

Infor Distribution Essentials

Infor ERP A+ Product Overview



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About Infor's Distribution Group

At Infor, we understand the challenge of growing a distribution business. Between managing day-to-day business realities and controlling costs, it's easy for growth opportunities to be overlooked. That's why we offer the solutions and expert resources to help you balance between taking care of today and planning for tomorrow. Infor leads the market in innovations that help distributors grow their businesses while controlling costs and increasing margins. We help distributors:

- Attract new business by competing on factors other than price
- Grow revenue without proportional increases in employee headcounts
- Retain existing customers by satisfying changing customer demands
- Outperform the competition by using technology to their advantage

We accomplish these goals by offering enterprise solutions with decades of practical application behind them. We do it by continually researching and developing innovative solutions to the unique challenges distributors face. And we do it by providing the wealth of assets and global resources that only Infor can deliver. With over 30 years of experience in distribution, we have a proven track record of helping distributors improve their bottom lines. To find out what our world-class ERP, supply chain management, eCommerce, inventory management, and warehouse management solutions can do for you, check out the solutions section of our site or contact us. We look forward to talking with you.

Key Infor Statistics

Infor is one of the world's largest providers of business software, with approximately \$2.1 billion in revenue, and the 10th largest software company in the world.

- 8,100+ employees
- Direct offices in 100 countries
- 70,000 customers worldwide
- Implementation and support capabilities in 100+ countries
- Global coverage: Americas, EMEA, APAC
- Development employees average 12 years of experience in their field



About Infor ERP A+

Combining power, control and convenience, Infor ERP Application Plus is a robust distribution management solution specifically designed to help distributors of all types run an efficient, end-to-end operation. From accounting and sales to the warehouse and everywhere in between, Infor ERP Application Plus allows distributors to enhance customer service, optimize inventory levels, increase productivity and improve profitability.

Designed to maximize speed and accuracy, Infor ERP Application Plus can access and integrate data across an entire operation, thereby eliminating many redundant, manual processes and streamlining business functions.

A+ is so reliable and information access is real time due to the single database on which the application is built. For example, when someone is looking for item availability or to see what case packs are available for an item, the user can be confident the information will be accurate because there is no synchronization required between Order Entry and the Warehouse Management System.

Vertical Market Focus

Infor ERP A+ addresses the specialized needs within the vertical markets we serve, including janitorial supply, restaurant supply, fine & industrial paper, medical, dental and ophthalmic distribution.

ERP Solutions

Customer Service Suite

Customer service keeps you in business. Price and availability are key, but without the ability to serve your customers by getting products and information to them quickly and accurately, you can't guarantee that your customer will call you first. Our customer service tools empower you to provide world-class customer service, whether it's over the phone, the internet, or in a retail environment. And because our tools are integrated with your entire enterprise, you can be sure that you are providing accurate and consistent information, any time, all the time.

Bid and Quote

Users can track the process of obtaining bids for the purchasing of product or tie the bid directly to a request from customers to source a sales order for them.

Features Include

- Accept and quote bids submitted by customers
- Manage the processing of customer quote
 - Enter a customer's RFQ
 - Enter vendors who will be asked to bid
 - Submit multiple requests for quote to selected vendors
 - Enter vendors' costs
 - Enter customer prices based on responses from vendors
- Manage bid and quote pricing
- Manage bid and quote responses
- Submit RFQ responses
- Approve and convert won items to vendor rebates
- Bid and quote tracking
- Bid entry, maintenance, and approval
- Bid status
- Pricing agreements
- 3-way price agreement between you, the customer, and the vendor
- 2-way price agreement between you and the vendor
- Agreement is for specific duration
- Bid and quote rebates
- Interfaces to Order Entry and Fax module
- Email support for customer quotes and vendor RFQs

Order Entry

Order Entry allows users to manage and support all aspects of order processing, pricing and customer service. Key functions include customer service, enter and maintain orders, create open purchase orders, print pick lists and invoices and save order history.

Features Include

- Multiple order types including order, invoice only, return, future, master, correction, shipping confirmation, and quote.
- Item availability
 - Real-time item availability and allocation
 - View availability in all warehouses
 - Expected purchase order receipt dates
 - Substitute items, item replacements, and item complements
 - Serial number and lot control (when using Warehouse Management module)
 - Customer inventory reservations
 - Warning if selling in non-standard pack size
- Multiple Warehouse Orders
 - Alternate warehouse lists
 - Override shipping warehouse
 - Automatic order split by warehouse
 - Consolidated order and invoice display
- Customer service comments
- Extended Item Comments
 - Can print on Pick Lists, Pack Lists, Invoices, Return Goods
- Authorizations (RGA's), and Acknowledgements
- Customer item number cross reference
- Duplicate customer PO number warning
- Multi-generation order numbers
- Multiple units of measure per item
- Customer specific units of measure
- Non-stock item handling
- Drop Ship entire order or by line item
- Deleted order and line item tracking
- Enter new customer orders without pre-assigned customer number
- Order cancellation date
- Order activity tracking
- Order pad (create new order from history)
- Order review with summary totals by dollar and weight
- Sold-To, Ship-To, Bill-To Capability
- Real-time credit check
- Order hold triggers
- Special Order Processing
 - Links Sales order to Purchase Order
 - Easy selection of order/line comments and key order elements to be automatically incorporated into Purchase Order
 - Ability to provide change control and synchronize all special order components via change requests
 - Detailed activity and history is available
 - Option-based immediate or delayed placement of special orders on new or existing documents
 - Ability to specify special order under/over shipment ceilings/limits at various levels
 - Options-based approval requirements
- Order entry item restrictions
 - By customer or item
 - Tracks unauthorized requests
- Future order processing that will auto-release based on lead time
- Flexible pricing capability
 - 5 list prices X 40 customer price discount codes X 999 item

- price classes
- Quantity break price by item and/or group
- Different quantity breaks by warehouse
- Cost plus, list minus, and/or gross margin pricing
- Print price books
- Customer/item pricing
- Contract Pricing
- Warehouse level pricing
- Real time pricing/overrides
- Customer price list redirect
- Promotional pricing by dollars or percentage with effective dates
- Sales tax calculation
 - 4 additional local taxes per tax body
 - Future local tax changes by date
 - Ability to override item tax codes
 - Customer and item tax classes for overrides
 - Independent Systems sales tax interface
 - Canadian Goods & Services Tax/Provincial Sales Tax
- Vendor Rebates
 - Based on customer sale
 - Optional auto-update of rebate to A/R or A/P
- Future contract maintenance
- Blanket orders with or without pre-assigned release dates
- Automatic back order release
 - Order priority
 - Request ship date
 - Cancel date
 - Priority matrix
 - Partial release based on value, weight, or quantity
- Multiple order ship confirmation
- Packer/Picker/Driver ID tracking
- Shipment History - unlimited online detail
- Route/Stop
 - Carrier codes
 - Carrier schedules
- Returns processing
 - RGA hold code for returns
 - Return reason codes by order line item
 - Printing of RGA/Pick-up Slips
 - Create returns from history
 - Returns analysis inquiry
 - Returned quantity checked against original ordered quantity
 - Automated Return to Vendor processing
- Pick List
 - Print by carrier
 - Sequenced by entry or item
 - Wave Picking
 - Summary Pick List
- Pack List
- Acknowledgement
- Invoice
- Material Safety Data Sheets
 - MSDS Items
 - MSDS Customer/Ship-to
 - MSDS Reporting, Pick Lists, and Shipping Labels
 - Easy MSDS Tracking
- Easy Entry and Tracking of Hazardous Material (HazMAT) Information
- Commission cost load factor
- Invoices
 - Print, reprint, fax, email, EDI, reprint invoices from history
 - Consolidated invoicing with user defined timetable
- Searches
 - Customer name
 - Customer ship-to
 - Item description
 - Partial item number
 - Manufacturer item number
 - Advanced Search

Point of Sale

Point of Sale integrates cash-and-carry operations with the host application and extends your ability to sell goods in a retail environment beyond the capabilities of an order entry system. It includes cash drawer and UPC scanner functionality and receipt printer.

Features Include

- Manage and control inventory at the store level
- One screen order entry process
- Cash register management utilities
- Flexible security by clerk or supervisor including
 - Returns processing
 - Price or cost override
 - Ability to login at multiple stores
 - Ability to cancel line items on orders, or entire orders
- Custom receipts
- Gift receipts
- Full integration with enterprise database
- Lot and serial processing
- Support for returned items
- Save in-process orders
- Interfaces to Electronic Payments module
- Merchant ID can be configured by store for EP settlements
- Store credit and gift card processing
- Multiple payment types per order
- Customer demographics by zip code
- Shelf and item price labels

Price Maintenance

Price Maintenance allows users to efficiently and accurately maintain the price and cost of all items. Users can change many items with a single transaction, review the new prices and make changes before they are updated in the item master tables.

Features Include

- Globally maintain item prices and costs
- Future price and cost
- Increase or decrease of current amount by \$ or %
 - Effective dates to define when price will change
 - Promotional price end date
 - Update any or all of each item's 5 price lists
 - Update any or all of each warehouse's 5 price lists
 - Update costs based on standard or user cost
 - Accounts for vendor quantity break costs
- Offline Future Price Entry

Inventory Management Suite

In many ways your success comes down to your ability to perfectly handle your inventory. To succeed in distribution, the buying, selling, and handling of inventory must be performed to perfection. You need to precisely balance inventory levels with customer demand while identifying the best product sources with the best product prices. Inventory Management Suite has all of the tools you need to provide advanced forecasting and optimal inventory levels to maximize service and minimize investment.

Bill of Material

Bill of Material allows users to manage single-level bill of material parent items with multiple components. Parent items can be manufactured, assortments or kits.

Features Include

- Supports manufactured items, assortments, kits
- Manufactured items are built to stock
- Assortments used to order multiple items automatically
- Kits permit products to be assembled with special features or options
- Seamless interface to Order Entry
- Kit component maintenance and reservations
- Substitute or add items to kits on the fly
- Automatic G/L update
- Labor rates for kits and manufactured items
- Ability to update parent cost
- Cost roll-up for components and labor
- Component inventory levels back flushed
- Ordering list for components - including order history list

Customer Consignment

Customer Consignment can define a consignment warehouse and track inventory on consignment at customer locations. Offer your customers flexible options when they purchase goods from you, free up valuable space in your own warehouse and test the sales of new products without initial liability to your customers.

Features Include

- One logical warehouse per company supports all consignment relationships
- Inventory is tracked at the customer/ship-to level
- Multiple consignment warehouses supported

- Transfer inventory from physical stocking warehouse to a logical consignment warehouse
- Pricing at time of transfer, or at time of billing
- Billing occurs when the inventory is used or sold
- Automated billing based on usage or count
- Inquiries available to view consignment inventory
- Lot and serial numbers can be tracked
- Supports returns to and from the consignment warehouse
- Inventory transaction history is available
- Customer consignment stock status report
- Transfer customer consigned inventory among ship-to's
- Option for automatic creation of replenishment stock transfer orders.

Inventory Accounting

Inventory Accounting provides users with a powerful tool to track inventory quantity and cost transactions, including adjustment transactions, analysis, cycle counts, and complete physicals.

Features Include

- Multi-warehouse support
- Warehouse level pricing and taxing
- Warehouse transfers
- Separate price classes and sales analysis item classes
- Item G/L codes
- Item tax class
- Detailed transaction history including view transaction
- comments and G/L entry
- 3 decimal positions for quantities
- 5 decimal positions for costing and pricing
- Unlimited selling units of measure per item
- 3 stocking units of measure/item
- Separate pricing unit of measure
- Optional surcharge by % or specific value
- Customer/item default units of measure
- Reporting and inquiry UOM default
- Physical Inventory System
- ABC codes
- Physical inventory codes
- Cycle count codes
- Count sheets generated by warehouse location
- Weights stored at item level
- Extended item comments
- HazMAT handling
- Valuation reports
- Landing cost factor definition by warehouse
- User defined item fields
- Harmonized tariff and commodity codes for Intrastat
- Detailed item activity

Inventory Management and Planning

Inventory Management and Planning allows users to plan for and respond to changing customer demand while maintaining a reasonable level of inventory investment. Forecasting techniques match inventory levels with changing customer demand. Identify slow moving items and allow more time to manage the fast moving items that contribute the most revenue to your business. Set up variables to reflect behavior of items and vendors during different times of the year.

Features Include

- Min/Max calculations based on
 - Sales history
 - Inventory forecasting model
 - Growth factor
 - Lead time
 - Order frequency
 - Safety stock
 - Service level
 - Order level
- Calculate and update vendor lead times
- Supports seasonal and non-seasonal items
- Exception reporting
- Safety stock analysis
- Forecasting based on superseded item, manual overrides
- Item demand history
- Demand variance utility allows consideration of unusual events which might skew demand
- Automatic and manual adjustments to demand
- “What if” analysis for evaluating changes to lead time, min/max, service level and more

Purchasing

Purchasing works with Inventory Management and Planning to determine the economic order quantity to create purchase orders for single or multiple warehouses, transfers between warehouses or centralized purchasing. It also allows users to track and review the life cycle of those purchase orders. Value Added Services uses suggested order capability in Purchasing to create work orders for appropriate finished goods quantities. It also reviews demand and creates suggested purchase orders for raw material for those finished goods.

Features Include

- Supports both your item and manufacturer’s item number
- Due date by line item
- Order assignments by line item
- Buyer approval levels on requisitions
- Vendor / Item Table
 - Track ordering minimums
 - Vendor/item cost
 - 2 buying units of measure
 - Separate manufacturer’s item number and description
 - Standard pack quantities
 - Supports minimum order dollar and weights
- Vendor/ Item / Warehouse Table
 - Track landing codes
 - Different vendor / item costs
- Complete buying information
 - Monthly usage
 - Monthly forecasts
 - Open orders
 - Lead time
- Accounts Payable interface
- Special Order Processing
 - Links customer order to Purchase order
 - Easy selection of order/line comments and key order elements to be automatically incorporated into Purchase Order
 - Ability to provide change control and synchronize all special order components via change requests
 - Detailed activity and history is available
 - Option-based immediate or delayed placement of special orders on new or existing documents
 - Ability to specify special order under/over shipment ceilings/limits at various levels
 - Options-based approval requirements
 - Cost breaks
 - Vendor minimums

- Warehouse transfers - automatic transfer receipts option
- Receiving by individual PO and/or receiver
- Return to Vendor Processing
- Complete receipt history for voucher validation
- PO receiver event codes for tracking inbound containers
- Vendor Contracts
 - Contract price
 - Quantity discounts
 - Buy/Get promotions with start & end dates
- Event codes
- Suggested Purchasing
 - Automatic PO Creation
 - Alternate Vendors
 - Special Orders
 - Vendor Minimums
 - Selection by vendor type
 - Work orders
 - Other warehouses shown as potential sources
 - Create multi-ship PO
 - Create centralized PO
 - Vendor volume discount
- Buyer Budgets

Value Added Services

Value Added Services supports light manufacturing operations in both made-to-stock and made-to-order environments. Value Added Services may be used for assembly/disassembly, in-house repair/refurbishment and other value-added operations. Outside services can be used to track inventory that leaves the facility and returns while adding any service charges to the cost of the product.

Features Include

- Supports
 - Assembly/disassembly
 - Conversion and change-out
 - Manufacture of parent and co-products
 - Unlimited user-defined tasks
- Elements include parent, co-product, and component
- Parents and co-products can be received into stock inventory or can be linked to a special order
- Tracking and costing of manufacturing process
 - Component materials
 - Routing
 - Labor
 - Outside services charges
 - Special charges
 - Overhead
 - Cost of work is distributed over the parent and co-products on a user-defined percentage basis
- Can create suggested work order, planned work orders for customer quotes or future orders, or special work orders
- Create production order to be released for running of job
- Allocates component inventory to production order jobs
- Ties to automatic back order release to fill back orders
- Uses routing to manage the process required to make the product (including sub-assembly)
- Can handle outside service operations including generate PO, tracking shipments, tracking receipts
- Ability to factor scrap for each component into finished product
- Tracks lot and serial items throughout sub assemblies
- Can create a work order directly from Order Entry to custom build a product for a customer.

Financial Management Suite

In any economy, tight fiscal control and good visibility into your finances are key factors for your profitability. Achieving good visibility into your finances requires financial tools that are tightly integrated at every level of your enterprise. Achieving effective management requires automated and flexible tools, good reporting and modeling, the ability to drill-down into reports to get at the specifics. To achieve both good visibility and effective management, you need the Financial Management suite.

Accounts Payable

Accounts Payable allows users to easily manage and integrate the entire payments process including open payables, invoices, printing checks, matching receipts with invoices and tracking payment history.

Features Include

- Multiple Distribution Accounts
- Duplicate paid invoice checking identifies invoices that may already have been paid
- Vendor search in all areas
- Online A/P history
- Create drop ship/PO receipts from voucher entry receipt validation
- A/P receipt validation with purchase price variance
- Partial receipts validation/support
- A/P landing cost validation with landing cost variances
- Comment entry available for inquiry and printing for invoices and/or vendors
- 1099 Reporting
- Check numbers recorded after actual check printing
- Flexible online payment selection
- Recurring invoices supported
- G/L Posting in summary or detail
- Associate Vendors or groups
- Check history selection for reconciliation
- Pre-receipt invoicing

Accounts Receivable

Accounts Receivable allows users to manage their entire receivables process including cash and collection operations. Track open invoices, payment history and collection comments by customer. Track your bank account balances and maintain a history of transactions. Our application includes flexible aging, finance charges, disputed invoices and statements on demand and managing open credit for credit limit and slow pay hold.

Features Include

- Online payment history
- Online shipment history detail
- Multiple aging codes (user-defined)
- Multiple A/R payment terms

- Create split/extended bill terms
- Cash Application
 - Automatic cash application
 - Miscellaneous cash receipts
 - Allow single check to be applied across multiple customers
- Customer collection comments with review date for follow-up
- Aged Trial Balance includes highest balance/oldest order and sales rep. selection
- Daily invoice aging
- On demand customer statements
- Dunning letters
- Payment trend analysis
 - Average days to pay
 - High credit date by Customer/Invoice
- Flexible aging terms
- Cash forecasting based on outstanding invoices and payment history
- Mailing labels
- Comments at the customer, payment, and invoice level
- Customer GL codes
- Disputed invoice handling
- Finance charge calculation by customer
- Customer master audit activity inquiry

Electronic Payments

Electronic Payments creates fast, paperless transactions and improve cash flow with automatic credit card payment transactions. Improve service and convenience by allowing customers to pay for orders and invoices with the credit card that you accept and support.

Features Include

- Online credit card authorization (can be real-time or batch)
- Payment types for each card allow update to A/R
- Configure on a company by company basis including
 - hold codes for credit card transactions
 - authorization amount and buffer
 - number of days transaction history to store
 - Define authorization expiration days
- Define “quick pay” options for customers choosing to pay invoices with credit cards
- Define specific credit cards for customers, including default or list
- Orders on Pending Authorization Hold can be authorized individually or in bulk
- Masking of all but last 4 digits of credit card number on most screens and reports
- Address Verification Service (AVS) support
- Credit Card Verification Value (CVV) support
- User security which controls access to credit card transactions
- Hold queue for
 - Pending Authorization
 - Expired Authorization
 - Processing Error
 - Declined Credit Card
- Allows you to accept credit cards for payments for phone, ecommerce, POS, or on account payment

General Ledger

General Ledger provides flexible and comprehensive financial information that is easily accessible. An innovative entry method minimizes account number data entry. The account number format is flexible, user-defined, provides for variable-length segments and each account can also have an alias or short name. All applications are fully integrated so GL entries automatically flow to your accounts based on flexible user defined rules.

Features Include

- Up to 25 Position account number with up to 5 user defined segments
- Optional G/L account number segment validation
- General Ledger Report Writer
- Customizable financial statement layout to match or improve what you have today.
- Statement Printing
 - Statement preview printing without setting up actual statement
 - Divisional account selection
 - Statement print groups to select one option to run all monthly statements at once
 - Save statements for later use
- GL statement export
- Work with saved statements
 - Multi-level statement inquiry down to the journal entry detail level
 - Reprint saved statements
- Multiple budgets for each GL accounts
- Flexible budget creation with copy feature from previous budgets
- Online history in detail or summary
- No month-end closing procedures, immediate system updating
- Adjustments to prior periods
- Inter-Company clearing accounts
- Expense account distribution
- Template group processing for recurring journal entries
- Drill down to original source document
 - Sales
 - Inventory
 - Purchasing
 - Cash disbursements
 - International currency
 - Warehouse Transfers

International Currency

International Currency allows users to more easily expand into the "global marketplace." Perform transactions in foreign currencies and support affiliate sales and/or distribution facilities in foreign countries by allowing these warehouses to operate in the local currency of the remote location.

Features Include

- Foreign country and currency control and multi-national processing by company
- Multiple exchange codes and dated rates
- Automatic GL entries for gains or losses caused by exchange rate fluctuation
- Perform transactions in local and trading currencies
 - Costs maintained and payments made in currency other than local
 - Transactions processed in an unlimited number of trading currencies

- Easy tracking of the financial effect of rate fluctuations
 - Currency definition description, symbol, number of decimal places
 - Currency relationships
 - Exchange codes
 - Currency Contract note pad feature
 - Multiple country/currency pricing
 - Euro currency regulations/override benchmarks
 - Currency information window
- Revaluations
 - Vendor Tables
 - Open POs
 - Un-vouchered receipt history
 - Open payables
 - Foreign Currency Bank Accounts
 - Customer Master Tables
 - Open Orders
 - Open Receivables

Reporting & Analytics Suite

Think about your business. You have an enterprise application that is used by nearly every person in your organization and contains data about nearly every transaction that occurs between you and your customers, and you and your suppliers. With the right tools, that data can come alive - it can trigger notification and events across departments in your organization, it can show you which customers and products are profitable, and it can show you how your service levels compare to goal. Smart businesses use the tools in the Business Intelligence Suite to do just that.

data@work

data@work work is a powerful tool that allows users to access and use their company's data to the fullest. Create virtual databases, virtual tables, charts, graphs and pivot tables. Users can schedule a wide variety of reports to run when they want, in the format they need.

Features Include

- Knowledge Library
 - lists all tables in plain English so users can easily understand database elements
 - table relationships are already established so users can easily join multiple tables
- Menus can be defined for a user or group of users
 - Executives, managers and staff have access to appropriate information
 - Because recurring reports can be added as menu options, users can be self reliant
 - Menus can have dashboards, reports, inquiries
- Scheduling Options
 - Real time
 - Nightly
- Alerts can be sent to any email address based on user defined conditions
- Export to PDF, Excel, Word, text and generic tables
- Deployment
 - Rich client and internet deployment
 - Remote branches and employees at trade shows can securely log in from any PC
 - Customers and Vendors can log in securely to see information you provide to them
- Information Available
 - Infor ERP A+ database
 - Additional calculation columns can be used to manipulate data to create new columns
 - Access other databases to consolidate to a single view – MS SQL, Excel, Access, others
 - Drill down from summary to detail

Executive Summary

Executive Summary is a consolidated view of all pertinent business information from order processing, inventory, sales, purchasing and financials with drill down capability into the details of all key departments.

Sales Analysis

Sales Analysis provides users with easy access to key account and sales information. Know what items were sold, to whom and when. Allows multiple views of the data, such as sales history by sales representative, customer and item. Bar graphs provide multiple year sales information for user-friendly comparison and analysis.

Features Include

- Sales Analysis by Ship-to, Corporate group, Budgets, Sales Rep, Customer, class, sub-class, Item, class, sub-class, Item/customer or customer/item
- Customer & Item ranking by dollar, order, profit, and more
- Drop ship sales analysis by customer or item
- Sales representative detail sales analysis
- Yearly sales quotas (by sales representative by month)
- Gross Profit Analysis
- Unlimited months/years of sales history online

Workflow Management

Workflow Management allows users to proactively monitor and manage process flows such as notifying a customer of the shipment of an order. This tool creates an intelligent communication link between the system and its users, customers and vendors for all functional areas of the business including customer service, finance, purchasing and the warehouse.

Features Include

- Send alerts when critical states are set in key processes
- Ability to fully tailor alert messages
- Data elements sent as part of alert message
- Multiple messages and recipients per alert
- Time sensitive escalation
- Messages can be delivered to other application users, or externally via email
- Alerts can be customized in a multitude of ways
- Query Alert makes it easy to create custom alerts
- Alert history retained for later follow up
- Launching of applications from within the alerts makes follow up easy
- Optional consolidation of alerts to a specific time interval or time of day alleviate interruptions

Warehouse Logistics Suite

Managing activities in your warehouse is key to efficiently managing your business. Because the A+ Warehouse Management and Radio Frequency modules have been developed using the same database the rest of the system uses, all information is real time. With proper security, anyone in the organization can view inventory availability to the bin level across all companies and warehouses with the confidence that because Infor ERP A+ is a single database, that all inventory information is real time and accurate. With A+, there is no need to schedule any kind of synchronization between the enterprise and warehouse management systems that other distribution applications require.

Warehouse Management

Warehouse Management dramatically improves warehouse productivity and accuracy by addressing workflow and product movement. Warehouse tasks such as receiving, directed put-away, moving, replenishment, counting, directed picking, packing and shipping are integrated and managed in a seamless manner.

Features Include

- Flexible setup
 - Up to 12 position location field with 5 user defined segments
 - User defined picking zones
 - Supports gradual implementation
 - Optional Pick List creation rules
 - Bar Code support
- Serial Number Tracking
 - From original receipt through shipping
 - After shipping only
 - Serial number reported through receiving and shipping confirmation
 - Serial number history in sales, receipts, and inventory transactions
 - History by item, customer, and order
 - Access to the original invoice
 - Cost tracking by serial number
- Bar Coded Labels
 - Item
 - Location
 - Shipping
 - Move
 - Put Away
- Lot Control
 - Date sensitive lots
 - Manufacturing lots
 - Dye lots
 - Lots for measuring availability
 - Discrete cost tracking
 - Fixed and variable case quantity control
 - History by item, customer, and order
 - Access to the original invoice
 - Multiple lots in the same bin location
- Put away and receipt processing
 - Automated inventory receiving and put away
 - PO lookup by vendor and item
 - System selects the best location based on storage requirements, product size, historical time-on-shelf
 - Pallet, case and unit put away
 - Put away lists
- Increased warehouse productivity
- Optional cycle count scheduling
- Improved picking accuracy
- Increased warehouse utilization
- Space optimization

- Improved inventory tracking with quantities, lots, and serial numbers
- Order fulfillment
 - Optional FIFO location selection by item type
 - Wave Picking
 - Picking method determined by location, quick picks, wave, staged picks, bulk picks
 - Pallet, case and unit picking
 - Optional box tracking and shipping
 - System selects “best fit” box based on order contents
 - Calculates total box weight including dunning weight
 - Case labels for bulk picking
- Physical inventory and cycle counting
 - Minimal disruption of normal operations
 - Controlled count sheet printing
- Reconciliation tools
- Count verifications
- Valuation reports
- Online moves to consolidate locations
- Suggested movement reports to replenish quick pick locations
- Offline counts via hand-held device
- Online warehouse management information
 - Location information by item
 - Item information by location
 - Inventory movement history
 - Suggested movements
 - Storage requirements, product size, weight and pallet information

Radio Frequency

Radio Frequency provides users with a powerful tool to receive, move and track inventory through its entire life cycle in your warehouses using a handheld or vehicle mounted radio receiver and eliminating paper. Scan bar-coded information to instantly update the database in real-time and reduce errors with this immediate validation.

Features Include

- Receiving inventory
 - Receive multiple PO's including handling for items not on PO's
 - UPC cross reference
 - Vendor/Item number reference
 - Verification of PO number
 - PO quantities checked against scanned amounts
 - Access to lot/serial number information
 - Vehicle/task/handler authorization for all tasks
 - Automatically post quantities before put-away to permanent location
 - Immediate put away on item by item basis
- Inventory put away
 - Scan item and quantities
 - Best travel path suggested
 - Immediate tracking of status
- Counting inventory
 - Eliminate hardcopy count sheets
 - System directed travel path from RF device
 - Immediate notice on RF device if scanned counts do not match expected counts
 - Option to force recounts of items with variances
- User defined tasks which may include breaks and vehicle maintenance
- Send messages to RF device from host

- Moving inventory within a warehouse
 - Unique move numbers automatically assigned
 - System suggested travel path for collecting / putting away inventory
 - Authorized users can create moves to replenish and/ or consolidate locations
- Ship confirmation from RF device
- Picking inventory
 - Verify items and locations from which picked
 - Option to move inventory to the shipping dock location
 - System directs user to follow most efficient travel path
 - Wave picking
 - Location override from RF device
- Work Statistics and Performance Monitoring
 - Time tracking & work stats
 - Analyze handler productivity
 - Comparative analysis with bar and graph displays
 - Identification of the employee and vehicle performing the task

eBusiness Suite

eCommerce Storefront

If you don't have a web presence, you're missing out on business opportunities. Consumers have come to expect that they can find products and information online, at their convenience. So, you have a web site, you're all set. Or are you? It's not enough to just have a catalog online anymore; customers expect the web sites they visit to do more for them.

eCommerce Storefront provides a state-of-the-art web interface, designed to provide a superior shopping experience for both business to business (B2B) and business to consumer (B2C) web sites. Featuring a robust catalog with an advanced search, order entry and tracking capabilities, and account maintenance, it has all the features you would expect. It also has a host of customer personalization features—such as, custom shopping lists and wish lists—that help make each user feel like your web site is working for them and that your businesses meeting their needs.

Business Benefits

eCommerce provides an automated means of effectively and efficiently aggregating, managing, and delivering product information in an online catalog and includes the following benefits:

- A complete self-service tool lets you receive customer orders and helps you reach customers anytime, anywhere, expanding your business without expanding cost or hours of operation.
- Specials lists let you target specific items for mark-down or promotion. Shopping lists let you customize content for your users. Wish lists let users customize content for themselves. This type of customized content helps you manage your customer relations and promote inventory based on interest and need.
- A robust catalog and an advanced search help customers quickly find products and obtain additional information, price, and availability for items. Sales are not lost to frustration or the inability to find products or information.
- Interfaces for B2B and B2C audiences extend your reach to the consumer market, adding to your customer base without burdening your customer service staff.
- Shipment tracking lets customers monitor their packages once they leave the warehouse. Providing a complete order to door solution for order tracking enhances customer service and builds trust.
- Java-based application and XML transactions position your technology in the most current development environment, making maintenance, upgrades, and product customization less expensive.

Features Include

- Provide self-service to your customers via the internet
- Order Entry
 - One-click access to order entry, order history, web specials, and customer shopping lists
 - One-click item search
 - Item comments
 - Complement/add-on items available for ordering

- Replacement/substitute/upgrade items available
- Tailor the display of stock availability, actual sell price, and savings to each user
- Recognize and display assortments
- Tailor sold-to/ship-to information
- Assign hold status to accounts
- Enter quotes
- Convert quote to order
- Save un-submitted order
- Specify items available via Internet
- Specify carriers available for Internet orders
- Copy order from history
- Order Status
 - One-click access to order status information identified by order number
 - View dates for entry, ship confirm, and invoice
 - View carrier information
 - One-click drill down to line item information
- Review AR information
- Administration for the application and user account management
- User account security

eCommerce Catalog

If you are like most distributors you have thousands of items in your catalog and you spend thousands of hours-and dollars—manually extracting, aggregating, and updating item information—information from a myriad of databases, suppliers, and other sources. Despite all of the time and money you spend on catalog management, you still have a catalog with errors, outdated information, inconsistent formats, and inconsistent information.

Your current method of catalog management may not be using your resources in the best way, efficiently meeting the needs of your current customers, or helping you reach potential customers effectively. Your catalog can contain the most current item and price information, include state-of-the-art search capabilities, and provide thousands of items that are not currently in your physical warehouse, if you have our catalog management tool: eCommerce Catalog.

Business Benefits

eCommerce Catalog provides an automated means of effectively and efficiently aggregating, managing, and delivering product information in an online catalog and includes the following benefits:

- Fully integrated with eCommerce Storefront.
- J2EE compliant to ensure maximum security, portability, performance, and scalability.
- Loads item information from your host database into your eCommerce Catalog database and keeps changes in sync.
- Includes data manipulation tools which allow multiple catalogs, creating new item class hierarchies, and other manipulation.
- Allows an unlimited number of item categories, custom item attributes, and attachments. Attachment files can be any type of media file, including image, document, movie, CAD drawing, product specification, etc.
- Includes search and replace "normalization" tools to insure that end-users will find items quickly and that the presentation of catalog information is consistent, regardless of the origin of the information.
- Adapt to your current Internet storefront and let you showcase items you don't typically stock in your warehouse without incurring the cost of stocking additional items in your physical warehouse.

- Reduce the manual labor required to publish catalog content and generate files for your catalog print process.
- Facilitate user actions such as searches and buying decisions through a feature rich GUI.
- Provide data aggregation tools to facilitate importing supplier catalog content for both stock and non-stock items. Content data can be imported via the Internet, CD, or a data file and can include item descriptions, price, specifications, etc.

Features Include

- Loads item information from your enterprise database and keeps changes in sync
- Allows import of supplier data from a variety of sources, including via transactions (when used with Collaboration Suite)
- Data manipulation tools which allow
 - multiple catalogs,
 - creating new item class hierarchies
 - other manipulation
- Unlimited number of item categories
- Unlimited number of custom item attributes
- Unlimited number of attachments of any type of media file (e.g. image, document, CAD drawing)
- Thumbnail and item no. link to item detail
- “Bread crumb” links on each screen show link history for current page
- Screen layouts can be configured including display/non-display, number of items to display on search results, column size, etc.
- Search and replace tools insure that users find items quickly and that the presentation of catalog information is consistent, regardless of the origin of the information.

Commerce Gateway

Just a few years ago, the biggest obstacle you faced as a distributor was integrating your existing business operations and applications into one efficient process. Tracking orders through your warehouse and automating your purchasing were once enough to give you a competitive advantage over the other suppliers in your community. But now the rules have changed.

You must integrate your business operation beyond your four walls. It's no longer enough to connect your back-office to your warehouse; you now need to connect to your suppliers, customers and any one providing value-added services to your supply chain.

- Your IT infrastructure must allow access to the information within your back office systems to partners within your community
- You must be able to accept information from your community in any format and integrate it so it can be processed seamlessly
- You cannot compromise your organization's security and internal controls or go through an expensive process of replacing the existing information system

Features Include

- Facilitates application-to-application exchange
- Internet-based message handling utility
- Sends and receives XML transactions and processes results
- Native access to business logic in back-office application
- Client component to trigger transactions at trading partner

EDI

Electronic Data Interchange reduces the manual handling and mailing of documents with vendors and customers. EDI includes acknowledgements, advanced shipping notices, invoices, price catalogs, purchase orders, purchase order changes, remittance advice and product activity data.

Features Include

- | | |
|---|---|
| <ul style="list-style-type: none"> • Send and receive purchase orders (850) • Send order acknowledgement (855) • Send invoices to customers (810) • Send advance ship notices (856) • Incoming Price Catalog (832) • Incoming ASN (856) • Incoming Remittance Advice/Payment (820) • Incoming PO changes (860) • Outbound Product Activity Data (852) • Automatic extracts • Resend Capability | <ul style="list-style-type: none"> • Documents tracked and monitored for completion • History maintained for EDI documents • Translation formats • Load pending documents at day-end (batch or immediate send) • Erroneous data can be fixed via the EDI inquiry eliminating the need to contact the trading partner • Documents can be resent or resubmitted after data is fixed |
|---|---|

forms@work

This fully integrated electronic forms application allows users to customize their forms in the Design Studio.

Features Include

- Custom formatting of pick and pack lists, order acknowledgement, invoice, AR statement, PO and AP check
- Eliminates the need for expensive pre-printed forms
- Route via email or fax, or print on network laser printer
- Output can be directed to forms@work on a system wide, company, or individual basis
- Enables desktop faxing

Mobile Order Management

Mobile Order Management enables field sales personnel in the distribution industry to process orders remotely using a PDA, laptop or other mobile device. The software's web-based interface allows users to quickly access inventory data, customer-specific pricing and wirelessly submit order information. When connected to the internet or local network, the user has access to current inventory availability and customer-specific pricing.

Features Include

- Enter order
- Check order status
- Add, change or remove charges, line items and comments
- Customer and ship to search
- Item search
- Manual price overrides, apply discount or markup %
- Spend less time on manual order processing and more time on customer needs
- Item availability
- Pricing

CRM

CORrelation

Visionary companies have always recognized the importance of putting the customer first. And while customer service has long been a key part of how companies go to market, building a truly customer-centered business has proven to be exceedingly difficult. It involves thorny technical (all that data in all those dissimilar databases), organizational (who really owns the customer?), and strategic (what is a customer and how do we want to engage them?) issues.

The global business environment gets more complex every day. Customers have more options and higher expectations. Companies need to do everything right to get profitable customers and keep them coming back.

The world has shifted to a relationship economy; one where competitive advantage is measured by a company's willingness to go the extra mile to fulfill a customer's need. Sometimes even miniscule differences in fulfillment efficiency can tilt the balance in favor of a competitor.

Companies that are unable to holistically embrace the reality of the new customer centered economy will continue to lose market share to competitors that have placed customers at the heart of their business strategy and their value chain.

That's where CORrelation comes in. Accessible anywhere in the world using a standard web-browser, CORrelation's robust suite of tools requires minimal training and can be implemented in days - not the months or years required by conventional CRM products. By rapidly deploying and using the solution, you recognize the ROI much more quickly and increase your competitive position by realizing the benefits of becoming a customer-centered business. CORrelation touches all areas of your business, beyond the typical CRM sales, marketing, and customer service approach.

By creating a single repository of all the touch points and interactions for your customers, partners, and employees, CORrelation empowers your organization to engage in what Peppers and Rogers call "Learning Relationships" where you become better and better at satisfying that particular customer or partner's needs.

The goal of any customer-centered business is to understand the needs of their customers well enough to treat them as "markets of one." To accomplish that goal requires processes that allow every one in your organization, to speak fluently of your company's history with any specific customer. You have to build programs and product offerings that talk specifically to the patterns and priorities that any given customer has indicated are important to them.

CORrelation provides you with a powerful leads engine that cleanses the raw data as it enters your system. It manages the marketing and segmentation activities against lists of prospective customers to automate your company's new customer acquisition process.

The same marketing engine allows you to proactively bring product offers to your existing customers. By utilizing the search tools embedded inside CORrelation, you can identify customer behavior and take marketing action.

CORrelation maintains a record of every interaction between your company and your customers or prospective customers.

Your employees have your company's history with every customer and partner at their fingertips. Additionally, you empower

your customer service organization with selling opportunities that they wouldn't have otherwise had while they are providing an enhanced level of service to your customers. Begin your journey towards peak performance and becoming a customer-centric organization by using the best-practice capabilities of CORrelation.

Contact and Activity Management

Company and Contact Management is the base for everything you can do with CORrelation. The first step in using CORrelation is to set up companies and their contacts in the system. You can then use this information to begin building a history of interaction with customers and contacts via calls, meetings, tasks, projects, training, sales opportunities, or customer care issues. With all of these interactions in one system, you can see a complete picture of your communication with clients. Your sales team can use this history to more effectively serve your clients. The support team can accurately keep track of issues and ideas they receive from the client.

The Contact Management features of CORrelation allow you to view demographic and recent communication information about each contact. The group of hyperlinks above each contact record enables you to perform a number of additional tasks:

- Maintain and view all relevant information about a company such as address, phone numbers, and web site address.
- Build and view history of interactions with company and contacts by capturing Activities (Calls, Meetings, Tasks, Sales Opportunities, and Helpdesk issues).
- Define and view hierarchy of relationships in a company, including headquarters and branch company locations, or parent and child company relationships
- Merge two contact records from the same company
- Copy history and notes from a contact in one company to a contact in another company
- Quickly locate a contact record based on a number of criteria
- View history of marketing and communications for the contact
- Add, modify, and view notes attached to a contact
- Create a resume or profile for the contact that includes work experience, education and skills
- Maintain customer search keys to capture unique characteristics about the contact
- View training history for contacts

Marketing and Leads Management

The goal of any customer-centered business is to understand the needs of their customers well. To accomplish that goal requires processes that allow your organization, regardless of who they are and what they do, to speak fluently to your company's history with any specific customer.

Additional features in this module include:

- Manage pipeline
- Create marketing lists based on attributes of contacts and leads
- Quickly send email, with or without attachments, to one or several contacts using the eEngine
- Cleanse raw data as it enters your system using powerful leads engine
- Manage marketing and segmentation activities against lists of prospective customers

Quick Search

- Advanced search capabilities
- Search over contacts, companies, users, projects, and activities
- Able to review previously generated lists or generate new lists

Scheduling and Knowledge Base Applications

The schedule management function of CORrelation allows you to enter appointments, calls and tasks into your calendar. You can use these appointments internally as well as tie them to specific contacts in the system. By tying your meetings, tasks and callbacks to your clients, you can keep a detailed history of the actions you have had with each client. CORrelation allows you to track each call, meeting, task, and e-mail that you send to your clients so you do not lose any of the important information regarding your client. The Knowledge Base in CORrelation allows you to categorize customer care call solutions and articles for easy access by internal users and external customers.

With the Knowledge Base module you can:

- Create new knowledge base articles and expose them to customers over the web
- Add and edit knowledge base categories
- Add closed customer care calls to the knowledge base

eEngine

- Used to create default Customer Care communication or messages to your clients
- Track all communication with contacts in each contacts MarCom record
- Marketing tool to send one-to-one communication to a large list of contacts or an individual
- Messages can be created once and with the use of the Auto Insertion points used many times

Personalized Home Page

- Set preferences, check your schedule, and enter time
- Professional Information page allows you to manage personal information stored on the user record
- My Schedule page allows you to view a schedule in a To Do list format, presenting action items due Today, This Week, Next 30 Days, and Outstanding.
- Menu Preference page allows you to choose the login page

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