
XA Customer Service Management R7-R9

June 14, 2011

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Agenda

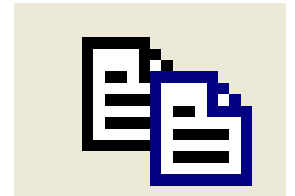
1. What's New in CSM?
2. Overview
3. System Preferences
4. Customers
5. Customer Orders
6. Host Jobs/Host Print
7. Picking/Shipping/Invoicing
8. Pricing
9. Power-Link Functions
10. CSM Codes

New in R7 – R9 CSM

- Available to Promise (ATP)
- Order copy
- Order Copy Templates
- Price Book Maintenance
- Features and options
- Kitting
- Order History Enhancements
- Sales Representatives
- Standing Orders

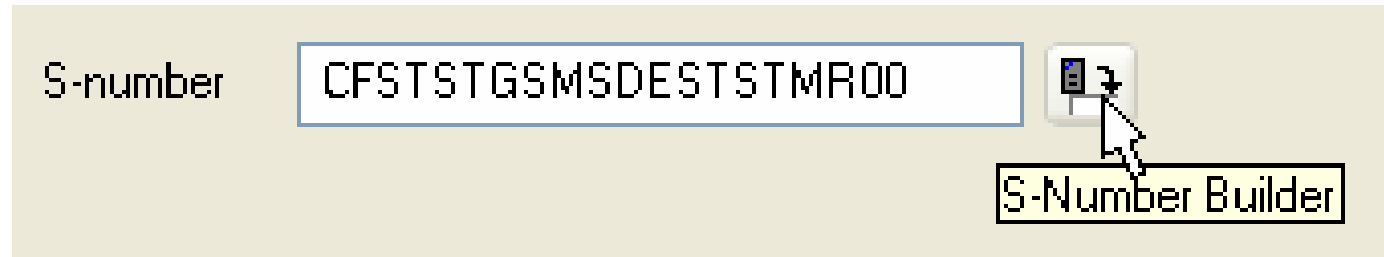
Order copy

- With this function you can quickly create a new order, quote, credit memo or standing order, by copying from any order type.
- This function includes options for copying line items, releases, comments, and special charges.
- Additional options allow you to automatically recalculate prices and order dates for the new order.



Features and options

- Some companies need the ability to make simple configuration choices at order entry time. CSM now allows this in the same way that COM always has.



Price Books

(8L) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Customers Customer Orders and Quotes C.O. Line Items C.O. Holds Customer Order History C.O. History Line Items

Companies Customer Items Industry Items **Price Books** Customer Contracts Customer Contract Line Items

Sales Representatives Daily Recap Transactions Promotions

(8L) Price Books

File Display Maintain Customize Navigation Help

General (all records)

Price Books

Price book	Description	Discount/markup type
COST	Cost mark-up pricing	Markup from unit cost
STD	Std Price Book	Discount or markup from unit price
TRAN	Cost Transfer pricing	Markup from unit cost
2008	Discount by customer code	Discount or markup from unit price

Customers and Orders Shipments and Invoices Customer Service Codes

Price Books

(8L) Price Books

File Display Maintain Customize Navigation Help

General (all records)

Price Books

Price book	Description	Discount/markup type
COST	Cost mark-up pricing	Markup from unit cost
STD	Std. Price Book	Discount or markup from unit price

(8L) Change Price Book - COST

File Display Maintain Customize Navigation Help

Default

COST Cost mark-up pricing

Description: Cost mark-up pricing
Discount/markup type: Markup from unit cost

General

Price Book Versions

Update Cancel Help

(8L) Change Price Book - COST

File Display Maintain Customize Navigation Help

Default

COST Cost mark-up pricing

Effective date: 01/01/1980

Version description

General

Price Book Versions

(8L) Price Book Version - COST, 01/01/1980

File Display Maintain Customize Navigation Help

Default

COST Cost mark-up pricing Version: Effective: 01/01/1980

Item price class	Customer price code	Customer item discount...	Customer item discount...
1000	C1 = Cost Markup 25%	01/01/1980	25.000
1000	C2 = Cost markup 30%	01/01/1980	30.000
1000	C3 = Cost Markup 40%	01/01/1980	35.000
2000	C1 = Cost Markup 25%	01/01/1980	25.000
2000	C2 = Cost markup 30%	01/01/1980	30.000
2000	C3 = Cost Markup 40%	01/01/1980	35.000
3000	C1 = Cost Markup 25%	01/01/1980	25.000
3000	C2 = Cost markup 30%	01/01/1980	30.000
3000	C3 = Cost Markup 40%	01/01/1980	35.000
4000	C1 = Cost Markup 25%	01/01/1980	25.000
4000	C2 = Cost markup 30%	01/01/1980	30.000
4000	C3 = Cost Markup 40%	01/01/1980	35.000
5000	C1 = Cost Markup 25%	01/01/1980	25.000
5000	C2 = Cost markup 30%	01/01/1980	30.000
5000	C3 = Cost Markup 40%	01/01/1980	35.000

General

- Base Prices
- Discount/Markup
- Quantity Price Break
- Customer Item Discounts
- Group Discounts

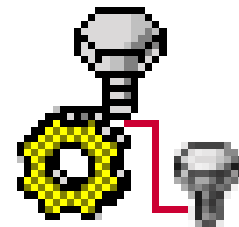
Continue Help

Kitting

CSM now supports kits

Kit Parents

This object allows the user to add components to items identified as kits in the engineering system without Item Master security



Kit Parents

Order History Enhancements

- For orders that have completely shipped and invoiced, you can now view the special charges, and comments associated with special charges and shipped items.

New in R7 – R9 CSM

- Unit of Measure Maintenance
- Unit of Measure Conversions
- Foreign Language Comments in Order History
- Standing Order Maintenance
- Sales Rep Maintenance
- APC Integration

New in R7 – R9 CSM

- Copy
 - Copy Order History to Order Capabilities
 - Copy Order History to Quote Capabilities
 - Copy Order History to Credit Memo Capabilities
 - Copy Credit Memo History to Credit Memo Capabilities
 - Copy Credit Memo History to Order Capabilities
 - Copy Credit Memo History to Quote Capabilities

New in R7 – R9 CSM

- End order processing – flexibility to run as part of order entry and maintenance.
- Split commissions – available at both header and line items.
- Comments – similar function to COM for auto include of comments at header, line item or release.
- Reporting – similar to green screen reports

End Order Processing

- Order Totals real-time information.
- Processing Options control printing, allocations and invoice generation.
- Default options for printing all documents can be set as preferences.

<u>C</u> ommissions	<u>L</u> ine Items	<u>H</u> olds
<u>G</u> eneral	<u>P</u> ricing/Billing	<u>S</u> old-to
Order <u>T</u>otals	<u>P</u> rocessing Options	
Counts		
Special charge		2
Line item		7
Quantity hash total		186.000

New in R7 – R9 CSM

- Picking/Shipping/Invoicing – available in Materials Management and also CSM as host jobs/host for complete shipments only at this time.
- Holds – new hold status field visible in Customers Orders and in CO Holds objects shows all holds.
- Integration to Contract Accounting Plus – contract can be assigned within the customer order.
- Price Book Unit of Measure with EPDM
- Maintenance of customer in IFM.

Customer order fulfillment

- ***Order fulfillment functions (Picking and Shipping) take place in the warehouse***
- ***They are packaged with Materials Management.***

Shipping

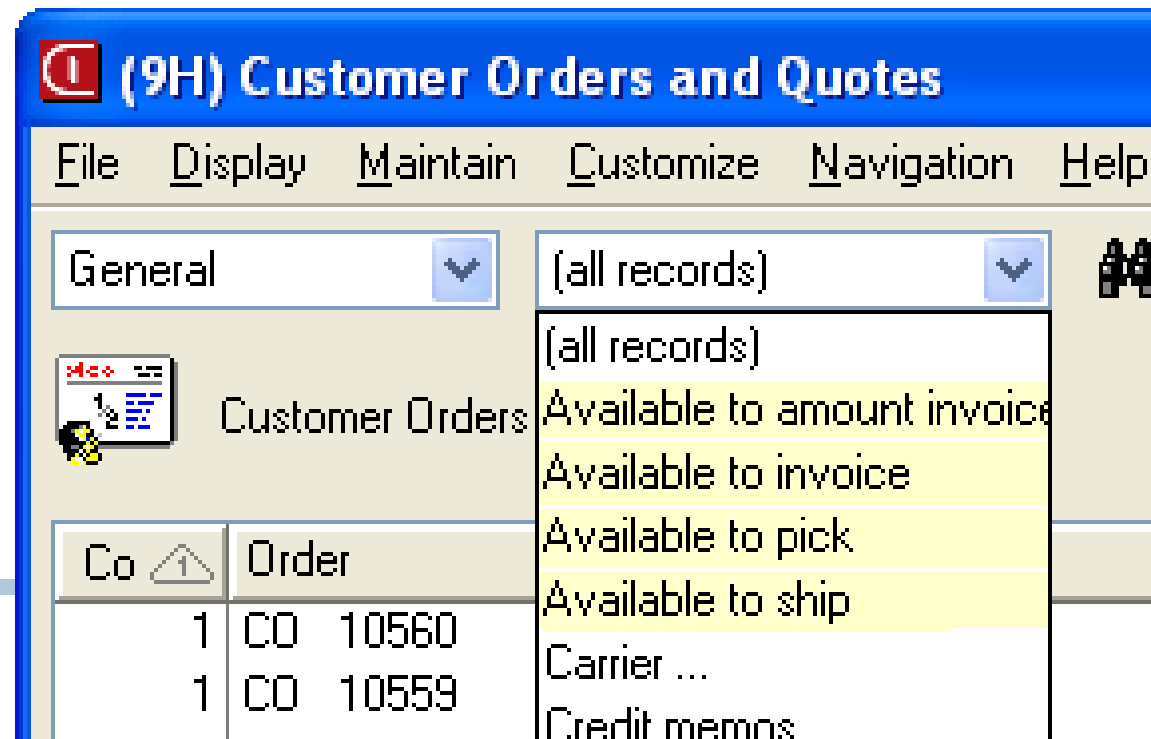
- Materials Management becomes the heart of customer order picking and shipping activity with the addition of Pick Lists, Containers, and Shipments

Pick consolidation	Default to Company
Pick short stock quantity	Ignore short stock
Automatic pick confirm	<input type="checkbox"/>
Discrete allocation	<input type="checkbox"/>

General Print Selection Criteria

Pick List Print

- A new subset called Available to Pick excludes orders (or lines, or releases) that are prevented from picking due to holds or other reasons.



The screenshot shows the SAP 'Customer Orders and Quotes' window. The title bar reads '(9H) Customer Orders and Quotes'. The menu bar includes File, Display, Maintain, Customize, Navigation, and Help. Below the menu bar, there are two dropdown menus: 'General' and '(all records)'. A third dropdown menu is open, showing a list of options: '(all records)', 'Available to amount invoice', 'Available to invoice', 'Available to pick', 'Available to ship', 'Carrier ...', and 'Credit memos'. The 'Available to pick' option is highlighted in yellow. Below the dropdown menus, there is a table with columns 'Co' and 'Order'. The table contains two rows of data:

Co	Order
1	CO 10560
1	CO 10559

Pick List Print

- Pick List overview shows all the information that prints on a pick list document.



Shipping

- Outbound shipments can be generated from:
 - Customer Orders
 - Pick Lists
 - Containers

The screenshot shows a software window titled "Generate Shipment". The window has a title bar with a small icon and the text "Generate Shipment". Below the title bar, there are three tabs: "Content", "Confirmation", and "Output". The "Content" tab is active. Inside the "Content" tab, there is a checkbox labeled "Execute" which is checked with a green checkmark. Below the "Execute" checkbox, there is a text input field labeled "Description". To the left of the main window, there is a separate box containing the text "Ready to invoice" followed by an unchecked checkbox.

• *Ready to invoice flag lets you automatically invoice the shipment.*

- Release 7.8 Enabled Immediate Ship Orders
- Bills Of Lading And Packing Lists Can Be Printed From The Shipment Object
- Serial Numbers Can Be Generated Or Entered For Shipped Items
- Tracking Numbers Can Be Specified On A Shipment Or By The Container
- Tracking URLs Have Been Added To The Carrier Object

Additional maintenance objects

- Maintenance function for customer items, industry items, contracts, and promotions
- Customer maintenance is now available in CSM when IFM is installed.
- Hold codes and Special charge codes can now be maintained.
- Code file maintenance relating to the assignment of invoice form numbers has been added
- Integration to

Additional maintenance objects

- Tax Categories
- Sales Branches
- Invoice locations
- Invoice Shipping Locations
- Code file maintenance
- Packing List Form Numbers

Overview CSM-Customer Service Management

- **Client/server architecture - Windows**
 - ✓ object-oriented
 - ✓ flexible navigation & work-flow capabilities – “point and click”.
 - ✓ **Attachments** (Drawings, MSDS, ISO SOP/GOP, etc.)...extremely powerful.
- **Broadcast/receive and workbenches** (click on one item and display other information such as the customers account statistics in another window.
- **Personal data management** (templates/ views/subsets...for you!)
- **Navigation History and Bookmarks** for quick retrieval of common tasks.

Customer Service Card

Customers & Orders Tab

The screenshot displays the Infor ERP XA Power-Link software interface. The window title is "(8L) Infor ERP XA Power-Link". The menu bar includes "File", "Customize", "Navigation", and "Help". A dropdown menu shows "Default". The main area contains a grid of icons for various functions: Customers, Customer Orders and Quotes, C.O. Line Items, C.O. Holds, Customer Order History, C.O. History Line Items, Companies, Customer Items, Industry Items, Price Books, Customer Contracts, Customer Contract Line Items, Sales Representatives, Daily Recap Transactions, and Promotions. On the right, a sidebar titled "Infor ERP XA" lists modules: Customer Service (circled in red), Engineering, Materials, Production, Finance, Procurement, Settings, and Integrator. At the bottom, there are three tabs: "Customers and Orders" (selected), "Shipments and Invoices", and "Customer Service Codes". A large red arrow points to the "Customers and Orders" tab. The text "This is Power-Link" is overlaid in red.

(8L) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

Engineering

Materials

Production

Finance

Procurement

Settings

Integrator

Customers

Customer Orders and Quotes

C.O. Line Items

C.O. Holds

Customer Order History

C.O. History Line Items

Companies

Customer Items

Industry Items

Price Books

Customer Contracts

Customer Contract Line Items

Sales Representatives

Daily Recap Transactions

Promotions

This is Power-Link

Customers and Orders

Shipments and Invoices

Customer Service Codes

Customer Service Card

Shipments & Invoices Tab

The screenshot displays the Infor ERP XA Power-Link software interface. The window title is "(8L) Infor ERP XA Power-Link". The menu bar includes "File", "Customize", "Navigation", and "Help". A dropdown menu is set to "Default". The main area contains a grid of icons for various functions: Shipments, Shipped Items, Customer Invoices, Packed Containers, Pick Pack Ship Items, Pick List Items, Carriers, Container Types, Serial Numbers, Sales Representatives, and Commission History. A red arrow points to the "Shipments and Invoices" tab at the bottom. On the right, a sidebar titled "Infor ERP XA" lists several modules, with "Customer Service" circled in red.

File Customize Navigation Help

Default

Shipments Shipped Items Customer Invoices Packed Containers Pick Pack Ship Items

Pick List Items Carriers Container Types Serial Numbers Sales Representatives

Commission History

Customers and Orders **Shipments and Invoices** Customer Service Codes

Infor ERP XA

- Customer Service**
- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Customer Service Card

Customer Service Codes Tabs

Note there are 4 codes tabs. Shipment and Invoice Codes tab is new.

The screenshot displays the Infor ERP XA Power-Link software interface. At the top, the window title is "(8L) Infor ERP XA Power-Link". Below the title bar is a menu bar with "File", "Customize", "Navigation", and "Help". A dropdown menu is currently set to "Default".

The main content area is divided into several tabs. The active tab is "Customer Codes", which is further divided into "Customer Codes" and "Customer Order Codes". Below these tabs is a grid of icons representing various code types, including:

- Address Types
- Carriers
- Countries
- Credit Ratings
- Customer Classes
- Customer Price Codes
- Customer Enterprises
- EU Delivery Terms
- EU Transaction Types
- EU Transport Modes
- Fixed Trade Discounts
- Item Classes
- Item Industry Classes
- Languages
- Market Analyses
- Payment Terms
- Priorities
- Sales Regions
- Sales Transport Terms
- Shipping Locations
- States
- Surcharges
- Surcharge Lines
- Tax Code For Authorities
- Tax Indicators
- Tax Suffixes
- Territories
- Global UM Conversions
- Class UM Conversions
- Item UM Conversions
- Zones

At the bottom of the main content area, there are three tabs: "Customers and Orders", "Shipments and Invoices", and "Customer Service Codes".

On the right side of the interface, there is a sidebar menu titled "Infor ERP XA". The menu items are: Engineering, Materials, Production, Finance, Procurement, Settings, and Integrator. The "Customer Service" item is circled in red.

Setting Customer Order Preferences

(8L) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Customers, Customer Orders and Quotes, C.O. Line Items, C.O. Holds, Customer Order History, C.O. History Line Items, Companies, Customer Items, Industry Items, Price Books, Customer Contracts, Customer Contract Line Items, Sales Representatives, Daily Recap Transactions, Promotions

(8L) Customer Order or Quote (all types) Preferences

Default

Company: (public preference)

Order type: (public preference)

Warehouse: (public preference)

Warehouse option: (public preference)

Perform End Order processing: (public preference)

Do not prompt each time for order type selection.

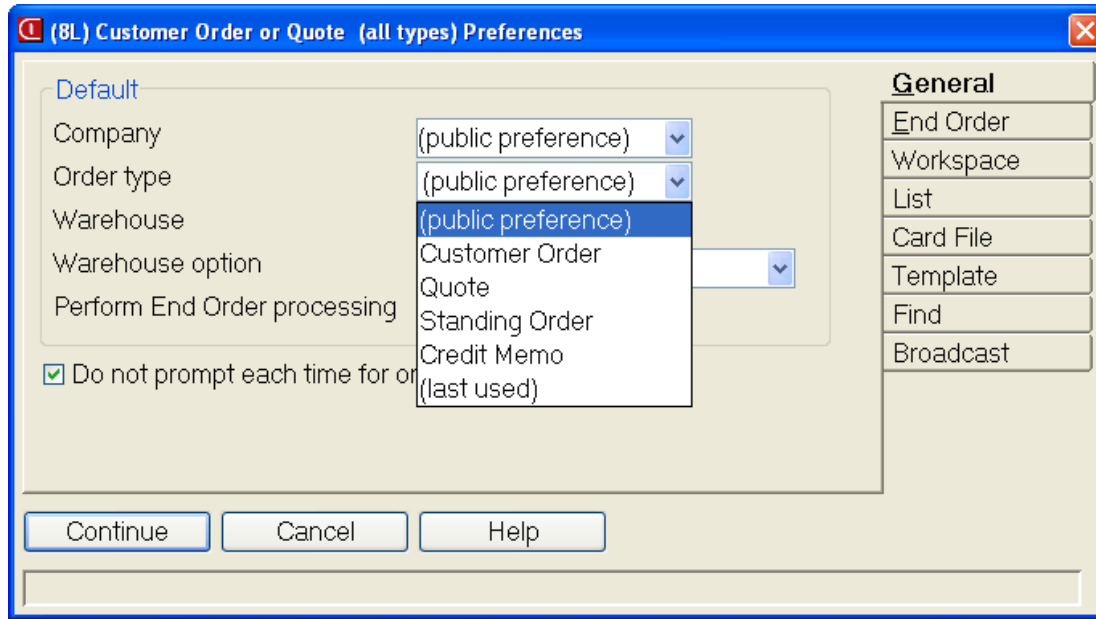
General

- End Order
- Workspace
- List
- Card File
- Template
- Find
- Broadcast

Customers and Orders | Shipments and Invoices | Customer Service Codes

Setting Preferences locks in your preferred information views and functions. This should be done for all CSM objects.

Setting Customer Order Preferences



- Note the new "(public preference)" selection which can be set for your company on the Settings tab in the main Power-Link card file.
- Address all options on all tabs for all objects where you do work or inquire.
- New tabs in R7+:
 - End Order
 - Workspace

Setting CO Preferences

(8L) Customer Order or Quote (all types) Preferences

Acknowledgement Yes

Generate pick list (public preference)

Pro forma packing list (public preference)

Pro forma invoice (public preference)

Print alternate currency (public preference)

Quote (public preference)

Standing order (public preference)

Print Options Pick List Options

Continue Cancel Help

Printing and Pick List options on the End Order tab.

(8L) Customer Order or Quote (all types) Preferences

Initial view C-General

Initial subset (public preference)

Initial sort Order number desc

Open action (public preference)

<Alt> open action (public preference)

<Ctrl> open action (public preference)

General

End Order

Workspace

List

Card File

Template

Find

Broadcast

Continue

(8L) Customer Order or Quote (all types) Preferences

Create template (public preference)

Copy template (public preference)

Change template (public preference)

Customer Order Customer Quote Credit Memo Standing Order

Continue Cancel Help

General

End Order

Workspace

List

Card File

Template

Find

Broadcast

Note different template choices for CO's, Quotes, Credit Memos, and Standing Orders on bottom tabs.

Customers

The screenshot shows the 'Customers' application window with a menu open. The menu is divided into 'Insert' and 'Delete' sections. The 'Insert' section includes 'Create', 'Change', 'Quick Change', and 'Copy'. The 'Delete' section includes 'Suspend', 'Activate', and 'Hold'. Below these are 'Mass Change', 'Mass Delete', 'Entity options', 'Price Book options', 'Personal Account options', 'Carrier options', and 'Templates'. A red circle highlights a group of icons in the toolbar, including a document, a pencil, a eraser, a trash can, and a magnifying glass. A yellow text box is overlaid on the table, providing instructions on how to use the menu and toolbar icons.

Select Maintain and the appropriate maintenance selection or use icons for new and existing customer master records, **EVEN FOR IFM** (International Financial Management) .

Co	Cus	City	Contact	Telephone	Fax	Currency	Status
1		Atlanta					S
1		Atlanta					A
1		Atlanta				FFR	A
1		Atlanta				MEP	A
1		Atlanta				DEM	A
1		Dallas					
1		Atlanta					
1		Hous					
1		Roch					
1		Paris					
1		Paris					
1		Denve					
1		Green					
1		Orlan					
1		Moun					
1		Memp					
1		Laure					
1		Hixso					
1		Salt Lake City					A
1		Ocoee					A
1		Hopkins					A
1		Atlanta					A
1		Greenville					A
1		Detroit					A
1		Washington					A
1		Denver		303-555-2774	303...		A
1		Atlanta					A
1		Macon	Mr. David Garris				A
1		Columbus	Rod Fortson				A
1		Pittsburgh					A
1		Norwich					A
1		Chicago					A
1		Athens					A

Customers

Double click any customer record and select Change pencil to make changes in card file.

(8L) Change Customer - 1, 101

File Display Maintain Customize Navigation Help

Default (IFM)

1 101 Radio Shack Global

Company 1
Customer status Active
Customer class RET = Retail
Warehouse 1
Stage area
Require purchase order Yes No
Language 001 = Default local language
Maintenance log Yes No
Salesrep 100
Market analysis RET = Retail

General

- Addresses
- Pricing/Billing
- Credit
- AR Entity Overview
- Accounts Receivable
- Logistics
- Media
- Customer Items
- Comments

Update Cancel Help

Customer Orders

The screenshot displays the Infor ERP XA Power-Link interface. The main window is titled "(BL) Infor ERP XA Power-Link" and contains a menu bar (File, Customize, Navigation, Help) and a toolbar. The main area shows a grid of icons for various business objects, with "Customer Orders and Quotes" highlighted. A secondary window titled "(BL) Customer Orders and Quotes" is open, showing a menu bar (File, Display, Maintain, Customize, Navigation, Help) and a toolbar. A red circle highlights the toolbar icons for creating new records (a pencil icon), and a red arrow points to the "Customer Orders and Quotes" window title bar. Below the toolbar is a table with columns: Co, Order, Hold status, Status, Reference, Customer, Name, and Whs. The table lists several orders with their respective hold and status values.

Co	Order	Hold status	Status	Reference	Customer	Name	Whs
1	CO 10913	1 = Held	10 = Entered		2501	Sun Microsyste...	110
1	CO 10912	0 = None	10 = Entered		3401	Wal-Mart Laure...	1
1	CO 10910	0 = None	15 = No lines eligible for pick	REC-SHT	2501	Sun Microsyste...	1
1	CO 10909	0 = None	15 = No lines eligible for pick		101	Radio Shack Gl...	1
1	CO 10908	0 = None	10 = Entered		101	Radio Shack Gl...	1
1	CO 10905	0 = None	10 = Entered		4301	Sysco Food Se...	1

Create customer orders, quotes and credit memos in this object. Note the new Hold Status field alerting users immediately that order is on hold

Customer Order Header Window & Card File

The screenshot shows the 'Customer Orders and Quotes' window with a menu bar (File, Display, Maintain, Customize, Navigation, Help) and a toolbar. A table lists customer orders with columns for Co, Order, Hold status, Status, Reference, Customer, Name, Whs, and Order. An orange callout box points to the 'Status' column, stating 'Many double column cards in CSM.' The 'Change Customer Order - 1, 1, 10913' dialog box is open, showing fields for Warehouse (110), Ship-to (default), Shipping instructions, Ship lead time (0), Sales (Regular credit sale), Order reference, Salesrep (100), Sales transport terms (blank), Language (001), Purchase Order Number, Date, Revision, Totals (Volume: 0.000, Weight: 2,100.000, Value: 12,950.80), Invoice amount (12,950.80), and Order type (Customer Order). A 'General' card file is visible on the right side of the dialog box, listing various sections like Pricing/Billing, Ship-to, Order Shipments, Commissions, Line Items, Holds, Special Charges, Overview, Comments, Order Totals, Processing Options, and Contract Accounting. The dialog box has 'Update', 'Cancel', and 'Help' buttons at the bottom, and a 'Perform End Order' checkbox.

Co	Order	Hold status	Status	Reference	Customer	Name	Whs	Order
1	CO 10913	1 = Held	10 = Entered		2501	Sun Microsysteme...	110	11/27
1	CO 10912	0 = None	10 = Entered		3401	Wal-Mart Laure...	1	02/26
1	CO 10910	0 = None	15 = No lines eligible for pick	BEC-SHT	2501	Sun Microsysteme...	1	12/11
1	CO 10909							10/10
1	CO 10908							08/14
1	CO 10905							07/25
1	CO 10904							07/25
1	CO 10903							07/24
1	CO 10826							07/06
1	CO 10825							05/21
1	CO 10824							05/11
1	CO 10823							04/10
1	CO 10822							03/21
1	CO 10821							03/21
1	CO 10819							03/08
1	CO 10817							02/03
1	CO 10816							02/03
1	CO 10814							02/02
1	CO 10813							02/02
1	CO 10812							02/02
								01/18
								12/20
								11/07
								11/01

Many double column cards in CSM.

CO Items Window and Card File

The image shows two overlapping windows from a software application. The background window is titled "(BL) C.O. Line Items" and displays a list of items with columns for Co, Customer, Description, Quantity, UM, Request, and Promise. The foreground window is titled "(BL) Change C.O. Line Item - 1, 1, 10958, 100" and shows a detailed card for a specific item, including fields for Customer, Address, Warehouse, Allocation type, and various status and quantity fields.

New subsets:

- Available to pick
- Available to ship

Customize the cards and card files if desired.

Co	Customer	Description	Quantity	UM	Request	Promise
1	6000000	Available to pick	10.000	EA	10/29/2004	10/29/2004
1	350	Available to ship	1.000	EA	10/29/2004	10/29/2004
1	60	Closed	1.000	EA	07/09/2008	07/09/2008
1	340	Commission overr...	1.000	EA	06/25/2008	06/25/2008
1	70	Customer ...	15.000	EA	06/18/2008	06/18/2008
1	340	Customer item cont...	20.000	EA	06/18/2008	06/18/2008
1	70	Customer range ...	20.000	EA	06/18/2008	06/18/2008
1	70	Dates & Company				
1	340	Graham				
1	7000000	Industry item cont...				
1	7000000	Name contains ...				
1	70	Non-inventory item				
1	70	Open				
1	70	Order ...				
1	70	Order range ...				
1	70	Order type ...				
1	70	Our item contains				
1	70	Our item range ...				
1	70	Promise date				
1	90000	Today's Orders				
1	91000	Warehouse conta...				
1	91000	late				
1	92000					
1	920001	CO 10941				
1	3401	CO 10942				
1	3401	CO 10942				
1	3401	CO 10942				
1	3401	CO 10943				
1	3401	CO 10943				
1	3401	CO 10943				

Field	Value	Field	Value
Customer	3401	Unit of Measure	
Addressee name	Wal-Mart Laurens	Order UM	EA = Each
Sequence		Stocking UM	EA = Each
Warehouse	1	Total	
Line item status	10 = Open	On-hand	11,888.000
Allocation type	None	Allocated	62,968.002
Quantity		Available	-51,009.002
Order	1.000	On-order	75.000
Stock	1.000	Credit	
Backorder	0.000	Credit	No
Shipped (stock)	0.000	Type	Standard sale
Date		Reason	(blank)
Request	06/25/2008	Features and Options	
		S-number	
		Manufacturing start date	10/20/2008

CSM Status Codes

➤ CO Header

- 00= Incomplete
- 10= Entered
- 15= No lines eligible for pick
- 50= Complete

➤ CO Item

- 10= Open
- 20= Active
- 50= Complete

➤ Pick List

- 00= Incomplete
- 10= Activity
- 50= Complete

➤ Shipment

- 00= Incomplete
- 20= Shipped, ready to invoice
- 30= Special charge only
- 50= Invoice printed
- 99= Proforma/amt only invoice

Drill to Needed Information

The screenshot shows the SAP 'C.O. Line Items' window. A table of line items is displayed with columns for Whs, Quantity, UM, Request, Promise, and Net sales amount. A right-click context menu is open over the row with Request date 06/25/2008. The menu items include 'C.O. Line Item details', 'Attachments', 'Maintenance History', 'Releases', 'Kit Component Releases', 'Shipped Items', 'Discrete Allocations', 'Holds', 'Commission Overrides', 'Inventory Transaction History', 'Sources of Demand', 'ATP Details', 'ATP Kit Details', 'Item Locations', 'Features and Options', 'Customer Order or Quote options', 'Customer options', 'Item Warehouse options', 'Item options', 'Item Revision options', 'Enterprise Item options', 'Customer Contract options', 'Warehouse options', 'Customer Item options', and 'Industry Item options'. A yellow callout box highlights the instruction: 'Right click on record and select DISPLAY or click DISPLAY in menu bar.' The 'Display' option in the context menu is circled in red.

Whs	Quantity	UM	Request	Promise	Net sales amount	Line item status
1	10.000	EA	10/29/2004	10/29/2004	661.500	Open
1	1.000	EA	10/29/2004	10/29/2004	66.150	Open
1	1.000	EA	07/09/2008	07/09/2008	500.000	Active
1	1.000	EA	06/25/2008	06/25/2008		
1	15.000	EA	06/18/2008	06/18/2008		
1	20.000	EA	06/18/2008	06/18/2008		
1	20.000	EA	06/18/2008	06/18/2008		
1	1.000	EA	05/16/2008	05/16/2008		
1	10.000	EA	02/14/2008	02/14/2008		
1	10.000	EA	12/20/2007	12/20/2007		
1	1,000.000	EA				
FDM						
FDM						
FDM	10.000	EA	09/30/2007	09/30/2007		
FDM	50.000	EA	09/30/2007	09/30/2007		
FDM	200.000	EA	09/30/2007	09/30/2007		
FDM	100.000	EA	09/30/2007	09/30/2007		
1	1.000	EA			3,600,000.000	Open
1	1.000	EA			2,000,000.000	Open
1	1.000	EA			2,599.950	Active
1	1.000	EA			39.950	Active
1	1.000	EA			29.950	Active
1	10.000	EA			32,000.000	Active
1	5.000	EA			0.000	Active
1	2.000	EA			1,299.900	Active

Right click on record and select DISPLAY or click DISPLAY in menu bar.

Highlight Order & Use Icons for Info

(8L) Customer Orders and Quotes

File Display Maintain Customize Navigation Help

C-General (all records)

Customer Orders and Quotes

Co	Order	Hold stat	Reference	Customer	Name	Order
1	CO U060002	0 = None	15 = No lines eligible for pick	601	PC Wareh	
1	CO U060001	0 = None	10 = Entered	601	PC Wareh	
1	CO U060006	0 = None	10 = Entered	601	PC Wareh	
1	CO U06004	1 = Held	10 = Entered	601	PC Wareh	
1	CO 10959	0 = None	15 = No lines eligible for pick	601	PC Wareh	
1	CO 10958	0 = None	10 = Entered	3401	Wal-Mart	06/18
1	CO 10956	0 = None	15 = No lines eligible for pick	701	American	06/18
1	CO 10955	0 = None	10 = Entered	3401	Wal-Mart	05/13
1	CO 10949	0 = None	10 = Entered	3401	Wal-Mart	01/28
1	CO 10948	0 = None	10 = Entered	70000001	Aerosp	12/20
1	CO 10947	0 = None	15 = No lines eligible for pick	701	Americ	11/06
1	CO 10946	0 = None	15 = No lines eligible for pick	701	Am	11/06
1	CO 10944	0 = None	15 = No lines eligible for pick	701	A	0/04
1	CO 10943	0 = None	15 = No lines eligible for pick	3401	W	0/27
1	CO 10942	0 = None	15 = No lines eligible for pick	3401	W	0/27
1	CO 10941	0 = None	10 = Entered	920001	C	0/02
1	CO 10940	0 = None	15 = No lines eligible for pick	910001	M	0/02
1	CO 10939	0 = None	15 = No lines eligible for pick	900001	A	0/02
1	CO 10938	0 = None	10 = Entered	2501	Sun Microsysteme...	08/27
1	CO 10937	0 = None	15 = No lines eligible for pick	701	American Com...	08/24
1	CO 10936	0 = None	15 = No lines eligible for pick	701	American Com...	08/24
1	CO 10935	0 = None	10 = Entered	70000001	Aerospace Cus...	08/24
1	CO 10934	0 = None	15 = No lines eligible for pick	3401	Wal-Mart Laure...	08/06
1	CO 10933	1 = Held	10 = Entered	2501	Sun Microsysteme...	07/11
1	CO 10932	0 = None	15 = No lines eligible for pick	2501	Sun Microsysteme...	07/11
1	CO 10931	0 = None	15 = No lines eligible for pick	2501	Sun Microsysteme...	07/09
1	CO 10928	1 = Held	15 = No lines eligible for pick	10001	Hi Tech Corp	06/01
1	CO 10927	1 = Held	10 = Entered	101	Radio Shack Gl...	06/01
1	CO 10926	0 = None	15 = No lines eligible for pick	70000001	Aerospace Cus...	05/29
1	CO 10925	0 = None	15 = No lines eligible for pick	701	American Com	05/29

CO line items

Order holds

Order shipments (truck)

Customer master

Mfg order for customer order

Tree Structure – Customer Order

(BL) Change Customer Order - 1, 1, 10777

File Display Maintain Customize Navigation Help

Default

1 Customer: 51001 Chrysler Order: CO 10777

Details: Customer Order Overview Details

Identification Details

Sold-to: Chrysler Ship-to: *default10 = Entered Amount: 17,249.65 Order: 08/17/2005 Re...

- HOLDS
- COMMENTS
- COMMISSIONS
 - Salesrep: 110 TONY Commission: 0.00% Participation: 100.00%
- LINE ITEMS
 - Whs: 1 1003 PC, 300 MHZ10 = Open Base: 3,299.950 Net sales: 16,499.750 Cost: 1...
 - RELEASES
 - 1 Promise: 08/29/2005 = Open Ordered: 5.000 EA Shipped: 0.000 Open: 0.000
 - HOLDS
 - SHIPPED ITEMS
 - HOLDS
 - COMMENTS

General
Pricing/Billing
Sold-to
Ship-to
Order Shipments
Commissions
Line Items
Holds
Special Charges
Overview
Comments
Order Totals
Processing Options
Contract Accounting

Update Cancel Help Perform End Order

Customer Order List Window- Views and Subsets in CSM

Views

Subsets. Note new ones:

- Available to amount invoice
- Available to invoice
- Available to pick
- Available to Ship

Order	Status	Reference	Customer	Name	Whs	Order
1 CO U0600	15 = No lines eligible for pick		001	ESM...	1	07/06
1 CO U0600	10 = Entered				1	07/06
1 CO U0600	10 = Entered				1	07/06
1 CO U0600	10 = Entered				1	07/06
1 CO 0953	15 = No lines eligible for pick				1	07/09
1 CO 0953	10 = Entered				1	06/18
1 CO 10954	15 = No lines eligible for pick				1	06/18
1 CO 10954	10 = Entered				1	05/13
1 CO 10949	10 = Entered				1	01/28
1 CO 10949	10 = Entered				1	12/20
1 CO 10949	15 = No lines eligible for pick				1	11/06
1 CO 10949	15 = No lines eligible for pick				1	11/06
1 CO 10949	15 = No lines eligible for pick				1	10/04
1 CO 10949	15 = No lines eligible for pick				1	09/27
1 CO 10949	15 = No lines eligible for pick				1	09/27
1 CO 10949	10 = Entered		3401	Wal-Mart Laure...	1	09/02
1 CO 10949	15 = No lines eligible for pick		920001	Columbus Trail...	A	09/02
1 CO 10949	15 = No lines eligible for pick		910001	Macon Trailer S...	A	09/02
1 CO 10933	15 = No lines eligible for pick		900001	Atlanta Trailer ...	A	09/02
1 CO 10933	10 = Entered		2501	Sun Microsystem...	1	08/27
1 CO 10933	15 = No lines eligible for pick		701	American Com...	1	08/24
1 CO 10933	15 = No lines eligible for pick		701	American Com...	1	08/24
1 CO 10933	10 = Entered		7000001	Aerospace Cus...	1	08/24
1 CO 10933	15 = No lines eligible for pick		3401	Wal-Mart Laure...	1	08/06
1 CO 10933	10 = Entered		2501	Sun Microsystem...	1	07/11
1 CO 10933	15 = No lines eligible for pick		2501	Sun Microsystem...	1	07/11
1 CO 10933	15 = No lines eligible for pick		2501	Sun Microsystem...	1	07/09
1 CO 10928	1 = Held		10001	Hi Tech Corp	1	06/01
1 CO 10927	1 = Held		101	Radio Shack Gl...	1	06/01
1 CO 10926	0 = None		7000001	Aerospace Cus...	1	05/29
1 CO 10925	0 = None		701	American Com	1	05/29

Customer Order Holds

(BL) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Customers Customer Orders and Quotes C.O. Line Items **C.O. Holds** Customer Order History C.O. History Line Items

Companies Customer Items Industry Items Price Books Customer Contracts Customer Contract Line Items

Sales Representatives

(BL) C.O. Holds

File Display Maintain Customize Navigation Help

General (all records)

Co	Order	Line	Release	Hold	Hold code descr...	Create user	Held	Approval user	Approval	Release t
1	CO 10301	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)
1	CO 10302	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)
1	CO 10305	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)
1	CO 10306	0	0	CH	Credit hold	STEVE	03/13/1998	DAVID	12/29/1998	Released,
1	CO 10307	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)
1								LLIOD	11/26/2000	Released,
1										(blank)
1										(blank)
1										(blank)
1										(blank)
1										(blank)
1										(blank)
1	CO 10314	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)
1	CO 10315	0	0	CH	Credit hold	STEVE	03/13/1998			(blank)

Order can't ship if on hold. Highlight, and release when appropriate.

Customers and Orders Shipments and Invoices Customer Service Codes

Host Jobs/Host Print in Customer Orders

Generate Invoice, Pick List, and Shipment from Customer Orders. Print any order/shipping document and some reports.

(8L) Customer Orders and Quotes				
File	Display	Maintain	Customize	Navigation
Refresh				F5
Calculate Column Statistics				
Host Print ...				
Host Jobs ...				
Export ...				
Send to ...				
Local Print ...				
Status				
Summary Info ...				
Close				

Status	Refer...
15 = No line...	
10 = Entered	
10 = Entered	
10 = Entered	
15 = No line...	
10 = Entered	
15 = No line...	
10 = Entered	
15 = No line...	
10 = Entered	
10 = Entered	
10 = Entered	
15 = No line...	
15 = No line...	
15 = No line...	
15 = No line...	

1	CO	10944	0 = None
1	CO	10943	
1	CO	10942	
1	CO	10941	
1	CO	10940	
1	CO	10939	
1	CO	10938	
1	CO	10937	
1	CO	10936	
1	CO	10935	
1	CO	10934	
1	CO	10933	
1	CO	10932	
1	CO	10931	
1	CO	10928	
1	CO	10927	
1	CO	10926	
1	CO	10925	
1	CO	10924	
1	CO	10915	
1	CO	10913	
1	CO	10912	

(8L) Customer Order or Quote Host Reports

Customer Order or Quote

Acknowledgements	Output
Blanket Item Status	Confirmation
Open Orders by Request Date	
Open Orders/Back Orders	<input type="checkbox"/> Print
Pro Forma Invoice	Description <input type="text"/>
Quote Status	Subset ... (all records)
Quotes	

(8L) Customer Order or Quote Host Jobs

Customer Order or Quote

Content	Confirmation	Output
Allocate		
Generate Invoice	<input checked="checked" type="checkbox"/> Execute	
Generate Pick List	Description <input type="text"/>	
Generate Shipment	Subset ... (all records)	
Recalculate Order Totals	Options	
	Print invoice <input type="checkbox"/>	
	Invoice type <input checked="checked" type="radio"/> Shipment <input type="radio"/> Amount	
	Invoice date 05/13/2008	

Host Print

Shipments and Invoice Objects

The screenshot displays the Infor ERP XA Power-Link application window. The title bar reads "(8L) Infor ERP XA Power-Link". The menu bar includes "File", "Customize", "Navigation", and "Help". A dropdown menu is currently set to "Default".

The main workspace contains several navigation icons with labels:

- Shipments (highlighted with a grey background)
- Shipped Items
- Customer Invoices
- Packed Containers
- Pick Pack Ship Items
- Pick List Items
- Carriers
- Container Types
- Serial Numbers
- Sales Representatives
- Commission History

A large red arrow points to the "Shipments and Invoices" tab at the bottom of the window.

On the right side, there is a sidebar titled "Infor ERP XA" with a "Customer Service" section containing the following items:

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

At the bottom, there are three tabs: "Customers and Orders", "Shipments and Invoices" (the active tab), and "Customer Service Codes".

Shipped Items Inquiry

(8L) Shipped Items

File Display Maintain Customize Navigation Help

Daily Ship R... *Ship date ra...

Shipped Items

Shipment date	Order	Name	Item	Shipped	UM	Net sales	Shipment	Carrier	Pro b numt
05/29/2007	CO 10925	American Computing	1000	25.000	EA	80,000.00	237	ROADWAY	2345
05/29/2007	CO 10925	American Computing	1002	10.000	EA	25,999.50	237	ROADWAY	2345
05/29/2007	CO 10924	Aerospace Customer	1000	10.000	EA	32,000.00	238	ROADWAY	
05/29/2007	CO 10924	Aerospace Customer	1001	5.000	EA	0.00	238	ROADWAY	
05/29/2007	CO 10924	Aerospace Customer	1002	8.000	EA	20,799.60	238	ROADWAY	
05/07/2007	CO 10922						32		
05/07/2007	CO 10921						30	ROADWAY	
05/07/2007	CO 10920						31	ROADWAY	
05/07/2007	CO 10918						36		
05/07/2007	CO 10917						33		
05/07/2007	CO 10916	American Computing	1000	5.000	EA	16,000.00	234	ROADWAY	
05/07/2007	CO 10912	Wal-Mart Laurens	1000	0.000	EA	0.00	235	ROADWAY	
05/07/2007	CO 10912	Wal-Mart Laurens	1050	5.000	EA	0.00	235	ROADWAY	
05/07/2007	CO 10912	Wal-Mart Laurens	1101	2.000	EA	1,299.90	235	ROADWAY	
05/06/2007	CO 10662	IBM - Rochester	1000	5.000	EA	2,000.00	229		
02/26/2007	CO 10911	Wal-Mart Laurens	1000	10.000	EA	32,000.00	228	ROADWAY	4351
02/26/2007	CO 10911	Wal-Mart Laurens	1050	5.000	EA	0.00	228	ROADWAY	4351
						221,062.650			

See what shipped today, subset by customer, by product, pro#, carrier, etc.

Invoice Inquiry

(8L) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Shipments Shipped Items **Customer Invoices** Packed Containers Pick Pack Ship Items Pick List Items Carriers

Container Types Serial Numbers Sales Representatives Commission History

(8L) Customer Invoices

File Display Maintain Customize Navigation Help

General (all records)

Customer Invoices

Co	Invoice/CM	Order	Total invoice	Curren...	Invoice date
1	465	CO 10957	1,850.00		06/18/2008
1	464	CO U06005	608.50		05/14/2008
1	463	CO 10945	52,598.00		05/13/2008
1	462	CO 10918	21.25		05/07/2007
1	461	CO 10922	3,200.00		05/07/2007
1	460	CO 10911	33,424.90		05/07/2007
1	459	CO 10916	16,000.00		05/07/2007
1	458	CO 10917	10,000.00		05/07/2007

Customers and Orders **Shipments and Invoices** Customer Service Codes

Create Shipment from Pick/Pack Ship Items

The screenshot shows a software application window titled "(8L) Pick Pack Ship Items". The interface includes a menu bar (File, Display, Maintain, Customize, Navigation, Help) and a toolbar with various icons. A data table is visible in the background with columns: Description, Kit, Pack/..., UM, Order, Ship..., Contai..., and Pick list. The table contains several rows of data, including items like "166 MHZ, D...", "PC, 200 MHZ", "PC, 266 MHZ", "MOUSE", and "MONITOR, 14".

Overlaid on the main window is a dialog box titled "(8L) Pick Pack Ship Item Host Jobs". The dialog has a "Generate Shipment" button and three tabs: "Content", "Confirmation", and "Output". The "Content" tab is active, showing a "Execute" checkbox, a "Description" field, a "Subset ..." dropdown menu (set to "(selected record)"), and an "Options" section with fields for "Ready to invoice" (checkbox), "Warehouse", "Carrier" (set to "(blank)"), and "Shipment ID". There are also "General" and "Print" buttons at the bottom of the dialog.

A yellow callout box with a red border contains the following text:

Select pick list and create shipment. Invoice at the same time ONLY FOR COMPLETE SHIPMENTS AT THIS TIME.

Shipment Print Documents or Invoice

The screenshot shows a software application window titled "(8L) Shipments". The main window has a menu bar with "File", "Display", "Maintain", "Customize", "Navigation", and "Help". The "File" menu is open, showing options like "Refresh", "Calculate Column Statistics", "Host Print...", "Host Jobs...", "Export...", "Send to...", "Local Print...", "Status", "Summary Info...", and "Close".

Three overlapping dialog boxes are visible:

- (8L) Shipment Host Jobs:** This dialog has a "Generate Invoice" button and a "Content" tab. Under the "Content" tab, there is a checked "Execute" checkbox, a "Description" text field, and a "Subset..." button next to a dropdown menu set to "(all records)".
- (8L) Shipment Host Reports:** This dialog has a "Bill of Lading" button and a "Content" tab. Under the "Content" tab, there is an unchecked "Print" checkbox and a "Description" text field.
- (8L) Shipment Host Reports (second instance):** This dialog has a "Prenumbered" button and a text field containing "//".

The background shows a data table with columns for dates and numbers. A "Submit" button is visible at the bottom left.

Shipping and invoicing has moved to Power-Link. From Shipments, print documents or invoice. Output allows for e-mailing docs or saving to 3 formats.

Re-printing Invoices

(8L) Infor ERP XA Power-Link

File Customize Navigation Help

Default

Infor ERP XA

Customer Service

- Engineering
- Materials
- Production
- Finance
- Procurement
- Settings
- Integrator

Shipments Shipped Items Customer Invoices Packed Containers Pick Pack Ship Items Pick List Items Carriers

Container Types Serial Numbers Sales Representatives Commission History

Host Job Provides Invoice Re-print Function

(8L) Customer Invoices

File Display Maintain Customize Navigation Help

General (all records)

Customer Invoices

Co	Invoice/CM	Order	Total invoice	Curren...	Invoice date
1	465	CO 10957	1,850.00		06/18/2008
1	464	CO U06005	608.50		05/14/2008
1	463	CO 10945	52,598.00		05/13/2008
1	462	CO 10918	21.25		05/07/2007
1	461	CO 10922	3,200.00		05/07/2007
1	460	CO 10911	33,424.90		05/07/2007
1	459	CO 10916	16,000.00		05/07/2007
1	458	CO 10917	10,500.00		05/07/2007

Customers and Orders Shipments and Invoices Customer Service Codes

Other R7 – R9 “Bells & Whistles”

- Favorites
- Sort arrow designators
- Graph cards
- Column statistics
- Workspaces – multiple preference settings
- Logical attribute text
- Locate button
- Workbench enhancements
- Rounding choice when changing view decimals
- Quick change
- Subset additional range options (last, current, or next week, qtr, year)
- Host job notification and e-mail of reports
- Public preferences
- Customizable toolbars
- Workbench enhancements
- Presentation schemes

***Thank you
for
attending!***