

## Infor10 ERP Business (SyteLine) System Functionality

### Core Functionality

#### Technology

- 100% Microsoft .NET technology
- Supports Microsoft Windows 7 (8.01.10 and up)
- Supports Microsoft Window Server 2008 R2
- MS-SQL 2008 R2
- Microsoft Office 2007 Integration
- Microsoft Office 2010 Integration
- SharePoint 2010
- Projects 2010
- Infor10 Workspace 10.1 and UI Blue 2.0 (8.03)
- Embedded BI from within Infor10 Workspace
- Infor10 ION
- Supports XP & Vista clients
- One-click client install
- Web client (IE8, IE9, Firefox, Chrome, Safari)
- Zero maintenance client
- Event management/workflow
- Highly configurable/customizable without source
- User events and configurations survive upgrades
- Full toolset provided to develop custom screens, adding applications and business logic

#### General Features

- Role based dashboards/home pages with alerts and drill downs
- Explorer based menu organized by module or role
- User defined queries
- Pre-defined queries
- Full drill-downs throughout
- Export record collections from user interface to Excel
- Import record collections from Excel into SyteLine via user interface
- Linked forms
- Tabbed form layout
- Quick Entry forms
- Workspaces (pre-arranged forms)
- Reporting directly to Excel, Word, .PDF, HTML, XML
- SyteLine IDO's integrated with SharePoint
- Mass updates of data
- Form and grid data entry
- Hide or Reorder grid columns
- Background process and report queues
- Diagramming component
- Unlimited notes
- Unlimited attachments (any electronic link)

- Attach text documents or spreadsheets to individual records in any collection
- Right click menu for adding forms or workspaces

#### Administration

- Password Security – Cannot reuse password for next x number of times
- Security by user, group and site
- Security for multiple sites can be created and managed from a master site
- Create tasks for other users
- Form and field level security
- Data-level security
- Data access security
- Electronic Signature
- Licensing by session type
- Middleware access security
- Multi-language
- SOX compliant password management
- Printer output management
- User Session Management – Orphans
- System Administrator Home form to allow quick access to key system administration data

#### Estimating

- Quoting and cost analysis
- Engineering sandbox development
- What-If scheduling
- What-If planning
- Pricing tables
- BOM Import
- Multiple price breaks
- Same as except
- Quote status
- Quote conversion to customer orders
- Estimates Quick Entry Form

#### CRM, Marketing & Sales

- Opportunity / Lead / Tasks tracking
- Contacts with Outlook integration
- Prospect / Customers information
- Salesperson Home form
- 360 Account Management views
- Sales and booking analysis
- Pipeline Management and Forecasting Tools
- Sales Teams

- Competitor Tracking
- Sales Campaigns
- Single and split commissions by order/line
- Pricing and discounts by product, customer, customer type and complex matrixes
- Customer /Sales Contact /Prospect Communication Logs with email integration
- Mail Merge and Email Blast
- Optional SyteLine CRM license module - Salespeople can be licensed to use only the CRM forms, so they don't need a full user license.

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### Customer Order Entry

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- Centralized and decentralized order entry
- Customer Orders Quick Entry Form
- Automatic credit checking, warnings and hold
- Order change history
- Volume, customer/item, contract and matrix pricing
- Hard and soft allocations
- Return Material Authorizations
- Tier Customers (Corp – Bill To, Sold To(s), Ship To(s))
- Drop Shipping by order/line/release
- Regular/Blanket Orders
- Kit orders
- Ship Early/Partial processing
- Time-phased item availability
- Ability to link customer order lines directly to Job Orders, Inventory, Purchase Orders and Transfer Orders
- Order/Line Discounts
- Available to promise for real delivery dates
- Features and Options order configuration
- Multi-lingual customer paperwork
- Foreign currencies
- Sales tax calculations, including VAT & GST
- Multi-lingual invoices
- Progressive billings
- Customer Document Profiles
- Letters of credit
- Order acknowledgements
- Advanced Shipping Notices
- Consolidated invoicing
- Drop ship orders (direct from vendor)
- DIFOT Reporting (Delivery in Full and On Time)

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### Multi-Company/Multi-Site Operations

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- Inter-site/Intra-site transfers
- Transfer Orders Quick Entry Form
- Site-based, linked Planning
- In-transit material tracking
- Flexible financial consolidation and reporting
- Automatic Inter-Company eliminations
- Inventory visibility across sites
- Divisions establish unique chart-of-accounts

- Divisions operate in any currency
- Consolidate to a standard chart of accounts
- Inter-site transfers at cost or markup
- One step inventory moves
- Multi-site journal entries
- Multi-site Customer, Vendor, and Item Maintenance
- Centralized Purchasing (PO Builder)
- Centralized Customer Order Entry
- Centralized PO Vouchering (Voucher Builder)
- Centralized A/P manual Vouchers
- Centralized Payment Processing (A/P)
- Centralized Payment Processing (A/R)

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### Projects

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

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### Production Management

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- Support of hybrid manufacturing (jobs, production schedules, JIT/Kanban)
- Labor reporting
- Labor efficiency reporting
- Payroll integration
- Machine-hour reporting
- Co-Products Jobs (multiple SKUs from the same Job)
- By-Products
- Rework jobs
- Overlapping Operations
- Scrap or Yield by Operation
- Outside Vendor Processing
- Comprehensive selective backflushing of material, labor, and overheads (Allows for backflushing of Lot and Serial tracked items)

- Tooling requirements
- Finite and infinite forward scheduling
- Planning can be used in place of scheduling
- "What-If" scheduling
- Dispatch lists by individual resources or resource groups
- Capacity Requirements Planning (machine, crew and tooling based)
- Intelligent setup sequencing
- Job prioritization and priority freeze
- Automated setup sequencing
- Manual override on job sequencing
- Drive costs by Work Center & Department
- Job tracking and costing broken out into 5 cost buckets
- Graphical views of capacity and schedule
- Schedule analysis by exception
- Resource Bottleneck analysis forms

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### Quality Management

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- Vendor history
- Statistics for rework and repairs
- Return statistics
- Lot/serial tracking
- Accept/Reject Material
- Reason codes for rejections
- Non-nettable inventory locations

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### Inventory Management

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- Real-time material tracking
- Real-time allocations
- Safety Stock
- Reorder Points
- Order min/mult/max
- Kitting
- Multiple Warehouses
- Selectable dedicated warehouses (as for spares)
- Location tracking
- Temporary and permanent item locations
- Lot/serial control
- Intelligent Serial and Lot Numbers
- Cradle to grave Lot/Serial Traceability
- Pre-assignment of Lot/Serial Numbers
- Container Inventory
- Dimensional Inventory
- Consignment Inventory
- Manufacturer's Item Number
- Inter and intra Warehouse transfers and moves
- Obsolete and slow moving inventory flags and analysis
- ABC flags and Analysis
- Inventory aging reporting
- Cost methods, including standard, actual, LIFO, FIFO and Lot Specific by item
- Costs by Item or Item Warehouse
- Multiple units of measure

- User defined unit of measure conversion
- Physical inventory
- Cycle counting
- Multi-lingual item descriptions

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### Shipping Management

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- Hard and soft allocations/reservations
- Picking and Packing lists
- Delivery Orders
- Goods Received Notices
- Available to ship analysis
- Multiple units of measure

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### Material Planning

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- Classic MRP or Infinite Advanced Planning (APS/I)
- Net change or regenerative MRP
- Master Production Scheduling
- Scheduler Batching groups several different items from different jobs into a batch for processing
- Firm planned orders for POs, PO Requisitions, Jobs, Production Schedules and Transfer Orders
- Material Planners Workbench
- Multi-level pegging
- Demand dependency
- Planning and Forecasting by Warehouse
- Prioritize demands by customer, by customer order, and by customer order lines, in addition to prioritizing by type.
- Customer-Specific Forecasts
- Planning BOMs (% of probability)
- Graphical capacity and scheduling charts
- What-If planning scenarios (APS/I)
- Single threaded planning from demand through indented BOM (APS/I)
- Automated Ready status flag states available or not for inventory demands or supply demands
- Components Shortage forms for visibility

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### Purchasing/Receiving

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- Purchase Requisitions with approval limits
- Regular and blanket purchase orders
- PO Change Orders
- Vendor specific pricing
- Purchasing history
- Vendor Performance Analysis
- Receipt rejections and reason codes
- Landed Costs
- Vendor Document Profiles

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### Electronic Data Interchange (EDI)

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- Support for 6 of the most common manufacturing transactions both Inbound and Outbound
- Supports Supply & Demand Management with 850 Purchase Order, 830 Planning Order and 862 Shipping Order
- Supports 855 Purchase Order Acknowledgement
- Supports 856 ASN transaction
- Supports 810 Invoice transaction
- Provides options for automatic data update or manual editing prior to posting

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### Master Data Management

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- Engineering Change Notices
- Revision Control
- Revision History
- Pending ECN flags
- Effectivity and Obsolescence dates on operations and materials
- Multi-level (20) Bill of Manufacture (routing/BOM)
- Use until used up logic
- Alternate items on BOMs
- Engineering "sandbox"
- Planning BOMs with Feature & Option Configuration
- Phantom items
- Where used
- Mass replace
- CAD BOM import
- Optional PLM module w/CAD interface (see below)

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### General Ledger

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- Hierarchical General Ledger
- Set G/L Account as Control Account
- Flexible robust chart of accounts
- Statistical accounts
- Allocation accounts
- Account Class
- Report against any combination of fields
- Export results of queries to Excel, ASCII file, Clipboard
- Full G/L drill down to source documents
- Budgeting
- Recurring Journals
- Upload Journal Data from External Sources
- Undo a Journal Entry
- Positive Pay File Utility
- Reversing entries
- Multi-site journal entries
- Bank reconciliation
- Fixed Assets module

- Obsolescence and effectivity dates on G/L accounts
- Built in Financial Report Writer
- Cash flow analysis
- Currency conversions
- Re-open closed years
- Security for out-of-period postings
- External Financial Interface

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### Financial Reporting

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- User defined financial reports
- Up to 99 columns
- Unlimited sub-totals and totals
- Calculations between columns
- Ratio calculations
- Drill down on screen
- Full financial reporting within Microsoft Excel
- Optional PM10 reporting (See below)
- Excel Based SyteLine Financials
- Supports Sun Systems Financials v. 5.4.1
- Executive Home form
- IFRS Certified

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### Accounts Payable

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- A/P payments centralized or decentralized
- Consolidated Vouchers (one voucher for multiple POs)
- Recurring Vouchers
- Full integration with purchasing for 3-way match
- Voucher pre-register (enter voucher prior to PO receipt)
- Vendor and voucher holds
- Selective Auto Voucher of PO Receipts
- Remit-To vendors
- Vendor Debit Memos
- Electronic fund transfer payments with remittance advice
- Multi-currency
- Payment processing
- Track 1099 Vendors and Payments
- Multi-lingual vendor paperwork

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### Accounts Receivable

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- A/R Cash Receipts centralized or decentralized that automatically post to Bank Reconciliations
- Consolidated Invoicing by period or group of shipments
- Multi-user Invoicing
- Credit management including customer and order holds
- Invoice Hold
- Progressive billing
- Adjustment Invoices
- Complex invoicing terms supported

- 3 Tier Customers (Corp – Bill To, Sold To(s), Ship To(s))
- Dunning letters
- Finance charges
- Letter of Credit support
- Multi-currency
- Multi-lingual invoices, credit memos & statements

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### Internationalization

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- Translation into multiple languages
- Currency formatting in 0-8 decimals
- Store multi-currency transactions in any of 4 values
- Ledger reporting by currency and losses
- Separate recording of gains and losses
- Revalue the domestic value of foreign bank accounts
- Landed costs
- Payment authorization
- Letters of credit
- VAT with Voucher Pre-Register
- VAT Recognition on Service Invoices and Vouchers
- Fixed rate of exchange for key business documents
- Multinational taxation
- Delivery Orders
- Goods Receipt Notices
- Alpha-numeric document numbering

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### Human Resources

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- Applicant tracking
- Benefits Management
- Detailed personnel records
- Regulatory compliance
- 401K support
- Vacation/Sick Leave tracking
- Position history
- Full Payroll system
- External payroll interface
- Support for HIRE Act
- Print and Reprint W-2's

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### Business Reporting & Analysis

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- Microsoft SQL Server Reporting Services (SSRS)
- Crystal
  - Imbedded Crystal Report Professional
  - Crystal Reports 2008
  - Note: Crystal was distributed as an option for upgrades prior to SL8.03 and that it will NOT be distributed for SL8.03 and higher
- Over 400 standard reports
- Graphing elements can be imbedded on any form
- Cut & Paste and export capability from Forms to MS Office applications
- Aging reports
- Reason reports on scrap and overages

- Flexible, query based report formats
- Standard pre-printed enterprise forms with optional license to customize
- Ability to route and FAX forms such as invoices or purchase orders electronically
- Ability to automatically route multiple copies of forms

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### SyteLine Application Event System

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- Assign user defined events to any SyteLine process, form, posting, record or activity.
- Electronic routing of information based on business rules
- Allows for collecting, distributing and approvals on line, real time
- Automates business processes
- Collaborate with Customers and Vendors
- Customize SyteLine's application flow
- Send alerts based on any event or change in data
- Cell phone or PDA device enabled
- Alerting on any business process outside of 'normal' conditions
- Suspend business transaction for approvals
- Internal and external Inbox for reviewing messages
- Outlook enabled as well as other email systems
- Pre-defined workflow templates

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### Microsoft Office Integration

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- Outlook Add-In
- Outlook Emails Added to Customer Interaction Logs
- Outlook Emails Added to SyteLine CRM
- Outlook Task List Associated with Calendar Events
- Sync Contacts and Tasks (between SyteLine and Outlook)
- Sync Calendars (between SyteLine and Outlook)
- Sync Task Lists (between SyteLine and Outlook)
- SyteLine Application Search (search and access SyteLine data directly from the Office application)
- Outlook SmartLink
- SyteLine Explorer in Outlook

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## Additional Functionality

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### SyteLine Data Collection

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- ❑ Integrated Data Collection supports all three types of commonly used collection methodology: Store & Forward, Wedge, and Radio Frequency.
- ❑ Store & Forward uses portable readers and scanners that capture and store information until the reader is placed back in its cradle, at which time it transmits contents in batch mode.
- ❑ Wedge data collection uses a reader attached to the PC keyboard to enter data which is immediately validated and checked for errors, and then directly posted to the database.
- ❑ The RF method offers the ability to enter data and scan transactions through the use of portable radio frequency equipment. It provides on-line, real-time validation of the Wedge method with the portability of the Store & Forward method.
- ❑ For Inventory Control: Cycle Counting, Physical Inventory, Material Movements.
- ❑ For Time & Attendance: Clock In/Clock Out, Lunch In/Lunch Out.
- ❑ For Manufacturing Control: Labor and machine reporting against jobs and production schedules, with moves, completions and scrap (including reason codes).
- ❑ Style sheets have been developed for the 1/4 VGA screen, 240 pixel wide Intermex CK31 device

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### SyteLine Configurator

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- ❑ Advanced constraint and rules based order and product configuration
- ❑ Ability to tailor and configure customer orders within a graphical, interactive order environment.
- ❑ Integrates features & options *and* intelligent rules enabling order entry to take complex orders correctly every time.
- ❑ Ability to configure a quote, an order, an order line or a job
- ❑ Performs calculations, text processing, and rules inheritance
- ❑ Multi-level configuration capability
- ❑ Ability to support intelligent part numbers
- ❑ Will intelligently generate BOM and Routing and pricing
- ❑ Flow chart graphical constraint development
- ❑ Save configurations

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### SyteLine APS – Finite Capacity

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- ❑ Advanced Planning System with Finite Capacity Planning
- ❑ Allows manufacturers to make firm commitments on customer orders, quotes, project resources, MPS items and forecasts in real-time.
- ❑ Simultaneously plans material, labor, tools, and the machinery required for each customer order at the time the order is entered.
- ❑ Immediate real-time Capable-to-Promise dates, not just Available to Promise.
- ❑ Launch Control.
- ❑ Upon placing an order, ability to determine why late and bottlenecks throughout entire product structure.
- ❑ What-If simulation with ability to compare/copy multiple alternatives.

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### Infor ERP Storefront

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- ❑ Business-to-business
- ❑ Shopping cart
- ❑ Electronic Checkout
- ❑ Full Catalog
- ❑ SyteLine integration for
  - Customers
  - Items
  - Pricing and Availability
  - Orders
  - Quotes
  - Order Status History
  - Shipping
  - A/R Summary
  - A/R Open Invoices
  - A/R Paid Invoices
  - A/R Invoice Details

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### SyteLine Forecasting

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- ❑ Creates forecasts from historical trend or from collaboration with customers or salespeople.
- ❑ Analyzes, graphs forecasts vs. history and trends, by item or item groups.
- ❑ Statistically calculates Item Safety Stock (ROP) and Order Minimum (EOQ Lot Size) and sets slow moving flag.
- ❑ Updates MRP/APS plan based on allowable percentage changes during specified time fences.
- ❑ Monitors the forecasts vs. actual demand and generates exception alerts.

- Provides market trend analysis with flexible period-to-period comparisons and graphing.
- Generates budget reports for revenue, material and labor based on the forecast.
- Supports reorder point forecasting, application of statistical models to forecast sales or usage, group forecasting, roll-up of expected demand and planning BOM forecasting based on historical usage percentages.
- Supports the following forecasting models: moving average, horizontal with exponential smoothing, lumpy, trend, seasonal, trend-seasonal, user defined models and automatic model selection based on best fit to historical behavior.

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#### SyteLine Credit Card Module

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- Take credit cards as payment on individual customer orders during order entry.
- On line authorization
- On line funds capture
- Fully secure, secondary database for CC info
- Orders placed on credit hold with de-authorization
- Payment auto-applied to invoice
- Allows for manual re-authorization

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#### SyteLine FS-Plus Service Management

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- Call center
- Customer profiles
- Call escalation
- Knowledgebase
- Event tracking
- Mean time to repair
- Resource scheduling
- Skill/certification/location matching
- Email notification
- Automatic service order generation
- SRO (Service Repair Orders)
- SRO customer estimates
- Customer deposit management
- SRO pre-defined templates
- Advance exchanges
- Loaners
- Planned vs. actual reporting
- Service calls
- Warranty claim
- Multiple customer billing on one SRO
- Preventative maintenance order support
- Return Material Authorization support
- Rework SRO
- Refurbish SRO
- Teardown/remanufacture SRO
- Time and expense tracking
- Multiple pieces of equipment per SRO
- Multiple operations per SRO Line

- Project/fixed billing option
- Service/extended warranty contracts
- Automatic contract renewal
- Long term rental support
- As-is configuration
- As-built configuration
- As-shipped configuration
- As-repaired configuration
- Multi-level bill of materials support
- Equipment meter
- Where used reporting
- Any level serial number/lot number/revision control
- Service history
- Multi-tiered/multiple warranty support
- Consumer registration history
- Expense approval
- Expense reconciliation
- Expense reimbursement
- Transaction variance reporting
- Tiered and flat-rate labor pricing
- Unified transaction entry (material/labor/T&E)
- Receiving and shipping direct from SRO
- Shipment paperwork
- Data collection support
- Margin analysis by equipment, customer, SRO
- Direct expense or WIP capability
- Service console
- SyteLine integration of inventory, purchasing, accounts receivable, accounts payable, general ledger

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#### SyteLine SM-Plus Mobile Service Management

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- Provides laptop and PDA access to field service information
- Incident reporting
- Repair Order transaction entry
- Remote Unit Configuration maintenance
- Review of customer incidents (by customer and unit)
- Review of customer repairs (by customer and unit)
- Toolset to present ANY SyteLine data to the user remotely
- Optional drawing/document viewing
- Full synchronization with SyteLine back office

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#### SyteLine Shop Trak

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- Fully integrated labor collection with touch screen and bar coding capabilities.
- On-line reconciliation of time, attendance and shop floor labor.
- Time and attendance data posted directly to SyteLine Payroll or ADP.
- Validation of time with SyteLine during entry.
- Supports unique lunch and break information for every shift/department.

- Security prevents logging time to un-approved operations.
- Online Visual Dispatch provides real-time visibility of work to shop floor.
- Rules based data collection supports accurate logging of machine time.
- Rules based data collection supports different pay rates for different work centers.
- Supports the ability to gather labor information for an employee running one or multiple machines.
- Multi-job capability supports machines processing multiple jobs at the same time.
- Customizable employee profiles.
- Fully integrated to Doc Trak for document management support.

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### SyteLine Doc Trak

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- Attach any type of file to SyteLine, including Microsoft document, CAD drawings and web pages.
- Create attachments manually with a windows browser or automatically with the file attachment rules.
- Attach files to individual SyteLine records or to SyteLine forms.
- Allows a user to view, add, e-mail or print attachments.
- Doc Trak supports SyteLine copy utilities.
- Doc Trak links individual documents or complete folders.
- A document icon alerts users to document attachments.
- Supports the ability to print attachments with SyteLine Job Paperwork.
- Links SyteLine customer, vendors, items and other information to web sites.

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### SyteLine Quality Control Solution

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- Modules available for receiving, work in-process customer shipments, and enterprise
- User defined inspection test plans and frequency of inspection.
- MRRs and CARs track non-conforming product, corrective actions, and cost of quality.
- User defined material disposition codes.
- Vendor approval, status, and performance reporting and tracking.
- Equipment and gage tracking.
- Reports including material tags, action reports, cost reports and test result details.

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### SyteLine Advanced Plant Maintenance

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- Production equipment

- Tool/Gage maintenance
- Fleet maintenance
- Facility maintenance
- IT infrastructure maintenance
- Call center/internal posts
- Call escalation
- Knowledgebase
- Event tracking
- Mean time to repair
- Resource scheduling
- Skill/certification/location matching
- Email notification
- Automatic service order generation
- Planned service
- Break/fix
- Automatically removes equipment from production schedule for planned service
- SRO (Service Repair Orders)
- SRO pre-defined templates
- Planned vs. actual reporting
- Warranty claim
- Preventative maintenance order support
- Rework SRO
- Refurbish SRO
- Teardown/remanufacture SRO
- Time and expense tracking
- Multiple pieces of equipment per SRO
- Multiple operations per SRO Line
- As-is configuration
- As-built configuration
- As-shipped configuration
- As-repaired configuration
- Multi-level bill of materials support
- Equipment meter
- Where used reporting
- Any level serial number/lot number/revision control
- Service history
- Multi-tiered/multiple warranty support
- Expense approval
- Expense reconciliation
- Expense reimbursement
- Transaction variance reporting
- Tiered and flat-rate labor pricing
- Unified transaction entry (material/labor/T&E)
- Data collection support
- Direct expense or WIP capability
- Service console
- SyteLine integration of inventory, purchasing, accounts receivable, accounts payable, general ledger

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### SyteLine FASview

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- Attach any electronic document or directory of documents to any form or property within SyteLine



- Document types include CAD drawings, Word, Excel, Web pages, Parts specs, videos, faxes, pictures, etc.
- Allows printing of related documents to purchase orders, jobs, customer orders, etc.
- User access to documents controlled by network security
- Automatic document attachment (i.e., a fax can automatically attach to a customer order)
- Manual document attachment
- Visual indicator of attachments for each form
- FASmail included – an on demand Email generation tool – define your own template(s) – Email attached documents to one or many recipients

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### SyteLine RMx RMA Extension

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- Disposition processing of RMA's
- Return to vendor processing of materials
- Assumptive credit posting for return to vendor
- Return to vendor for repair and return
- Return to vendor for shipment direct to customer
- Support scrap, return to inventory, return to vendor, and issue to Service Repair Order (SRO – FS-Plus integration)
- Vendor shipping paperwork

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### SyteLine OPM (Outside Process Mgmt)

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- Automates handling of paperwork for outside operations during the manufacturing process
- Creates Purchase Order and cross-references from Job
- Handles partial quantity moves
- Vendor shipping management
- Vendor shipping paperwork
- Vendor "To Be Shipped" report
- Vendor "Items at Vendor" report

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### SyteLine RFQ (Request for Quote)

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- Manages requests to vendors for material quotations
- Mail, Fax, or Email RFQ's to vendors
- Request up to 10 prices/quantity breaks
- Historical data retention
- Attach electronic documents to RFQ's being sent out
- Pre-defined vendor sets by item or product code
- Automatic generation of vendors by vendor set, by item/vendor cross reference table or by past RFQ
- Supports non-vendors or first time vendors
- Selection assist by best price or best lead time
- Automatic assignment of vendor to related PO Requisition
- Cross reference to PO Requisition

- Mass generation of RFQ's for price updates

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### SyteLine Request for Quote Web Access

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- Web access for vendors
- Review of quote requests
- Update of quote requests with vendor delivery & pricing
- Feeds updates back to SyteLine RFQ

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### SyteLine IOF (Instant Order Fulfillment)

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- Single window entry and editing of customer orders
- Visibility of inventory availability and time-phased inventory beyond current levels
- Running total of price, cost, and margin displayed
- Lock capability of large orders to prevent partial shipments
- Combined Pick List/Packing Slip document
- Automated generation of pick/pack document based on rules and inventory levels
- Optional inventory reservation during pick/pack generation
- Pick/pack document only printed when ready for picking – no managing paperwork
- One button shipping of entire order as picked
- Packing slip editing
- One button creation of Bill of Lading

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### SyteLine Tax Interface

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- Interface for third party sales tax systems
- Supports Vertex Quantum and AVP Taxware
- Supports invoicing transactions for CO Invoices, CO Credit Memos, CO Price Adjustments, Project Invoices, A/R Invoices, A/R Credit Memos, and A/R Debit Memos
- If using FS-Plus, supports SRO Invoices and SRO Contract Invoices
- Uses third party software to calculate sales tax and records information back into SyteLine

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### SyteLine Business Intelligence (Cognos)

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- Delivered with a standard set of business analysis drill downs to SyteLine.
- Graphical Data Analysis and Drill Down.
- EIS tool that let's you look at, and analyze data relationships across multiple databases.
- Allows both integrated graphical and spreadsheet multidimensional analysis.
- Analyze buying patterns, customer behavior, spot strategic trends in product mix or cost structure, with customized graphical reporting.

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### SyteLine Financial Reporting PM10

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- Extends SyteLine's financial reporting capabilities
- Presentation quality financial reports.
- Embedded accounting intelligence with data integrity.
- Drilldown from report to transaction detail.
- Flexible reporting hierarchies.
- Consolidate multiple companies/accounts/calendars.
- Currency translation and reporting capability embedded in PM10 supporting IFRS, FASB52 and US GAAP.
- Import and export spreadsheet data.
- Electronic distribution options: e-mail & Web
- Easy to learn and also to create and maintain reports.
- Overall ease of use and flexibility.
- Created by accountants for accountants.
- Customized graphical reporting.

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### Infor Product Lifecycle Management (PLM 8)

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- Vaulted document management
- Document version control
- BOM revision control
- Workflow collaboration
- Engineering Change Notices
- ECN Approval process workflows
- Security by project, user profiles and roles
- Drawing viewer
- Change Impact Analysis
- Design "What-If's"
- BOM Comparisons
- Optional CAD integrations for all major CAD software

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### SyteLine Workbench Suite

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- Supports business driven KPI's with full drilldown to related areas
- Functional area data sets from which to work
- Predefined combined views of SyteLine data for Customer Service, Purchasing, Inventory Management, Customer Orders, Production, Service Technician, etc.
- Ability to sort, rearrange, and override column data fully customizable with outputs to Excel / PDF or printed format
- Right click drill down into SyteLine program filtered to current data
- Screen filters for statuses
- Fully customizable with SyteLine toolset

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### SyteLine Integral Enterprise Viewer (IEV)

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- Powerful end-user reporting and viewing tools.
- Inquire, view, report, navigate and export on any SyteLine data and any data in other OLE DB databases in your enterprise.
- Provides access to data locally or across the World Wide Web, in single or multi-site environments.
- Use IEV to call other applications and serve as a system integration tool.
- Extract data outputs to e-mail, Excel, PDF, other file formats and printer report options.
- IEV includes built-in inquiries for SyteLine, APS, CRM and other SyteLine solutions.
- Users can create, personalize and drill down into any data source and save inquiries for quick retrieval.
- IEV is easy to use and users can learn the IEV and begin to use it in just minutes.
- IEV is used by executive managers, end-users, power-users, system administrators and developers.

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### SyteLine POS (Point of Sale)

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- Parts counter/service counter support
- Enter an order and invoice while the customer waits
- Combines order entry, shipping, invoicing, receipt printing, invoice posting, payment entry, and payment posting into one process
- Supports cash drawer checkout/check-in
- Supports cash, checks, credit cards, and on account transactions
- Supports multiple invoice runs simultaneously
- Cash drawer management
- End of day processing
- Integrated to FS-Plus and SyteLine
- Order Line entry shows warehouse, location, and lot availability

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### SyteLine Shipping and Logistics (TMS)

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- Visibility of daily shipments (LTL, exports, parcel, etc.)
- Automated integration to carrier systems for labels and parcel shipping
- Automatically capture parcel cost and tracking numbers
- LTL shipping, Bill of Ladings and ProBill number capture
- Automated backorder management with shipping transactions and multiple shipments per order
- Export shipping and paperwork (i.e. Commercial Invoice, Certificate of Origin, etc.)

- ❑ Automated shipment email notices and online shipment tracking
- ❑ Shipment packing, container management, and labels / packing lists
- ❑ Inventory staging with directed picking
- ❑ Mobile barcode scanning and paperless operation via wireless / RF
- ❑ One-click freight quotes for shipping cost / times using management freight terms
- ❑ Full web based dash boarding on data resulting from shipments, containers and other transactions

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### SyteLine SytePlan – Sales and Operations Planning

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- ❑ Build and freeze the Annual Operations Plan (AOP) using multi-dimensional sales dollars and units planning
- ❑ Compare the Sales Plan to Shipments, Forecasts, WIP, Inventory, BackLog data to see what needs to be done to achieve the plans
- ❑ Analyze forecast changes over time and compare to plan and actual. Review the time-phased demand/supply balance for problems
- ❑ Establish Sales goals and manage attainment
- ❑ Product margin analysis
- ❑ Rough cut labor capacity planning
- ❑ Backlog and on-time shipping management
- ❑ Finished goods and WIP management
- ❑ Production planning

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### SyteLine Channel Sales

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- ❑ Flexible Product Catalog
- ❑ Guided Product Selection
- ❑ Product configuration
- ❑ Product Visualization
- ❑ Dynamic Pricing
- ❑ Quote/Proposal document generation
- ❑ Ordering
- ❑ Status and history inquiry
- ❑ Internationalization

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### SyteLine Flex2D Visualization

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- ❑ 2D Model Images
- ❑ 2D Print Images
- ❑ Annotated Drawings
- ❑ AutoCAD and CAD Files

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### Infor Barcode

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- ❑ Data collection
- ❑ Supports multiple languages
- ❑ For Inventory Control: Cycle Counting, Physical Inventory, Material Movements.

- ❑ For Manufacturing Control: Labor and machine reporting against jobs and production schedules, with moves, completions and scrap (including reason codes).
- ❑ Telnet

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### SyteLine Mobile Access

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- ❑ Licensed modules (SyteLineMobile and SyteLineMobile\_MS)
- ❑ Accessible from your smart phone
- ❑ Authorization groups to control mobile access
- ❑ IT Administrator Mobile Home page
- ❑ Production Supervisor Mobile Home page
- ❑ Controller Mobile Home page
- ❑ Executive Mobile Home page
- ❑ Salesperson Mobile Home page
- ❑ Subscribe to Alerts
- ❑ Customizable by user
- ❑ Specify default mobile Home page by user

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### SyteLine Portals

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- ❑ SyteLine Customer Portal
  - Promotions / Announcements / What's New
  - White Paper Repositories
  - Chat function
  - Knowledge base access / searching
  - SilverLight Videos – Product Demos
  - Order Status / Credit Balances / Credit Limit
  - Quotes (Estimate Orders)
  - Consigned Inventory
  - Document Share
  - Customer Interactions
  - Product Lookup
  - Invoice Reprints
  - Subscribe to Alerts / Send emails
  - Customizable – add web parts and pages