 'customer id', c.NAME 'customer name', col.LINE_NO 'line#', p.ID 'part id', col.ORDER_QTY 'orderqty'
FROM CUSTOMER_ORDER co
LEFT OUTER JOIN CUSTOMER c ON c.ID = co.CUSTOMER_ID
LEFT OUTER JOIN CUST_ORDER_LINE col ON co.ID = col.CUST_ORDER_ID
LEFT OUTER JOIN PART p ON p.ID = col.PART_ID
WHERE co.id like 'Order id' and p.id like 'Part id' and col.line_no like 'Line no' and co.status = 'R'
ORDER BY co.ID, col.LINE_NO
```

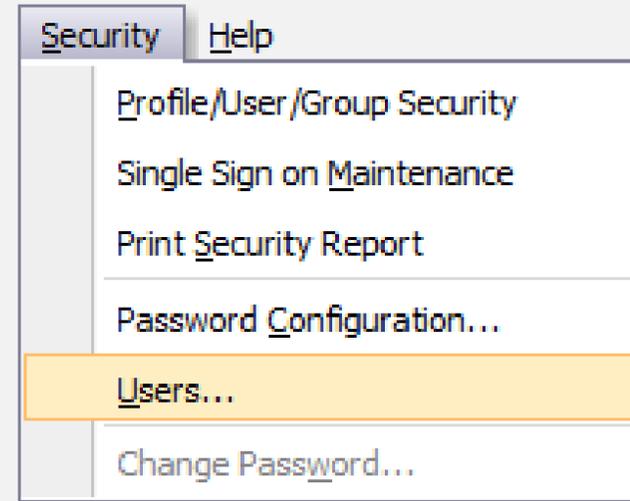
 Below the 'Query Input' area is a table with columns: 'order id', 'customer id', 'customer name', 'line#', 'part id', and 'orderqty'. The table contains several rows of data. A blue arrow labeled 'Search criteria' points to a dialog box that is open over the table. The dialog box has three input fields: 'Order id' with a '%' symbol, 'Part id' with a '%' symbol, and 'Line no' with a '%' symbol. Below the input fields are 'Ok' and 'Cancel' buttons. Another blue arrow labeled 'Drill-to' points to a specific row in the table, which is highlighted in blue. At the bottom left of the interface, there is a 'Join Tables' section with a table listing 'Table Name' and 'Table Name' columns, with 'CUSTOMER_ORDER', 'CUSTOMER', 'CUST_ORDER_LINE', and 'PART' listed.



Add Users

Feature

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



The 'Users' window displays a table with the following columns: User ID, Password, Repeat Password, Visual, Mobile Labor, and Mobile Material. The table contains 13 rows of user data. Below the table are buttons for 'Insert', 'Delete', 'Save', 'Refresh', and 'Close'.

User ID	Password	Repeat Password	Visual	Mobile Labor	Mobile Material
BILL_ENG			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ED			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
FRED			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JANELL			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
KELLY_SALES			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KENT_GENMANAGER			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LEO_QC			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MARK			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MARY_MATERIALS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SONYA_PURCH			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TOM			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TONY_SALES			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Sales

infor 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

Part ID 1000-MPL Quantity 1.00 Engineered by RLAGOY
 WINE DISPLAY UNIT - MAPLE Engineer date 12/1/2015
 Operations: Forward schedule Drawing ID/Rev 1000-MPL- RLAGOY A

Seq No	Resource ID	Cost Grouping	Setup Hrs	Run Hrs	Setup \$ / Hr	Run \$ / Hr	Long Description	Drawing ID	Drawing Rev #
10	QUOTE	ENG	0.00	25.00	0.00	75.00			
20	QUOTE	MACH	8.00	150.00	55.00	23.00			
30	QUOTE	INSTALL	0.00	8.00	0.00	25.00			
40	QUOTE	TRANS	0.00	1.00	0.00				

Materials for operation: 0/20

Piece No	Description	Cost Grouping	Qty Per	Fixed Qty	Unit Mat'l Cost	Fixed Cost	Long Description
10	1/4 MAPLE PLYWOOD	MAT	2.00	0.00	38.00	0.00	1/4 MAPLE PLYWOOD
20	6 X 8 X 3/4 PREMIUM MAPLE	MAT	10.00	0.00	17.88	0.00	6 X 8 X 3/4 PREMIUM MAPLE
30	TEMPERED GLASS	MAT	1.00	0.00	0.00	350.00	TEMPERED GLASS
40	FASTNERS & HINGES	MAT	1.00	0.00	0.00	120.00	FASTNERS & HINGES

infor Quick Quote

Import Template

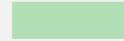
Steps

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

The screenshot shows the 'Quick Quote - Copy From' dialog box in the infor VISUAL QuickQuote application. The dialog has a 'Type' section with radio buttons for 'Eng Master', 'Work Order', 'Quote Master', and 'Excel' (which is selected). It also includes fields for 'Base ID', 'Lot ID/Eng ID', and 'Split ID' (set to 0). A 'File name' field contains the path 'C:\Infor\VISUAL\VE810\My Homepage\CLE...'. The background shows a data table with columns for various quote parameters.

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 Descr	Qty Per	Fixed Qty	Unit Mat'l Cost	Fixed Cost
1	Q			5.00	0.00	HRS/PC	0.00	35.00 0.00	0.00 0.00					
2	Q			16.00	0.00	HRS/PC	0.00	17.50 0.00	0.00 0.00					
3	Q		10	23.00	0.00	HRS/PC	0.00	22.00 0.00	0.00 0.00	Materials	1.00	3,588.00	0.00	0.00
4	Q			6.00	0.00	HRS/PC	0.00	10.00 0.00	0.00 0.00					
5	Q			4.00	0.00	HRS/PC	0.00	13.75 0.00	0.00 0.00					

 Required operation & material columns

 Required price & quantity columns



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

Costing		Planning	Accounting
Costs			
Material	<input type="text" value="18.50"/>		
Labor	<input type="text" value="0.00"/>		
Fixed	<input type="text" value="0.00"/>		

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

 Use qty breaks on purchases during recalc

infor 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

The screenshot displays the Infor Estimating Window interface. The central window shows a quote for 'BIGSKY ELECTRONICS' with details such as 'Quote ID: QT0003', 'Customer ID: BIGELE', and 'Quote Date: 12/18/2015'. A table below lists the quote lines, with the first line selected: 'Ln# 1, Part ID F-200-0001, Quantities quoted 1:50:100:150, Cost from Quote Mstr 1, Description PCA, MEMORY BOARD BIGSKY ELECTI, Prices quoted 950.58;770.8476;769.01412;768.8516'. A context menu is open over this line item, listing various actions. The 'Material Planning Window' option is highlighted in yellow, and a green arrow points to it from the bottom right. To the left, a 'Customer Totals' chart shows 'Credit Limit' at approximately 58k and 'Credit Balance' at approximately 45k. To the right, a 'Part Availability' chart shows 'On Hand' at 100, 'Demand' at 100, 'On Order' at 100, and 'Available' at 0, with a 'Safety Stock' line at 20.

Ln#	Part ID	Quantities quoted	Cost from	Description	Prices quoted
1	F-200-0001	1:50:100:150	Quote Mstr 1	PCA, MEMORY BOARD BIGSKY ELECTI	950.58;770.8476;769.01412;768.8516

infor Quick Quote

View Excel import source

A copy of the imported Excel data is retained.

infor VISUAL QuickQuote(tm) - MMC - Q QT0021/1

Part ID: [] Quantity: [1] Engineered by: [] Engineer date: []

Operations: Forward schedule Drawing ID/Rev: [] []

Seq No	Operation Type	Resource ID	Bid Rate Category	Setup Hrs	Run	Run Type	Load Size Qty	Move Hours	Service ID	Transit Days	Drawing ID	Draw Rev #	% Scrap Yield	Scrap
10		Q		5.00	0.00	HRS/PC		0.00					0.000	Scrap
20		Q		16.00	0.00	HRS/PC		0.00					0.000	Scrap
30		Q		23.00	0.00	HRS/PC		0.00					0.000	Scrap
40		Q		6.00	0.00	HRS/PC		0.00					0.000	Scrap
50		Q		4.00	0.00	HRS/PC		0.00					0.000	Scrap

C:\Infor\VISUAL\VE810\My Homepage\CLESKY.xlsx

W/O Sub ID	Part ID	Quantitie...	Prices qu...	Pieces	Seq No	Operatio...	Resourc...	Piece No	Setup Hrs	Run	Run Type	Move Ho...	Setup Co...	Run Cost...	Burden P...	Burden P...	Long Des...	Qty Per	Fixed Qty	Unit Mat'l ...	Fixed Cost
		1;10;100	2500;230...																		
					10		Q		5.00	0.00	HRS/PC	0.00	35.00	0.00	0.00	0.00					
					20		Q		16.00	0.00	HRS/PC	0.00	17.50	0.00	0.00	0.00					
					20			10									Materials	1.00	3,588.00	0.00	0.00
					30		Q		23.00	0.00	HRS/PC	0.00	22.00	0.00	0.00	0.00					
					40		Q		6.00	0.00	HRS/PC	0.00	10.00	0.00	0.00	0.00					
					50		Q		4.00	0.00	HRS/PC	0.00	13.75	0.00	0.00	0.00					



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

Production Cost & Gross Profit - MMC - 3001

Ln#	Line Status	Desired Ship Date	Supply ID	Supply Qty	Shipped Qty	Want Date	Supply Status	Estimated	Actual	Projected	Sell Price	Est. Gross Profit	Proj. Gross Profit	Gross Profit Diff.	Currency ID
1	On hold	8/11/2016	40068/1	10	0	8/11/2016	Released	50,197.94	14,784.00	64,956.10	72,000.00	21,802.06	7,043.90	(14,758.16)	(USD) \$
1	On hold	8/11/2016	Other	0	0			0.00	0.00	0.00	0.00	0.00	0.00	0.00	(USD) \$
2	On hold	8/11/2016	40069/1	10	0	8/11/2016	Released	50,197.94	51.66	50,223.76	63,000.00	12,802.06	12,776.24	(25.82)	(USD) \$
2	On hold	8/11/2016	Other	0	0			0.00	0.00	0.00	0.00	0.00	0.00	0.00	(USD) \$
Totals								100,395.88	14,835.66	115,179.86	135,000.00	34,604.12	19,820.14	(14,783.98)	(USD) \$



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

Shipping Entry - Infor VISUAL - VE902

File Edit View Info Options Notes Macros Help

Site ID: MMC
 Order ID: 02062
 Packlist ID: 50011PK
 Desired Ship Date: 7/29/2017
 Promise Ship Date:
 Promise Del Date:
 Actual Ship Date: 10/5/2017

General Other

Sold To:
 Sold to:
 ABLE MANUFACTURING
 3 McKinley Square
 BOSTON, MA 02109
 USA
 Contact:
 ATTN: Mr. David J. Brown

Sales Rep: MARK
 FOB: SHIPPING POINT
 Ship Via: FEDEX
 Ship Status: Approved
 Status User: SYSADM

US DOLLAR
 Released

C/O Ln#	Supply Type	Reference	Trc	Ship Date	Promise Ship Date	Promise Del Date	Qty Ordered	C. O. Pieces	C. O. Length	Trans ID	Trans Description
1		Part: R6676 BEARING	<input type="checkbox"/>				1			261	Shipped this order by mistake

Inventory Transactions - MMC - R6676

From Date: 10/5/2017 Thru Date: [] Next Date: Prev Date: []

Trans ID	Date	Type	Location	Reference	Qty	Description
261	10/5/2017	Rtn Issue	MMC-MAIN/AREA1	C 02062/1	1	Shipped this order by mistake

infor 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

Return Material Authorization - Infor VISUAL - VISUAL8 10

File Edit View Info Options Notes Macros Help

Site ID: MMC
 RMA ID: MMC_00132
 Customer ID: STAPRO
 Packlist: MMC_50211PK
 Original Order: MMC_02312

General Contact

Contact ID/Name: Mr. William M. Welch
 Position/Salutation: Dear Mr. Welch:
 Phone / Ext: (800) 519-4800 Fax: (800) 519-4802
 Mobile:
 Email: [mailto://marty.wilkins@infor.com](mailto:marty.wilkins@infor.com)

Preview for Report - C:\INFOR\810code\VMRMAFM1.QRP

File View Print

Created: 6/21/2016
 RMA Number: MMC_00132
 Type: Evaluation
 Reason: INSPECTION
 Order Number: MMC_02312
 Warranty: N

Page: 1

Sold To
 STANDARD PRODUCTS CORPORATION
 7800 Whipple Ave. N. W
 North Canton, OH 44767-8796
 USA

Ship To
 STANDARD PRODUCTS CORPORATION
 7800 Whipple Ave. N. W
 North Canton, OH 44767-8796
 USA

Contact
 Mr. William M. Welch
 (800) 519-4800

Ln#	PART ID	Description	QTY
1	2	Part 2 - Purchased & Burdened	1.00

Return To
 Majestic Manufacturing Company, Inc.
 641 East Industrial Boulevard
 Yourtown Industrial Park
 Yourtown, NH 03123-9876
 USA

User Defined Fields - ** Tenant **

User defined field layout ID: RMA

RMA UD1
 RMA UD2
 RMA UD3
 User Defined 4
 User Defined 5
 User Defined 6
 User Defined 7
 User Defined 8
 User Defined 9
 User Defined 10

Ok Cancel

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

infor 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.

Price Book Data:

Price Group ID	Break Value	Unit Price	Value
Casters	1.00	(USD) \$	12.99
Casters	10.00	(USD) \$	12.69
Casters	25.00	(USD) \$	12.39
Casters	50.00	(USD) \$	12.19
Casters	100.00	(USD) \$	11.89
Casters	250.00	(USD) \$	11.59
Casters	500.00	(USD) \$	11.29
Casters	10,000.00	(USD) \$	10.99

Part Maintenance Settings:

- Part ID: 26-1202-40
- Part Description: CASTERS, LOCKING 4", P/N 41100-0091-0000
- Price Group: Casters
- Wholesale Unit Price: [Field]

infor 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

The screenshot shows the Infor VISUAL Customer Order Entry window. The interface includes a menu bar (File, Edit, View, Info, Options, Notes, EDI, Macro, Help) and a toolbar with various icons. The main area is divided into several sections:

- Header Section:** Site ID is set to CHI. Other fields include Our Order ID, Order Date (11/28/2016), Customer ID (CLESKY), Customer PO, Desired Ship Date (11/28/2016), Promise Ship Date, and Promise Del Date.
- Address Section:** Sold to/Ship to address: CLEAR SKY INDUSTRIES, 7 Executive Boulevard, YONKERS, NY 10701, USA. Status is On hold, FOB is SHIPPING POINT, Ship Via is HSS TRUCK, and Carrier ID is Yellow.
- Table Section:** A table with columns: Ln#, Part ID, Quantity, Misc Ref/Descr, Site ID, Promise Del Date, Supply Status, Supply Type, Job ID, Lot ID, and Unit Price.

Ln#	Part ID	Quantity	Misc Ref/Descr	Site ID	Promise Del Date	Supply Status	Supply Type	Job ID	Lot ID	Unit Price
1	ACFILTER	100	AIR CONDITIONER FILTER	CHI		No Supply				
2	AMTSGASKET	100	GASKET	CLE		In Stock				

 A blue arrow points to the Site ID dropdown for line 2, which is currently set to CLE. The dropdown menu is open, showing options: CLE, CHI, and CLE.
- Summary Section:** Total \$3,394.00, Freight \$0.00, Tax \$0.00, Grand Total \$3,394.00.



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

The screenshot shows the Infor VISUAL Part Maintenance window for item 26-1203-40. The Product Code is set to PM. A modal dialog box displays the error: "Product Code PM is inactive and cannot be used." Below the main window, a "Product Codes" table is visible, showing the status of various product codes.

Product Code	Description	Demand Fence 1	Demand Fence 2	Active
AUTOMOTIVE		21	60	<input checked="" type="checkbox"/>
ELECTRONICS				<input checked="" type="checkbox"/>
FURNITURE	Furniture			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> GENERIC				<input type="checkbox"/>
INJ MOLD	Injection Molded Products			<input checked="" type="checkbox"/>
PM				<input type="checkbox"/>



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

The screenshot displays two overlapping windows from the Infor VISUAL application. The background window is 'Customer Maintenance - Infor VISUAL - VE901', showing customer details for 'ABLE MANUFACTURING' with Customer ID 'ABLMAN'. The foreground window is 'Shipping Entry - Infor VISUAL - VE901', showing shipping details for Site ID 'MMC' and Order ID '9000'. A modal dialog box titled 'Shipping Entry' is open, displaying an error message: 'This customer account has exceeded the credit limit. Unable to save this shipment'. In the 'Customer Maintenance' window, the 'Entity Credit Limit' tab is active, and the 'Ship Credit Limit Control' dropdown is highlighted in yellow with a blue arrow pointing to it. The dropdown is set to 'No override'. Below the dropdown, the 'Credit Limit' is \$100,000.00 and the 'Credit Balance' is -\$314,823.02.

C/O Ln#	Supply Type	Reference
✓ 2	WO	Job: 9000/2 A8000 ASSEMB



Procurement

infor Receiving Inspection

Feature

- Add Go-to buttons

Benefit

- Ability to easily drill to supporting documents
- Increased productivity

Receiving Inspection - Infor VISUAL - VE810T2

File Edit View Options Notes Help

Transaction Date: 6/30/2016

Receiver Lines in Inspection

Action	Part ID	Site ID	Receiver ID	Recvr Line#	Purchase Order ID	Vendor ID	Vendor Name	Inspection Reason	Received Date	Buye
	RJ45	MMC	00039	1	PO-30041	C&S	C&S MANUFACTURER:		2/18/2015	SYSADM
	RJ45	MMC	00040	1	PO-30041	C&S	C&S MANUFACTURER:		2/18/2015	SYSADM
	RJ45	MMC	00042	1	PO-30042	C&S	C&S MANUFACTURER:		2/21/2015	SYSADM
	RJ45	MMC	00449	1	PO-30040	BOSSEL	BOSTON SELLING GRO		8/24/2016	SYSADM

Lines to Return or Release

Receiver ID	Recvr Line#	Reference	Trc	Link	Site ID	Order Qty	Received Qty	# Pcs Received	# Pcs in Insp.	Length	Width	Height	# Pcs to Return	# Pcs to Release
00039	1	RJ45 - RJ45 CONNECTOR	<input type="checkbox"/>	<input type="checkbox"/>	MMC	3	1							



Outside Service Maintenance

Feature

Add document attachment functionality to service maintenance

Benefit

Ability to maintain all standard documents associated with the outside service

The screenshot shows the 'Outside Service Maintenance' window in Infor VISUAL. The main window has a menu bar (File, Edit, View, Maintain, Info, Options, Macros, Help) and a toolbar with icons for file operations. The main area contains fields for Site ID (MMC), Service ID (CHROME), Description (CHROME PL), Service Part ID, Preferred Vendor ID (THEPLA), and Usage UM. There are also tabs for 'Costs' and 'Planning', and input fields for 'Cost per unit', 'Base charge per', 'Minimum charge', and 'Bid Rate Category'. An 'Obsolete' checkbox is visible. A 'Document Reference' dialog box is open, showing a table of document references for Service ID CHROME and Site ID MMC. A blue callout box labeled 'Documents' points to the document attachment icon in the toolbar.

Document ID	Description	Reference Type	Stage	Revision	ECN Rev Control	Document File Path
CPG - Specs.pdf	Chrome Plate Guideline	General	PILOT	1	<input type="checkbox"/>	C:\Infor\VISUAL\VE900\Drawings



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

	Quantity	Price	Leadtime
Up To 1	2.00	2.5000	2
Up To 2	50.00	2.3500	2
Up To 3	150.00	2.2500	2
Up To 4	1,000.00	1.7800	10
Up To 5			
Up To 6			
Up To 7			
Up To 8			
Up To 9			
Up To 10			
Default		2.5000	3



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

Purchase Receipt Entry - Infor VISUAL - VE902

File Edit View Info Options Notes Macros Help

Site ID: MMC
 Order ID: PO-30357
 Receiver ID: 00459
 Act Recv Date: 10/4/2017
 Receive on: 10/4/2017
 Promise Delivery Date:
 Promise Ship Date:
 Bill of Lading ID:
 Vendor Packlist ID:
 Vendor Packlist Date:
 Vendor Freight Bill ID:

General

ARROW ELECTRONICS
 1166 Springlake Drive
 Itasca, IL 60143
 USA
 ATTN: Mr. John Smith

Buyer: SYSADM
 FOB: SHIPPING POINT
 Ship via: UPS GROUND
 Carrier ID:
 Intrastat:
 US DOLLAR
 Released

Ln#	Reference	Trc	Part ID	Current Part Stage	Current Part Revision	Ordered Stage/Rev	Vendor Part ID	Quantity Ordered	P. O. Pieces	Trans ID	Trans Description	P. O. Length
✓ 1	E-100-0101 - CAPACITO	<input type="checkbox"/>	E-100-0101					100		260	Received wrong item	
2	E-300-0103 - RESISTOR	<input type="checkbox"/>	E-300-0103				E-300-0103	100				

Inventory Transactions - MMC - E-100-0101

From Date:
 Thru Date:
 Next Date:
 Prev Date:

Trans ID	Date	Type	Location	Reference	Qty	Material Unit Cost	Description
260	10/4/2017	Rtn Receipt	MMC-MAIN/AREA1	P PO-30357/1	100	1.2400	Received wrong item
258	10/4/2017	Receipt	MMC-MAIN/AREA1	P PO-30357/1	100	1.2400	



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

infor Purchase Order Entry - Infor VISUAL - VE902/SYSADM

File Edit View Info Options Notes Macros Help

Site ID: MMC | Pur from/Ship to | Contact | Dispatch | EDI | Other | Notifications

Order Date: 9/1/2017 | Our Order ID: PO-30009 | Vendor ID: HOOSTE | Desired Recv Date: 10/14/2017 | Promise Delivery Date: 10/13/2017 | Promise Ship Date: 10/8/2017 | Warehouse ID: MMC-MAIN | Currency ID: (USD) \$

HOOKSETT STEEL SUPPLY COMPANY
345 Route 28 Bypass
Hooksett Industrial Park
Hooksett, NH 03287-5477
USA

Status: Released | FOB: DESTINATION | Ship via: BEST WAY | Buyer: SYSADM | Ship-to ID: | Sales Order ID: | Internal Order:

Ln#	Quantity	Site ID	Part ID	U/M	Unit Price	Extension	Promise Delivery Date	Promise Ship Date	Confirmed Ship Date	Piec
1	35	MMC	B3242	FT	12.50	\$437.50			10/7/2017	

Warehouse ID: All Warehouses | All Warehouses

Demand Warehouse	Date Required	Total Qty Required	Qty Issued	Qty Required	Stat	Peg to	Customer ID	Demand User 1	Demand User 2	Demand User 3	Demand Dimer (# Pieces, L*W)	Projected Quantity	Supply Warehouse	Qty Ordered	Qty Received	Net Qty Due	Confirmed Ship Date	Due Date	Rls Date	Stat	Order ID	Vendor ID
	9/20/2017	1.000	0.000	1.000	F	02097-2/1						-21.000										
	9/20/2017	1.000	0.000	1.000	R	02060-2/1						-22.000										
	9/21/2017	1.000	0.000	1.000	F	02059-2/1						-23.000										
	9/21/2017	1.000	0.000	1.000	F	02097-2/2						-24.000										
	9/21/2017	10.000	5.000	5.000	R	3000-2/1/MMC-1						-29.000										
												1.000	MMC-MAIN	35.000	5.000	30.000	10/7/2017	10/14/2017	9/1/2017	R	P PO-30009/1	HOOSTE
	7/18/2018	5.000	0.000	5.000	F	02095-2/1						-4.000										



PO Entry – Item ID Column

VE 9.0.1

VE 9.0.2

Feature

Eliminate the combined part id & description column

Benefit

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

Purchase Order Entry - Infor VISUAL - VE901/SYSADM

File Edit View Info Options Notes Macros Help

Site ID: MMC | Pur from/Ship to | Contact | Dispatch | EDI | Other | Notifications

Order Date: 4/21/2016 | Our Order ID: PO-30000 | Vendor ID: PREELE | Desired Recv Date: 5/2/2016 | Promise Delivery Date: | Promise Ship Date: | Warehouse ID: MMC-MAIN | Currency ID: (USD) \$

PRECISION ELECTRONICS INC.
1401 Main Ave SW
Hickory, NC 28602
USA

Status: Released | FOB: SHIPPING POINT | Ship via: UPS GROUND | Buyer: SYSADM | Ship-to ID: | Sales Order ID: | Internal Order:

Price Breaks by Header Site | Internal Customer ID:

Ln#	Quantity	Site ID	Part ID	Part Description	U/M
1	4,000	MMC	E-100-0104 - CAPACITOR, CER, .10uF 5% 25V	CAPACITOR, CER, .10uF 5% 25V	EA
2	1,000	MMC	E-100-0224 - CAPACITOR, CER, 2.2uF 10% 25V	CAPACITOR, CER, 2.2uF 10% 25V	EA
3	5,000	MMC	E-100-0471 - CAPACITOR, CER, 470pF 10% 25V	CAPACITOR, CER, 470pF 10% 25V	EA
4	6,000	MMC	E-101-0224 - CAPACITOR, TANT, 2.2uF 10% 25V	CAPACITOR, TANT, 2.2uF 10% 25V	EA
5	8,000	MMC	E-300-0103 - RESISTOR, 10K 1/8W 5%	RESISTOR, 10K 1/8W 5%	EA
6	300	MMC	E-300-0104 - RESISTOR, 100K 1/8W 5%	RESISTOR, 100K 1/8W 5%	EA
7	500	MMC	E-300-0221 - RESISTOR, 220 Ohms 1/8W 5%	RESISTOR, 220 Ohms 1/8W 5%	EA
8	950	MMC	E-300-0471 - RESISTOR, 470 Ohms 1/8W 5%	RESISTOR, 470 Ohms 1/8W 5%	EA

Purchase Order Entry - Infor VISUAL - VE902/SYSADM

File Edit View Info Options Notes Macros Help

Site ID: MMC | Pur from/Ship to | Contact | Dispatch | EDI

Order Date: 4/21/2016 | Our Order ID: PO-30000 | Vendor ID: PREELE | Desired Recv Date: 5/2/2016 | Promise Delivery Date: | Promise Ship Date: | Warehouse ID: MMC-MAIN | Currency ID: (USD) \$

PRECISION ELECTRONICS INC.
1401 Main Ave SW
Hickory, NC 28602
USA

Price Breaks by Header Site | Internal Customer ID:

Ln#	Quantity	Site ID	Part ID	Part Description	U/M
1	4,000	MMC	E-100-0104	CAPACITOR, CER, .10uF 5% 25V	EA
2	1,000	MMC	E-100-0224	CAPACITOR, CER, 2.2uF 10% 25V	EA
3	5,000	MMC	E-100-0471	CAPACITOR, CER, 470pF 10% 25V	EA
4	6,000	MMC	E-101-0224	CAPACITOR, TANT, 2.2uF 10% 25V	EA
5	8,000	MMC	E-300-0103	RESISTOR, 10K 1/8W 5%	EA
6	300	MMC	E-300-0104	RESISTOR, 100K 1/8W 5%	EA
7	500	MMC	E-300-0221	RESISTOR, 220 Ohms 1/8W 5%	EA
8	950	MMC	E-300-0471	RESISTOR, 470 Ohms 1/8W 5%	EA



PO Receipt Entry – Dispatch ID

Feature

Receiving can now receive based on a specific service dispatch ID

Benefit

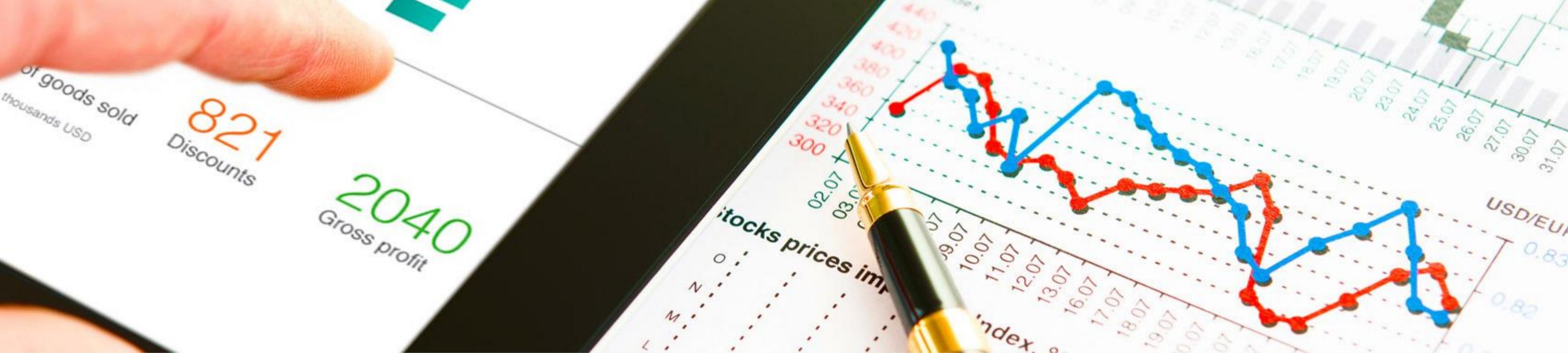
- Receive against the original dispatch ID for accuracy
- Provides complete PO and Dispatch totals

The screenshot shows the 'Purchase Receipt Entry' window in Infor VISUAL. The 'General' tab is active, displaying fields for Site ID (MMC), Order ID (PO-30349), Receiver ID, Service Dispatch ID (OSD00001), Act Recv Date (10/6/2017), and Receive on (5/3/2018). A vendor selection window is open for 'C&S MANUFACTURERS' with address '2745 Main Street, Topsfield, MA 03123-9833, USA' and contact 'ATTN: Miss Joan A. Baxter'. Shipping details include Buyer (SYSADM), FOB (SHIPPING POINT), Ship via (UPS RED), and Carrier ID. The currency is set to US DOLLAR and the status is Released.

Ln#	Reference	Trc	Part ID	Quantity Ordered	Total Qty Dispatched	Dispatch Qty Dispatched	Dispatch Qty Received	Total Qty Recv	Quantity Received	Ordered Stage/Rev	Vendo
✓ 1	HTRT - Heat Treating	<input type="checkbox"/>		10	10	10	1	1	9		

Annotations with callouts pointing to the table data:

- Total purchase order quantity (points to Quantity Ordered: 10)
- Total dispatched against this PO (points to Total Qty Dispatched: 10)
- Total quantity dispatched on this Dispatch ID (points to Dispatch Qty Dispatched: 10)
- Total received on this Dispatch ID (points to Dispatch Qty Received: 1)
- Total quantity received on this PO (points to Quantity Received: 9)
- Total quantity being received on this receipt (points to Total Qty Recv: 1)

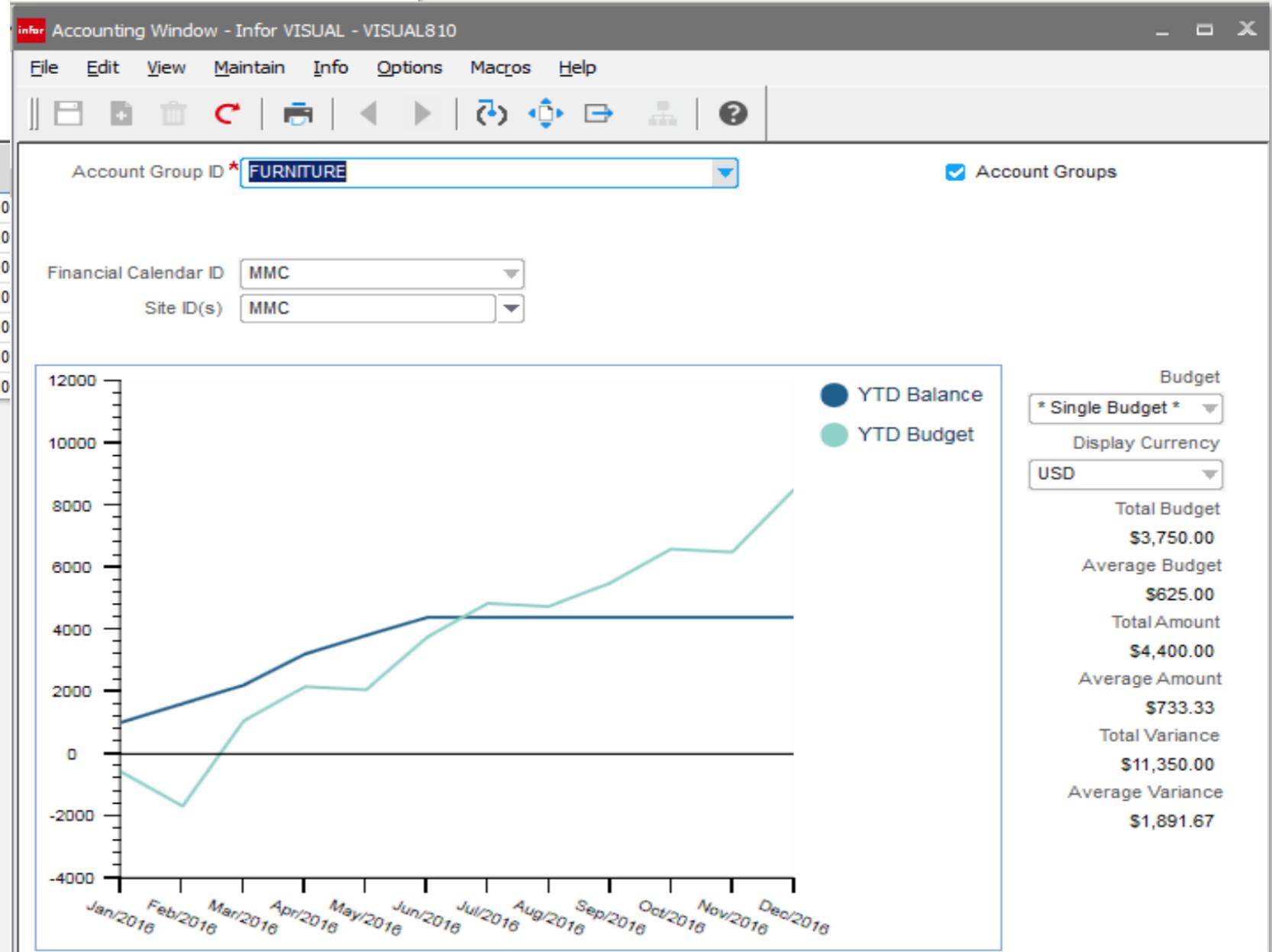
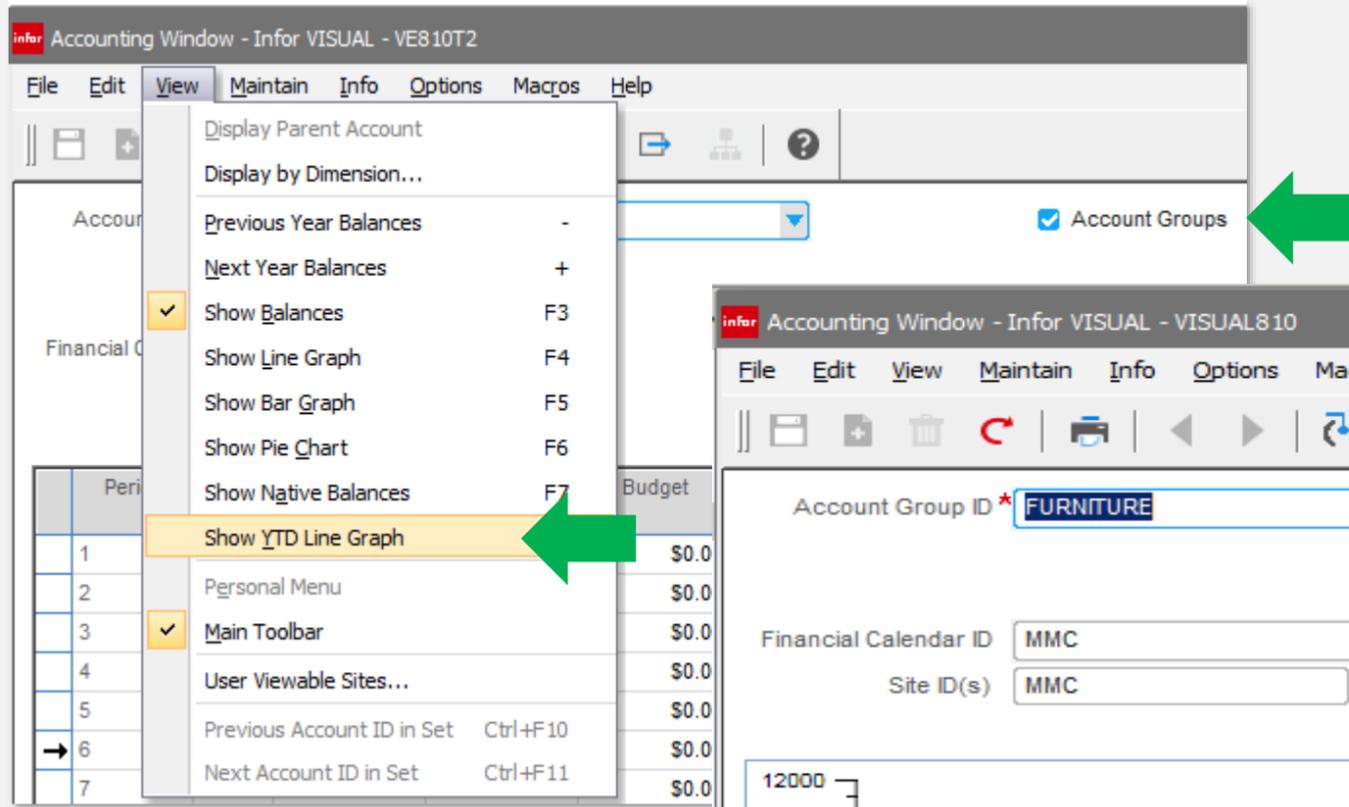


Accounting

(Standard Financials)



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

infor 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

Accounting Entity Maintenance - Infor VISUAL - VE8 10

Entity ID * EAST

Requisition Maintenance

Approval Label 1

Approval Label 2

Approval Label 3

Approval Label 4

Generate All Tasks Simultaneously

Passwords Required for Secured Fields

Create Financial Batches with Only One Transaction

Rejection Codes

Majestic Manufacturing Company, Inc.
A/R Invoices - G/L transactions (by Batch, Invoice)

10/7/2016 4:28 PM
Page 1

Batch ID(s) from 00078 to 00079 for User ID: SYSADM; Posted transactions only - (USD) \$
Site ID: MMC

Batch ID	Description	Type	Date	Debit	Credit
00078	Receivables subsidiary ledger	ARI	10/7/2016		
IV-06524AR	10/7/2016 10/7/2016 CENGRO CENTRE GROUP				
5145-001	Domestic Commissions			10.00	
1010-000	Accounts Receivable			100.00	
4005-000	Gross Sales - Domestic				100.00
1205-001	Commissions Accrual				10.00
Invoice Total:				110.00	110.00
Batch total:				110.00	110.00
00079	Receivables subsidiary ledger	ARI	10/7/2016		
IV-06525AR	10/7/2016 10/7/2016 INDCAS INDIANAPOLIS CASTING COR				

G/L Transactions

Site ID(s) MMC Accounting Month Current

Report Currency (USD) \$ 10/1/2016

Trans ID	Batch ID	Site ID	Type	Batch Date	Debit Amount	Credit Amount	Reference	User ID
460	00078	MMC	ARI	10/7/2016	\$100.00	\$0.00		SYSADM
464	00079	MMC	ARI	10/7/2016	\$250.00	\$0.00		SYSADM

G/L Subledger Transactions - (Batch Details) Site ID MMC - Batch ID 00079

Date	Invoice ID	Currency ID	Customer ID	Name	Debit Account ID	Credit Account ID	Debit	Credit	User ID
10/7/2016	IV-06525AR	(USD) \$	INDCAS	INDIANAPOLIS CASTING CORPORATION	5145-001		\$25.00		SYSADM
10/7/2016	IV-06525AR	(USD) \$	INDCAS	INDIANAPOLIS CASTING CORPORATION	1010-000		\$250.00		SYSADM
10/7/2016	IV-06525AR	(USD) \$	INDCAS	INDIANAPOLIS CASTING CORPORATION		4005-001		\$250.00	SYSADM
10/7/2016	IV-06525AR	(USD) \$	INDCAS	INDIANAPOLIS CASTING CORPORATION		1205-001		\$25.00	SYSADM

infor Recalculate Standard Costs

Feature

Export to Excel option added

Recalculate Standard Costs - MMC

Exception processing

Show Current Costs Show Cost Categories Exception processing

Show Changes Only

Part ID	Description	Commodity	Current Unit Cost	Current Material Unit Cost	Current Labor Unit Cost	Current Burden Unit Cost	Current Service Unit Cost	New Unit Cost	New Material Unit Cost	New Labor Unit Cost	New Burden Unit Cost	New Service Unit Cost
00089123	SERVICE TAG, GENERAL		0.03	0.03	0.00	0.00	0.00					
1/4 RD BAR			23.00	23.00	0.00	0.00	0.00					
1/4' RD BAR			23.00	23.00	0.00	0.00	0.00					
<input checked="" type="checkbox"/> 1/4PLATE	1/4 INCH STEEL PLATE	STEEL	125.00	125.00	0.00	0.00	0.00	124.444444	124.444444	0.00	0.00	0.00
<input checked="" type="checkbox"/> 1/4X3ANGL	1/4 INCH BY 3 INCH ANGLE IRON		15.00	15.00	0.00	0.00	0.00	11.67	11.67	0.00	0.00	0.00
1/8 ALUM			45.00	45.00	0.00	0.00	0.00					
10446	LABEL, ROUND, 1.5" DIA, MODOCARTS		0.00	0.00	0.00	0.00	0.00					
24-130	CTE 30 IN LB, BLACK, HINGE		0.00	0.00	0.00	0.00	0.00					
26-1202-40	CASTERS, LOCKING 4", P/N 41100-009		0.00	0.00	0.00	0.00	0.00					
26-1203-40	CASTERS, NON-LOCKING 4", P/N 4100		0.00	0.00	0.00	0.00	0.00					
3/16PLATE	3/16 DIMENSIONAL STEEL PLATE		12.75	12.75	0.00	0.00	0.00					

Searching Fabricated Purchased All

Receipt Selection Options

Start Date End Date

Use the latest receipt if no receipts occurred in this date range

Print Options

Print Destination