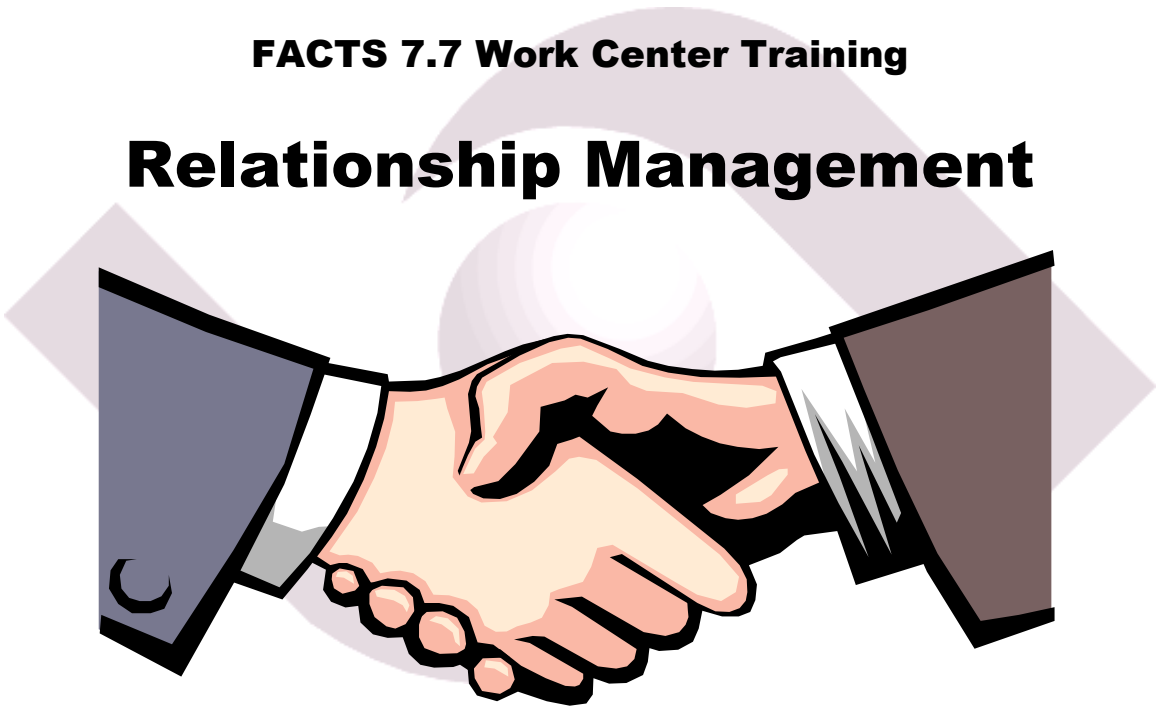


FACTS 7.7 Work Center Training

Relationship Management



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Last Update: January 4, 2011
Includes Facts 7.7.2 Release Notes

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
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
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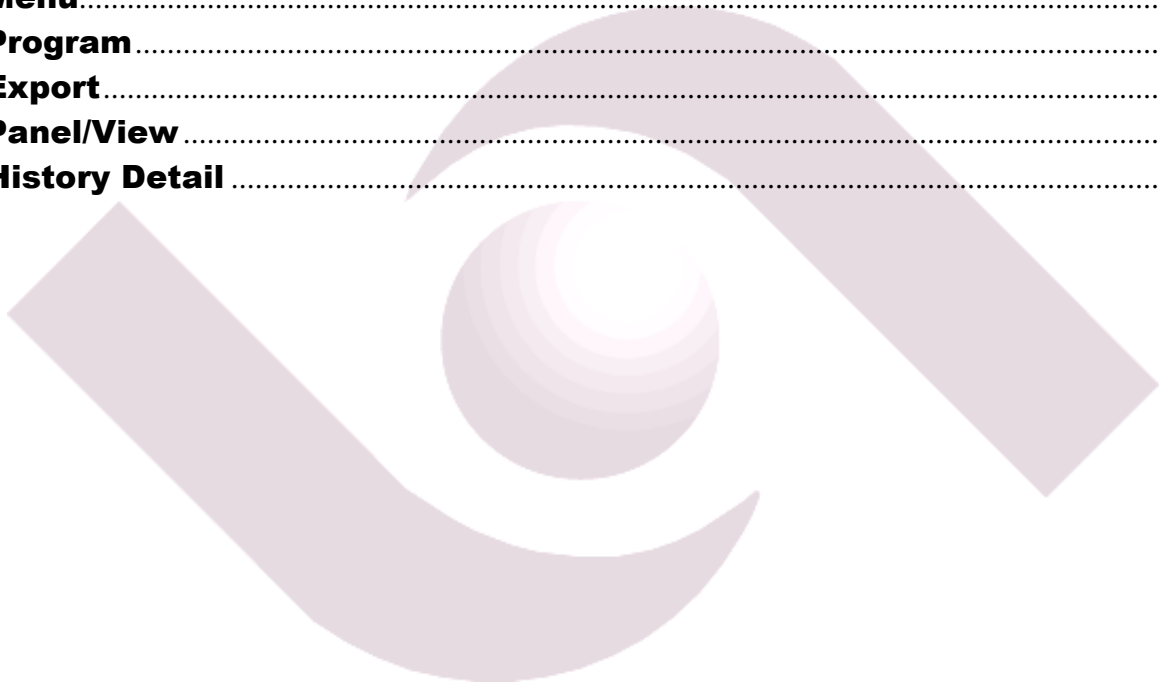
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Work Center Introduction

Definitions

Work Center – One or more queries defined around a primary data file. The work center represents the underlying data from the primary and related files used for presentation through the queries. For example, in Credit & Collections; the open AR invoice file is the primary file used through the work center. The customer file is a related file.

Query/Look – A collection of data fields and data views using data elements from the primary and related data files. Multiple queries can be set up using the same Work Center data to allow presentation of different data based on the specific job function for example.

Panel – One of 7 display areas on a query. They are the tree view on the left side, 3 summary and 3 detail panels on the right. The summary panels are displayed when a specific work center record has not been selected and the detail panels are displayed when a specific work center record has been selected and validated.

View – The content or layout of any panel. Content can be displayed in either a grid or list format.

Keyboard Navigation

Press	To
END	Display the bottom of the active window.
HOME	Display the top of the active window.
NUM LOCK+ASTERISK on numeric keypad (*)	Display all subfolders under the selected folder.
NUM LOCK+PLUS SIGN on numeric keypad (+)	Display the contents of the selected folder.
NUM LOCK+MINUS SIGN on numeric keypad (-)	Collapse the selected folder.
LEFT ARROW	Collapse current selection if it's expanded, or select parent folder.
RIGHT ARROW	Display current selection if it's collapsed, or select first subfolder.

UP ARROW

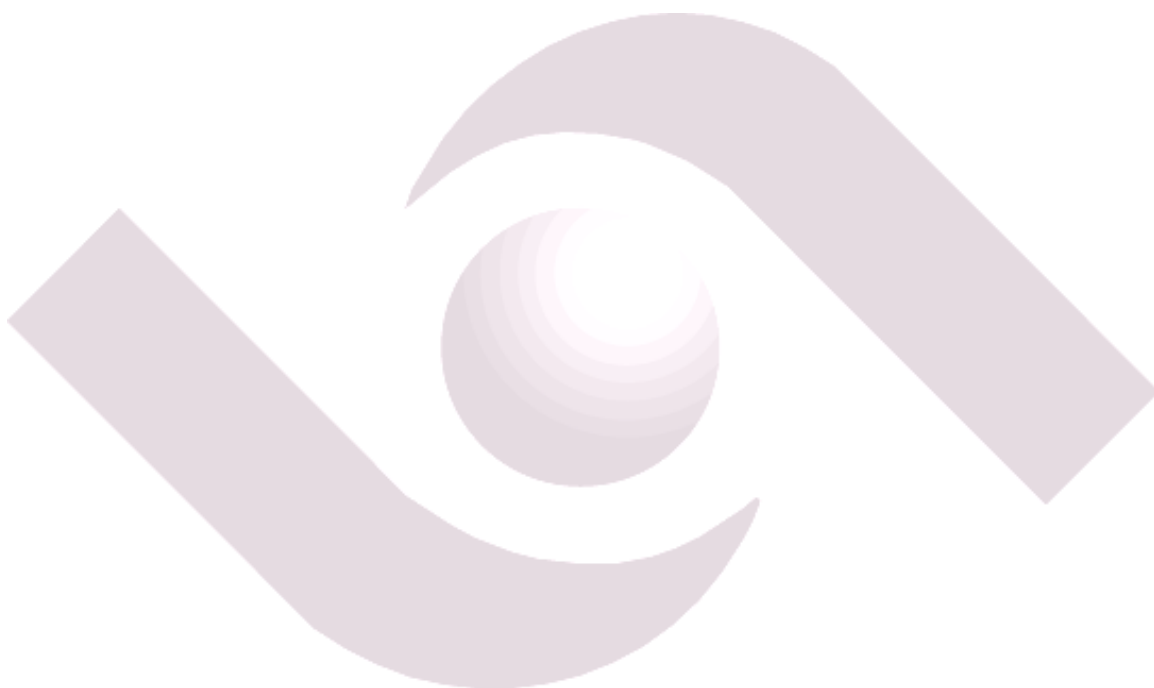
Highlight previous entry

DOWN ARROW

Highlight next entry

Any letter or number

Goes to the entry in the highlighted level of the tree that corresponds to the key pressed



Work Center Terminology

Button Bar

Menu Bar

Filter currently applied

Expand & Collapse tree view buttons

Tree View Panel

Fields displayed in this view.

**Display Panels (Top, Middle & Bottom)
Total of 6 panels, 3 summary and 3 detail.**

Customer Aging

CURRENT	14.00
1-30	14.00
31-60	0.00
61-90	0.00
OVER 90	12,447.31
Total	12,475.31
Disputed	0.00
Days Sales Outstanding	107
Open Sales Orders	0.00
Credit Limit	15,000.00
Last Payment Date	05/10/2008

Total Aging (based on filter selections)

100% = 184,185

CURRENT	1-30	31-60	61-90	OVER 90
14.00	14.00	0.00	0.00	12,447.31

Open To Do

Date	Time	Customer	Contact	Typ
06/12/15	03:16 pm	Southeastern Industr	Ms. Julie Johnson	CB
06/12/19	12:51 pm	Cowboy World	Mr Ron Martens	CB
07/10/02	09:22 am	Cowboy World	Mr. Steve Smith	CB
07/10/02	09:31 am	Cowboy World	Mr. Steve Smith	CB
07/10/04	04:32 pm			CB
08/04/10	10:02 am	Cowboy World	Mr. Joe Virginia	CB
08/06/08	09:56 am		Tony Martin Sr.	CB
08/06/29	10:00 am		Ms. Heather Jonesbor	CB

Some of the features in each work center are unique to that specific work center. We will now cover each work center in detail so that you can see all the various concepts in practice.

Credit & Collections

The Credit & Collections work center is a tool to help you automate your Credit & Collections process. In the left hand, tree view, panel of the system, you will find all current open invoices. The default view as the software is delivered is in customer order. The summary panels on the right, show you aging for the highlighted customer, the overall company aging and open to-dos. The summary panels will change as we drill down into the detail.

Tree View of open invoices

Highlighted customer aging

Company aging

Open To Do's for user logged on

Customer Aging

CURRENT	14.00
1-30	14.00
31-60	0.00
61-90	0.00
OVER 90	12,447.31
Total	12,475.31
Disputed	0.00
Days Sales Outstanding	107
Open Sales Orders	0.00
Credit Limit	15,000.00
Last Payment Date	05/10/2008

Total Aging (based on filter selections)

100% = 184,185

Category	Value
CURRENT	14.00
1-30	14.00
31-60	0.00
61-90	0.00
OVER 90	12,447.31

Open To Do

Date	Time	Customer	Contact	Typ
06/12/15	03:16 pm	Southeastern Industr	Ms. Julie Johnson	CB
06/12/19	12:51 pm	Cowboy World	Mr Ron Martens	CB
07/10/02	09:22 am	Cowboy World	Mr. Steve Smith	CB
07/10/02	09:31 am	Cowboy World	Mr. Steve Smith	CB
07/10/04	04:32 pm			CB
08/04/10	10:02 am	Cowboy World	Mr. Joe Virginia	CB
08/06/08	09:56 am		Tony Vertin Sr.	CB
08/06/29	10:00 am		Ms. Heather Jonesbor	CB

To Do's

The bottom right hand panel displays all open to do records for the user logged on. By highlighting the 'to do' option, a detail button becomes available and allows you to maintain the highlighted to do.

Contact	Full Name	Company	Phone	Time Zone	Type	Src	Slsp1	# of Emp	SIC
2537	Mr. Steve Smith	Cowboy World	952-983-0987	Central	CUS	CC	40	55	5903
2538	Mr Bob Gannon	Roark Architectural, Inc.	651-836-0046	Eastern	CUS	CRF	30	340	5904
2539	Mr. Joe Virginia	Cowboy World	952-983-0987	Central	CUS	CC	40	55	5903
2540	Mr. Steve Johnston	Deluxe Equipment Wa...	218-463-1781	Eastern	CUS	CRF	30	500	5034
2544	Mr. Dagny Taggart	Taggart Transcontine...	214-890-8498	Central	CUS	CRF	30	16	
2545	Mr. Eddie Wilers	Taggart Transcontine...	214-890-8498	Central	CUS	CRF	30	16	
2546	Mr. James Wilson	Barnes Machinery & E...	404-223-0934	Atlantic	CUS	CC	30		
2547	Ms. Gaylene Barber	Central Georgia Mater...	404-889-3422	Atlantic	CUS	CC	30		
2548	Mr. Philip Knutson	Equipment Handling ...	404-499-0922	Atlantic	CUS	CC	30		
2552	Ms. Nancy Harrigan	Porsche Pieces, Inc.	404-237-4199	Mountain	CUS	ERF	30		
2553	Mr. Darwin Goodwin	Texas Material Handli...	214-980-4632	Eastern	CUS	VRF	30		
2554	Mr. Clayton Jurkavich	Word Processing Syste...	404-977-9933	Atlantic	CUS	CC	30		
2555	Ms. Freida Porter	East Coast Tool Comp...	404-983-0933	Atlantic	CUS	CC	30		
2556	Mr. David Augustus	Southeastern Servioe ...	404-235-9830	Atlantic	CUS	HAR	30		
2557	Mr. Leonard Porter	Georgia Print Machin...	404-383-9344	Eastern	CUS	CC	30		

Detail Panels

When you are in the customer view, highlight and expand a customer record down to the invoice detail the summary panels change to detail panels. You must have an invoice record highlighted.

Credit & Collections - Current View: Customer - Last Rebuild: 05/02/2006 5:07 PM By: GUI Reminder Status: STOPPED

Maintenance View Export Options

Past Invoice

Contacts for: Deluxe Equipment Warehouse (Customer C101)

Contact	First Name	Last Name	Phone	Type
2540	Steve	Johnsston	218-463-1781	CUS
10003	Ron	Simonsen	507-451-4054	CUS
10015	Bruce	Johnson	218-463-1781	CUS

History Detail

Changes Field: CHANGE_FLAG changed from " " to "C"
 Field: MEMO changed from " " to " "
 Field: DISPUTED_INVOICE changed from "N" to "Y"
 Field: EXCLUDE_FROM_CREDIT_LIMIT changed from "N" to "Y"
 Field: DISPUTED_INVOICE_MEMO changed from " " to "freight"

Collection History

Date	Time	Action	Contact Name	Memo/Reference
05/27/05	4:06 PM	Changed		Changed by: GUI

Filter: None

Viewing by: Customer --> Invoice # --> Reference/Po

Callouts:

- All contacts for the highlighted customer
- Highlighted history detail
- Chronological history of the highlighted invoice

Collection History

The collection history screen will record all transactions that affect a highlighted invoice. This will give you the full chronological history for each invoice. These transactions will each be covered individually. They include:

- **Notes**
- **To Do's**
- **Emails**
- **Attaching External Documents**

- **Document Change to the AR Invoice**
- **Document Entry**

The collection history records can be viewed in the history detail panel by highlighting them. They are all date, time and user code stamped.



Contacts

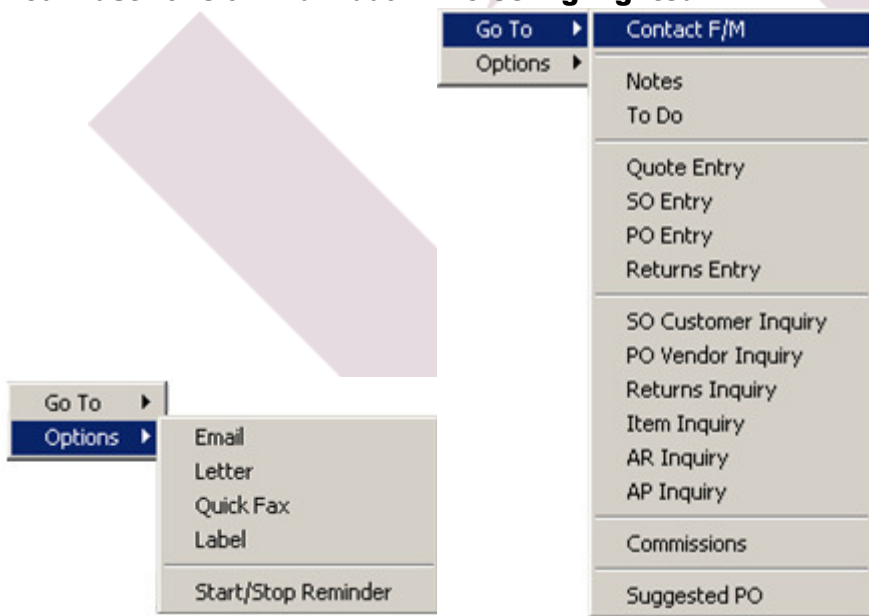
The top panel on the right displays all contacts for the active customer in the left panel. If the FacetPhone® integration is turned on a button will display allowing the user to dial the highlighted contact.

History Detail

The center panel will give you the detail of the selected Collection History record. This includes detail of the note, to-do, email or document change that was made.

Right Click Menus

While you are in the work center you may access any of the standard RM functions. The right click menu is accessible when you select a contact from the upper right detail panel. You must have an individual invoice highlighted.



Button Bar



Customer F/M.

Pressing this button will run the customer F/M program based on the customer highlighted in the tree view. This will utilize the standard Facts security. If you do not have access to the customer file maintenance program, you will get the standard security message.

01-FACTS 7.7 Demo, Customer F/M (ARF910) - Infor

Notes Audit Help

Customer C131 Automation Systems Supply Co.

Main Accounting Invoicing Sales History Miscellaneous User-Defined

Name Automation Systems Supply Co.

Address 1 234 LBJ Freeway

Address 2 Bldg # 4

City Dallas State TX Zip Code 75332

Address 3 Dallas, TX 75332

Alpha AUTOMATION

Contact Information

Contact 1 Joe Phillips Phone 214-890-8792

E-mail

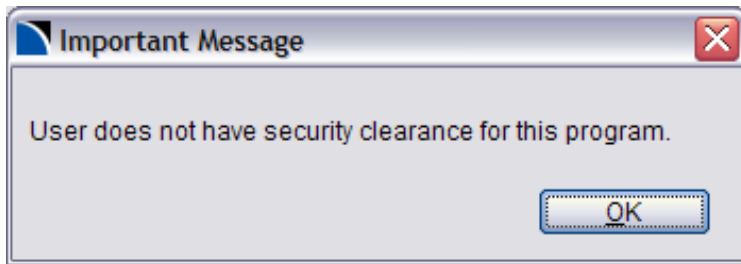
Contact 2 Phone

E-mail

Web Site

RM Contacts

Doc Routing Corp Groups Archives Save Delete New Exit





Edit Document.

Pressing this button will run the Document Change F/M based on the invoice highlighted in the tree view. If no invoice is highlighted or the invoice number field is not visible, the Edit Document button will be disabled. Again, standard Facts security will apply here.

01-FACTS 7.7 Demo, Document Change F/M (ARF210) - Infor

Notes Audit Help

Customer C100 Southeastern Industrial Supply

Document # 001450

Continuation # 0

Current Discount 23.75

Transaction Type IN

Ship-to # S100 Southeastern Industr

Status

Entry Date 10/12/2009

Original Amount 1187.50

Due Date 11/12/2009

Original Cost 600.00

Discount Due Date 10/30/2009

Original Discount 23.75

Entry Period 10/2009 OCT

Current Amount 1187.50

Memo 12245

Last Sequence # 0

Disputed Invoice

Register # 0295

Disputed Inv Memo

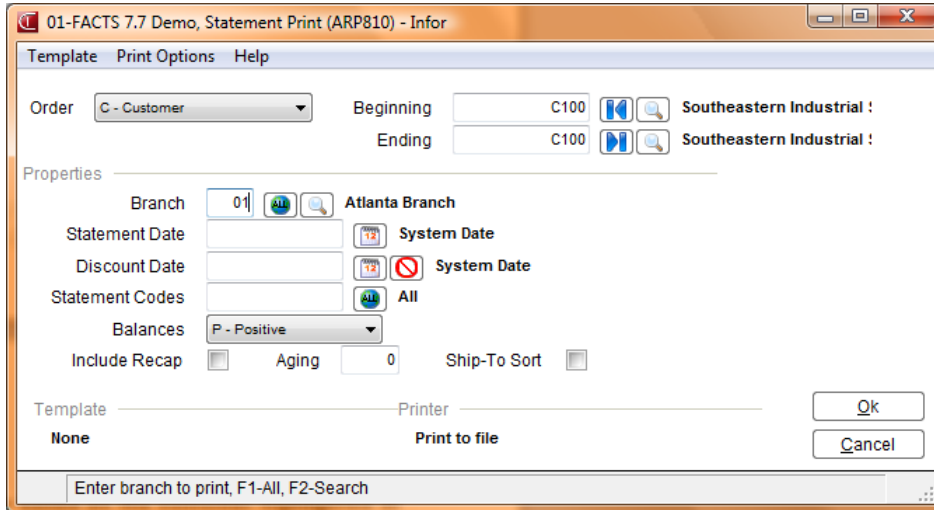
Branch 01 Atlanta Brar

Exclude from Credit Check Exclude from Dunning Letter

Save Delete New Exit

Statement Print

This option will run the AR Statement Print program based on the customer highlighted or selected in the tree view. If the user has a default print template defined for the statement print, the order will be changed to customer and the beginning and ending customer number will be loaded with the highlighted or selected customer. All other print template default fields will be as last saved for the print template. If no template is defined, the customer will not pre-fill. You must select the customer.



01-FACTS 7.7 Demo, Statement Print (ARP810) - Infor

Template Print Options Help

Order: C - Customer Beginning: C100 Southeastern Industrial : Ending: C100 Southeastern Industrial :

Properties

Branch: 01 Atlanta Branch

Statement Date: System Date

Discount Date: System Date

Statement Codes: All

Balances: P - Positive

Include Recap: Aging: 0 Ship-To Sort:

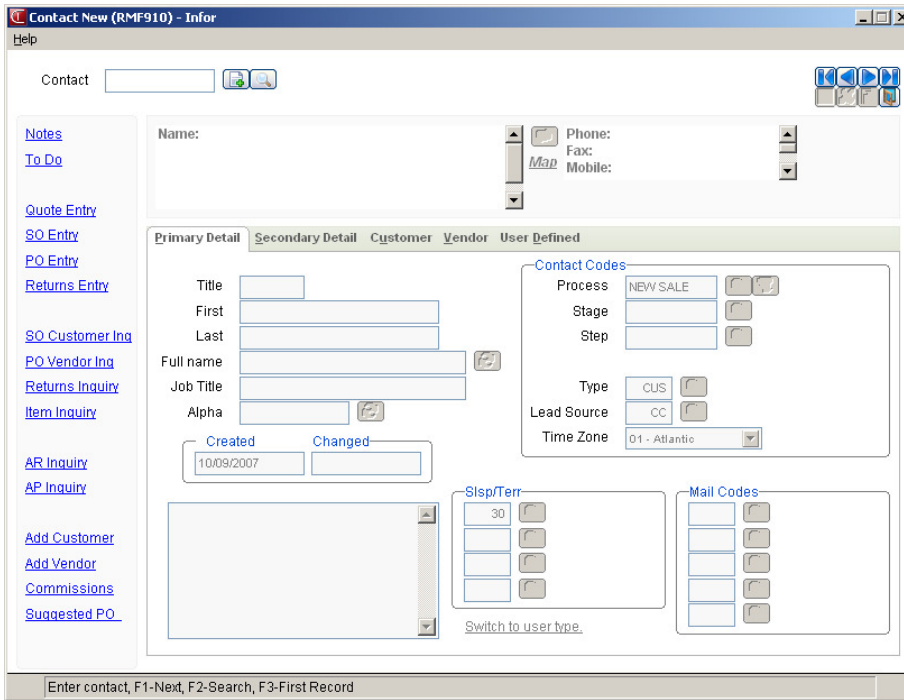
Template: None Printer: Print to file

Ok Cancel



Enter branch to print, F1-All, F2-Search

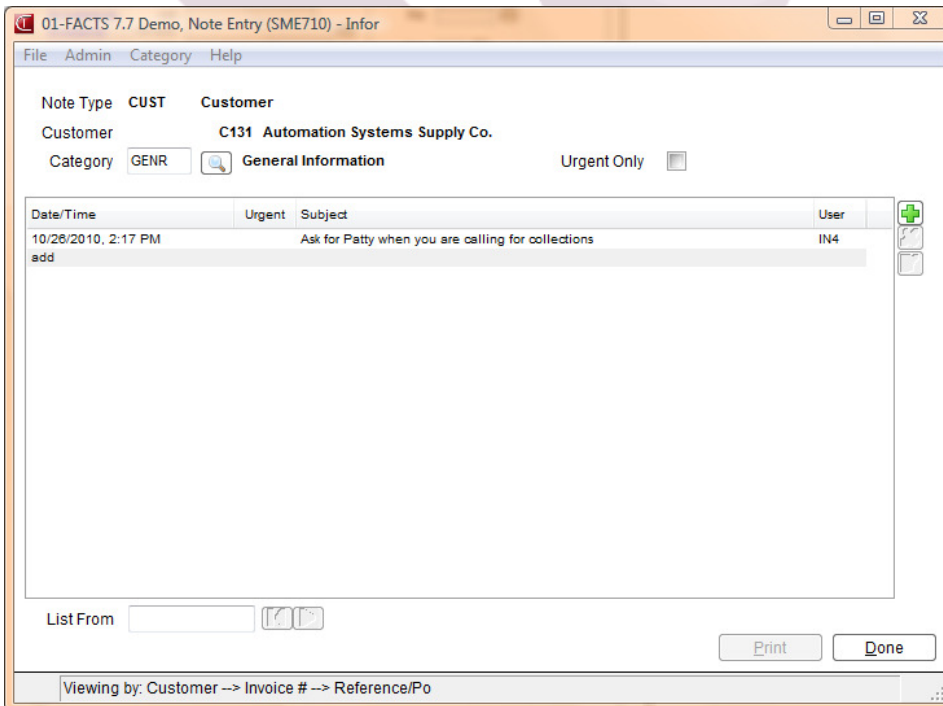
Add Contact

Pressing this button will run the contact F/M program so that a new contact can be added for the highlighted or selected customer.



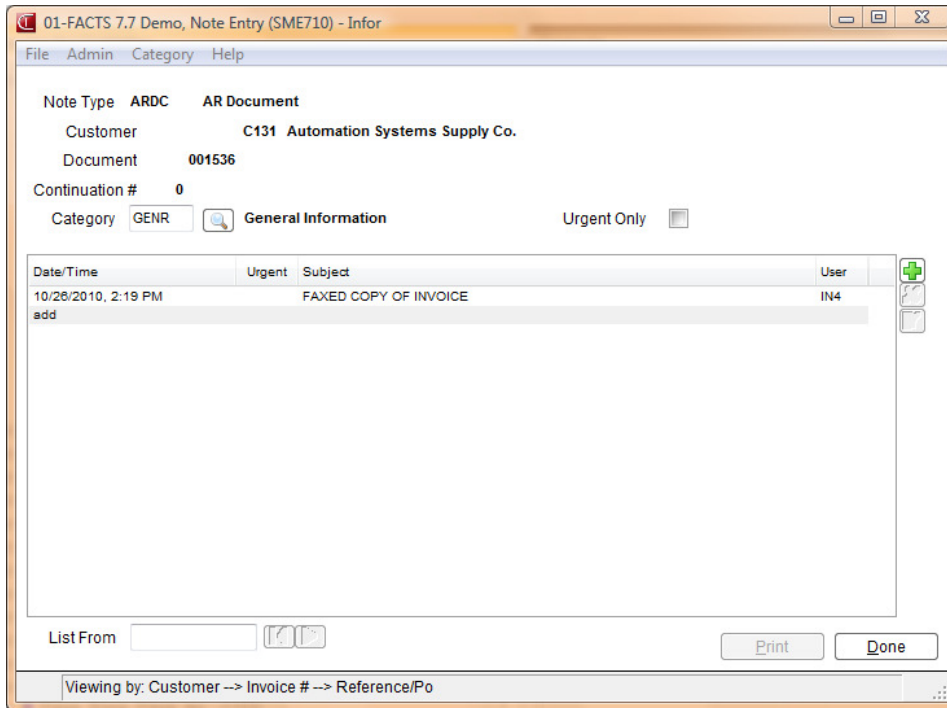
& Customer Notes

If customer notes are on file for the selected customer, the  button is displayed otherwise the  icon is displayed. Notes can be displayed or entered by pressing this button.



& AR Document Notes

If document notes are on file for the selected document, the  button displays otherwise the  button is displayed. Notes can be displayed or entered by pressing this button.

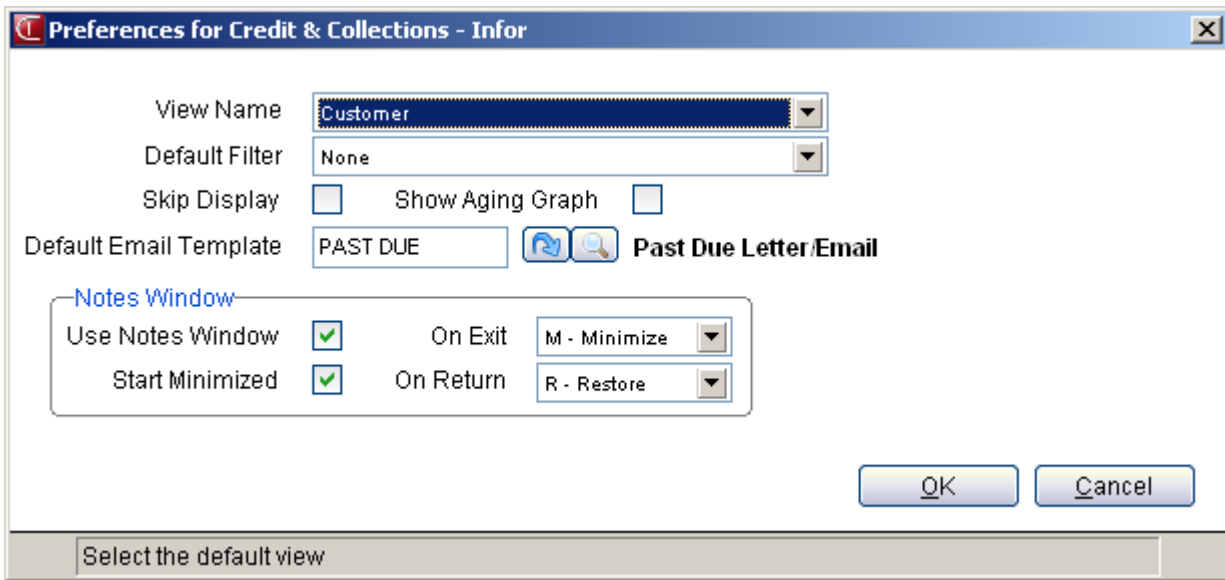


Date/Time	Urgent	Subject	User
10/28/2010, 2:19 PM	add	FAXED COPY OF INVOICE	IN4

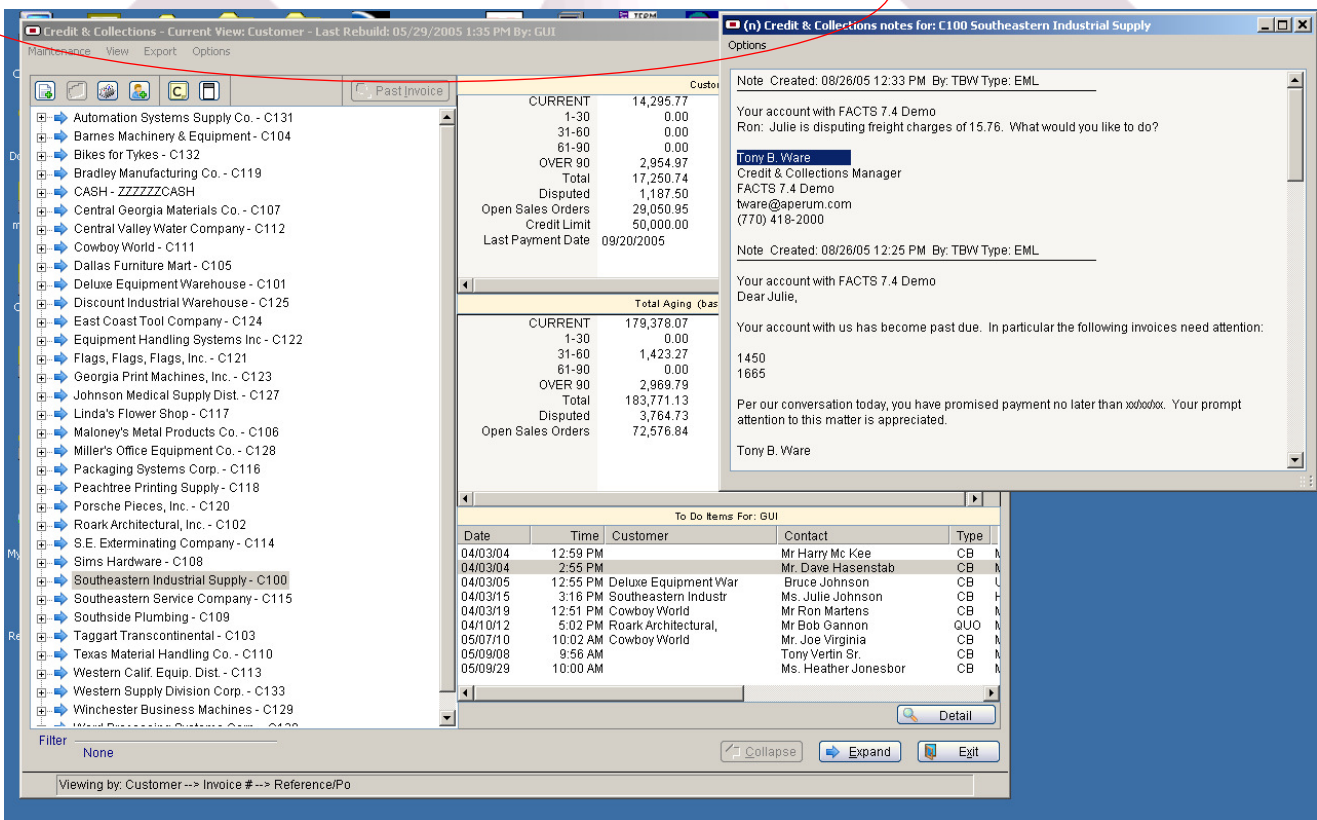
Floating Notes

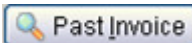
In order to allow users to have access to the collections note for a customer the user can decide to use the floating notes that are available in the Credit and Collections manager. The floating notes will display all the collection notes for a customer in descending date order. The floating note window will display on top of all other windows and can be resized to fit anywhere on the work center or desktop.

The user preferences is where the floating notes can be turned on or off.



The user can also control how the floating notes window will operate when used. They can select to have the window start minimized. When exiting to another program the options are: minimize, hide, or no action. On return from another program: restore to previous state, minimize, hide, or no action.





Past Invoice

Pressing this button will run the past invoice document inquiry program based on the invoice highlighted in the tree view. If no invoice is highlighted or the invoice number field is not visible, the Past Invoice button will be disabled.

Past Invoice 001915

Doc Detail by Document

Customer C131
Automation Systems Supply Co.
234 LBJ Freeway
Bldg # 4
Dallas, TX 75332

Init Whse 01 Atlanta Warehouse
Ship-To SAME
Automation Systems Supply Co.
234 LBJ Freeway
Bldg # 4
Dallas, TX 75332

Invoice 04/15/2010
Shipped 04/15/2010
Salesperson 40 Daniel Simmons
Terms 01 1% 10th Net 30
Priority Normal

Ship Via FED EX P2
Reference

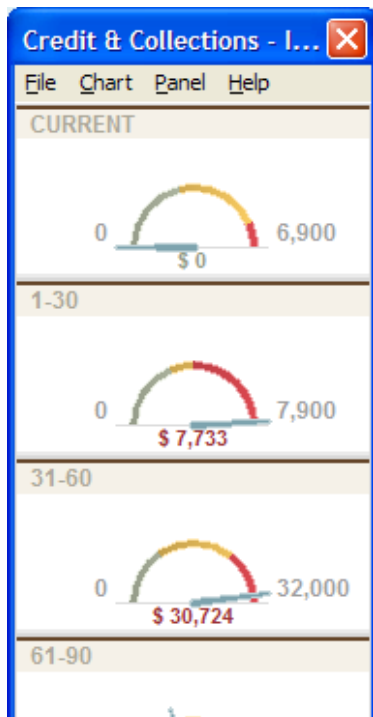
Ordered By

GL Posting AR Detail

LN#	Item	Flags	WH	Ordered	Ship	Backorder	UM	Price	UM	Extension	Full
<p>Merchandise 781.25 Misc Amt .00 Discount .00 Taxable 781.25 Tax .00 Freight .00 Doc Total 781.25</p>											

Viewing by: Customer --> Invoice # --> Reference/Po

Credit & Collections Dashboards



Options

- Configure Views
- Filters
- Refresh Data
- Preferences
- Note Window
- Dashboards
- Show Aging Chart

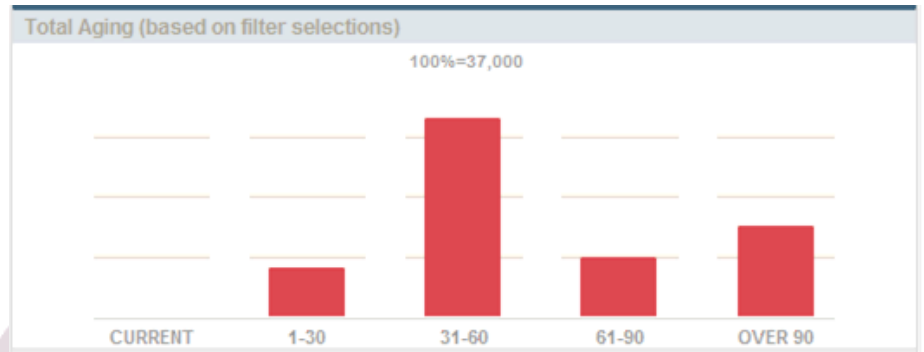
Viewing by: Customer

- Dallas Furniture M
- Deluxe Equipmer
- Maloney's Metal P

Past Invoice Current Filter: D

A collection of dashboards & graphs have been created to work in conjunction with the Credit & Collections Work Center. These dashboards synchronize with the Work

Center to display aging totals, days sales outstanding and disputed invoice totals. When the totals change due to filters being applied or the Work Center being refreshed, the dashboards will change to reflect the new values. New items have been added to the Options menu of the Work Center to launch the dashboards and to show/hide the aging graph.



As with all dashboards, the user can change the colors and intervals where one color changes to the next. For each individual dashboard, you have the option to show or hide. Your selections are saved in a preferences file so that the next time you launch only the dashboards you have selected to show will be displayed.

01-FACTS 7.6 Demo, Aging detail for OVER 90 (RMI654) - Infor

Options Export Help

Customer	Customer Name	Document	T	Due	Original	Current	Entered	Period	Ship-
C131	Automation Systems Supply Co.	001536-0	IN	06/30/2007	1075.90	1075.90	05/08/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001571-0	IN	06/30/2007	1337.77	1337.77	06/30/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001602-0	IN	06/30/2007	1490.47	1490.47	06/30/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001632-0	IN	06/30/2007	1267.12	1267.12	06/30/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001652-0	IN	06/30/2007	1686.25	1686.25	06/30/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001695-0	IN	06/28/2007	533.70	533.70	06/28/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001708-0	IN	06/28/2007	1444.95	1444.95	06/28/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001736-0	IN	06/30/2007	911.10	911.10	06/28/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001748-0	IN	06/28/2007	625.00	625.00	06/28/2007	2007/06	SAI
C131	Automation Systems Supply Co.	001783-0	IN	07/01/2007	360.60	360.60	07/01/2007	2007/07	SAI
C131	Automation Systems Supply Co.	001885-0	IN	05/10/2007	933.20	933.20	04/15/2007	2007/05	SAI
C131	Automation Systems Supply Co.	001915-0	IN	05/30/2007	781.25	781.25	04/15/2007	2007/05	SAI

AR Detail View Invoice Close

The customer and company aging now includes Days Sales Outstanding based on the following formula:

1. Calculate the number of days old for each invoice based on the aging date which is either the invoice or due date depending on the aging control settings.
2. For each invoice with a positive balance, accumulate the balance.
3. For each invoice with a positive balance, accumulate the balance times the number of days old described in step 1.
4. Divide the total from step 3 by the total from step 2 and round to a whole number to arrive at the number of days sales outstanding.

For example:

Invoice 1: \$1500 x 45 days old:	67500	Or: \$1500 x 15 days old:	22500	
Invoice 2: + \$150 x 15 days old:	+ 2250	+ \$150 x 45 days old:	+ 6750	
Totals: \$1650	69750		\$1650	29260
	÷ \$1650		÷ \$1650	
Days Sales Outstanding:		42		18

The screenshot shows the Infor Credit & Collections interface. The main window displays a list of invoices for 'Southeastern Industrial Supply - C100'. The 'Customer Aging' report on the right shows the following data:

Customer Aging	
CURRENT	0.00
1-30	0.00
31-60	0.00
61-90	0.00
OVER 90	105.00
Total	105.00
Disputed	0.00
Days Sales Outstanding	105
Open Sales Orders	114,214.17
Credit Limit	9,999,999.00
Last Payment Date	09/21/2004

The 'Total Aging (based on filter selections)' report shows:

Total Aging (based on filter selections)	
CURRENT	0.00
1-30	7,732.55
31-60	30,724.38
61-90	9,285.41
OVER 90	14,100.10
Total	61,842.44
Disputed	0.00
Days Sales Outstanding	65
Open Sales Orders	992,991.81

The 'Open To Do' section shows a list of tasks with columns for Date, Time, Customer, and Contact.

Menu Bar

Maintenance

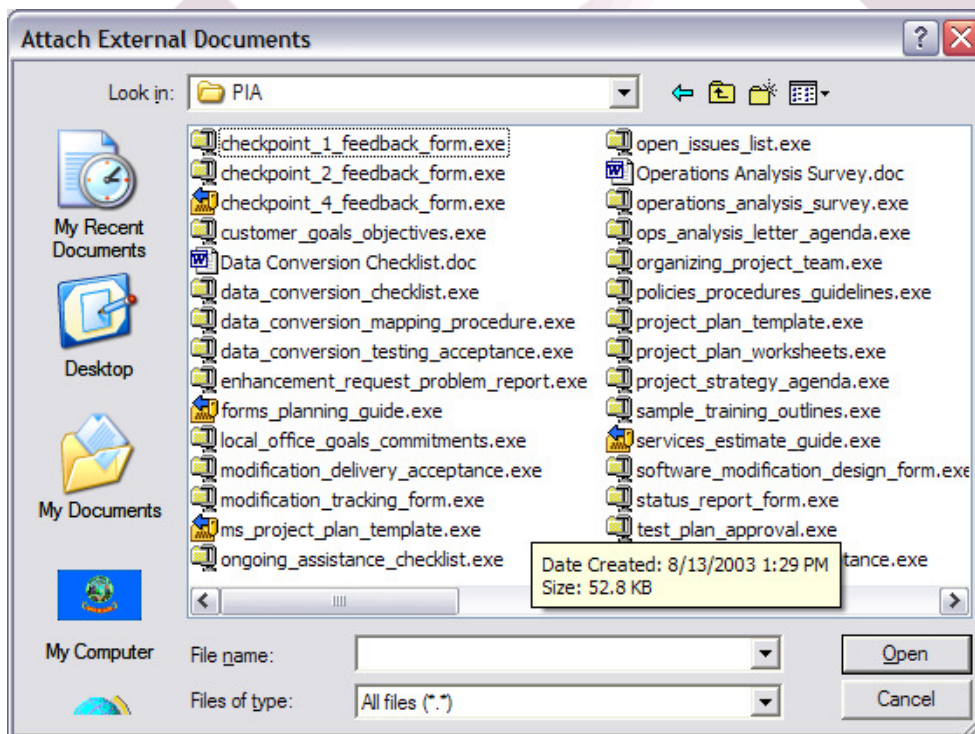
The maintenance menu has the following options:

- Customer F/M
- Edit Highlighted Invoice
- Statement Print
- New Contact
- Attach External Document
- Quit

The first 4 options correspond to the first 4 buttons on the button bar. It is simply a matter of preference as to which is used.

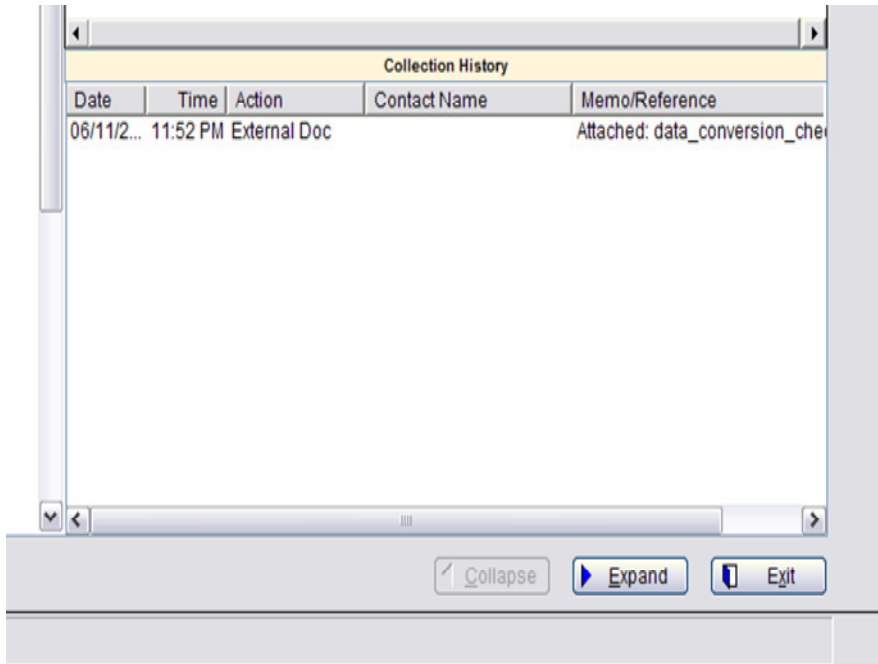
Attach External Document

This menu option will display a file selection window. If a document is selected, a history record is created with the action code of 'External Doc' for the invoice that is highlighted. When this item is highlighted in the collections history panel, the history detail panel will display the document path.



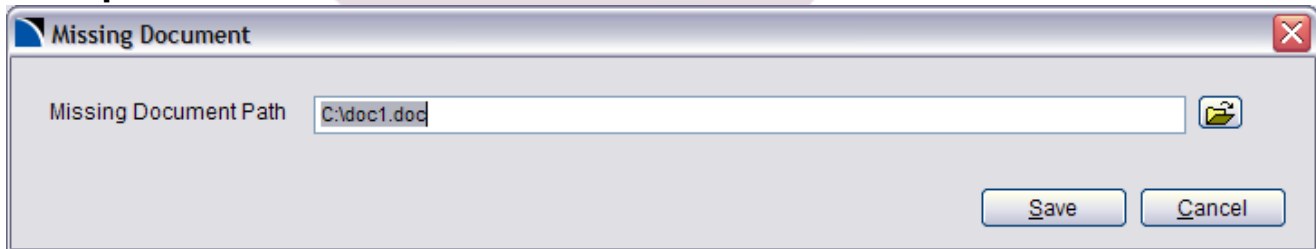
Folders (directories) may now be attached to an entity by entering 'dir' as the file name after opening the desired folder. Opening a folder attachment opens a window to the specified folder. This is useful when the entire folder's contents are related to the entity it is attached to.

Sample of history record created:



A right click menu is available when you have an external document history record highlighted. The options are:

- **Open Document** – The program will attempt to open the attached document. If the document is not found, a dialog box opens prompting you for the missing document path. If the document has moved, you have the option to locate it and change the path.



- **Detach Document** – This option removes the document path from the invoice and creates a history record to note the action.

View

The view menu contains a dynamically generated list of defined views. When a view is selected, the tree view panel is redisplayed using the selected view. Please refer to the [Configure Views](#) menu section for a detailed discussion of how views are created. The standard views delivered with the software are:

- View by Customer
- View by Disputed
- View by Branch
- View by Amount
- View by Salesperson

Options

Configure Views

View Control - CREDIT & COLLECTIONS Current view: Tree

Select View Edit

Credit & Collections Fields:

- CURRENT AMOUNT
- CUSTOMER #
- DISPUTE MENO
- DISPUTED?
- DUE DATE
- ENTRY DATE
- INVOICE #
- INVOICE CONTINUATION NUMBER
- INVOICE MEMO
- ORIGINAL AMOUNT

Contact Fields:

- RM CONTACT PHONE

Association Fields:

- CREDIT CHECK DAYS
- CREDIT CHECK TYPE
- CREDIT LIMIT
- INDUSTRIAL
- SHIP-TO
- TERMS CODE

To select a field, drag it from one of the columns above to the grid below

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	Field Name 5	Field Name 6
1	Customer	CUSTOMER #	INVOICE #				
2	Disputed	DISPUTED?	CUSTOMER #	INVOICE #			
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

Save Exit

The view that an end user will maintain the most frequently is the tree view panel. This is the panel where you can choose the data you wish to display, and the order in which you wish to display it. This is the default view to edit when you select configure views. These views are system wide. You may have up to 15 views each with 6 data fields.

Grid Entry

View Name Column – View description for the row of fields. These are entered by clicking into the cell to edit

Field Names – Previously defined fields that are dragged from any one of the 3 columns on top and dropped onto the grid

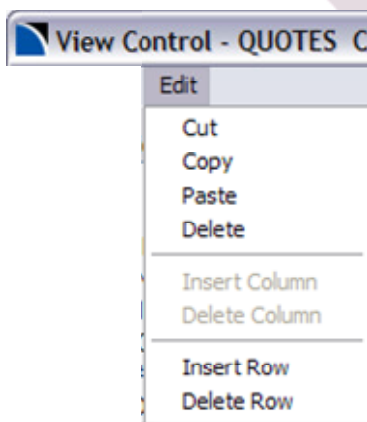
Menu

Select View

The Select View menu is built dynamically based on security and the work center you are in. The only view you may maintain from Credit & Collections is the tree view. The Select View menu is not active in this application.

Edit

The edit function allows you to insert rows or columns as appropriate. Position your cursor, where you wish and select the insert row.



Filters

Filters allow you to limit the data that appears in your tree view. You can perform multiple level filters. All filter set-ups can be defined as templates to select as you wish.

Following is a sample filter that displays only invoices that are greater than 0 and are 90 days old.

Any/All Selection

A button is available to allow a toggle of 'any' or 'all' options when you have multiple levels in your filters.

For multiple level filters select any or all

	Filter Field	Filter Type	Results
1	DUE DATE	Age Dates	Today is more than 60 days past the Due Date
2	CURRENT AMOUNT	Greater Than/Less Than	Current Amount greater than or equal to 0
3			
4			
5			
6			
7			
8			
9			
10			
11			

Filtering options will depend on the type of data field you have selected, text, numeric, or date.

Text – File Maintained Field Filters

When you select a field that exists in another Facts file maintenance i.e., customer number, you will get the following:

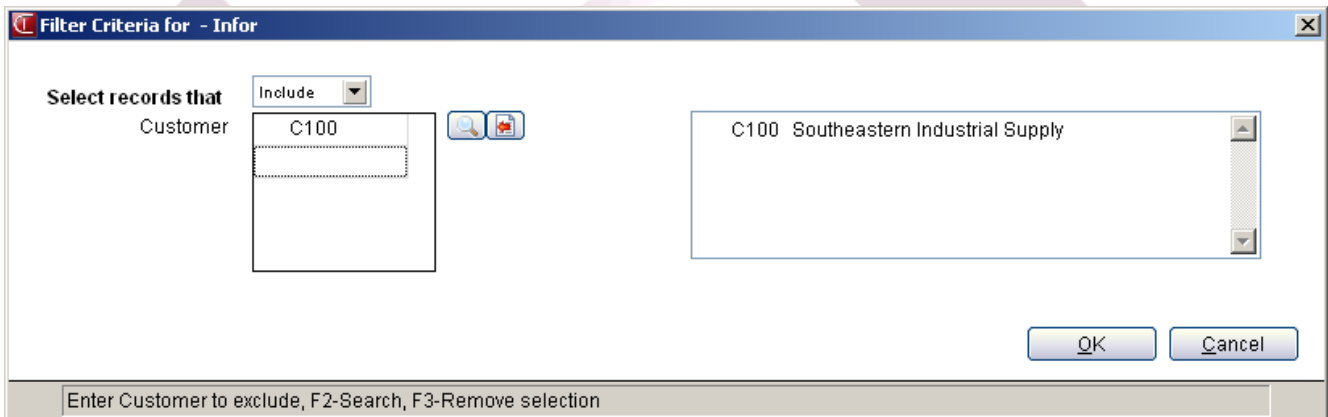
Beginning/Ending Range
Include/Exclude
Starts With/Contains

Beginning Ending Range:

If this is an existing field in another facts file, i.e., customer number search options will be available.



Include/Exclude

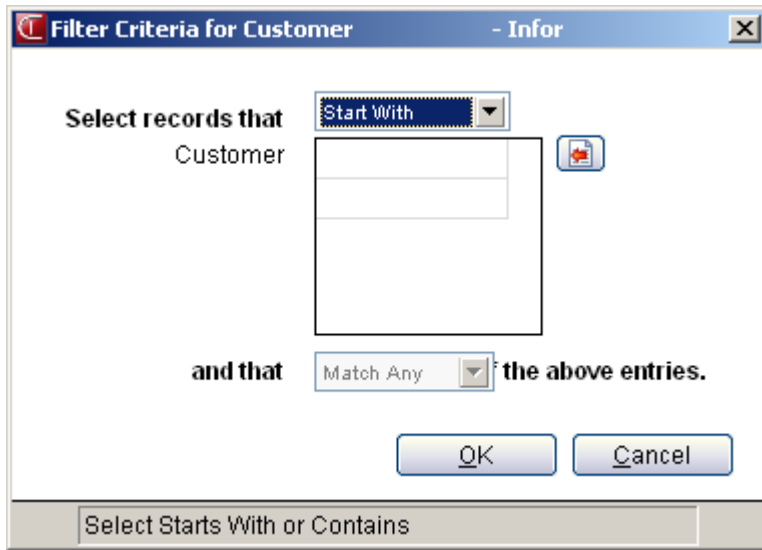


Select either the include option or the exclude option and list specific records in the box below. Selections are listed in the right hand panel.

Starts With/Contains:

Select whether your filter will be based on the field starting with specific characters, or whether the entire field contains a string of characters.

Any/All Selection is only available when you select the 'contains' option. This identifies whether the filter will use an 'and' or an 'or' when selecting data.



Text Field Filters

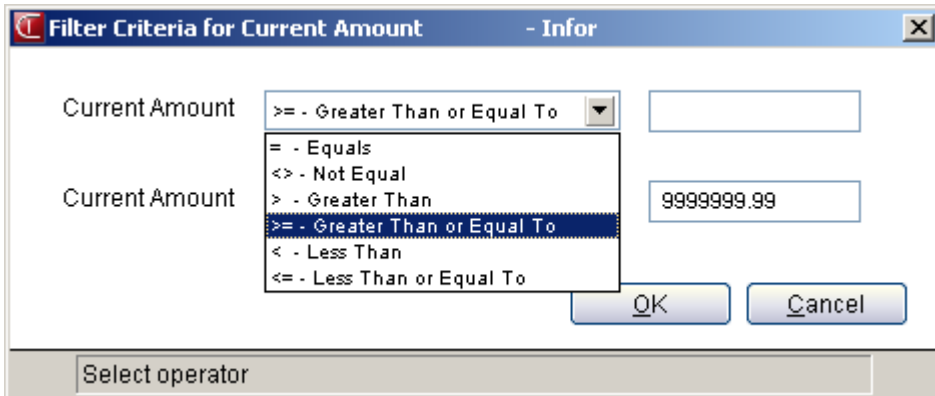
Text fields that are not available in other Facts file maintenances, give you these options. Searches are not available.

Beginning/Ending Range
Starts With/Contains

Details covered above.

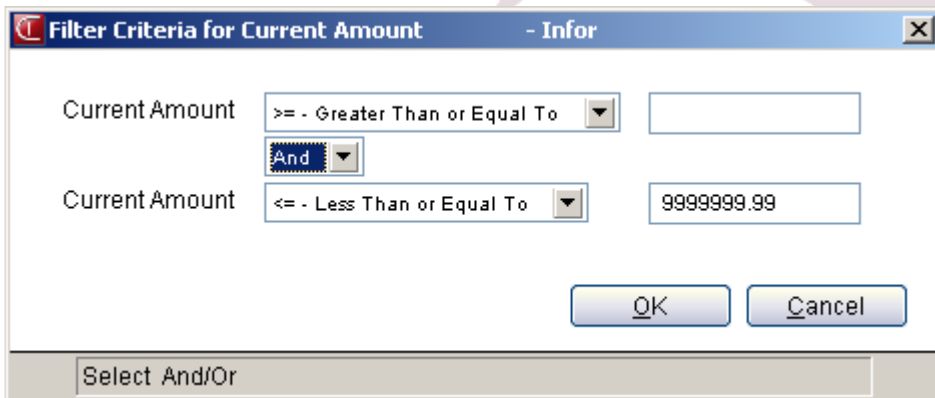
Numeric Field

When working with numeric fields, you can select one of the following:



The screenshot shows a dialog box titled "Filter Criteria for Current Amount" with a close button (X) in the top right corner. The dialog contains two rows, each with the label "Current Amount". The first row has a dropdown menu set to ">= - Greater Than or Equal To" and an empty text input field. The second row has a dropdown menu set to "> - Greater Than" and a text input field containing "9999999.99". A dropdown menu is open over the first dropdown, listing the following options: ">= - Greater Than or Equal To", "= - Equals", "<> - Not Equal", "> - Greater Than", ">= - Greater Than or Equal To" (highlighted), "< - Less Than", and "<= - Less Than or Equal To". At the bottom right are "OK" and "Cancel" buttons. At the bottom left is a text box labeled "Select operator".

You can then select an 'and' or an 'or' function to execute multiple layers.



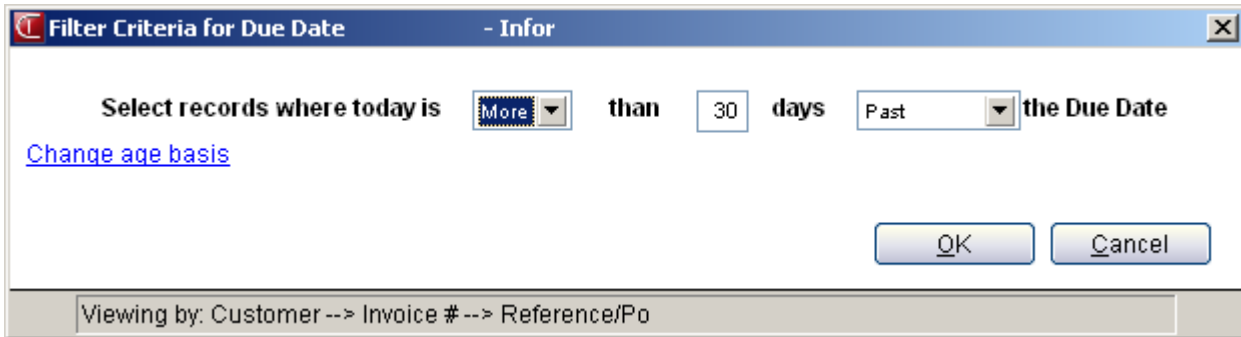
The screenshot shows the same dialog box as above. The first row remains the same. The second row now has a dropdown menu set to "<= - Less Than or Equal To" and a text input field containing "9999999.99". A dropdown menu is open between the two rows, showing the options "And" (highlighted) and "Or". At the bottom right are "OK" and "Cancel" buttons. At the bottom left is a text box labeled "Select And/Or".

Dates

This process allows you to age date fields from Facts. The system will default to using today's date as the basis for the aging. You can enter a numbers of days and then specify whether you want 'past' or 'prior to' a specific fields in Facts.

Example:

1. All invoices that are 90 days old:



Filter Criteria for Due Date - Infor

Select records where today is **More** than **30** days **Past** the Due Date

[Change age basis](#)

OK Cancel

Viewing by: Customer --> Invoice # --> Reference/Po

Change Age Basis



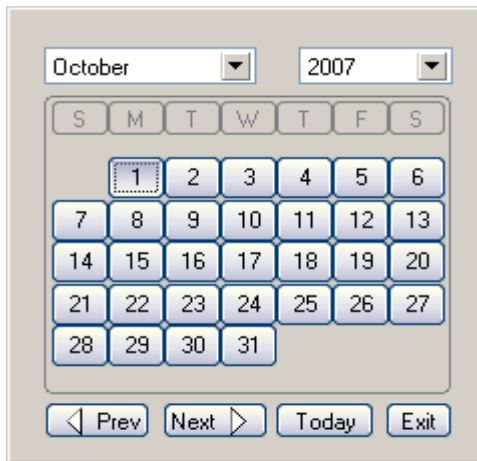
Aging Basis - Infor

10/01/2007

OK

This allows you to change the date that is used for aging the dates. It defaults to the system date.

The first icon  on the screen is a calendar function



The second icon  defaults to the system date.

2. Show me all customers that have purchased anything in the last 30 days (based on the date last sale field)



3. Show me all invoices that are going to be past due in 7 days or less.

Filter Criteria for Due Date - Infor

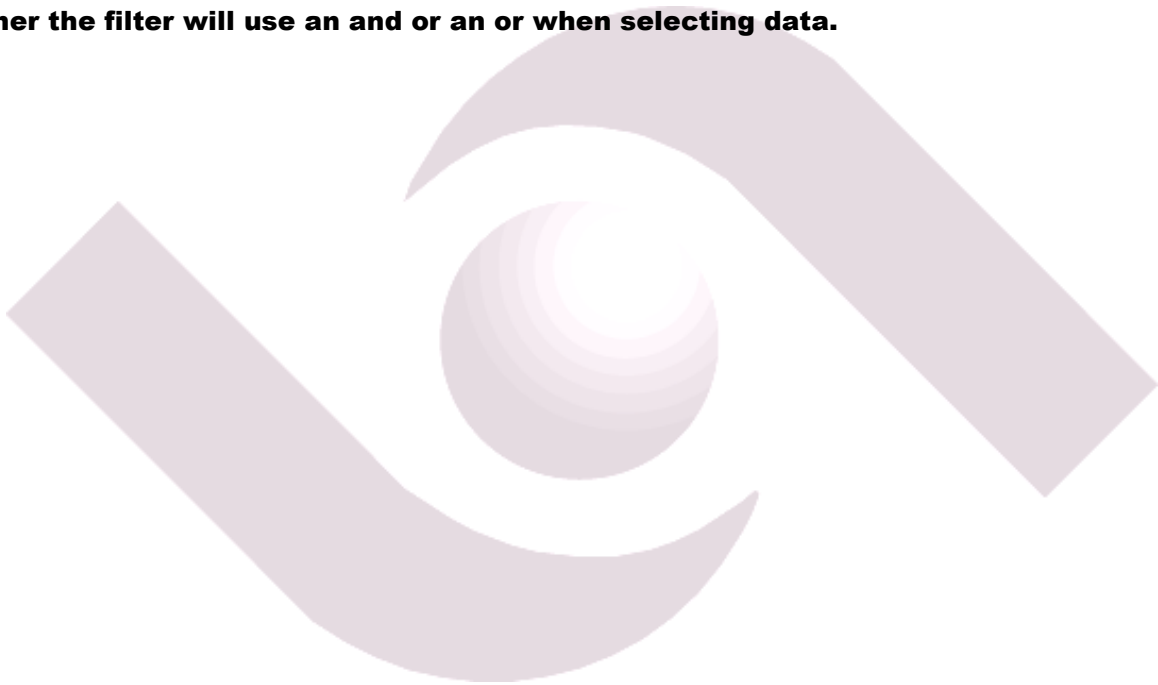
Select records where today is **Less** than **7** days **Prior to** the Due Date

[Change age basis](#)

OK Cancel

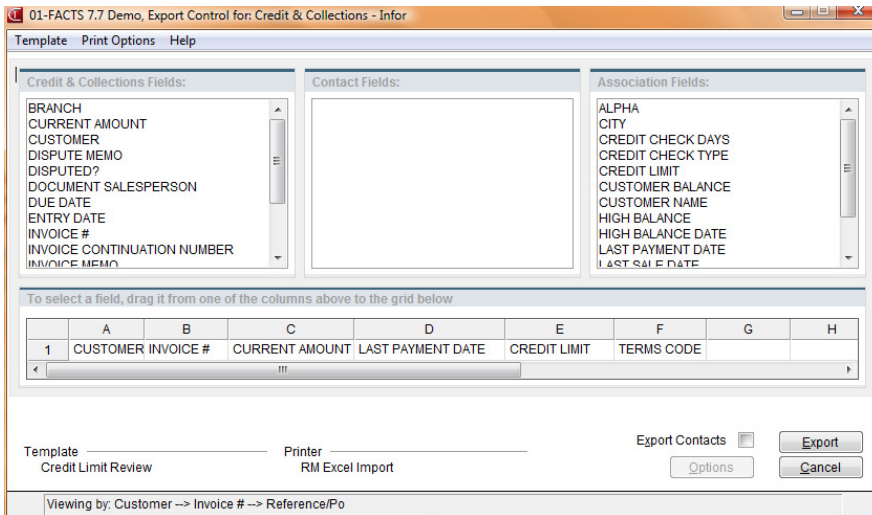
Viewing by: Customer --> Invoice # --> Reference/Po

Any/All Selection is only available when you select the 'contains' option. This identifies whether the filter will use an and or an or when selecting data.



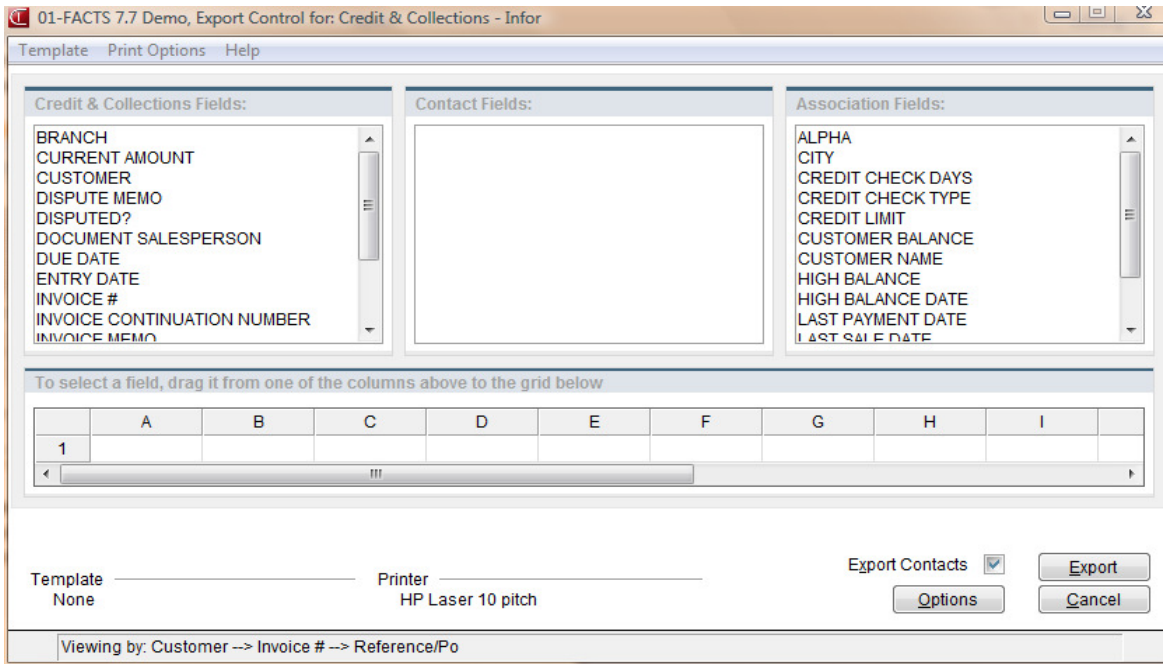
Export

The export menu is displayed if the user has the proper security. The security is set by query. When the export option is selected, the following screen is displayed. See security for more details. Exports will follow and utilize any filter you currently have applied.



Contacts associated with data in selected work centers can now be exported. The contacts exported correspond to the filtered data in the work center. The contact import has been enhanced to allow the importing of contacts directly into a broadcast list. Work centers where export is available are:

- **Customer Profile Manager**
- **Vendor Profile Manager**
- **Credit & Collections**



Two new buttons have been added to the export screen. When exporting contacts, column A must be the customer or vendor number.

- **Export Contacts:** The export contacts check box must be checked in order to export contacts
- **Options:** The options button is enabled only when the export contacts check box is checked.

- **Broadcast List/Description:** The broadcast list can be an existing or new list. The search brings up existing lists and fills in the description. If a new list name is entered, the description field must be filled in.
- **Contact Type Filter:** The contact type filter has the same functionality as the corresponding field in the contact filter screens. You can leave the field blank to include all types or select a single or multiple contact types. A search is available for selecting contact types.
- **Mail Code filter:** The mail code field has the same functionality at the corresponding field in the contact filter screens. You can leave the field blank to include all codes or select a single or multiple mail codes. A search is available for selecting mail codes.
- **Export Missing:** The export missing check box allows you to exclude customer/vendor records that do not have a contact record defined.

The export filter logic works on the type or mail code. If a contact matches either the type or mail code, the contact will be exported.

Exporting

When exporting contacts, the first 6 columns are reserved for the broadcast fields:

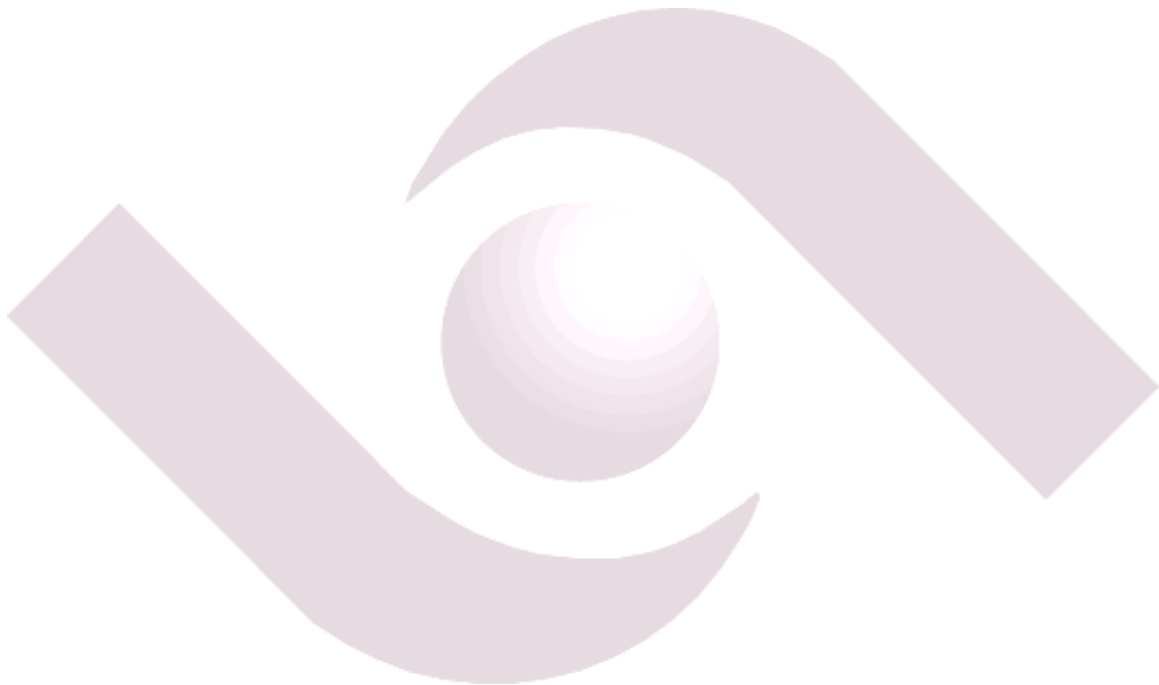
- **List Name**
- **List Description**
- **Line Number**
- **Contact Number**
- **Email Address**
- **Fax Number**

The export does this automatically. All of the work center fields selected will start in the first column after the required fields.

Export Templates

The templates allow you to define multiple export options and configurations at a system level and a user level. The template and print options functionality is identical to the report template and options and will not be discussed in detail here.

Printer Selection Note – The standard export to Excel printer is DDE. When this printer is selected, Excel will be opened and the contents of the tree view will be exported. If you choose any other printer, the data will be printed in a tab delimited format.

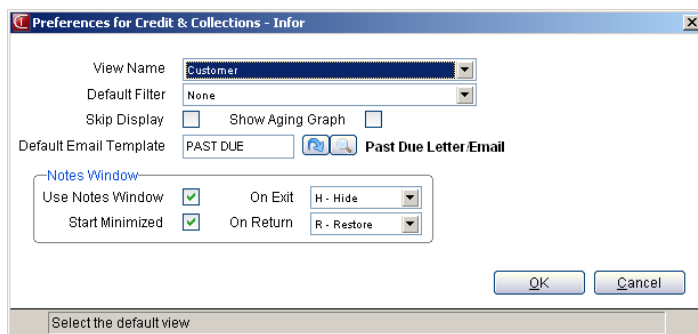


Refresh Data

While you are in a work center, data can be changing from other sources within Facts or within the work center itself. For example, while you are working in Credit & Collections, someone may be utilizing cash receipts and applying cash to open invoices. The refresh data option allows you to go out and refresh the work center with current Facts data. Another example would be if you marked an invoice as disputed; it will not display that way until you refresh the data.

User Preferences

Each user can define preferences for some basic defaults.



View Name: Enter the default view name you wish to load when starting the Credit & Collections Work Center.

Default Filter: Select the filter template you wish to use as your default when starting the Credit & Collections Work Center.

Skip Display: If this option is selected the filter window will not display when you start the Credit & Collections Work Center. If it is turned off, the filter window will display first allowing you to maintain or select a different filter when you access the program from the menu. This option is only applicable if you have a default filter selected.

Synchronization

Just like other areas in RM the standard Facts synchronization feature is available. You can synchronize the Credit & Collections work center to the RM contact inquiry, AR customer inquiry and/or the SO Customer inquiry.

Quotes Work Center

The quotes work center gives you a tool to track all quotes, assign them a status and follow up or report on any of the quotes or options. All of the same functionality and capabilities that exist in Credit & Collections apply here. We will only cover the differences.

The screenshot shows the 'Quotes - Last Rebuild: 10/05/2007 9:09 AM By: GUI (RME290) - Infor' window. The interface is divided into several sections:

- Tree View of open quotes:** A list of customers and quotes on the left. 'Cowboy World - C111' is highlighted.
- Highlighted customer statistics:** A table showing statistics for the selected customer.
- Company statistics:** A table showing statistics for the selected company.
- Open quotes about to expire:** A table listing quotes with their expiration dates and amounts.

Category	Count
Open	2
Expired	3
Accepted	1
Declined	0
Partial	0
Total	6
Open Amount	465
Expired Amount	18,272
Accepted Amount	0
Declined Amount	0
Partial Amount	0

Category	Count
Open	15
Expired	5
Accepted	11
Declined	0
Partial	1
Total	32
Open Amount	56,048
Expired Amount	26,381
Accepted Amount	6,105
Declined Amount	0
Partial Amount	1,660

Exp Date	Customer	Quote #	Reference	Amount
08/17/08	Aero-Space-Computer Sup...	000817	1021	2378.50

Open Quotes About to Expire

The bottom right hand panel displays all open quotes about to expire. By highlighting a quote record and doing a right click a detail button becomes available and allows you to maintain or access an inquiry for the highlighted quote.

The screenshot shows the Infor software interface with the following components:

- Viewing by: Customer** (Left Panel): A tree view of customers. 'Cowboy World - C111' is highlighted.
- Statistics** (Top Right Panel):

Open	2
Expired	3
Accepted	1
Declined	0
Partial	0
Total	6
Open Amount	465
Expired Amount	18,272
Accepted Amount	0
Declined Amount	0
Partial Amount	0
- Company Totals (Based on filter selections)** (Middle Right Panel):

Open	15
Expired	5
Accepted	11
Declined	0
Partial	1
Total	32
Open Amount	56,048
Expired Amount	26,381
Accepted Amount	6,105
Declined Amount	0
Partial Amount	1,660
- Quotes About To Expire** (Bottom Right Panel):

Exp Date	Customer	Quote #	Reference	Amount
08/17/08	Aero-Space-Computer Sup...	000817	1021	2378.50

Detail Panels

When you are in the customer view, highlight and expand a customer record down to the quote detail the summary panels change to detail panels. You must have a quote record highlighted.

The screenshot shows the 'Quotes' application window. The left pane displays a tree view of customers and quotes. The right pane contains three summary panels. Red boxes and arrows highlight specific areas:

- Quote detail:** Points to the tree view where 'Cowboy World - C111' is selected.
- Quote summary:** Points to the 'Statistics' panel.
- Highlighted history detail:** Points to the 'Company Totals (Based on filter selections)' panel.
- Chronological history of the highlighted quote:** Points to the 'Quotes About To Expire' table.

Open	2
Expired	3
Accepted	1
Declined	0
Partial	0
Total	6
Open Amount	465
Expired Amount	18,272
Accepted Amount	0
Declined Amount	0
Partial Amount	0

Open	15
Expired	5
Accepted	11
Declined	0
Partial	1
Total	32
Open Amount	56,048
Expired Amount	26,381
Accepted Amount	6,105
Declined Amount	0
Partial Amount	1,660

Exp Date	Customer	Quote #	Reference	Amount
08/17/08	Aero-Space-Computer Sup...	000817	1021	2378.50

Quote History

This functions the same as Credit & Collections, see that section for more detail.

Quote Summary

This panel is user definable and lists details about the quote. See configure views for more information.

History Detail

This functions the same as Credit & Collections, see that section for more detail.

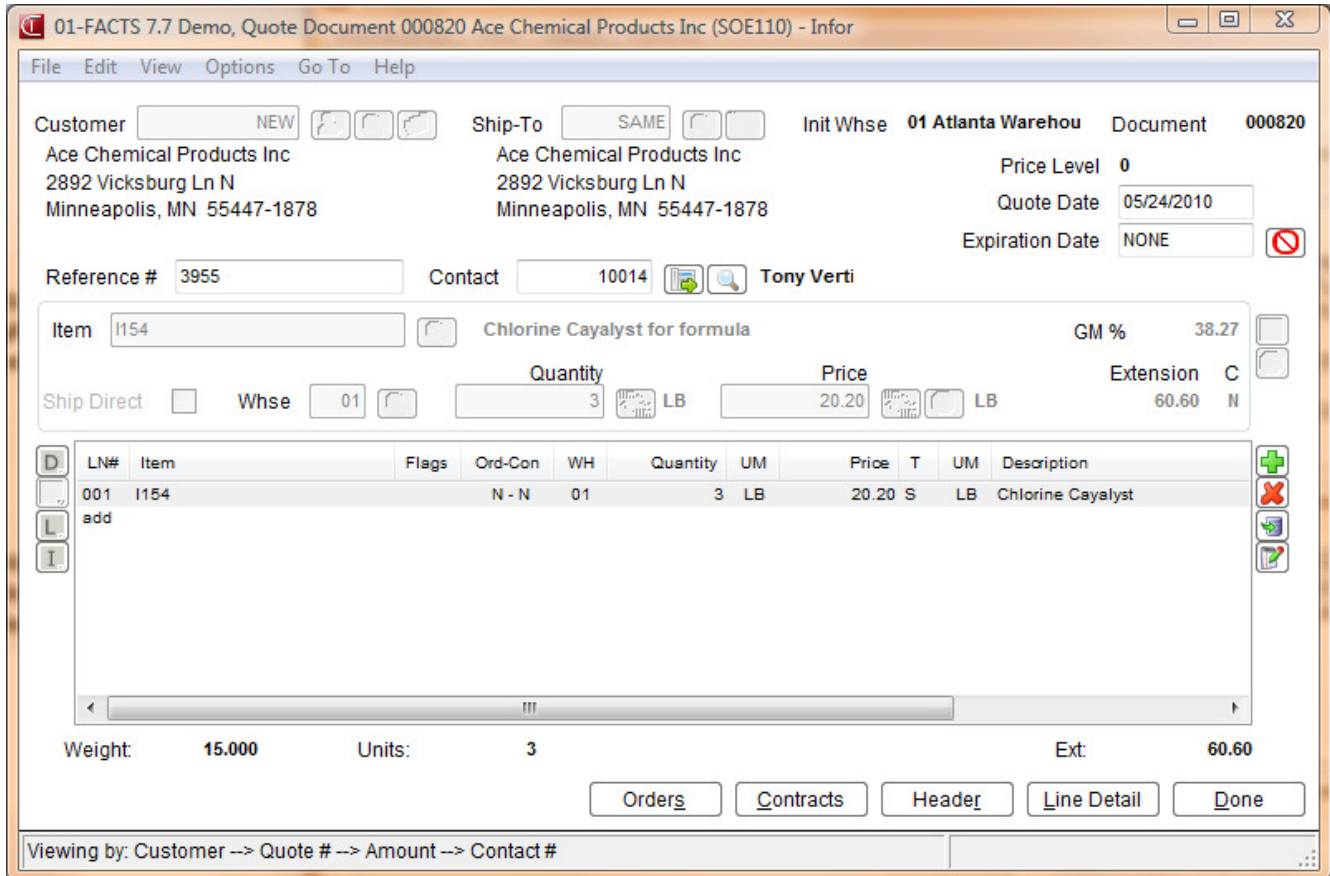
Right Click Menus

This functions the same as Credit & Collections, see that section for more detail.

Button Bar

New Quote

Pressing this button will execute the quote entry program allowing you to create a new quote for the customer or prospect you have highlighted. Make sure you select a contact and have your quote entry options set up to prompt for the RM contact.



01-FACTS 7.7 Demo, Quote Document 000820 Ace Chemical Products Inc (SOE110) - Infor

File Edit View Options Go To Help

Customer Ship-To Init Whse 01 Atlanta Warehou Document 000820
Ace Chemical Products Inc Ace Chemical Products Inc Price Level 0
2892 Vicksburg Ln N 2892 Vicksburg Ln N Quote Date 05/24/2010
Minneapolis, MN 55447-1878 Minneapolis, MN 55447-1878 Expiration Date NONE

Reference # Contact Tony Verti

Item Chlorine Cayalyst for formula GM % 38.27

Quantity Price Extension C
Ship Direct Whse LB LB 60.60 N

LN#	Item	Flags	Ord-Con	WH	Quantity	UM	Price	T	UM	Description
001	I154		N - N	01	3	LB	20.20	S	LB	Chlorine Cayalyst

add

Weight: 15.000 Units: 3 Ext: 60.60

Viewing by: Customer --> Quote # --> Amount --> Contact #

Edit Document.

Pressing this button will allow you to edit a quote based on the quote highlighted in the tree view. If no quote is highlighted or the invoice number field is not visible, the Edit Document button will be disabled. Again, standard Facts security will apply here.

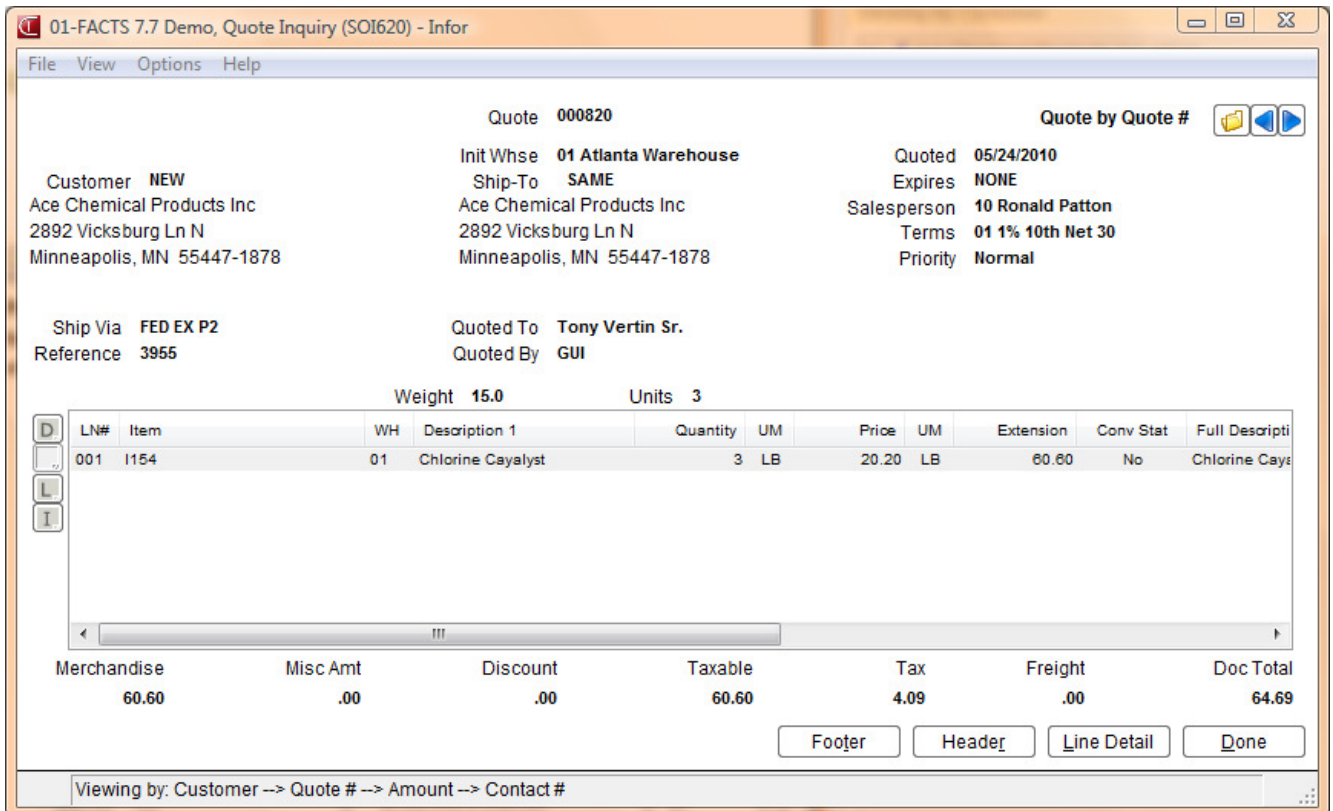
& Customer Notes

This functions the same as Credit & Collections. Please see that section for more detail.






Quote Detail

Pressing this button will run the quote document inquiry program based on the quote highlighted in the tree view. If no quote is highlighted or the quote number field is not visible, the Quote Detail button will be disabled.



01-FACTS 7.7 Demo, Quote Inquiry (SOI620) - Infor

File View Options Help

Quote 000820 Quote by Quote #   

Customer NEW
Ace Chemical Products Inc
2892 Vicksburg Ln N
Minneapolis, MN 55447-1878

Init Whse 01 Atlanta Warehouse
Ship-To SAME
Ace Chemical Products Inc
2892 Vicksburg Ln N
Minneapolis, MN 55447-1878

Quoted 05/24/2010
Expires NONE
Salesperson 10 Ronald Patton
Terms 01 1% 10th Net 30
Priority Normal

Ship Via FED EX P2
Reference 3955

Quoted To Tony Vertin Sr.
Quoted By GUI

Weight 15.0 Units 3

LN#	Item	WH	Description 1	Quantity	UM	Price	UM	Extension	Conv Stat	Full Descripti
001	1154	01	Chlorine Cayalyst	3	LB	20.20	LB	60.60	No	Chlorine Cays

Merchandise 60.60
Misc Amt .00
Discount .00
Taxable 60.60
Tax 4.09
Freight .00
Doc Total 64.69

Footer Header Line Detail Done

Viewing by: Customer --> Quote # --> Amount --> Contact #

Menu Bar

Maintenance

See Credit & Collections

Attach External Document

See Credit & Collections

View

The view menu contains a dynamically generated list of defined views. When a view is selected, the tree view panel is redisplayed using the selected view. Please refer to the [Configure Views](#) menu section for a detailed discussion of how views are created. The standard views delivered with the software are:

View by Customer

- View by Quote Number
- View by Expiration Date
- View by Salesperson
- View by Status (See new features below)

Options

Configure Views

Quotes Fields:

- AMOUNT
- COST
- CUSTOMER
- DATE ACCEPTED
- DATE DECLINED
- DECLINED REASON
- DISCOUNT
- EXPIRATION DATE
- INITIATING WAREHOUSE
- MISC AMOUNT
- QUOTE #

Contact Fields:

- CONTACT #
- CONTACT FULL NAME
- CONTACT PHONE #

Association Fields:

- ALPHA
- CONVERTED SALES ORDER NUMBER
- CUSTOMER NAME
- LAST SALE DATE

To select a field, drag it from one of the columns above to the grid below

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4
1	Customer	CUSTOMER	QUOTE #	AMOUNT	CONTACT #
2	Expiration Date	EXPIRATION DATE	QUOTE CUSTOMER NAME	QUOTE #	CONTACT #
3	Declined Reason	DECLINED REASON	QUOTE CUSTOMER NAME	REFERENCE / PO NUMBER	QUOTE #
4	Quote Status	STATUS	QUOTE CUSTOMER NAME	QUOTE #	CONTACT #
5	Salesperson	SALESPERSON	QUOTE CUSTOMER NAME	QUOTE #	
6	Declined Date	DATE DECLINED	DECLINED REASON	QUOTE #	CONTACT #
7	Contact	CONTACT #	QUOTE CUSTOMER NAME	QUOTE #	REFERENCE / PO NUM
8	Salesperson	SALESPERSON	QUOTE CUSTOMER NAME	QUOTE #	
9					
10					
11					

Save Exit

The view that an end user will maintain the most frequently is the tree view panel. This is the panel where you can choose the data you wish to display, and the order in which you

wish to display it. This is the default view to edit when you select configure views. These views are system wide. You may have up to 15 views each with 6 data fields.

See Credit & Collections for more detail.

Menu

Select View

The Select View menu is built dynamically based on security and the work center you are in. Some of the summary or detail panels on the right are easily configured by the user. Only the panels that can be changed will show in the menu. This is set in the User Code Additional Info F/M on the RM infrequent file maintenances menu. In addition, the user must have menu security which is set up in the View Header F/M.

View Control - Quotes Current view: Primary View

Select View Edit

1 - Quote Summary
2 - Primary View

AMOUNT
COST
CUSTOMER
DATE ACCEPTED
DATE DECLINED
DECLINED REASON
DISCOUNT
EXPIRATION DATE
INITIATING WAREHOUSE
MISC AMOUNT
QUOTE #

Contact Fields:
CONTACT #
CONTACT FULL NAME
CONTACT PHONE #

Association Fields:
ALPHA
CONVERTED SALES ORDER NUMBER
CUSTOMER NAME
LAST SALE DATE

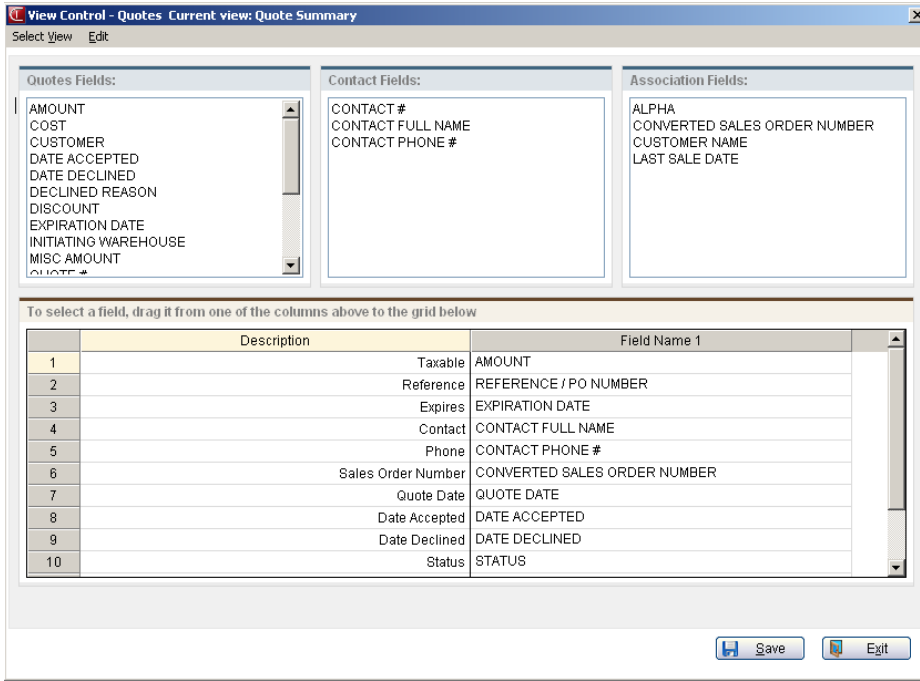
To select a field, drag it from one of the columns above to the grid below

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4
1	Customer	CUSTOMER	QUOTE #	AMOUNT	CONTACT #
2	Expiration Date	EXPIRATION DATE	QUOTE CUSTOMER NAME	QUOTE #	CONTACT #
3	Declined Reason	DECLINED REASON	QUOTE CUSTOMER NAME	REFERENCE / PO NUMBER	QUOTE #
4	Quote Status	STATUS	QUOTE CUSTOMER NAME	QUOTE #	CONTACT #
5	Salesperson	SALESPERSON	QUOTE CUSTOMER NAME	QUOTE #	
6	Declined Date	DATE DECLINED	DECLINED REASON	QUOTE #	CONTACT #
7	Contact	CONTACT #	QUOTE CUSTOMER NAME	QUOTE #	REFERENCE / PO NUM
8	Salesperson	SALESPERSON	QUOTE CUSTOMER NAME	QUOTE #	
9					
10					
11					

Save Exit

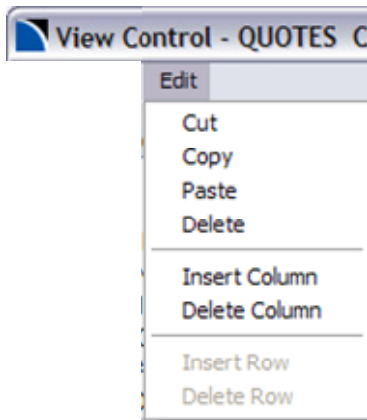
Quote Summary

This view can be maintained

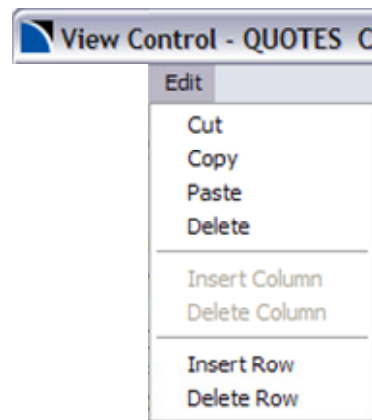


Edit

The edit function allows you to insert rows or columns as appropriate. Position your cursor, where you wish and select the insert row or a column depending on the view you have selected. The appropriate selections are available.



The edit menus will change based on the type of view. On the left is the edit menu for list views and on the right for grid and tree views.



Filters

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Export

The export menu is displayed if the user has the proper security. The security is set by query. When the export option is selected, the following screen is displayed. See security for more details. The export will utilize any filter you have currently have selected.

01-FACTS 7.7 Demo, Export Control for: Credit & Collections - Infor

Template Print Options Help

Credit & Collections Fields:

- BRANCH
- CURRENT AMOUNT
- CUSTOMER
- DISPUTE MEMO
- DISPUTED?
- DOCUMENT SALESPERSON
- DUE DATE
- ENTRY DATE
- INVOICE #
- INVOICE CONTINUATION NUMBER
- INVOICE MEMO

Contact Fields:

Association Fields:

- ALPHA
- CITY
- CREDIT CHECK DAYS
- CREDIT CHECK TYPE
- CREDIT LIMIT
- CUSTOMER BALANCE
- CUSTOMER NAME
- HIGH BALANCE
- HIGH BALANCE DATE
- LAST PAYMENT DATE
- LAST SALE DATE

To select a field, drag it from one of the columns above to the grid below

	A	B	C	D	E	F	G	H
1	CUSTOMER INVOICE #		CURRENT AMOUNT	LAST PAYMENT DATE	CREDIT LIMIT	TERMS CODE		

Template _____ Printer _____

Credit Limit Review RM Excel Import

Export Contacts

Options Export Cancel

Viewing by: Customer --> Invoice # --> Reference/Po

Export Templates

See Credit & Collections

Printer Selection Note – See Credit & Collections

Refresh Data

This functions the same as Credit & Collections. See Credit & Collections for more detail.

User Preferences

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Synchronization

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Opportunity Manager

The opportunity manager is a tool that allows you to record specific sales opportunities with user definable details about the opportunity. It also provides for user definable win/loss data. It incorporates the process flow to facilitate pipeline forecasting based on a documented sales process.

The screenshot shows the Opportunity Manager application window. The interface includes a tree view on the left, a statistics table at the top right, a pipeline table in the middle, and a top 10 opportunities table at the bottom right. Red callout boxes with lines pointing to specific elements provide labels for these features.

Tree View of opportunities: Points to the left-hand navigation pane showing a hierarchy of sales representatives and warehouses.

Highlighted sales rep statistics: Points to the 'Statistics for selected records' table.

Company Quarterly Pipeline: Points to the 'Pipeline by Process/Stage' table.

Top 10 Opportunities by dollar amt: Points to the 'Top 10 Opportunities' table.

Field	Value
Total count	3
Total amount	\$36,998
Total at close %	\$11,959
20	2
Amount	\$28,200
At close %	\$6,680
Deluxe Equipment Warehouse	1
Amount	\$23,000
At close %	\$4,600

Process	Stage	Q4 - 2007	Q1 - 2008	Q2 - 2008	Q3 - 2008
Totals:		\$0	\$0	\$0	\$0

SL...	Company Name	Opportunity	Stage
20: ...	Deluxe Equipment Warehous...	New Location	INITIAL:
30: ...	Taggart Transcontinental	Conveyors-0804	PRICING:
20: ...	Discount Industrial Warehou...	Materials-0305	INITIAL:

Top 10 Opportunities

The bottom right hand panel displays the top 10 opportunities for the company. By highlighting the opportunity and pressing a right click, you can edit the opportunity.

The screenshot shows the 'Opportunity Management' application window. The title bar indicates the last rebuild was on 10/05/2007 at 9:09 AM by GUI (RME280). The interface includes a menu bar (Maintenance, View, Export, Options), a toolbar with icons for maintenance, view, export, and options, and a status bar showing 'Current Filter: Open' and buttons for 'Collapse', 'Expand', and 'Exit'.

The main content area is divided into three panels:

- Viewing by: Opp Company Name:** A tree view showing three companies: 'Deluxe Equipment Warehouse' (highlighted), 'Discount Industrial Warehouse', and 'Taggart Transcontinental'.
- Statistics for selected records:** A table showing summary statistics for the selected records.
- Pipeline by Process/Stage:** A table showing the pipeline for the selected records across four quarters (Q4 - 2007, Q1 - 2008, Q2 - 2008, Q3 - 2008).
- Top 10 Opportunities:** A table listing the top 10 opportunities for the selected records.

Total count	3
Total amount	\$36,998
Total at close %	\$11,959
Deluxe Equipment Warehouse	1
Amount	\$23,000
At close %	\$4,600

Process	Stage	Q4 - 2007	Q1 - 2008	Q2 - 2008	Q3 - 2008
Totals:		\$0	\$0	\$0	\$0

SL...	Company Name	Opportunity	Stage
20: ...	Deluxe Equipment Warehous...	New Location	INITIAL:
30: ...	Taggart Transcontinental	Conveyors-0804	PRICING:
20: ...	Discount Industrial Warehou...	Materials-0305	INITIAL:

Detail Panels

When you are in the salesperson view, highlight and expand a salesperson record down to the opportunity detail the summary panels change to detail panels. You must have an opportunity record highlighted.

The screenshot displays the Opportunity Management interface with the following panels and callouts:

- Opportunity detail:** A tree view on the left showing a hierarchy of locations. The 'Close Date: 02/01/2009' is highlighted.
- Summary for highlighted opportunity:** A panel on the top right showing fields: Phone (507-451-4054), Close Date (02/01/2009), Close Percentage (20%), Stage (INITIAL: Initial Sales Stage), Deal Name (New Location), Contact Name (Mr Ron Simonsen), Status (Open), and Amount (23,000).
- Highlighted history detail:** A panel in the middle right showing a note: Note Date (12/14/08), By (GUI), Note Type (GEN), and text: 'Communication with Mr Ron Simonsen regarding: his new location. H will be needing quotes on all new product lines to open this location.'
- Chronological history of the highlighted opportunity:** A table at the bottom right showing a list of actions.

Date	Time	Action	Contact Name	Memo/Reference
12/14/08	9:35 PM	Note	Mr Ron Simonsen	... Note Created
12/14/08	9:34 PM	New Record		... New Record created by: GUI
10/13/08	9:41 PM	Change Quote	Mr Ron Simonsen	... Quote changed by: GUI
10/10/08	9:39 PM	New Quote	Mr Ron Simonsen	... Quote created

Opportunity Summary

The top right panel displays summary information from the Opportunity file maintenance.

Opportunity History

This functions the same as Credit & Collections. See Credit & Collections for more details.

History Detail

This functions the same as Credit & Collections. See Credit & Collections for more details.

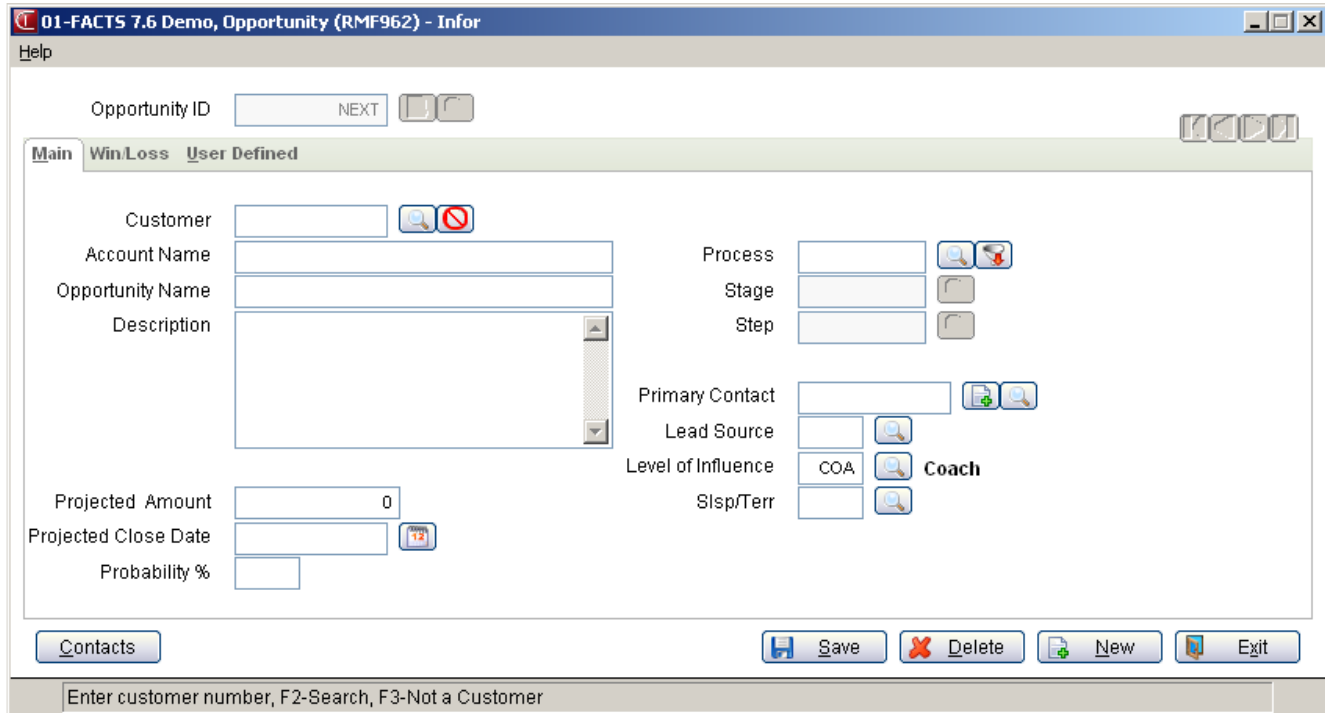
Right Click Menus

This functions the same as Credit & Collections. See Credit & Collections for more details.

Button Bar

New Opportunity

Pressing this button will run the Opportunity F/M program



Customer

An opportunity optionally, may be associated with an existing customer. Search is available.

Account Name

If the opportunity is not associated with a customer, you can give it a specific account name.

Opportunity Name

Name of the specific opportunity

Description

Enter a free form text description of the opportunity. Include as many details as you would like.

Amount

Enter the total dollar amount of the opportunity. This is a mandatory field.

Close Date

Enter the projected close date for forecasting.

Probability %

Enter the projected probability percentage for forecasting.

Process/Stage/Step

Enter the appropriate process/stage/step. This is optional but is used for forecasting.

Lead Source

Enter the lead source, from the RM lead source file maintenance. This is a mandatory field.

Primary Contact

Enter the primary contact from RM associated with this opportunity. A search is available. This is a mandatory field.

Level of Influence

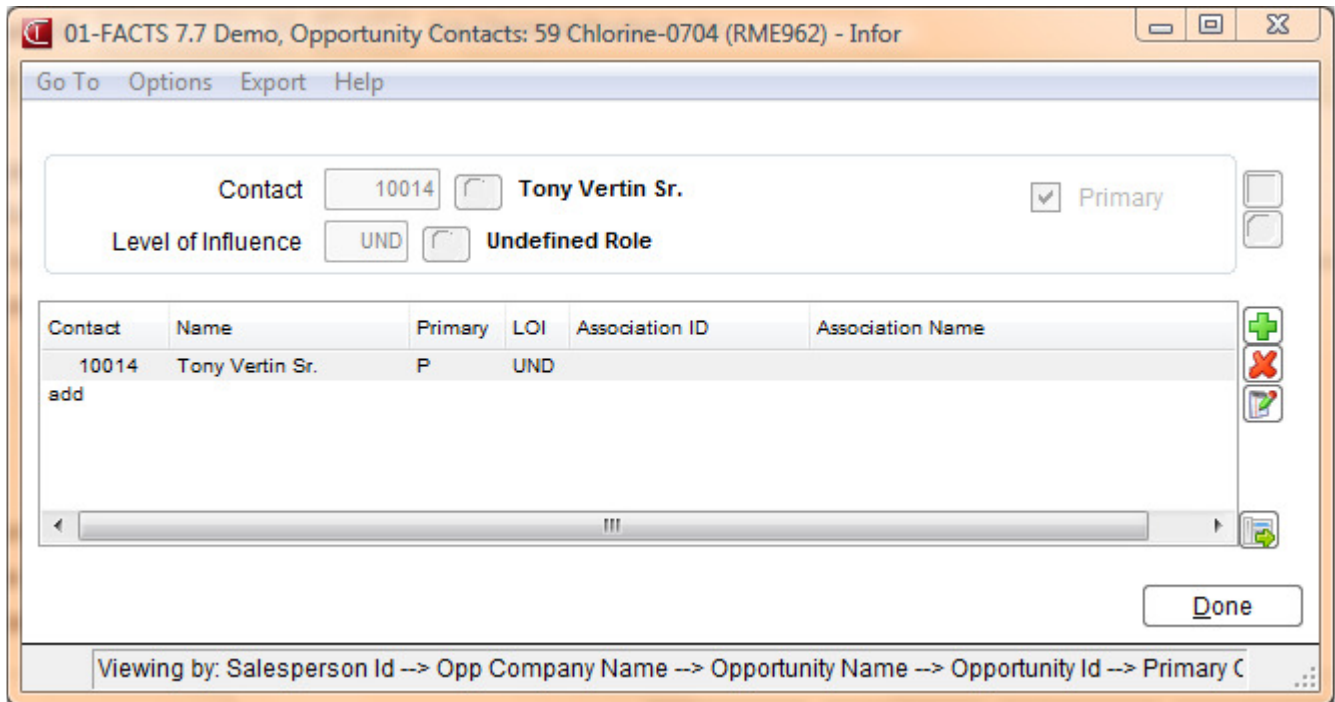
Assign the level of influence for the primary contact.

Sisp/Territory

Enter the primary salesperson for the opportunity. A search is available. This is a mandatory field.

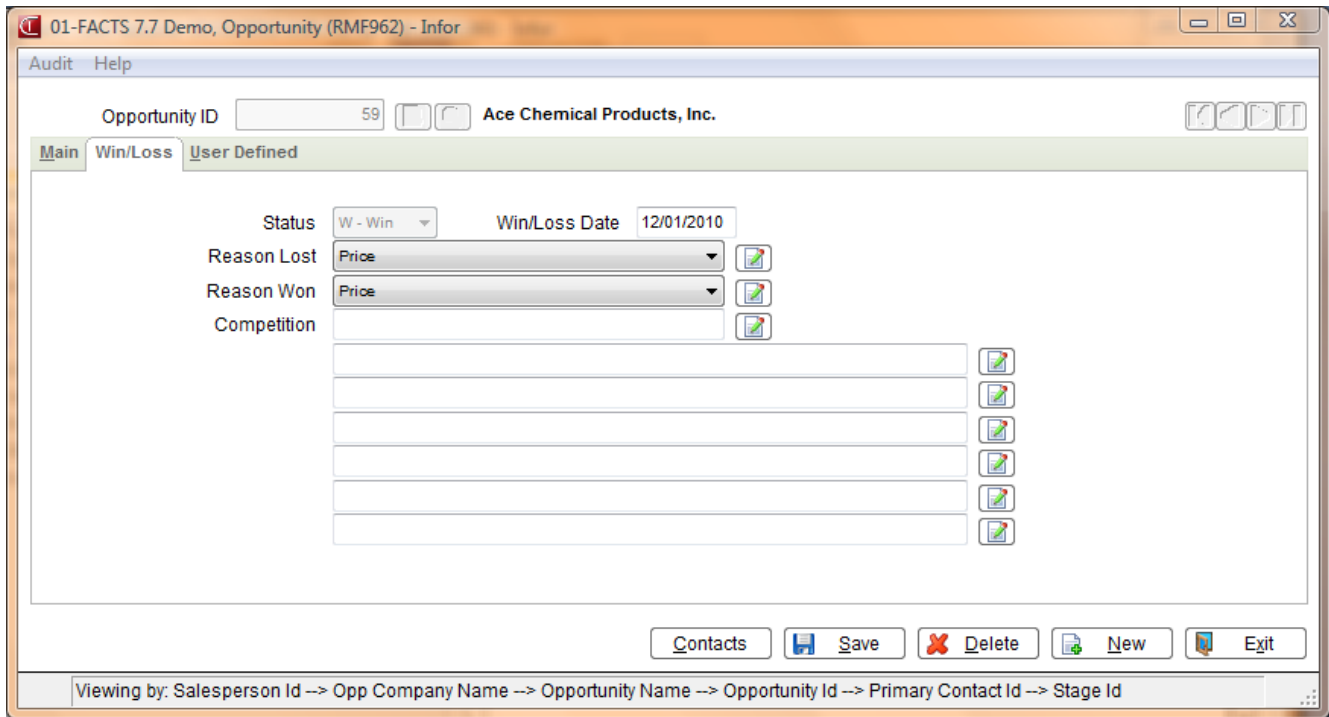
Contacts button

Allows you to add multiple contacts to the Opportunity. One can also change the Level of Influence for the contacts or change who the primary contact is for the opportunity.



Win/Loss Tab

The win/loss tab has only one standard field of Status. Your choices are Open, Win or Loss. The remaining 9 fields are user definable for any type of win/loss analysis you wish to do. These are standard Facts User Defined Fields and require you to be an admin user to maintain definitions. Any user defined fields will not be available for view, exports or filters until your Facts Solution Partner sets them up in the programming tools.



Additional User Defined Fields

The third tab on the Opportunity maintenance will by 12 user definable fields.



Edit Opportunity

Pressing this button will run the Opportunity F/M based on the opportunity highlighted in the tree view. If no opportunity is highlighted or the opportunity number field is not visible, the Edit opportunity button will be disabled. Again, standard Facts security will apply here.



Quote Entry

The quote entry option allows you add a quote that relates to a specific opportunity. When the quote is added it is attached to the contact and to the opportunity. The history

record that is created will show an action of new quote and will allow you to drill down into the actual document via a right click option.

The screenshot shows the 'Opportunity Management' application window. The title bar indicates it was last rebuilt on 10/05/2007 9:09 AM by GUI (RME280). The interface includes a menu bar (Maintenance, View, Export, Options) and a toolbar with icons for maintenance, view, export, options, and a search function. The main area is divided into four sections:

- Viewing by: Opp Company Name:** A tree view showing a hierarchy of company names: Deluxe Equipment Warehouse, 62: New Location (23,000, Close: 02/01/09), 20: Gregory Billings, Open (Close Date: 02/01/2009), Discount Industrial Warehouse, and Taggart Transcontinental.
- Opportunity Summary:** A summary of the selected opportunity: Phone 507-451-4054, Close Date 02/01/2009, Close Percentage 20%, Stage INITIAL: Initial Sales Stage, Deal Name New Location, Contact Name Mr Ron Simonsen, Status Open, and Amount 23,000.
- Highlighted History Item Detail:** A detailed view of a note: Note Date 12/14/08, By GUI, Note Type GEN, and the text: 'Communication with Mr Ron Simonsen regarding: his new location. H will be needing quotes on all new product lines to open this location.'
- Opportunity History:** A table showing the history of actions performed on the opportunity.

Date	Time	Action	Contact Name	Memo/Reference
12/14/08	9:35 PM	Note	Mr Ron Simonsen	... Note Created
12/14/08	9:34 PM	New Record		New Record created by: GUI
10/13/08	9:41 PM	Change Quote	Mr Ron Simonsen	... Quote changed by: GUI
10/10/08	9:39 PM	New Quote	Mr Ron Simonsen	... Quote created
10/08/07	7:50 PM	Changed		Changed by: GUI

C & C Customer Notes

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Menu Bar

Maintenance

This functions the same as Credit & Collections. See Credit & Collections for more detail.

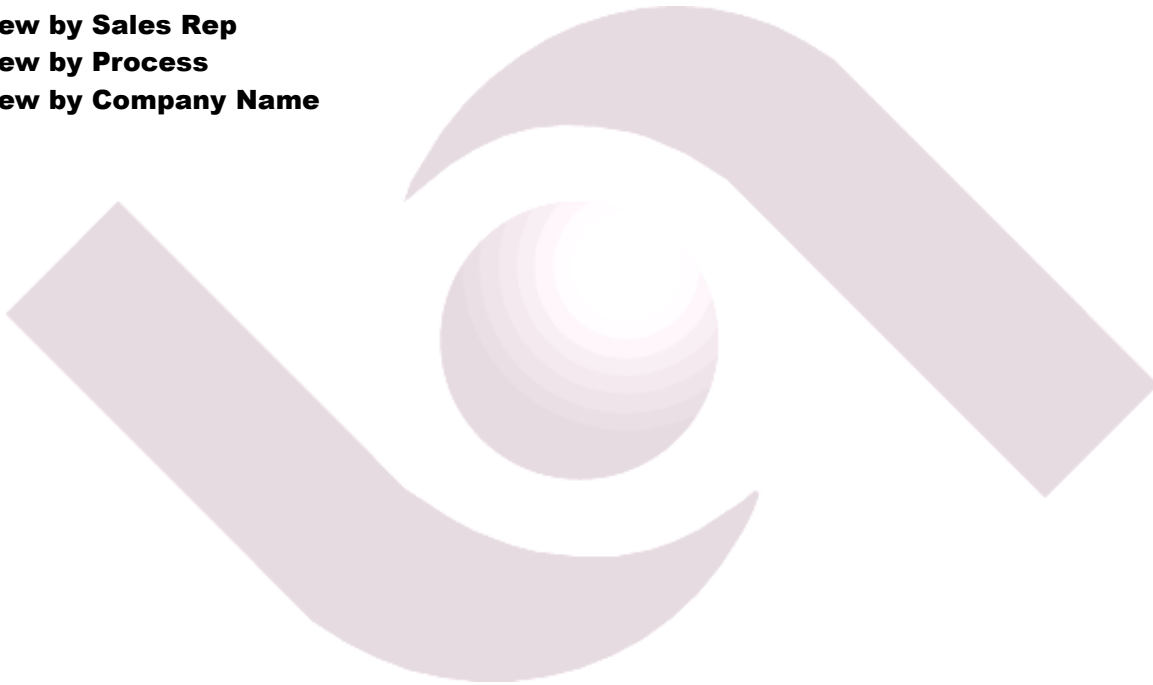
Attach External Document

This functions the same as Credit & Collections. See Credit & Collections for more detail.

View

The view menu contains a dynamically generated list of defined views. When a view is selected, the tree view panel is redisplayed using the selected view. Please refer to the [Configure Views](#) menu section for a detailed discussion of how views are created. The standard views delivered with the software are:

- **View by Sales Rep**
- **View by Process**
- **View by Company Name**



Options

Configure Views

The screenshot shows a window titled "View Control - Opportunity Current view: Primary Tree View". It has a menu bar with "Select View" and "Edit". Below the menu bar are three columns of field lists:

- Opportunity Fields:** CLOSE DATE, LEAD SOURCE, LEVEL OF INFLUENCE, OPP COMPANY NAME, OPPORTUNITY AMOUNT, OPPORTUNITY CUSTOMER(#), OPPORTUNITY ID, OPPORTUNITY NAME, PRIMARY CONTACT ID, PROBABILITY %, PROCESS.
- Contact Fields:** CONTACT FULL NAME, CONTACT ID, MOBILE PHONE, PHONE.
- Association Fields:** CITY, COMMISSION PERCENT, PYR SALES, REGION, YTD SALES.

Below these lists is a grid with the instruction: "To select a field, drag it from one of the columns above to the grid below". The grid has columns: View #, View Name, Field Name 1, Field Name 2, Field Name 3, Field Name 4, and a small icon column. The data in the grid is as follows:

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	
1	Salesperson	SALESPERSON ID	OPP COMPANY NAME	OPPORTUNITY NAME	OPPORTUNITY ID	PF
2	Process/Stage	PROCESS	STAGE ID	OPPORTUNITY NAME	OPPORTUNITY ID	PF
3	Company Name	OPP COMPANY NAME	OPPORTUNITY ID	SALESPERSON ID	STATUS	CL
4	Region	REGION	SALESPERSON ID	OPPORTUNITY ID	CLOSE DATE	
5	Status	STATUS	OPPORTUNITY ID	OPPORTUNITY NAME		
6	Level Of Influence	LEVEL OF INFLUENCE	SALESPERSON ID	OPPORTUNITY ID	OPPORTUNITY NAME	
7	Lead Source	LEAD SOURCE	SALESPERSON ID	OPPORTUNITY ID	OPPORTUNITY NAME	
8						
9						
10						
11						

At the bottom right of the window are "Save" and "Exit" buttons.

The view that an end user will maintain the most frequently is the tree view panel. This is the panel where you can choose the data you wish to display, and the order in which you wish to display it. This is the default view to edit when you select configure views. These views are system wide. You may have up to 15 views each with 6 data fields.

Grid Entry

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Menu

Select View

The Select View menu is built dynamically based on security and the work center you are in.

The screenshot shows a software window titled "View Control - Opportunity" with the current view set to "Primary Tree View". The window has two tabs: "Select View" (active) and "Edit". Under the "Select View" tab, there are two options: "1 - Opportunity Summary" and "2 - Primary Tree View".

Below the tabs are three columns of fields:

- Available Fields:** CLOSE DATE, LEAD SOURCE, LEVEL OF INFLUENCE, OPP COMPANY NAME, OPPORTUNITY AMOUNT, OPPORTUNITY CUSTOMER(#), OPPORTUNITY ID, OPPORTUNITY NAME, PRIMARY CONTACT ID, PROBABILITY %, PROCESS.
- Contact Fields:** CONTACT FULL NAME, CONTACT ID, MOBILE PHONE, PHONE.
- Association Fields:** CITY, COMMISSION PERCENT, PYR SALES, REGION, YTD SALES.

Below these columns is a grid with the following columns: View #, View Name, Field Name 1, Field Name 2, Field Name 3, Field Name 4, and a small icon column. The grid contains the following data:

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	
1	Salesperson	SALESPERSON ID	OPP COMPANY NAME	OPPORTUNITY NAME	OPPORTUNITY ID	PF
2	Process/Stage	PROCESS	STAGE ID	OPPORTUNITY NAME	OPPORTUNITY ID	PF
3	Company Name	OPP COMPANY NAME	OPPORTUNITY ID	SALESPERSON ID	STATUS	CL
4	Region	REGION	SALESPERSON ID	OPPORTUNITY ID	CLOSE DATE	
5	Status	STATUS	OPPORTUNITY ID	OPPORTUNITY NAME		
6	Level Of Influence	LEVEL OF INFLUENCE	SALESPERSON ID	OPPORTUNITY ID	OPPORTUNITY NAME	
7	Lead Source	LEAD SOURCE	SALESPERSON ID	OPPORTUNITY ID	OPPORTUNITY NAME	
8						
9						
10						
11						

At the bottom right of the window are "Save" and "Exit" buttons.

Opportunity Summary

View Control - Opportunity Current view: Opportunity Summary

Select View Edit

Opportunity Fields:

- CLOSE DATE
- LEAD SOURCE
- LEVEL OF INFLUENCE
- OPP COMPANY NAME
- OPPORTUNITY AMOUNT
- OPPORTUNITY CUSTOMER(#)
- OPPORTUNITY ID
- OPPORTUNITY NAME
- PRIMARY CONTACT ID
- PROBABILITY %
- PROCESS

Contact Fields:

- CONTACT FULL NAME
- CONTACT ID
- MOBILE PHONE
- PHONE

Association Fields:

- CITY
- COMMISSION PERCENT
- PYR SALES
- REGION
- YTD SALES

To select a field, drag it from one of the columns above to the grid below

	Description	Field Name 1
1	Phone	PHONE
2	Close Date	CLOSE DATE
3	Close Percentage	PROBABILITY %
4	Stage	STAGE ID
5	Deal Name	OPPORTUNITY NAME
6	Contact Name	CONTACT FULL NAME
7	Status	STATUS
8	Amount	OPPORTUNITY AMOUNT
9		
10		
11		
12		

Edit

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Filters

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Export

The export menu is displayed if the user has the proper security. The security is set by query. When the export option is selected, the following screen is displayed. See security for more details. The export will utilize any filter you currently have applied.

01-FACTS 7.7 Demo, Export Control for: Credit & Collections - Infor

Template Print Options Help

Credit & Collections Fields:

- BRANCH
- CURRENT AMOUNT
- CUSTOMER
- DISPUTE MEMO
- DISPUTED?
- DOCUMENT SALESPERSON
- DUE DATE
- ENTRY DATE
- INVOICE #
- INVOICE CONTINUATION NUMBER
- INVOICE MEMO

Contact Fields:

Association Fields:

- ALPHA
- CITY
- CREDIT CHECK DAYS
- CREDIT CHECK TYPE
- CREDIT LIMIT
- CUSTOMER BALANCE
- CUSTOMER NAME
- HIGH BALANCE
- HIGH BALANCE DATE
- LAST PAYMENT DATE
- LAST SALE DATE

To select a field, drag it from one of the columns above to the grid below

	A	B	C	D	E	F	G	H
1	CUSTOMER INVOICE #	CURRENT AMOUNT	LAST PAYMENT DATE	CREDIT LIMIT	TERMS CODE			

Template _____ Printer _____

Credit Limit Review RM Excel Import

Export Contacts

Options Export Cancel

Viewing by: Customer --> Invoice # --> Reference/Po

Export Templates

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Printer Selection Note

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Refresh Data

This functions the same as Credit & Collections. See Credit & Collections for more detail.

User Preferences

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Synchronization

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Customer Profile Manager

The customer profile manager is a tool that allows you build and store a database of additional information on your customers. The profile manager is a file maintenance program with 5 tabs and 12 individual data fields per tab for a total or 60 user definable fields.

The concepts from the other work centers all apply here as well. The tree view as delivered will sort by customer number.

Customer Profile - Current View: Customer - Last Rebuild: 05/02/2006 5:07 PM By: GUI

Maintenance View Export Options

Contacts for: Cowboy World (Customer C111)

Contact	First Name	Last Name	Phone	Type
2537	Steve	Smith	952-983-0987	CUS
2539	Joe	Virginia	952-983-0987	CUS
10011	Ron	Martens	952-938-5451	CUS

History Detail

Changes Field: "# Employees" changed from " 4" to " 4"

Profile History

Date	Time	Action	Contact Name	Memo/Reference
08/24/05	11:18 AM	Changed		Changed by: GUI

Filter: None

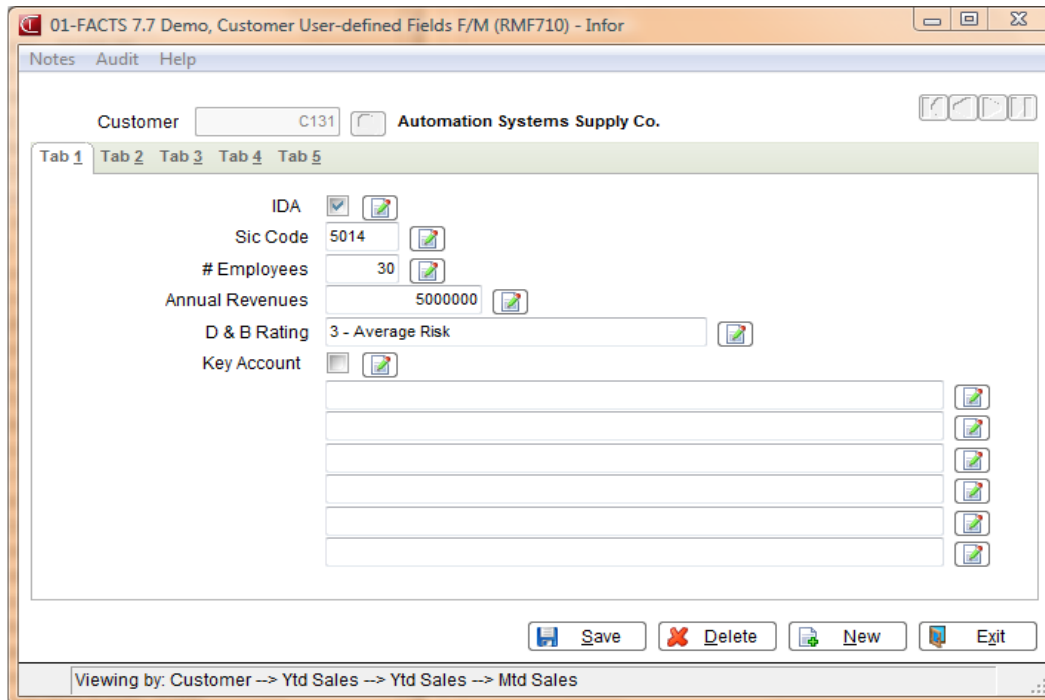
Viewing by: Customer --> Ytd Sales --> Mtd Sales

Button Bar

New Profile F/M

This runs the actual profile file maintenance and allows you to create a new profile. If you are a user defined field administrator, you can add definitions of user defined fields. The profile uses Facts standard user defined fields. We will not cover them in detail here.

Following is an example of a database that is already set-up in the profile manager. The example shown here is a user that is not a user defined field administrator.



In this example we have listed what type of software the customer is using and what version they are using.

Edit Profile

Call up the existing profile for the customer that is highlighted.

Customer F/M

Runs the customer file maintenance program

& C Customer Notes

See credit and collection customer notes

Views

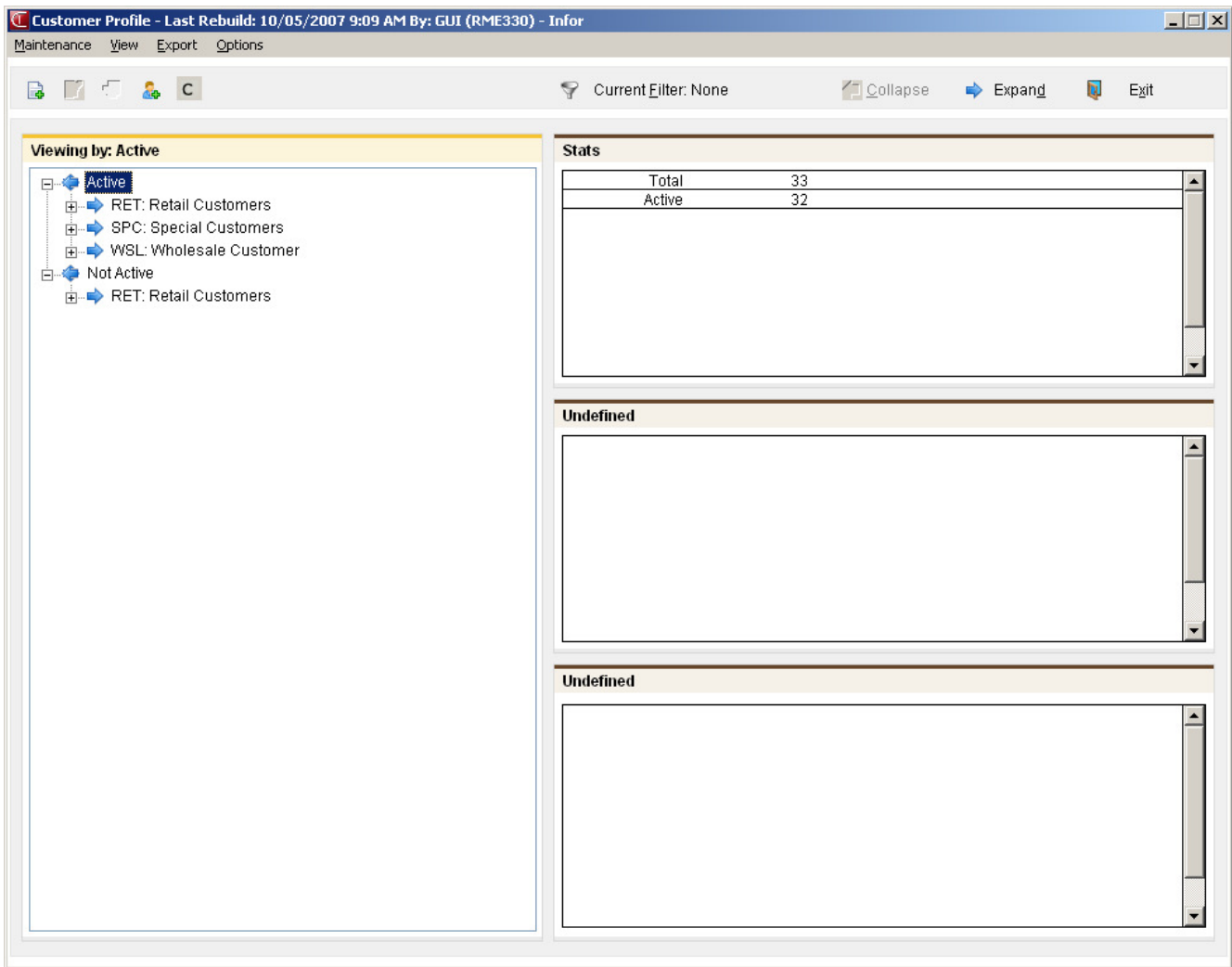
Because of the nature of a user definable set of fields, the only standard view that will be released/set-up will be by customer. All user-defined fields will require some set up by your Facts solution partner based on the definition of the fields. Following are some examples of how it can be used.

User defined fields for product type (Facts or Takestock) and version level (6.06, 6.07 etc.) have been set up by customer. A view can be created by either one of those user-defined fields.

Stats	
Total	30
Version 6.06	9

You will notice that the top summary panel displays counts of the information in the tree view.

Detail panels are available and add addition count fields as you expand to the next detail level. For example:



All other panels will need to be defined by your Facts Solution Partner with you.

Filters

See Credit & Collections for specifics on filters. User defined fields will need to be defined by your Facts Solution Partner with you.

Exports

See Credit & Collections for specifics on exports. User defined fields will need to be defined by your Facts Solution Partner with you.

Sales Order Work Center

The Sales Order Work Center gives you the tools a tool to track all open orders. All of the same functionality and capabilities that exist in the other work center apply here. We will only cover the differences.

The screenshot shows the Sales Order Work Center interface. On the left is a tree view of open orders. The main area is divided into three sections: Customer Statistics, Company Totals, and Orders with a Request Date. Red boxes and arrows highlight specific features:

- Tree View of open orders:** Points to the left-hand navigation pane.
- Highlighted customer statistics:** Points to the 'Statistics' table for the selected customer.
- Company statistics:** Points to the 'Company Totals' table.
- Open orders with a reference date:** Points to the table listing orders with request dates.

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	10
Normal Amount	27,892
Total Count	10
Total Amount	27,892
Past Due	10
Due Today	0

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	40
Normal Amount	68,479
Total Count	40
Total Amount	68,479
Past Due	40
Due Today	0

Requested	Order #	Reference	Customer	Step	Est By	Contact
09/23/04	E00005	PO#001427	Equipment Handling Syste...	30	EDI	
09/23/04	E00001	PO#001427	Southeastern Industrial Su...	30	EDI	Ms. J...
09/27/04	001592	876DOF36712..	Southeastern Service Co...	10	10	Mr. Davi...
09/28/04	001590	84762DKJE	East Coast Tool Company	30	40	Ms. Fre...
10/01/04	001641	BOB-JONES	Texas Material Handling C...	40		Mr. Darv...
01/29/05	001654	BLANKET OPA	Discount Industrial Wareh...	20		Mr. Low...

Open Orders with a Request Date

The bottom right hand panel displays all open order with a reference date. By highlighting an order record and doing a right click a detail button becomes available and allows you to maintain or access an inquiry for the highlighted order.

Sales Orders - Last Rebuild: 10/05/2007 9:09 AM By: IN4 (RME340) - Infor

Maintenance View Export Options

Order Detail Current Filter: Open_Backorders Collapse Expand Exit

Viewing by: Customer

- ▶ Barnes Machinery & Equipment - C104
- ▶ Bradley Manufacturing Co. - C119
- ▶ Cowboy World - C111
- ▶ Dallas Furniture Mart - C105
- ▶ Deluxe Equipment Warehouse - C101
- ▶ Discount Industrial Warehouse - C125
- ▶ East Coast Tool Company - C124
- ▶ Equipment Handling Systems Inc - C122
- ▶ Georgia Print Machines, Inc. - C123
- ▶ Miller's Office Equipment Co. - C128
- ▶ Porsche Pieces, Inc. - C120
- ▶ Roark Architectural, Inc. - C102
- ▶ Southeastern Industrial Supply - C100
- ▶ Southeastern Service Company - C115
- ▶ Taggart Transcontinental - C103
- ▶ Texas Material Handling Co. - C110
- ▶ Word Processing Systems Corp. - C130

Statistics

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	6
Normal Amount	5,049
Total Count	6
Total Amount	5,049
Past Due	6
Due Today	0

Company Totals (Based on filter selections)

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	44
Normal Amount	53,651
Total Count	44
Total Amount	53,651
Past Due	36
Due Today	0

Orders With a Request Date

Requested	Order #	Reference	Customer	Slsp	Ent By	Cor
06/23/08	E00005	PO#001427	Equipment Handling Syste...	30	EDI	
06/23/08	E00001	PO#001427	Southeastern Industrial Su...	30	EDI	
06/27/08	001592	876DGF36712...	Southeastern Service Co...	10	10	
06/28/08	001590	84762DK3E	East Coast Tool Company...	30	40	
07/01/08	001641	BOB JONES	Texas Material Handling C...	40		
10/28/08	001654	BLANKET GPA...	Discount Industrial Wareh...	20		

Detail Panels

When you are in the customer view, highlight and expand a customer record down to the order detail the summary panels change to detail panels. You must have an order record highlighted.

Order detail

Order summary

Highlighted history detail

Chronological history of the highlighted Order

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	6
Normal Amount	5,049
Total Count	6
Total Amount	5,049
Past Due	6
Due Today	0

Rush Priority	0
Rush Amount	0
Hold Priority	0
Hold Amount	0
Normal Priority	44
Normal Amount	53,651
Total Count	44
Total Amount	53,651
Past Due	36
Due Today	0

Requested	Order #	Reference	Customer	Step	Ent By	Cor
06/23/08	E00005	PO#001427	Equipment Handling Syste...	30	EDI	
06/23/08	E00001	PO#001427	Southeastern Industrial Su...	30	EDI	
06/27/08	001592	876DGF36712...	Southeastern Service Co...	10	10	
06/28/08	001590	84762DK3E	East Coast Tool Company...	30	40	
07/01/08	001641	BOB JONES	Texas Material Handling C...	40		
10/28/08	001654	BLANKET GPA...	Discount Industrial Wareh...	20		

Order History

This functions the same as Credit & Collections, see that section for more detail.

Order Summary

This panel is user definable and lists details about the quote. See configure views for more information.

History Detail

This functions the same as Credit & Collections, see that section for more detail.

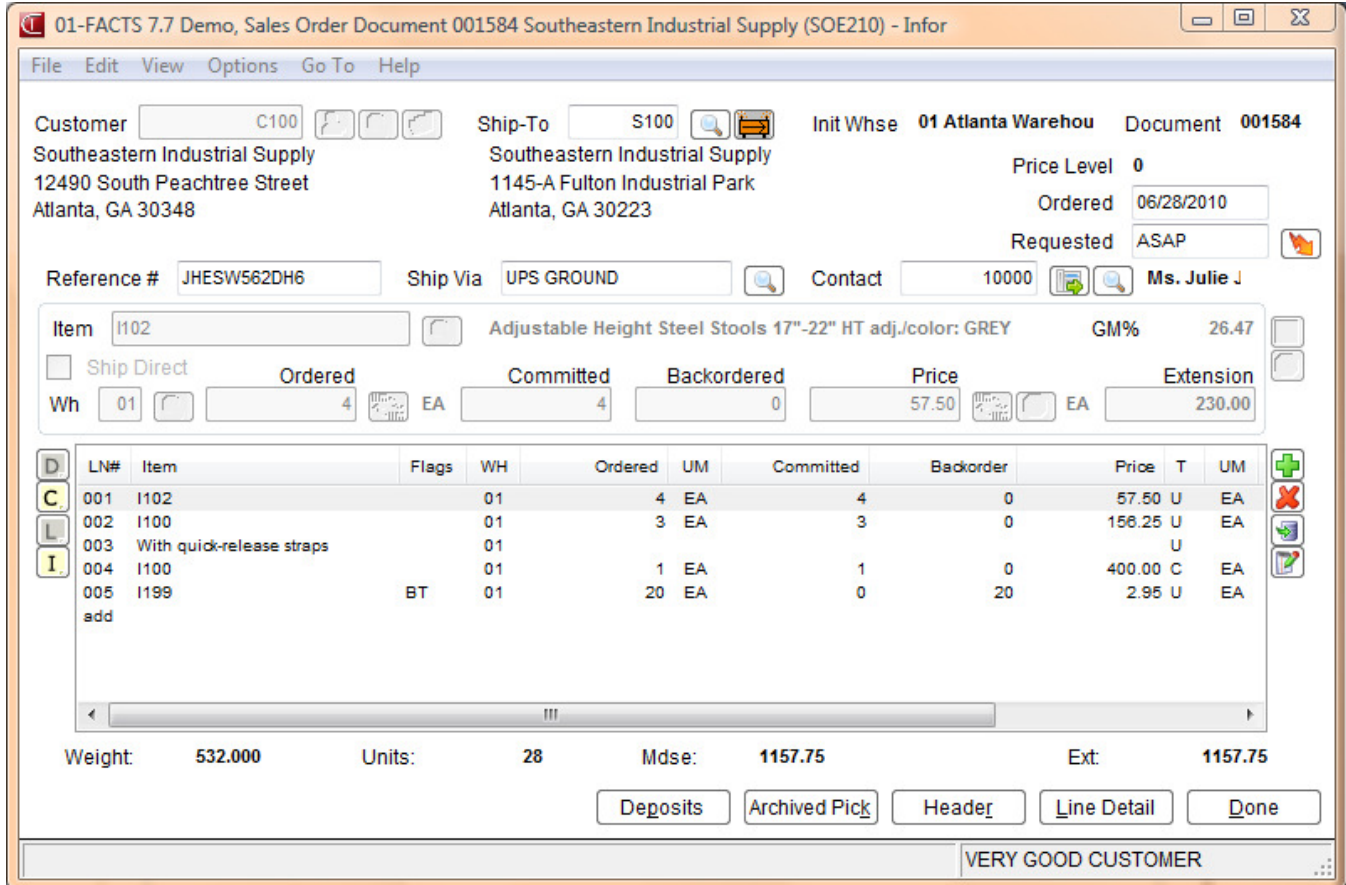
Right Click Menus

This functions the same as Credit & Collections, see that section for more detail.

Button Bar

New Order

Pressing this button will execute the order entry program allowing you to create a new order for the customer you have highlighted. Make sure you select a contact and have your order entry options set up to prompt for the RM contact.



LN#	Item	Flags	WH	Ordered	UM	Committed	Backorder	Price	T	UM
001	I102		01	4	EA	4	0	57.50	U	EA
002	I100		01	3	EA	3	0	156.25	U	EA
003	With quick-release straps		01						U	
004	I100		01	1	EA	1	0	400.00	C	EA
005	I199	BT	01	20	EA	0	20	2.95	U	EA

Edit Document.

Pressing this button will allow you to edit an order based on the order highlighted in the tree view. If no order is highlighted, the Edit Document button will be disabled. Again, standard Facts security will apply here.

Change Hold Status

Pressing this button will allow you to change the hold status for the document. This will call up the Hold Selections program.

Add Contact

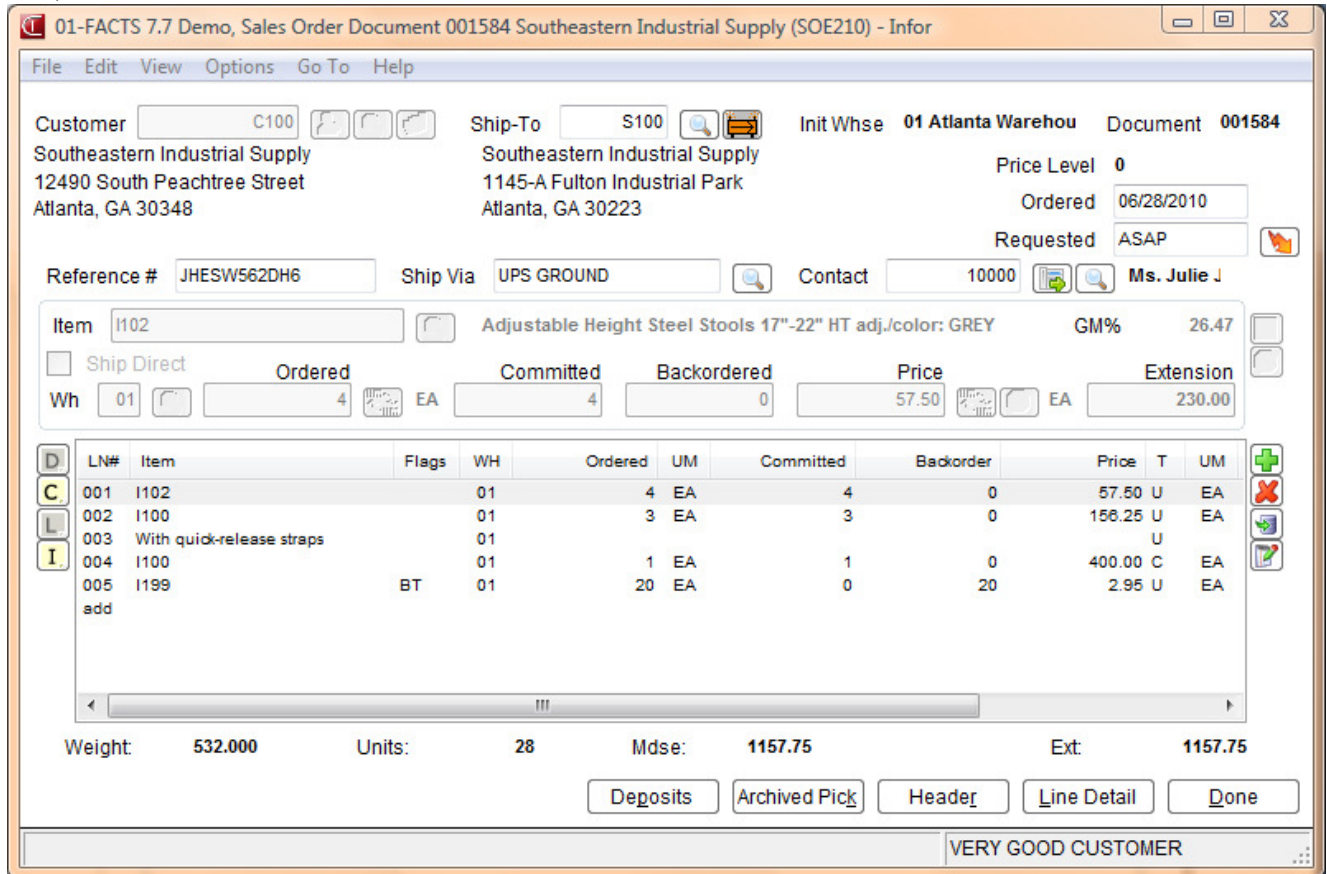
Pressing this button will run the contact F/M program so that a new contact can be added for the highlighted or selected customer.

& Customer Notes

This functions the same as Credit & Collections. Please see that section for more detail.

Order Detail

Pressing this button will run the order document inquiry program based on the order highlighted in the tree view. If no order is highlighted or the order number field is not visible, the Order Detail button will be disabled.



LN#	Item	Flags	WH	Ordered	UM	Committed	Backorder	Price	T	UM
001	I102		01	4	EA	4	0	57.50	U	EA
002	I100		01	3	EA	3	0	156.25	U	EA
003	With quick-release straps		01							
004	I100		01	1	EA	1	0	400.00	C	EA
005	I199	BT	01	20	EA	0	20	2.95	U	EA

Menu Bar

Maintenance

See Credit & Collections

Attach External Document

See Credit & Collections

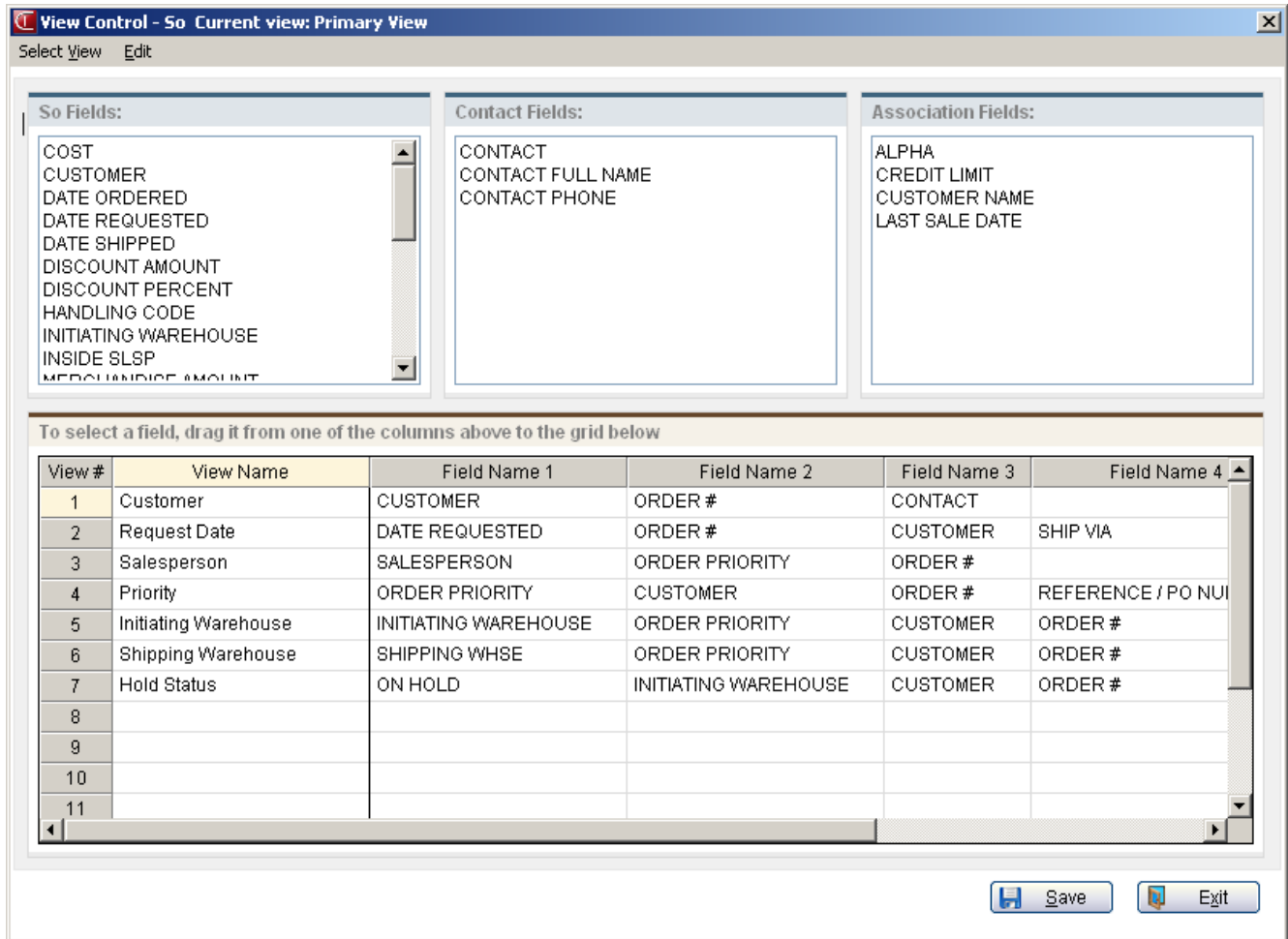
View

The view menu contains a dynamically generated list of defined views. When a view is selected, the tree view panel is redisplayed using the selected view. Please refer to the [Configure Views](#) menu section for a detailed discussion of how views are created. The standard views delivered with the software are:

- **View by Customer**
- **View by Request date**
- **View by Salesperson**
- **View by Priority**
- **View by Initiating warehouse**
- **View by Shipping warehouse**
- **View by Hold Status**

Options

Configure Views



The view that an end user will maintain the most frequently is the tree view panel. This is the panel where you can choose the data you wish to display, and the order in which you wish to display it. This is the default view to edit when you select configure views. These views are system wide. You may have up to 15 views each with 6 data fields.

Menu

Select View

The **Select View** menu is built dynamically based on security and the work center you are in. Some of the summary or detail panels on the right are easily configured by the user. Only the panels that can be changed will show in the menu. This is set in the **User Code Additional Info F/M** on the **RM infrequent file maintenances** menu. In addition, the user must have menu security which is set up in the **View Header F/M**.

To select a field, drag it from one of the columns above to the grid below

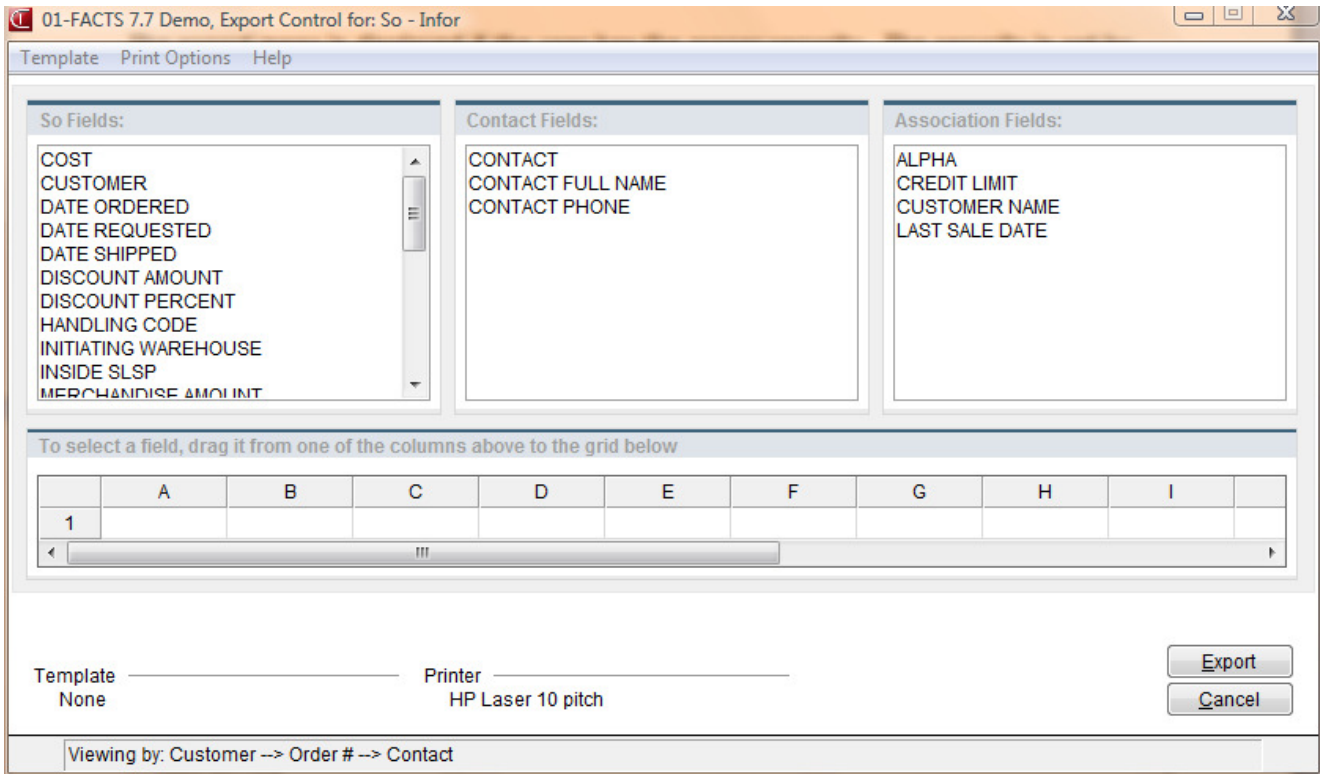
View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4
1	Customer	CUSTOMER	ORDER #	CONTACT	
2	Request Date	DATE REQUESTED	ORDER #	CUSTOMER	SHIP VIA
3	Salesperson	SALESPERSON	ORDER PRIORITY	ORDER #	
4	Priority	ORDER PRIORITY	CUSTOMER	ORDER #	REFERENCE / PO NU
5	Initiating Warehouse	INITIATING WAREHOUSE	ORDER PRIORITY	CUSTOMER	ORDER #
6	Shipping Warehouse	SHIPPING WHSE	ORDER PRIORITY	CUSTOMER	ORDER #
7	Hold Status	ON HOLD	INITIATING WAREHOUSE	CUSTOMER	ORDER #
8					
9					
10					
11					

Filters

This functions the same as **Credit & Collections**. See **Credit & Collections** for more detail.

Export

The export menu is displayed if the user has the proper security. The security is set by query. When the export option is selected, the following screen is displayed. See security for more details. The export will utilize any filter you have currently have selected.



Export Templates

See Credit & Collections

Printer Selection Note – See Credit & Collections

Refresh Data

This functions the same as Credit & Collections. See Credit & Collections for more detail.

User Preferences

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Synchronization

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Purchase Order Work Center

The Purchase Order Work Center gives you the tools a tool to track all open purchase orders. All of the same functionality and capabilities that exist in the other work center apply here. We will only cover the differences.

The screenshot shows the 'Purchase Order - Last Rebuild: 10/05/2007 9:09 AM By: GUI (RME350) - Infor' window. The interface includes a menu bar (Maintenance, View, Export, Options), a toolbar with icons for PO Detail, Current Filter (Open PO), Collapse, Expand, and Exit. The main content area is divided into three sections:

- Viewing by: Vendor:** A tree view on the left showing a list of vendors, including 'General Industrial MFG - V100', 'Georgia Shipping Equip. Co. - V110', 'Industrial Supply Distributors - V101', 'N...al Conveyors, Inc. - V115', 'Rearden Metals, Inc. - V104', 'Warehouse Equipment Unlimited - V105', and 'Warehouse Interiors, Inc. - V120'. A callout box labeled 'Tree View of Purchase Orders' points to this list.
- Statistics:** A table showing vendor statistics. A callout box labeled 'Highlighted Vendor Statistics' points to the table.
- Company Totals (Based on filter selections):** A table showing company-wide statistics. A callout box labeled 'Highlighted Vendor Statistics' points to this table.
- POs due before 10/15/07:** A table with columns for Promised..., Vendor Name, PO #, Reference, and Amount. A callout box labeled 'Purchase Orders due' points to this table.

Open Purchase Orders Due in the Next Week

The bottom right hand panel displays all open purchase order with a request date that are due in the next 7 days. By highlighting a purchase order record and doing a right click a detail button becomes available and allows you to maintain or access an inquiry for the highlighted purchase order.

Detail Panels

When you are in the vendor view, highlight and expand a vendor record down to the purchase order detail the summary panels change to detail panels. You must have a purchase order record highlighted.

Purchase Order detail

Purchase Order summary

Highlighted history detail

Chronological history of the highlighted Purchase

Date	Time	Action	Contact Name	Memo/Reference
06/28/08	11:28 AM	Change PO		Purchase Order changed by
06/28/08	11:25 AM	Note	Mr. Kevin Larson	... Note Created

Order History

This functions the same as Credit & Collections, see that section for more detail.

Order Summary

This panel is user definable and lists details about the purchase order. See configure views for more information.

History Detail

This functions the same as Credit & Collections, see that section for more detail.

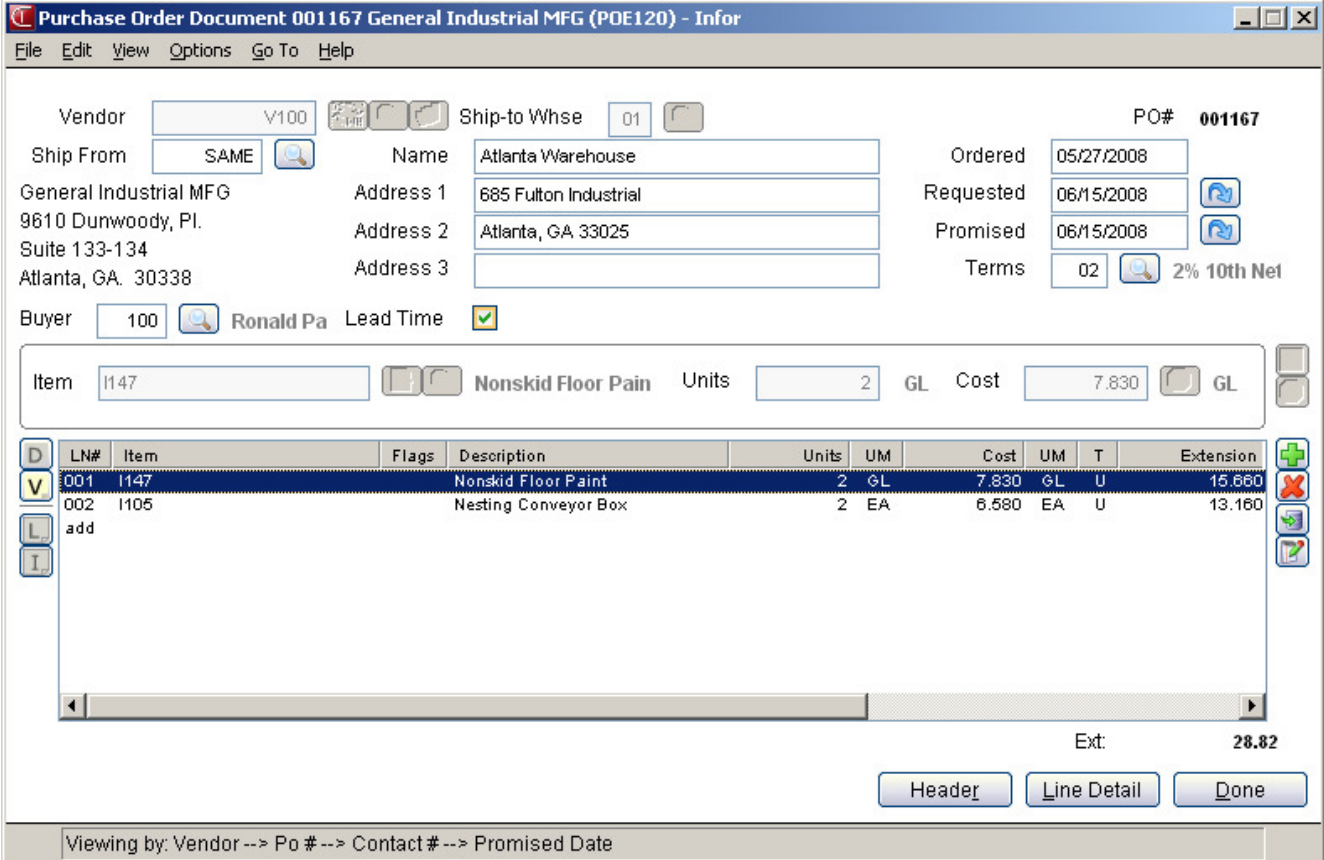
Right Click Menus

This functions the same as Credit & Collections, see that section for more detail.

Button Bar

New Purchase Order

Pressing this button will execute the Purchase order entry program allowing you to create a new Purchase order for the vendor you have highlighted. Make sure you select a contact and have your Purchase order entry options set up to prompt for the RM contact.



Purchase Order Document 001167 General Industrial MFG (POE120) - Infor

File Edit View Options Go To Help

Vendor Ship-to Whse PO# 001167

Ship From Name Atlanta Warehouse

General Industrial MFG Address 1 685 Fulton Industrial

9610 Dunwoody, Pl. Address 2 Atlanta, GA 33025

Suite 133-134 Address 3

Atlanta, GA. 30338

Ordered 05/27/2008

Requested 06/15/2008

Promised 06/15/2008

Terms 02 2% 10th Net

Buyer Ronald Pa Lead Time

Item Nonskid Floor Pain Units GL Cost GL

D	LN#	Item	Flags	Description	Units	UM	Cost	UM	T	Extension
V	001	1147		Nonskid Floor Paint	2	GL	7.830	GL	U	15.660
L	002	1105		Nesting Conveyor Box	2	EA	6.580	EA	U	13.160
I		add								

Ext: 28.82

Header Line Detail Done

Viewing by: Vendor --> Po # --> Contact # --> Promised Date

Edit Document.

Pressing this button will allow you to edit a Purchase order based on the Purchase order highlighted in the tree view. If no Purchase order is highlighted, the Edit Document button will be disabled. Again, standard Facts security will apply here.

Vendor Profile

Pressing this button will allow you to change the hold status for the document. This will call up the Hold Selections program.

Add Contact

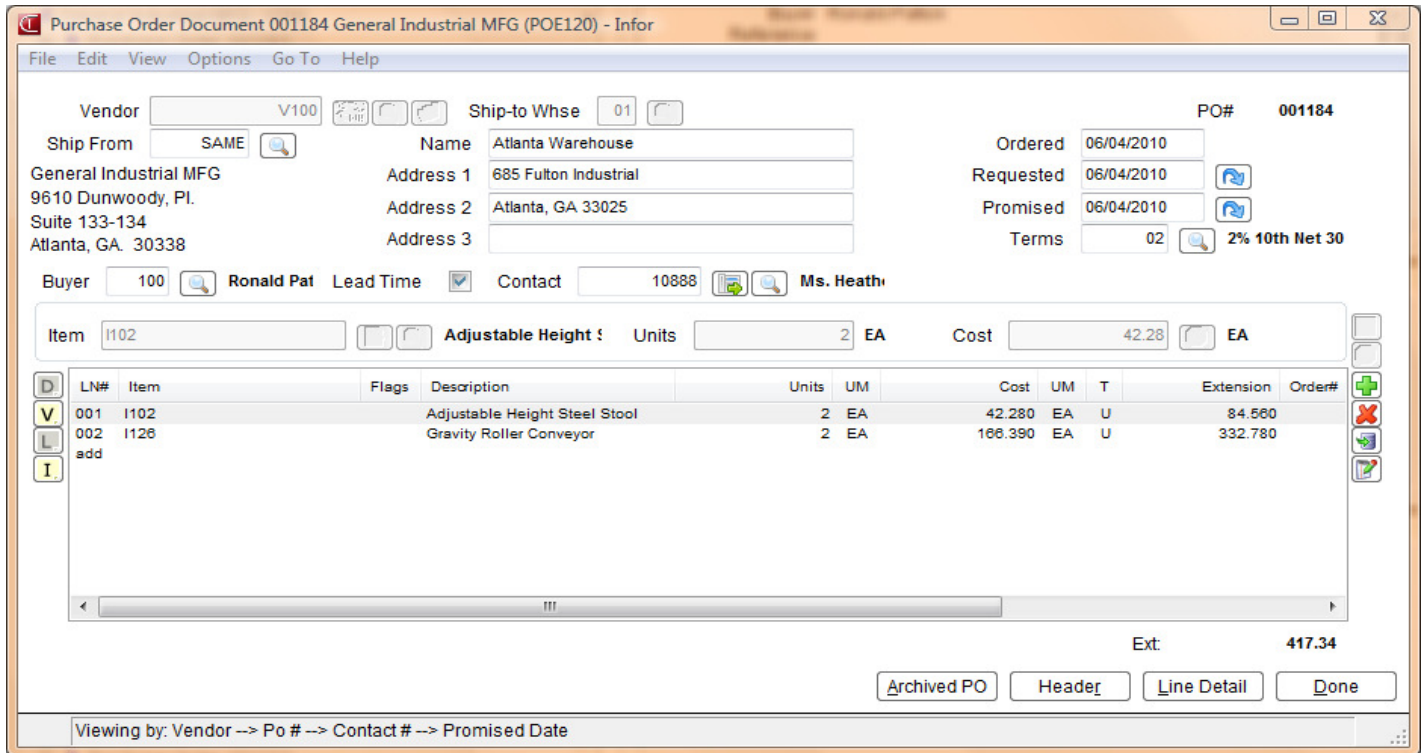
Pressing this button will run the contact F/M program so that a new contact can be added for the highlighted or selected customer.

& Vendor Notes

This functions the same as Credit & Collections. Please see that section for more detail.

PO Detail **Order Detail**

Pressing this button will run the purchase order document inquiry program based on the purchase order highlighted in the tree view. If no purchase order is highlighted or the purchase order number field is not visible, the Purchase Order Detail button will be disabled.



Purchase Order Document 001184 General Industrial MFG (POE120) - Infor

File Edit View Options Go To Help

Vendor Ship-to Whse PO# 001184

Ship From Name Atlanta Warehouse

General Industrial MFG Address 1 685 Fulton Industrial

9610 Dunwoody, Pl. Address 2 Atlanta, GA 33025

Suite 133-134 Address 3

Atlanta, GA. 30338

Ordered 06/04/2010

Requested 06/04/2010

Promised 06/04/2010

Terms 02 2% 10th Net 30

Buyer Ronald Pat Lead Time Contact Ms. Heath

Item Adjustable Height Units EA Cost EA

LN#	Item	Flags	Description	Units	UM	Cost	UM	T	Extension	Order#
001	I102		Adjustable Height Steel Stool	2	EA	42.280	EA	U	84.560	
002	I126		Gravity Roller Conveyor	2	EA	166.390	EA	U	332.780	
	add									

Ext 417.34

Archived PO Header Line Detail Done

Viewing by: Vendor --> Po # --> Contact # --> Promised Date

Menu Bar

Maintenance

See Credit & Collections

Attach External Document

See Credit & Collections

View

The view menu contains a dynamically generated list of defined views. When a view is selected, the tree view panel is redisplayed using the selected view. Please refer to the [Configure Views](#) menu section for a detailed discussion of how views are created. The standard views delivered with the software are:

- View by Vendor
- View by Promise date
- View by Buyer
- View by Status
- View by Warehouse
- View by Direct Ships

Options

Configure Views

The screenshot shows a software window titled "View Control - Purchase Order" with the current view set to "Primary View". The window contains three columns of fields for configuration:

- Purchase Order Fields:** AMOUNT, BUYER, CONTACT #, PO #, PO TYPE, PROMISED DATE, RECEIPT #, RECEIVED DATE, REFERENCE / SO NUMBER, REQUEST DATE, STATUS.
- Contact Fields:** CONTACT FULL NAME, CONTACT PHONE #.
- Association Fields:** ALPHA, VENDOR NAME.

Below these columns is a grid for configuring views. The grid has 12 rows and 8 columns. The first six rows are pre-filled with system views:

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	Field Name 5	Field Name 6
1	Vendor	VENDOR	PO #	CONTACT #	PROMISED DATE		
2	Promised Date	PROMISED DATE	VENDOR	PO #	CONTACT #		
3	Buyer	BUYER	VENDOR	PO #	CONTACT #		
4	Status	STATUS	PO #				
5	Warehouse	WAREHOUSE	VENDOR	STATUS	PO #		
6	Direct Ships	PO TYPE	WAREHOUSE	VENDOR	PO #		
7							
8							
9							
10							
11							
12							

At the bottom of the window are "Save" and "Exit" buttons.

The view that an end user will maintain the most frequently is the tree view panel. This is the panel where you can choose the data you wish to display, and the order in which you wish to display it. This is the default view to edit when you select configure views. These views are system wide. You may have up to 15 views each with 6 data fields.

Menu

Select View

The **Select View** menu is built dynamically based on security and the work center you are in. Some of the summary or detail panels on the right are easily configured by the user. Only the panels that can be changed will show in the menu. This is set in the **User Code Additional Info F/M** on the **RM infrequent file maintenances** menu. In addition, the user must have menu security which is set up in the **View Header F/M**.

View Control - Purchase Order Current view: Primary View

Select View Edit

1 - Purchase Order Summary
2 - Primary View

AMOUNT
BUYER
CONTACT #
PO #
PO TYPE
PROMISED DATE
RECEIPT #
RECEIVED DATE
REFERENCE / SO NUMBER
REQUEST DATE
STATUS

Contact Fields:
CONTACT FULL NAME
CONTACT PHONE #

Association Fields:
ALPHA
VENDOR NAME

To select a field, drag it from one of the columns above to the grid below

View #	View Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	Field Name 5	Field Name 6
1	Vendor	VENDOR	PO #	CONTACT #	PROMISED DATE		
2	Promised Date	PROMISED DATE	VENDOR	PO #	CONTACT #		
3	Buyer	BUYER	VENDOR	PO #	CONTACT #		
4	Status	STATUS	PO #				
5	Warehouse	WAREHOUSE	VENDOR	STATUS	PO #		
6	Direct Ships	PO TYPE	WAREHOUSE	VENDOR	PO #		
7							
8							
9							
10							
11							
12							

Save Exit

Filters

This functions the same as **Credit & Collections**. See **Credit & Collections** for more detail.

Export

The export menu is displayed if the user has the proper security. The security is set by query. When the export option is selected, the following screen is displayed. See security for more details. The export will utilize any filter you have currently have selected.

01-FACTS 7.7 Demo, Export Control for: Purchase Order - Infor

Template Print Options Help

Purchase Order Fields:

- AMOUNT
- BUYER
- CONTACT #
- PO #
- PO TYPE
- PROMISED DATE
- RECEIPT #
- RECEIVED DATE
- REFERENCE / SO NUMBER
- REQUEST DATE
- STATUS

Contact Fields:

- CONTACT FULL NAME
- CONTACT PHONE #

Association Fields:

- ALPHA
- VENDOR NAME

To select a field, drag it from one of the columns above to the grid below

	A	B	C	D	E	F	G	H	I	
1										

Template _____ Printer _____

None HP Laser 10 pitch

Export

Cancel

Viewing by: Vendor --> Po # --> Contact # --> Promised Date

Export Templates

See Credit & Collections

Printer Selection Note – See Credit & Collections

Refresh Data

This functions the same as Credit & Collections. See Credit & Collections for more detail.

User Preferences

This functions the same as Credit & Collections. See Credit & Collections for more detail.

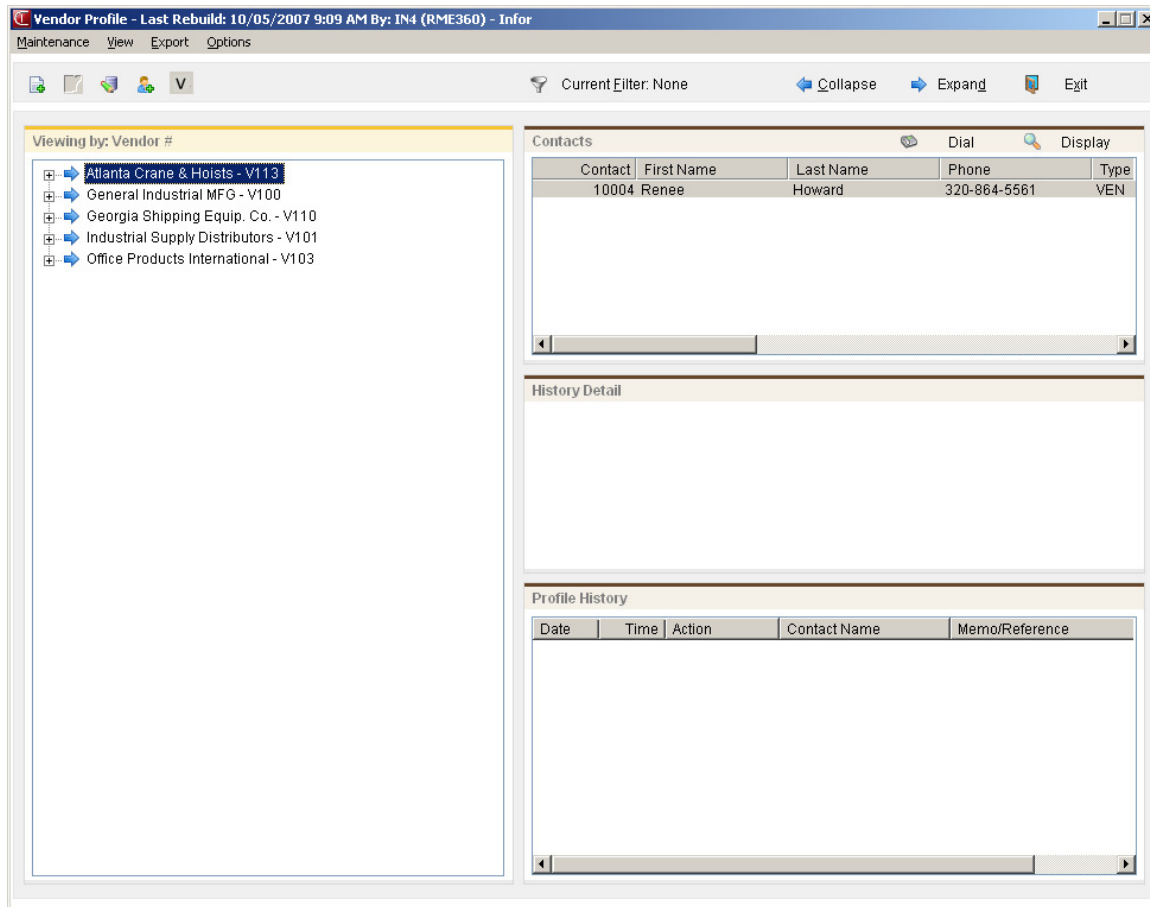
Synchronization

This functions the same as Credit & Collections. See Credit & Collections for more detail.

Vendor Profile Manager

The vendor profile manager is a tool that allows you build and store a database of additional information on your vendors. The profile manager is a file maintenance program with 5 tabs and 12 individual data fields per tab for a total or 60 user definable fields.

The concepts from the other work centers all apply here as well. The tree view as delivered will sort by vendor number.



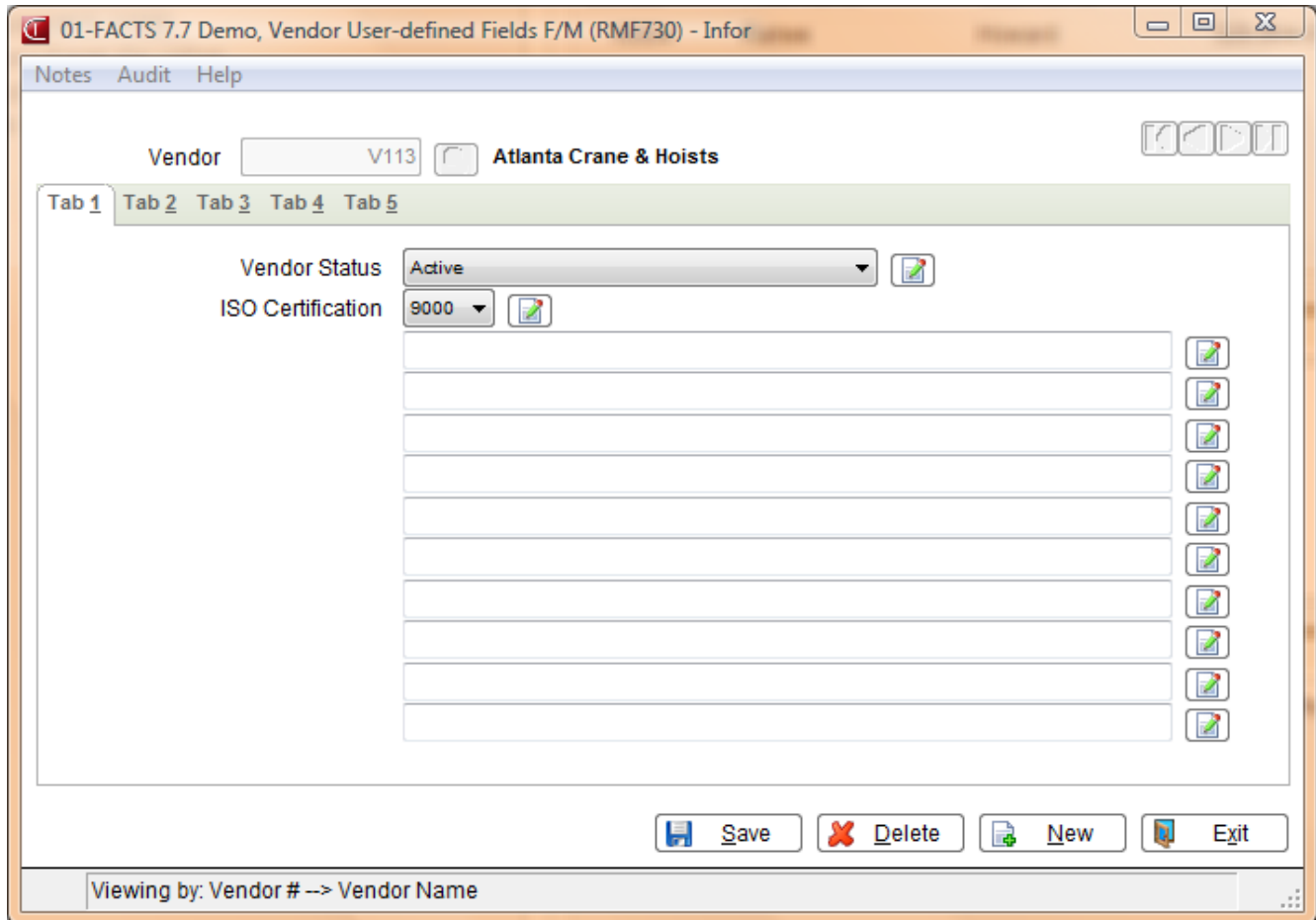
Button Bar



New Profile F/M

This runs the actual profile file maintenance and allows you to create a new profile. If you are a user defined field administrator, you can add definitions of user defined fields. The profile uses Facts standard user defined fields. We will not cover them in detail here.

The blank screen below is an example of how the software is delivered.



 **Edit Profile**

Call up the existing profile for the vendor that is highlighted.

 **Vendor F/M**

Runs the vendor file maintenance program

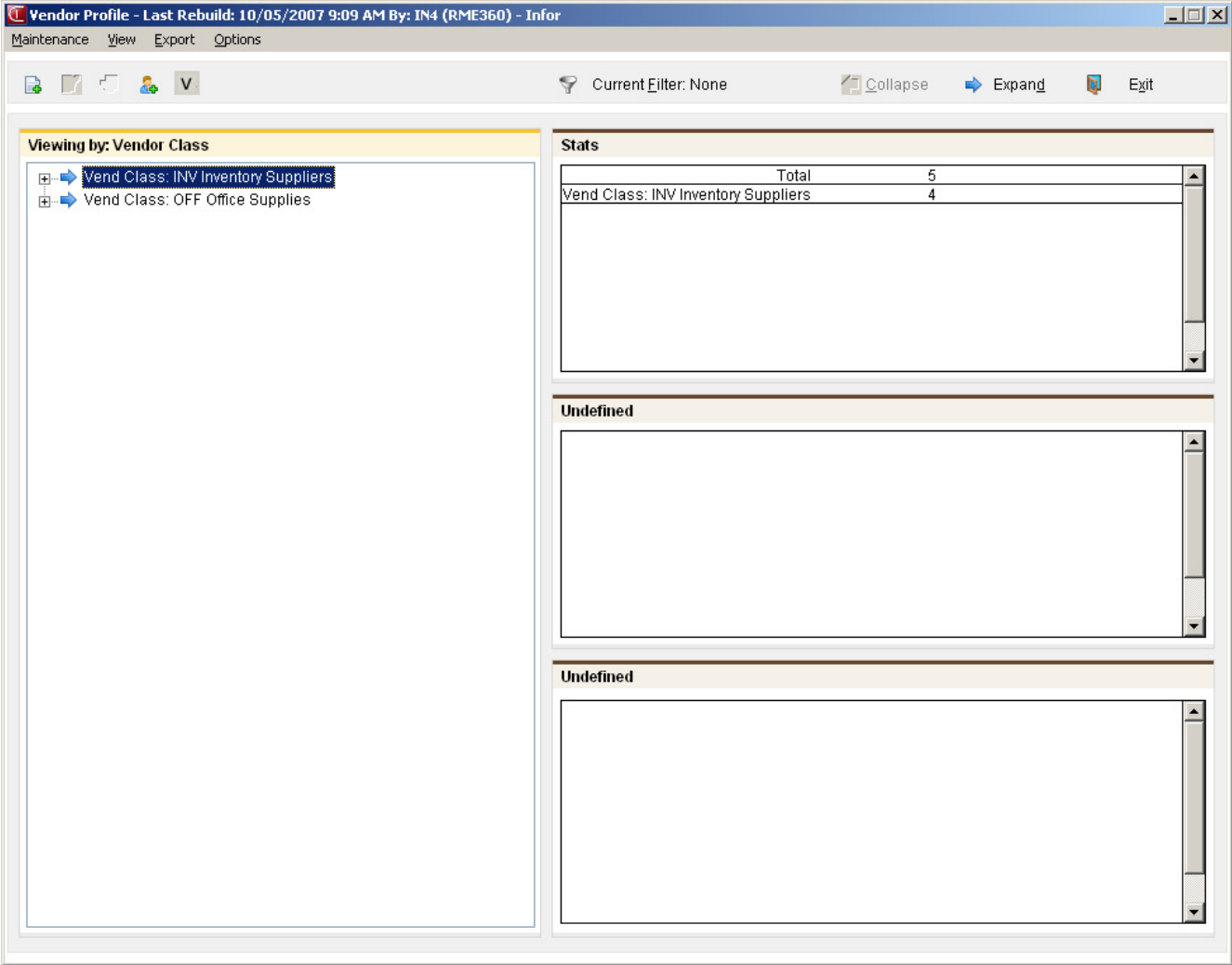
 **Vendor Notes**

See credit and collection vendor notes

Views

Because of the nature of a user definable set of fields, the only standard view that will be released/set-up will be by vendor. All user-defined fields will require some set up by your Facts solution partner based on the definition of the fields. Following are some examples of how it can be used.

User defined fields vendor status and ISO Certification have been set up by vendor. A view can be created by either one of those user-defined fields.



You will notice that the top summary panel displays counts of the information in the tree view.

Detail panels are available and add addition count fields as you expand to the next detail level. For example:

Vendor Profile - Last Rebuild: 10/05/2007 9:09 AM By: IN4 (RME360) - Infor

Maintenance View Export Options

Current Filter: None Collapse Expand Exit

Viewing by: Vendor #

- Atlanta Crane & Hoists - V113
 - Atlanta Crane & Hoists
- General Industrial MFG - V100
 - General Industrial MFG
- Georgia Shipping Equip. Co. - V110
- Industrial Supply Distributors - V101
 - Industrial Supply Distributors
- Office Products International - V103
 - Office Products International

Contacts

Contact	First Name	Last Name	Phone	Type
10018	Francis	Mitchell	952-933-8500	VEN
10021	Jeff	Solitsky	507-237-2877	VEN
10538	Bridgit	Jones	608-784-3392	VEN

History Detail

Profile History

Date	Time	Action	Contact Name	Memo/Reference
------	------	--------	--------------	----------------

All other panels will need to be defined by your Facts Solution Partner with you.

Filters

See Credit & Collections for specifics on filters. User defined fields will need to be defined by your Facts Solution Partner with you.

Exports

See Credit & Collections for specifics on exports. User defined fields will need to be defined by your Facts Solution Partner with you.

Reports

All of these reports have been written using the new Report Formatter tool providing multiple output options and user formatting capability.

Quote

Quote Status Report

01-FACTS 7.7 Demo, Quote Status Report (RMR730) - Infor

Template Print Options Custom Report Layout Help

Order: 1 - Status (dropdown menu open showing: 1 - Status, 2 - Customer, 3 - Sisp/Terr, 4 - Customer Alpha, 5 - Declined Reason)

Beginning Quote: [] First []

Ending Quote: [] Last []

Beginning Date: [] First []

Ending Date: [] Last []

Customer: [] All []

Sisp/Terr: [] All []

Status: 12345 [] All []

Warehouse: [] All []

Include BOM:

Template: None Printer: Print to file Layout: Standard

Ok Cancel

Select sort order

The quote status report is designed to utilize the new fields added to the quote header. The fields are:

Accepted Date – The date the customer accepts the quote and it is partially or fully converted to an order.

Declined Date – The date the customer declines a quote. A calendar button is available for this date.

Reason Code – The reason a quote was declined. The reason codes are the same as those used for lost sales. A search is available – see below.

Header Detail for Document 000820 Ace Chemical Products Inc - Infor

Main Codes

Customer Ship-To

Ace Chemical Products Inc
2892 Vicksburg Ln N
Minneapolis, MN 55447-1878

Ace Chemical Products Inc
2892 Vicksburg Ln N
Minneapolis, MN 55447-1878

Init Whse Atlanta Warehouse

Reference #

Quote Date Accepted Date

Expiration Date Declined Date None

Quoted To Reason Code

Quoted By

PO#

Order Priority

Ship Via

Ship Complete

Enter customer number (NEW=New cust), F1-Add, F2-Cust Search

Lost Sale Reason Code Search - Infor

Options Export Print

Lost Sale Reason Code

Starts with Go To

Filters

Keywords **And** **Go**

Code	Description
NS	Nonstock Items
OS	Currently out of stock
PR	Price not competitive

OK **Cancel**

Enter characters reason code must start with

01-FACTS 7.7 Demo, Quote Status Report (RMR730) - Infor

Template Print Options Custom Report Layout Help

Order **1 - Status** Beginning Quote **First**

Ending Quote **Last**

Properties

Begin **First**

Ending Date **Last**

Customer **All**

Slsp/Terr **All**

Status **All**

Warehouse **All**

Include BOM

Template Printer Layout **OK**

Cancel

Select sort order

Order - The report has the option of printing by Customer, Salesperson, Quote Number, Customer Alpha and Status. The status is a numerical code indicating the current status of the quote.

Status - Select the range of status codes you wish to print on your report. A search is available.

Customer - Select the range of customers you wish to print on your report. A search is available. If you select this sort order, the individual customer select is disabled.

Sisp/Terr - Select the range of salesperson/territory codes you wish to print on your report. A search is available. If you select this sort order, the individual salesperson/territory select is disabled.

Customer/Alpha - Allows printing the report and selecting a range of alpha codes.

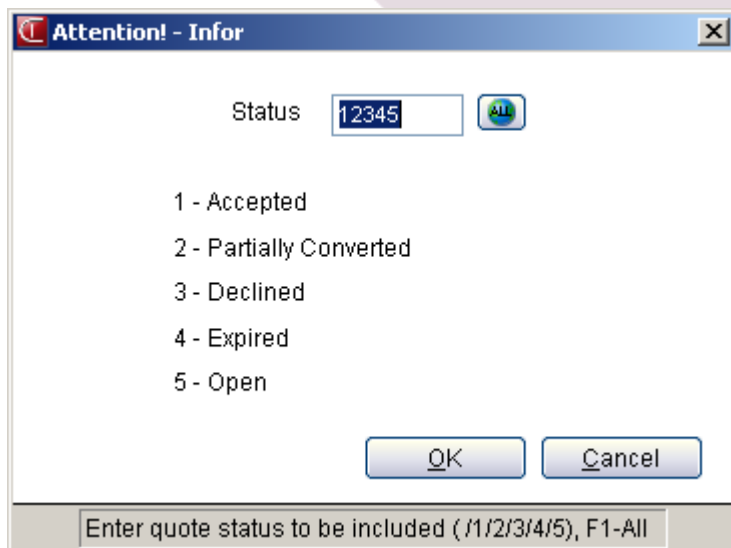
Declined Reason - Select the range of reason codes. When this sort order is selected the selection of status defaults to 3 for declined.

Beginning and Ending Dates - Select the range of quote dates you wish to print.

Customer - Select an individual customer to print. Available on all sort orders except customer.

Salesperson - Select an individual salesperson to print. Available on all sort orders except salesperson.

Status - Select the status codes to include on the report or all.



Warehouse – Enter a single warehouse or print for all warehouses. A search is available.

Incl BOM – Check this box if you want to include BOM components for line items that have them.

Opportunity

Pipeline Report

01-FACTS 7.7 Demo, Pipeline Report (RMR710) - Infor

Template Print Options Custom Report Layout Help

Order S - Salesperson/Territory Beginning Ending First Last

Properties

Process Stage All All

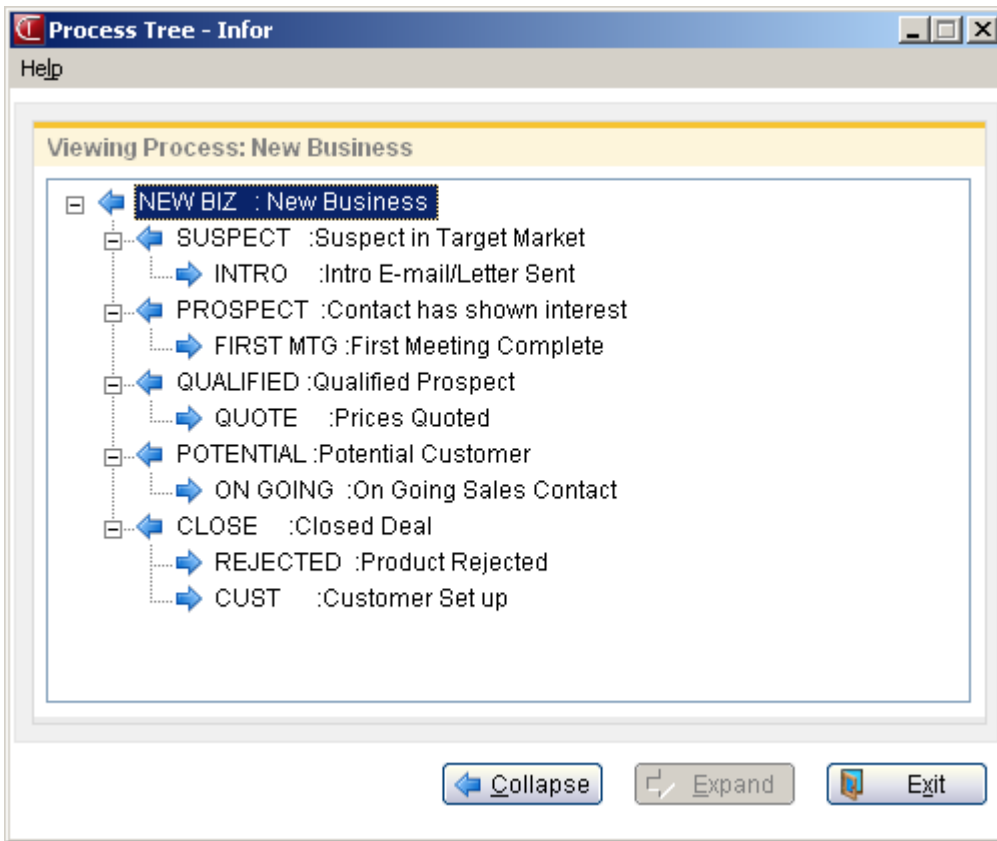
Template Printer Layout Ok Cancel

None Print to file Standard

Order – The report can be printed in Salesperson, Region, Lead Source and Process/Stage

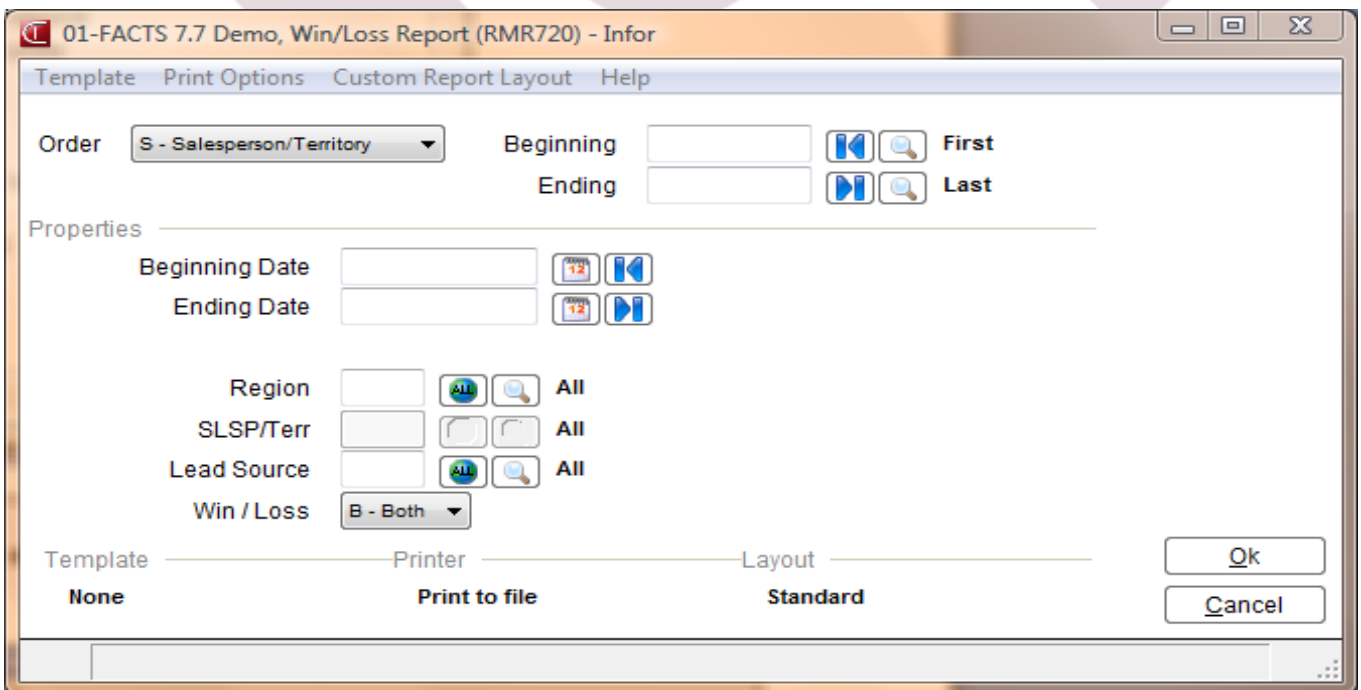
Beginning and Ending Dates – Used to control the date range of the report.

Process – Select a single process or print all processes. A search is available and a process flow screen can be displayed on the screen.



Stage – Select a single stage or print all stages. A search is available

Win/Loss Report



Order – The report can be sorted by Salesperson/Territory, Region, Lead Source or Process. A range with search capabilities is available for each sort order.
Beginning and Ending Dates – Used to control the date range of the report.

Region – Select a single region or all regions to print. A search is available.

Sisp/Terr – Enter a single salesperson or print for all salespeople. A search is available.

Lead Source – Enter a single lead source or print for all lead sources. A search is available.



Security

Overview

Security in the Work Centers is applied to the following areas:

- **Menu**
- **Program**
- **Export**
- **Panel/View**
- **History detail**

Menu

To restrict an entire query, apply standard FACTS program security.

Program

The security for programs run from the Work Center, such as Customer F/M, also uses standard FACTS security. The Work Center will display a security message if a user attempts to run a program that they do not have security for.

Export

Export security is set up by query. If the user does not have export security, the export menu will not be displayed.

Panel/View

If the user does not have security to view a panel, the panel will be disabled and the message 'Panel Not Available' will be displayed. See below.

Credit & Collections - Current View: Customer # - Last Rebuild: 06/14/2004 10:29 AM

Maintenance View Export Options

Past Invoice

Customer Aging

CURRENT	15,573.03
1-30	0.00
31-60	0.00
61-90	0.00
OVER 90	0.00
Total	15,573.03
Disputed	1,366.12
Open Docs	30,713.54
Over Credit Limit	
Credit Limit	50,001.00

Total Aging (based on customers selected)

Panel Not Available

To Do Items For: MR Martin

Date	Time	Contact	Type	Priority	Notes
2004/05/26	4:00 PM		CB	Medium	Call Back regard
2004/05/27	9:35 AM	Ms. Julie Johnson	CB	Medium	Call Back regard
2004/06/07	10:56 AM		CB	Urgent	test
2004/06/08	5:40 AM	Bruce Johnson	WFP	Medium	Watch for payme

Filter Open

Viewing by: Customer # --> Invoice #

Buttons: Collapse Expand Exit

History Detail

If the user does not have security to view the details of a particular action, like notes, the detail of the note will not be displayed. The message 'User does not have security to view detail' will be displayed in place of the detail. See below.

Credit & Collections - Current View: Customer # - Last Rebuild: 06/14/2004 10:29 AM

Maintenance View Export Options

Contacts for: Deluxe Equipment Warehouse (Customer C101)

Contact	First Name	Last Name	Phone	Type
2540	Steve	Johnsston	218-463-1781x33	CUS
10003	Ron	Simonsen	507-451-4054	CUS
10015	Bruce	Johnson	218-463-1781	CUS

History Detail

Note User does not have security to view detail

Collection History

Date	Time	Action	Contact Name	Memo/Reference
05/28/04	5:26 AM	To Do	Bruce Johnson	To Do Created
05/28/04	5:25 AM	Note	Bruce Johnson	Note Created
05/28/04	5:24 AM	Changed		Changed by: MR

Filter Open

Viewing by: Customer # --> Invoice #

Buttons: Collapse Expand Exit