



# Infor CloudSuite Industrial

Functionality List – v10.x - Cloud

# Core Functionality

## TECHNOLOGY

- Microsoft Office 2019 Integration
- Microsoft Project Pro 2019 Integration
- Mongoose framework
- Web client (Chrome [recommended], Firefox, Safari, and Edge)
- Event management / workflow
- Highly configurable / customizable without source
- User events and configurations survive upgrades
- Full toolset provided to develop customer screens, adding applications and business logic
- The flexibility of the tool set allows for responsive design. Build layouts that adapt to the size of the display design whether you are on a desktop, laptop, tablet, or phone. This reduces your development efforts by building forms once and using them anywhere.

## GENERAL FEATURES

- Role based dashboards / home pages with alerts and drill downs
- User Start Form – users can select KPIs and sub-forms that are important to them
- Concepts and Overview forms (Business Process Mappings)
- Explorer based menu organized by module or role
- User defined queries
- Pre-defined queries
- Full drilldowns throughout
- Export record collections from user interface to Excel
- Import record collections from Excel into CSI via user interface
- Linked forms
- Tabbed form layout
- Quick Entry forms
- Workspaces (pre-arranged forms)
- Reporting directly to Excel, Word, PDF, HTML, XML
- Infor CloudSuite IDOs 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

## BUSINESS REPORTING & ANALYSIS

- Mongoose Report Forms
- Mongoose DataView Reporting
- 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

## MICROSOFT OFFICE INTEGRATION

\*\*Office must be installed on the client machines

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

## MONGOOSE PRODUCTIVITY TOOLS

DataViews, KPIs, DataSearch

(formerly known as Workbench Suite)

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

#### **APPLICATION EVENT SYSTEM**

- Assign user defined events to any process, form, posting, record or activity.
- Electronic routing of information based on business rules
- Allows for collecting, distributing and approvals online, real time
- Automates business processes
- Collaborate with Customers and Vendors
- Configure Infor CloudSuite'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

#### **MULTI-COMPANY / MULTI-SITE OPERATIONS**

- 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)
- Demand and Source Site PO-CO Automation
- Sites can be set up in Multiple databases, or you can define multiple sites within a Single Infor CloudSuite database. You can also have a combination of both – a hybrid model.

#### **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

#### **CUSTOMER ORDER ENTRY**

- 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
- Define multiple currencies for customers
- Sales tax calculations, including VAT & GST
- Multi-lingual invoices
- Progressive billings
- Customer Document Profiles
- Letters of credit
- Order acknowledgements
- Advanced Shipping Notices
- Consolidated invoicing
- Invoice Batching
- Drop ship orders (direct from vendor)
- DIFOT Reporting (Delivery in Full and On Time)
- Promotion pricing and rebates
- Shipment approvals

- Multi-site item sourcing form
- Calculated freight shipment for Credit Cards
- Customer 360 form

#### **SHIPPING MANAGEMENT** • Hard and soft allocations/reservations

- Picking and Packing lists
- Delivery Orders
- Goods Received Notices
- Available to ship analysis
- Multiple units of measure
- Pick, Pack, and Ship Workbenches
- Package Label Integration
- Shipment of non-inventory items

#### **PROJECTS**

- User defined activity tracking
- Full interface to manufacturing, purchasing, accounts payable, accounts receivable, order entry, inventory, payroll, and general ledger
- User defined project types and cost codes
- Multi-level % 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
- Project Change Tracking

#### **MASTER DATA MANAGEMENT**

- Engineering Change Notices
- Revision Control
- Revision History
- Pending ECN flags
- Effectivity and Obsolescence dates on operations and materials
- Material Use-Up Report
- 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
- Non-inventory items
- Where used
- Mass replace
- CAD BOM import

- Copy BOM from one site to other sites
- Optional PLM module w/CAD interface (see below)
- What-if costing analysis
- Compliance tracking

#### **INVENTORY MANAGEMENT**

- Real-time material tracking
- Real-time allocations
- Safety Stock
- Reorder Points
- Order min/multi/max
- Kitting
- Multiple Warehouses
- Selectable dedicated warehouses (as for spares)
- Location tracking
- Temporary and permanent item locations
- Lot/serial control
  - Lot Revisions
  - Lot Expiration
  - Restriction codes
- 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
- Item 360 – View all item information from a single form
- Compliance Tracking

#### **MATERIAL PLANNING**

- 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, Transfer Orders and Service Orders
- Material Planners Workbench
- Multi-level pegging
- Demand dependency

Resource Bottleneck analysis forms and reports

- 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
- Freeze APS schedule
- Freeze Schedule with Offset
- Predict demand for jobs that are configured through CPQ
- Automatically enforce Get ATP(Available to Promise)/CTP(Capable to Promise)

#### **PURCHASING / RECEIVING**

- Purchase Requisitions with approval limits
- Regular and blanket purchase orders
- PO Change Orders
- Vendor specific pricing
- Purchasing history
- Purchase Order Change Logs
- Vendor Performance Analysis
- Receipt rejections and reason codes
- Landed Costs
- Vendor Document Profiles
- Purchase Order Tolerance for Inventory and Non-Inventory Items
- Vendor 360
- Foreign currencies
- Define multiple currencies for Vendors

#### **RETURN MATERIAL AUTHORIZATION (RMA)**

- Generate a unique RMA number automatically
- Receive returns to non-nettable locations
- Customer credit memos based upon receipt of the returned item
- Add Notes or Documents to RMAs
- Manage cost of returned product by linking to the original order shipped
- Issue repair or replacement orders for returned materials
- Track information that will help you improve both customer service and overall part quality
- Maintain documented control over the return of parts

Use Extended Dispositions to specify multiple disposition codes for one RMA line. These codes identify the next steps for the returned material.

Each disposition code has one of these disposition types:

- **Scrap:** The material is damaged beyond repair and must be thrown away.
- **Return to Inventory:** The material can be put back in inventory to be resold on another customer order or used as a material on another job.
- **Return to Vendor for Repair:** The item can be returned to the vendor either for credit or repair.
- **Return to Vendor for Credit:** The item can be returned to the vendor for credit that automatically creates a voucher adjustment. •  
Rework: If your system is licensed for the Service module, material can be cross referenced to a service order to repair the item.

#### **REQUEST FOR QUOTE (RFQ)**

- Manages requests to vendors for material quotations
- Mail, Fax, or Email RFQs to vendors
- Request up to 10 prices/quantity breaks
- Historical data retention
- Attach electronic documents to RFQs 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 RFQs for price updates

#### **INTERNATIONALIZATION**

- 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
- Support for Local.ly

### **FINANCIAL REPORTING**

- User defined financial reports
- Up to 99 columns
- Unlimited sub-totals and totals
- Calculations between columns
- Ratio calculations
- Drilldown on screen
- Include Chart of accounts dimensions
- Full financial reporting within Microsoft Excel
- Optional PM10 reporting (See below)
- Excel Based Financials
- Supports Sun Systems Financials
- Supports Infor Global Financials (German market only)
- Executive Home form
- IFRS Certified

### **GENERAL LEDGER**

- Hierarchical General Ledger
- Multi-Calendar
- Multi-Books
- Set G/L Account as Control Account
- Flexible robust chart of accounts
- Statistical accounts
- Allocation accounts
- Dimensions and attributes for accounts
- Account Class
- Report against any combination of fields
- Export results of queries to Excel, ASCII file, Clipboard
- Full G/L drilldown 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
- Bulk Load of journal entries
- Post Journals in the Background
- Bank Reconciliations
  - Import Bank Statement
  - Bank Reconciliation Utility
  - OCR Reference Control
- Global Banking Requirements
- Bank Transit Number
- IBAN
- Bank Identifier Code (BIC)
- Bank Authority Party ID
- Cancellation Posting for Single Entry Accounting
- SEPA direct debit functionality
- DAS2 Fiscal Reporting
- Allocation accounts
  - By Percent

- By Fixed Amount
- By Variable or Statistical Account
- Ledger Dimensions for Analyzing Financial Reports
- Fixed Assets module
- Obsolescence and effectivity dates on G/L accounts
- Built in Financial Report Writer
- Excel Financial Report Writer
- Cash flow analysis
- Currency conversions
- Re-open closed years
- Security for out-of-period postings
- External Financial Interface

### **ACCOUNTS PAYABLE**

- 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
- Minority Owned Vendors
- Vendor Debit Memos
- Electronic fund transfer payments with remittance advice
- Multi-currency
- Alternate exchange rates
- Payment processing
- Track 1099 Vendors and Payments
- Multi-lingual vendor paperwork
- Manage Surcharges

### **ACCOUNTS RECEIVABLE**

- 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
- Import electronic payments from bank files

- Centralized Invoicing
- Manage Surcharges
- Process Chargebacks

#### **APS – FINITE CAPACITY**

- 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

#### **FIXED ASSETS**

- Cradle to grave asset management ○ Parent/Child relationships
- User-defined asset numbers
- Useful Life displays in Year/Month
- Unlimited number of Asset classes
- Comprehensive Asset Definition
- Location
- Insurance
- Original PO and Invoice Number
- Serial and/or Model Number
- Manufacturer
- Costs
- Seven predefined depreciation methods and allows additional, user-defined depreciation methods to be added as needed
- Maintain multiple depreciation schedules for each Fixed Asset
- Partial depreciation
- Link to Purchase Orders
- Interfaces to the General Ledger
- Fixed Assets Disposal
- Fixed Assets Transfer
- Depreciation Posting (for BOOK schedule only)
- Entering of a Fixed Asset purchase

#### **PRODUCTION MANAGEMENT**

- 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 and 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

#### **OUTSIDE PROCESS MANAGEMENT (OPM)**

- 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

#### **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 matrices
- Customer/Sales Contact/Prospect Communication Logs with email integration
- Mail Merge and Email Blast
- Optional Infor CloudSuite CRM license module - Salespeople can be licensed to use only the CRM forms, so they don't need a full user license.



## SERVICE MANAGEMENT

- 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
- Service Repair Orders (SRO)
- 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
- Tear down/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

- Infor CloudSuite integration of inventory, purchasing, accounts receivable, accounts payable, general ledger
- Generate pay from service hours

## QUALITY

- Available for receiving, work in-process customer shipments, and enterprise quality processes
- 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

## CREDIT CARD INTERFACE

- Take credit cards as payment on individual customer orders during order entry
- Online authorization
- Online funds capture
- Fully secure, secondary database for credit card info
- Orders placed on credit hold with deauthorization
- Payment auto-applied to invoice
- Centralized Credit Card Validation
- Allows for manual re-authorization
- Interface to Gateway provider of your choice
- Support for Multiple Credit Card Gateways and Currencies
  - CenPOS and BridgePay

## HUMAN RESOURCES

\*\*Supports USA Only

- Applicant tracking
- Benefits Management
- Detailed personnel records
- Regulatory compliance
- 401K support
- Vacation/Sick Leave tracking
- Position history
- Marital Status (Married, Single, Head of Household)
- Full Payroll system (*for North American companies*)
- Generate Pay from Service Hours
- Direct Deposit support
- External payroll interface
- Support for HIRE Act
- Print and Reprint W2s
- 1094C and 1095C processing
- Employee 360 - manage employees from a single form
- Process Manager to help manage processes such as Onboarding and Offboarding



- Support for Rehire of Employee and Adjusted Date of Hire
- Supports reporting of Employee Injuries for Workman's Compensation

### **TAX INTERFACE**

\*Multi-tenant cloud only supports AvaTax

- 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 Infor CloudSuite

### **PAYROLL INTERFACE**

\*Currently only supports Celergo

CloudSuite External Payroll Interface performs two-way data exchange between Infor CloudSuite Industrial and your third-party payroll system. With this two-way integration you will be able to send the following data from CloudSuite to your payroll system:

- Employee personal data
- Employee address data
- Employee job/payroll data
- Employee country-specific data
- Employee direct deposit data
- Employee deduction and earning data
- Payroll data, including hours worked and rates

You will be able to receive the following data from your payroll system.

- Journal entries, including account numbers, and amounts
- Error data regarding records sent from CloudSuite that could not be processed

### **IMPLEMENTATION ACCELERATORS**

- Quick implementation. By pre-configuring a significant number of core processes it is flexible enough to adapt to your unique requirements.
- Industry best practices. Is based on experiences gained from hundreds of projects.
- Reduced implementation risk for employees. Infor Deployment Methodology refines your pre-configured solution proposal step by step, so fewer personnel need to be involved in developing the project scope and implementing the solution. Instead, you can focus on helping your users become proficient in the Infor applications.

- A foundation for future success. Is ideal for companies that want to implement Infor CloudSuite Industrial rapidly and easily and need long-term scalability and continuous improvement.
- Lower overall total cost of ownership. Your Infor implementation can be less costly, less risky, and deliver faster time to benefit.

### **POINT OF SALE**

- 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 check-out/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 Infor CloudSuite Order Line entry shows warehouse, location, and lot availability

### **ELECTRONIC DATA INTERCHANGE (EDI)**

- 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

*Note: Infor CloudSuite EDI can interface with several different translators: Inovis EDI, Sterling GENTRAN:Server, Radley RADEDI/CARaA or TSI Mercator. You must purchase and install one of these separate programs in order to complete your EDI communication system. For more information, contact your Infor account representative.*

### **PRINTING & PACKAGING MODULE**

- Templates for print quotes
- Standard printing industry formulas
- Formula Workbench to create and save custom formulas
- Specify cost/price requirements and use Industry specific formulas to create an estimated Print Quote Price
- Copy the structure and information of a similar existing quote into the Workbench to create a new quote
- Compare costs to Print Quote Price

- Analyze material usage and estimate the quantity of materials used for printing, such as ink and oil, based on the Print Quote Price calculations
- Calculate the paper consumed by operations on a printing estimate job
- Determine operation setup time and run time for your machinery, based on the Print Quote requirements

## MOLDING MODULE

- Manage production in four important ways:
  - Tooling
  - Co-jobs
  - Estimating
  - Alternate BOMs
- **Improve capability to promise** - When you schedule a variety of orders with disparate tooling requirements, it's easy to accidentally create production bottlenecks with multiple plans that call for the same tool simultaneously. The Infor CloudSuite Molding Pack incorporates tool scheduling as an integral part of production planning, so you can deliver what you promise.
- **Plan more quickly and efficiently** - When tooling is a critical resource, there is no substitute for robust planning capabilities that take those requirements into account to help you plan more accurately.
- **Get more accurate costing** - By improving the accuracy of your production plan, you will have better costing information and be able to provide better quotes.

## Optional Modules

### COUNTRY PACKS for LOCALIZATION

Countries that CloudSuite Industrial works without requiring a country pack:

- United States, United Kingdom, Ireland, Australia, New Zealand, Singapore, South Africa, Hong Kong, Canada

Optional Country Packs:

- Japan
- Thailand
- Germany
- China
- Poland
- Vietnam
- France
- Mexico

### INFOR CAMPUS PLUS

You can minimize training costs and maximize learning results with a subscription to the Infor CloudSuite Industrial learning library.

- With a subscription, your team receives unlimited access to all the CloudSuite training resources which include: More than 5,000 pages of standard training materials (with step-by-step instructions)
- More than 250 days of virtual instructor-led training (we provide the hands-on environment)
- More than 100 hours of video courses (and we keep adding more)

## INFOR FACTORY TRACK

- **The Shop Floor module** is a modern touchscreen solution that allows tracking of production activities. Operators can access the shop floor kiosks to track labor, WIP, attendance transactions and much more.
- **The Warehouse Mobility module** a real-time barcoding and data collection solution that serves an online extension of CloudSuite Industrial's inventory management capabilities
- **The Time Track module** is a comprehensive time and attendance management solution that delivers capabilities like vacation management, centralized time reporting, supervisor dashboards, and configurable payroll extracts

## ADVANCED FORECASTING

- 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, user defined models and automatic model selection based on best fit to historical behavior

## SYTEPLAN

### Sales and Operations Planning

- 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 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

## SYTELEAN

- Planning and execution for lean manufacturing
- Suitable for repetitive items with consistent use
- Provides Kanban pull system to support the production plan
- Looks at actual usage for purchased or manufactured parts to better predict future needs
- Simulator finds good fit items and provides data in Excel
- Usage based planning is a method that eliminates waste for items with consistent usage
- Exposes excess buying, manufacture and inventory
- Enhances and leverages SyteLine planning tools

## MOBILE

\*To use the Mobile module, users must be connected to the Internet

- Licensed modules (Infor CloudSuite Mobile and Infor CloudSuite Mobile 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
- Service Home page
- Subscribe to Alerts
- Customizable by user
- Specify default mobile Home page by user
- Multi-site Views

## SERVICE MANAGEMENT MOBILE

\*\*Mobile app can be used in connected or disconnected mode

- **Device compatibility** — Empower your workforce through the use of mobile devices. A mobile license grants a technician access to work disconnected using an Apple or Android phone or tablet or connected, via an internet browser, on a phone or mini-tablet.
- **Customer and Service Details** — Field technicians can easily access customer contact information as well as and historical data such as incidents, service orders, service contracts, invoices and unit configuration details related to that customer.
- **Transaction Processing** — Field technicians can process transactions for labor, materials and miscellaneous expenses associated with a Service Request Order (SRO).
- **Follow-up Service & Future Requests** – While in the field, future service commitments can be made by creating follow-up appointments for the job at hand or creating new incidents to address additional service requests.
- **Credit Card Processing** — With use of the support gateway provider, a technician can process credit card payments while in the field.
- **Native Device Calls** – easily launch phone dialing or mapping features of the iOS or Android device to assist with the technician routing and communication
- **Signature Capture** – capture a signature as part of the service order completion and approval process.
- **GPS Polling** — Technicians that have mobile devices equipped with GPS can transmit their coordinate information to the back office. The information is useful to a scheduling manager or dispatch which needs track the partners last known location for route optimization and chart historical locations for a given day.
- **Clock On/Off**— Clock-on when the technician arrives on-site and clock-off when the work is completed for accurate time tracking for billing purposes and labor analysis.
- **Picture Attachments** — Quick access to the device's camera and photos for attaching an image to the work order to further document the work complete and the equipment serviced.
- **Service Work Order Printing** – Print and Share a PDF with the details of the work performed, the company logo and a signature from the customer.

## RENTAL MANAGEMENT MOBILE

\*\*Mobile app can be used in connected or disconnected mode

- **Device compatibility** - Empower your workforce through the use of mobile devices. A mobile license grants equipment delivery personnel to work disconnected using an Apple iOS or Android phone or tablet or connected, via an internet browser.
- **Customer and Contract Details** - Delivery personnel can easily access customer contact information as well as and historical data such as prior contracts and delivery/collection data.
- **Equipment Availability** – Allow real time queries on equipment availability whilst at customer site.
- **Transaction Processing** - Delivery personnel can process equipment drops and collections whilst capturing signatures for proof of delivery/collection.
- **Native Device Calls** - Easily launch phone dialing, email or mapping features of the iOS or Android device to assist with the driver routing and communication
- **Signature Capture** - Capture a signature as part of the contract completion and approval process.
- **GPS Polling** - Drivers using mobile devices equipped with GPS can transmit their coordinate information to the back office. The information is useful to a scheduling manager or dispatch who needs to track driver's last known location for route optimization and chart historical locations for a given day.
- **Picture Attachments** - Quick access to the device camera and photos for attaching an image to the work order to further document the work complete and the equipment delivered/collected.
- **PO Requisitions**-You can now use the Employee Self Service (ESS) web application to create or edit purchase order requisitions and submit them for approval. Managers can approve requisitions, as well as create or update requisitions, for their direct reports. Employees and managers can also view PO requisition history.
- Model formulas based on weight or volume as well as loss or yield percentages
- Account for materials used in the formula that are soluble or are removed from the process prior to packaging
- Manage multiple units of measure for any item
- Resize a formula based on production needs, scaling all of the components accordingly
- Maintain full history of formulation revisions and be able to recall prior versions and place into production as needed.
- Manufacturing Specifications allow you to combine the materials on the formulation with a routing from the standard CloudSuite Industrial application providing the efficiency of defining templates and the flexibility of combining the templates to define your process manufacturing operations.
- Process Workbench allows you to be able to see for a Manufacturing Specification all the jobs that are created from that specification, it includes the formulation job and well as the multiple fill jobs to various packaging sizes.
- Issue materials quickly and efficiently by reporting in batch production quantities.
- Leverage core CloudSuite Industrial functionality that addresses costing and lot

## EMPLOYEE SELF SERVICE

- **Employee and manager self-service**—You can streamline your HR process by instituting employee and manager self-service features that let your team manage time-off requests and approvals, view and update personal and payroll information. They can also view their paystubs and work calendar.
- **Infor CloudSuite Employee Self-Service** frees up HR employees to focus on more strategic tasks. It also gives managers access to key human resource data such as performance reviews, organization charts, and educational background to drive strategic decisions.
- **Payroll**— You'll improve payroll accuracy and gain seamless integration with Infor's financial management solutions thanks to Infor CloudSuite Employee Self-Service's fast, direct access to payroll data. You'll also be ready to streamline the way you manage hours, pay, deductions, and direct deposits.

## PROCESS INDUSTRY PACK

- Split Bills of Material – create bills to create a batch of product that is then used to fill multiple container sizes.
- Model formulas based on weight or volume as well as loss or yield percentages
- Account for materials used in the formula that are soluble or are removed from the process prior to packaging
- Manage multiple units of measure for any item
- Resize a formula based on production needs, scaling all of the components accordingly
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- Issue materials quickly and efficiently by reporting in batch production quantities.
- Leverage core CloudSuite Industrial functionality that addresses costing and lot and serial traceability.
- **Transaction Processing** - Delivery personnel can process equipment drops and collections whilst capturing signatures for proof of delivery/collection.
- **Native Device Calls** - Easily launch phone dialing, email or mapping features of the iOS or Android device to assist with the driver routing and communication
- **Signature Capture** - Capture a signature as part of the contract completion and approval process.
- **GPS Polling** - Drivers using mobile devices equipped with GPS can transmit their coordinate information to the back office. The information is useful to a scheduling manager or dispatch who needs to track driver's last known location for route optimization and chart historical locations for a given day.
- **Picture Attachments** - Quick access to the device camera and photos for attaching an image to the work order to further document the work complete and the equipment delivered/collected.

#### EQUIPMENT RENTAL & SERVICE INDUSTRY PACK

- Rental contracts in estimate, reservation and agreement status
- Rental estimates for prospects linking to CRM and opportunity management, facilitating sales pipeline management
- Equipment availability forecasting – see your availability into the future
- Check availability across multiple branches
- Deliver equipment from multiple branches.
- Dedicated rental pricing capability
- Yard/warehouse delivery/return functionality for pick, inspect, pack, load.
- Equipment check-out, check-in
- Document management system for customer insurance certificates, equipment technical manuals, etc.
- Rent for re-rent capability
- Equipment utilization, repair cost, profitability metrics
- Customer on-rent, contract and equipment profitability reports
- Customer-focused project estimates
- Bid management
- Change order management
- Project costing and budget
- Subcontractor breakdown

- Vendor management
- Full integration with service module to maintain your rental fleet and dispatch repair technicians to your fleet in the field
- Mobile accessibility
- Offline accessibility
- Multi-site – Communication/collaborate between the office and field teams
- Salesforce integration available

#### INFOR CRM

\*Cloud – can be sold as ST and integrated to MT CSI The solution provides native multi-office, multi- company integrations and adds new tabs to Infor CRM Back Office Extension so you can display mission-critical ERP information like:

- Customers and contacts
- Bill-to, ship-to, and pay-from
- Quotes and sales orders
- Shipments and returns
- Receivables and invoices
- Products and locations—Infor CRM equips your team with the information it needs to provide a consistent customer experience at any point during your customer's journey.
- **Sales managers**—Use holistic customer experience data to teach sales staff how to be better at building relationships. Customer history data can also be used to predict forecasts and your pipeline.
- **Sales representatives**—View complete information about customer interactions across all departments to forge closer customer relationships. Gain valuable insights into the account receivables that can affect commissions
- **Marketing managers**—Gain insights into the products that have high tickets/returns and avoid promoting them. Know what customers have outstanding invoices and use this information to create better campaign list segmentations.
- **Service/support representatives**—Get instant access to sales orders and return details to rapidly resolve customer calls. Confirm ship-to, bill-to, and pay-from details to ensure proper deliveries. And use CRM and ERP data to address receivable and invoice issues

#### INFOR CONFIGURE PRICE QUOTE (CPQ)

- 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

#### **INFOR 2D DESIGN AUTOMATION (CPQ)**

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

#### **INFOR ENTERPRISE QUOTING (EQ)**

- Quoting and ordering system that provides an intuitive experience for selling configured and standard products through all your channels, including dealers and distributors
- Product visualization helps your reps quickly confirm their products, features, and option selections during configuration
- Dynamic pricing instantly produces a configuration-specific list price, dealer cost and quoted selling price
- Document Automation capabilities dynamically generate personalized proposals that include configured product information and images
- Single point of control for sharing product customer, and order information with all back-office manufacturing and business systems

Detailed Reporting and analytics provide your sales leaders with increased visibility into the performance of their direct and deal the sales process organizations

#### **PORTALS**

\*\*When customer buys Portals, they get all three (Customer, Vendor, Reseller) Vendor Portal Features:

- Purchase Orders
- Consigned Inventory
- Inventory Level Projection
- Price Requests
- Vendor Interactions
- On Time Delivery
- Planned Orders
- Product Price Contracts

Communication:

- Customer Interaction Log
- Documentation Sharing & Management
- Announcements
- Other- Press Releases, Videos, FAQ, Knowledgebase, and Contact Us

Account Management:

- Company Profile
  - User Profile
  - Company Details, Billing and

- Shipping
- Payment and Credit Limit
- Name, Email preference
- Password Management
- Additional User Creation
- Inbox

Customer Portal Shopping Features:

- Intuitive Product Lookup
- Inventory Availability
- Top Sellers
- Featured Products
- Shopping Cart capability
- Credit Card Interface support
- Customer negotiated price support
- Customer Catalogs
- Multi-Currency
- Ability to review and place Order
- Visibility of Shipping Charges

Communication:

- Customer Interaction Log
- Documentation Sharing & Management
- Announcements
- Press Releases, Videos, FAQ,
- Knowledge Base, and Contact Us

Account History:

- Order Status
- Estimates Listing

Account Management:

- Company Profile
  - Company Details, Billing and Shipping
  - Payment and Credit Limit
  - User Profile
  - Name, Email preference
  - Password Management
  - Additional User Creation
  - Inbox

Service:

- Incident Entry and Inquiry
- Service Knowledge Base Query
- Unit Registration

Reseller Portal

Same features as Customer Portal plus the following functionality:

- Commissions Due
- Pose As
- Service Order Query
- Service Transaction Entry
- Inbox

#### **INFOR EXPENSE MANAGEMENT (XM)**

- Improve employee compliance with spending policies
- Lower administrative costs
- Increase savings through effective vendor negotiation and rebate usage
- Reduce unnecessary travel and purchases

- Reduce people needed to process documents
- Reduce manager time spent on approvals
- Increase accuracy of time billed to clients and paid time off due employees
- Higher amounts of foreign taxes reclaimed
- Increased efficiency through effective domestic and nondomestic VAT identification
- Reduced employee time spent on travel planning, expense reporting, time capture, and purchasing of goods and services

## **INFOR ENTERPRISE ASSET MANAGEMENT (EAM)**

### Features:

- Graphical User Interface
- Predefined Reports
- Key Performance Indicators
- Web Architecture
- Minimal Hardware

### Modules:

- Assets
- Work Management
- Preventive Maintenance
- Materials Management
- Purchasing
- Mobile

### Deployment:

- On-Premise
- Hosted
- Subscription

## **CADLink**

\*Sold as on-premise solution only but can integrate to MT Cloud

- Two-way connection between Infor CloudSuite Industrial and your CAD system (AutoCAD®, NX™, Inventor®, Creo® (formerly Pro/E®), SolidWorks®, and more)
- Automatically exchange routing data and bill of materials (BOM) items with CloudSuite Industrial
- Eliminates the manual re-entry of data
- Cut design cost
- Reduce cycle time
- Improve information flow
- Reduce data entry errors
- Eliminate engineering ERP clerical work
- Ensure drawing data is consistent
- Speed design throughput
- Reduce BOM errors by tying dimensions directly to BOM

## **INFOR GLOBAL HUMAN RESOURCES**

- Supports modules for Administrator and
- Absence Management
- Lists of employee skill codes
- Credential/license codes
- Absence/leave types
- Employee ID, name and address
- Time off requests and approvals

- When GHR causes an employee to be added, or HR Status for employee is updated, CSI User is notified via workflow

## **BIRST ANALYTICS**

- Coordination with Infor OS and Data Lake to present data insights in the context of user and business process flows
- Interactive and responsive dashboards with drag-and-drop creation, drill-anywhere, and filtering capabilities
- Guided ad hoc experience that allows users to quickly filter, sort, and include multiple measure and attribute selections
- Powerful operational reporting for advanced report creation on core transactional tables
- Anywhere analytics on mobile

## **INFOR RHYTHM FOR COMMERCE**

- Provides a fully integrated multi-tenant eCommerce system to sell complete product assortment online through a modern customer engagement platform
- Robust product information management solution that enriches a customer's product data and present robust product details to buyers
- Allows users to access data directly from ERP, so pricing, availability, and customer data is always available in real time
- Enrich user interactions – builds loyalty by delivering exceptional user experiences that engage customers more richly and help improve conversion rates
- Power the top and bottom line – increases profitability by giving a new marketing and sales channel with a low, predictable total cost of ownership
- Scale market impact – expands reach and grows brands by taking advantage of sales and distribution opportunities
- Responsive design
- Tight ERP system integration
- Product information management (PIM)
- Cost effective management in the cloud

# **Infor OS**

## **INFOR MING.LE**

- intelligence—Infor Ming.le combines real-time information from ERP, SCM, enterprise asset management (EAM), and financial systems, as well as any other transactional information, on a single screen. It automatically senses the type of work you're doing and displays information relevant to that task, without requiring you to search for information and store the results.
- Infor Ming.le Mobile - Infor Ming.le mobile capabilities let you work smarter and faster anytime, and anywhere. You can head off



problems and keep business moving with critical information and alerts accessible on your mobile device.

- **Tasks and alerts**—Infor technology transmits transactional information in real time, so you can keep up with the progress of important activities. You can filter, view, and monitor information to keep tabs on the items that matter most. Infor Ming.le also includes a workflow interface that can push approvals and alerts to the appropriate people when problems arise.
- **Drill back**—Analytics and reports in Infor Ming.le feature full drill back capabilities so you can see the information supporting the data on your screen. If total costs suddenly spike on one production line, for example, you can immediately drill down and see which component of cost changed most to contribute to the increase. You'll be able to zero in on issues that matter and keep your operations under control more easily.
- **Streams** - The Infor Ming.le platform enables you to organize recurring conversations around a business topic, defined by the users, with the ability to involve internal and external participants. Streams captures conversations that relate to unstructured business processes as participants collaborate to complete activities, due on different dates and times, organizing documents by threading them around each activity.
- **Infor Communities** - With this feature, you can extend your Infor Ming.le platform to external participants, facilitating structured communication and business process tracking with your customers, suppliers, or citizens.

#### Ming.le Homepages

- Start page for the CloudSuite
- Team-based
- Role-based
- Widget catalog

#### INFOR DOCUMENT MANAGEMENT

- **Input** - Automatically add documents to Infor Document Management as part of a capturing process or an automated process. Or, add them manually using your ERP applications or any of the Infor Document Management clients, all inside Infor Ming.le. You can even use a Microsoft Office application to add documents directly to the back-end platform. The system creates the appropriate metadata, referencing your documents to your ERP objects. With Infor Document Management's Document Capture component, you can store an invoice image file together with data that's extracted from the invoice. Later, when looking at the invoice in your invoice matching program, the scanned document is also there to view. All this can be accomplished using basic setup and configuration.

- **Store** - All of your documents are stored in a repository that applies role-based authentication and authorization to ensure the safety of your information. The repository also provides versioning and check-out/check-in capabilities, so you can be sure you're always working with the latest, most complete version of a document.
- **Connect** - Attributes that are stored with your documents allow soft links to be created between your documents and your applications. Your application doesn't have to know any of the specifics about a stored document to connect to it. Infor Document Management creates this connection for you, since your business objects and documents share all of the same attributes

#### INFOR ION

Infor ION enables intelligent business operations by simplifying integration between disparate systems, while combining contextual business intelligence, common reporting and analysis, streamlined workflow, and business monitoring in a single, consistent architecture.

- Embraces open, non-proprietary standards like OAGIS (industry standard XML format) to ensure that both Infor and non-Infor applications can talk to each other in the same common language.
- Provides role-based access and intuitive modeling tools to ensure business users can build event monitors and workflows, as well as modify business processes, as needed.
- Provides key capabilities in the areas of exception management through rules-based monitoring and unified logging and error reporting and delivers alerts to any business user on their desktop or their mobile device.

#### SMART HELP

- In-context access to knowledge
- In app access to Infor product documentation
- knowledge base articles
- Training materials
- Ability to include customized documentation