



Infor SyteLine

Functionality List

October
2013

Infor SyteLine System Functionality

Core Functionality

TECHNOLOGY

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

GENERAL FEATURES

- Role based dashboards/home pages with alerts and drill downs
- Concepts and Overview forms
- Explorer based menu organized by module or role
- User defined queries
- Pre-defined queries
- Full drill-downs throughout
- Export record collections from user interface to Excel
- Import record collections from Excel into SyteLine via user interface
- Linked forms
- Tabbed form layout
- Quick Entry forms
- Workspaces (pre-arranged forms)
- Reporting directly to Excel, Word, .PDF, HTML, XML
- SyteLine IDO's integrated with SharePoint

- Mass updates of data
- Form and grid data entry
- Hide or Reorder grid columns
- Background process and report queues
- Diagramming component
- Unlimited notes
- Unlimited attachments (any electronic link)
- Attach text documents or spreadsheets to individual records in any collection
- Right click menu for adding forms or workspaces

ADMINISTRATION

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

ESTIMATING

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

CRM, MARKETING & SALES

- Opportunity / Lead / Tasks tracking
- Contacts with Outlook integration
- Prospect / Customers information
- Salesperson Home form
- 360 Account Management views
- Sales and booking analysis
- Pipeline Management and Forecasting Tools
- Sales Teams
- Competitor Tracking
- Sales Campaigns
- Single and split commissions by order/line
- Pricing and discounts by product, customer, customer type and complex matrixes
- Customer /Sales Contact /Prospect Communication Logs with email integration
- Mail Merge and Email Blast
- Optional SyteLine CRM license module - Salespeople can be licensed to use only the CRM forms, so they don't need a full user license.

CUSTOMER ORDER ENTRY

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

MULTI-COMPANY/MULTI-SITE OPERATIONS

- Inter-site/Intra-site transfers
- Transfer Orders Quick Entry Form
- Site-based, linked Planning
- In-transit material tracking
- Flexible financial consolidation and reporting

- Automatic Inter-Company eliminations
- Inventory visibility across sites
- Divisions establish unique chart-of-accounts
- Divisions operate in any currency
- Consolidate to a standard chart of accounts
- Inter-site transfers at cost or markup
- One step inventory moves
- Multi-site journal entries
- Multi-site Customer, Vendor, and Item Maintenance
- Centralized Purchasing (PO Builder)
- Centralized Customer Order Entry
- Centralized PO Vouchering (Voucher Builder)
- Centralized A/P manual Vouchers
- Centralized Payment Processing (A/P)
- Centralized Payment Processing (A/R)
- Demand and Source Site PO-CO Automation
- Sites can be set up in Multiple databases, or you can define multiple sites within a Single SyteLine database. You can also have a combination of both – a hybrid model.

PROJECTS

- User defined activity tracking
- Full interface to manufacturing, purchasing, accounts payable, accounts receivable, order entry, inventory, payroll, & general ledger
- User defined project types and cost codes
- Multi-level % to complete analysis
- Revenue recognition by milestones
- Invoice milestone billing
- Invoice and Revenue milestones in different currencies
- Retention invoices
- Microsoft Project interface (import/export)
- Work Breakdown structures
- Budget by period
- Labor and expense reporting
- Shipping

- Late Alerts on Projects, Project Tasks, and Project Resources to alert managers about scheduling problems
- Out of Range (Schedule or Cost Code Variance) indicators by project
- Grid View of project transactions
- Project Manager Home form
- Project Change Tracking

PRODUCTION MANAGEMENT

- Support of hybrid manufacturing (jobs, production schedules, JIT/Kanban)
- Labor reporting
- Labor efficiency reporting
- Payroll integration
- Machine-hour reporting
- Co-Products Jobs (multiple SKUs from the same Job)
- By-Products
- Rework jobs
- Overlapping Operations
- Scrap or Yield by Operation
- Outside Vendor Processing
- Comprehensive selective backflushing of material, labor, and overheads (Allows for backflushing of Lot and Serial tracked items)
- Tooling requirements
- Finite and infinite forward scheduling
- Planning can be used in place of scheduling
- "What-If" scheduling
- Dispatch lists by individual resources or resource groups
- Capacity Requirements Planning (machine, crew and tooling based)
- Intelligent setup sequencing
- Job prioritization and priority freeze
- Automated setup sequencing
- Manual override on job sequencing
- Drive costs by Work Center & Department
- Job tracking and costing broken out into 5 cost buckets
- Graphical views of capacity and schedule
- Schedule analysis by exception
- Resource Bottleneck analysis forms

Infor SyteLine Functionality List

QUALITY MANAGEMENT

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

INVENTORY MANAGEMENT

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

SHIPPING MANAGEMENT

- Hard and soft allocations/reservations
- Picking and Packing lists
- Delivery Orders
- Goods Received Notices
- Available to ship analysis
- Multiple units of measure
- Pick, Pack, and Ship Workbenches
- Package Label Integration
- UPS/FedEx Integration

MATERIAL PLANNING

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

PURCHASING/RECEIVING

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

ELECTRONIC DATA INTERCHANGE (EDI)

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

MASTER DATA MANAGEMENT

- Engineering Change Notices
- Revision Control
- Revision History
- Pending ECN flags
- Effectivity and Obsolescence dates on operations and materials
- Material Use-Up Report
- Multi-level (20) Bill of Manufacture (routing/BOM)
- Use until used up logic
- Alternate items on BOMs
- Engineering "sandbox"
- Planning BOMs with Feature & Option Configuration
- Phantom items
- Non-inventory items
- Where used
- Mass replace
- CAD BOM import
- Copy BOM from one site to other sites
- Optional PLM module w/CAD interface (see below)
- What-if costing analysis
- Compliance tracking

GENERAL LEDGER

- Hierarchical General Ledger
- Multi-Calendar
- Multi-Books
- Set G/L Account as Control Account
- Flexible robust chart of accounts
- Statistical accounts
- Allocation accounts
- Dimensions and attributes for accounts
- Account Class
- Report against any combination of fields
- Export results of queries to Excel, ASCII file, Clipboard
- Full G/L drill down to source documents
- Budgeting
- Recurring Journals
- Upload Journal Data from External Sources
- Undo a Journal Entry
- Positive Pay File Utility
- Reversing entries
- Multi-site journal entries
- Bank reconciliation
- Fixed Assets module
- Obsolescence and effectivity dates on G/L accounts
- Built in Financial Report Writer
- Excel Financial Report Writer
- Cash flow analysis
- Currency conversions
- Re-open closed years
- Security for out-of-period postings
- External Financial Interface

FINANCIAL REPORTING

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

ACCOUNTS PAYABLE

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

ACCOUNTS RECEIVABLE

- A/R Cash Receipts centralized or decentralized that automatically post to Bank Reconciliations
- Consolidated Invoicing by period or group of shipments
- Multi-user Invoicing
- Credit management including customer and order holds
- Invoice Hold
- Progressive billing
- Adjustment Invoices
- Complex invoicing terms supported
- 3 Tier Customers (Corp – Bill To, Sold To(s), Ship To(s))
- Dunning letters
- Finance charges
- Letter of Credit support
- Multi-currency
- Multi-lingual invoices, credit memos & statements
- Import electronic payments from bank files
- Centralized Invoicing
- Manage Surcharges

INTERNATIONALIZATION

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

HUMAN RESOURCES

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

Infor SyteLine Functionality List

BUSINESS REPORTING & ANALYSIS

- Microsoft SQL Server Reporting Services (SSRS)
- Crystal
 - Imbedded Crystal Report Professional
 - Crystal Reports 2008
 - Note: Crystal was distributed as an option for upgrades prior to SL8.03 and that it will NOT be distributed for SL8.03 and higher
- Over 400 standard reports
- Graphing elements can be imbedded on any form
- Cut & Paste and export capability from Forms to MS Office applications
- Aging reports
- Reason reports on scrap and overages
- Flexible, query based report formats
- Standard pre-printed enterprise forms with optional license to customize
- Ability to route and FAX forms such as invoices or purchase orders electronically
- Ability to automatically route multiple copies of forms

SYTELINE APPLICATION EVENT SYSTEM

- Assign user defined events to any SyteLine process, form, posting, record or activity.
- Electronic routing of information based on business rules
- Allows for collecting, distributing and approvals on line, real time
- Automates business processes
- Collaborate with Customers and Vendors
- Customize SyteLine's application flow
- Send alerts based on any event or change in data
- Cell phone or PDA device enabled

- Alerting on any business process outside of 'normal' conditions
- Suspend business transaction for approvals
- Internal and external Inbox for reviewing messages
- Outlook enabled as well as other email systems
- Pre-defined workflow templates

MICROSOFT OFFICE INTEGRATION

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

SYTELINE POS (POINT OF SALE)

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

SYTELINE RMX RMA EXTENSION

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

SYTELINE OPM (OUTSIDE PROCESS MGMT)

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

Optional Modules

**** Means Installed with Core SyteLine and turned on with a key**

INFOR CONFIGURATOR

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

SYTELINE APS – FINITE CAPACITY (**)

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

SYTELINE FORECASTING

- Creates forecasts from historical trend or from collaboration with customers or salespeople.
- Analyzes, graphs forecasts vs. history and trends, by item or item groups.
- Statistically calculates Item Safety Stock (ROP) and Order Minimum (EOQ Lot Size) and sets slow moving flag.
- Updates MRP/APS plan based on allowable percentage changes during specified time fences.
- Monitors the forecasts vs. actual demand and generates exception alerts.
- Provides market trend analysis with flexible period-to-period comparisons and graphing.
- Generates budget reports for revenue, material and labor based on the forecast.
- Supports reorder point forecasting, application of statistical models to forecast sales or usage, group forecasting, roll-up of expected demand and planning BOM forecasting based on historical usage percentages.
- Supports the following forecasting models: moving average, horizontal with exponential smoothing, lumpy, trend, seasonal, trend-seasonal, user defined models and automatic model selection based on best fit to historical behavior.

SYTELINE CREDIT CARD MODULE (**)

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

Infor SyteLine Functionality List

SYTELINE SERVICE MANAGEMENT()**

- Call center
- Customer profiles
- Call escalation
- Knowledgebase
- Event tracking
- Mean time to repair
- Resource scheduling
- Skill/certification/location matching
- Email notification
- Automatic service order generation
- SRO (Service Repair Orders)
- SRO customer estimates
- Customer deposit management
- SRO pre-defined templates
- Advance exchanges
- Loaners
- Planned vs. actual reporting
- Service calls
- Warranty claim
- Multiple customer billing on one SRO
- Preventative maintenance order support
- Return Material Authorization support
- Rework SRO
- Refurbish SRO
- Teardown/remanufacture SRO
- Time and expense tracking
- Multiple pieces of equipment per SRO
- Multiple operations per SRO Line
- Project/fixed billing option
- Service/extended warranty contracts
- Automatic contract renewal
- Long term rental support
- As-is configuration
- As-built configuration
- As-shipped configuration
- As-repaired configuration
- Multi-level bill of materials support
- Equipment meter
- Where used reporting
- Any level serial number/lot number/revision control
- Service history
- Multi-tiered/multiple warranty support
- Consumer registration history
- Expense approval
- Expense reconciliation
- Expense reimbursement
- Transaction variance reporting

- Tiered and flat-rate labor pricing
- Unified transaction entry (material/labor/T&E)
- Receiving and shipping direct from SRO
- Shipment paperwork
- Data collection support
- Margin analysis by equipment, customer, SRO
- Direct expense or WIP capability
- Service console
- SyteLine integration of inventory, purchasing, accounts receivable, accounts payable, general ledger

SYTELINE SERVICE MANAGEMENT MOBILE ()**

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

SYTELINE SHOP TRAK

- Fully integrated labor collection with touch screen and bar coding capabilities.
- On-line reconciliation of time, attendance and shop floor labor.
- Time and attendance data posted directly to SyteLine Payroll or ADP.
- Validation of time with SyteLine during entry.
- Supports unique lunch and break information for every shift/department.
- Security prevents logging time to un-approved operations.
- Online Visual Dispatch provides real-time visibility of work to shop floor.
- Rules based data collection supports accurate logging of machine time.

- Rules based data collection supports different pay rates for different work centers.
- Supports the ability to gather labor information for an employee running one or multiple machines.
- Multi-job capability supports machines processing multiple jobs at the same time.
- Customizable employee profiles.
- Fully integrated to Doc Trak for document management support.

SYTELINE DOC TRAK

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

SYTELINE QUALITY CONTROL SOLUTION

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

SYTELINE ADVANCED PLANT MAINTENANCE ()**

- Production equipment
- Tool/Gage maintenance
- Fleet maintenance
- Facility maintenance
- IT infrastructure maintenance
- Call center/internal posts
- Call escalation
- Knowledgebase
- Event tracking
- Mean time to repair
- Resource scheduling
- Skill/certification/location matching
- Email notification
- Automatic service order generation
- Planned service
- Break/fix
- Automatically removes equipment from production schedule for planned service
- SRO (Service Repair Orders)
- SRO pre-defined templates
- Planned vs. actual reporting
- Warranty claim
- Preventative maintenance order support
- Rework SRO
- Refurbish SRO
- Teardown/remanufacture SRO
- Time and expense tracking
- Multiple pieces of equipment per SRO
- Multiple operations per SRO Line
- As-is configuration

- As-built configuration
- As-shipped configuration
- As-repaired configuration
- Multi-level bill of materials support
- Equipment meter
- Where used reporting
- Any level serial number/lot number/revision control
- Service history
- Multi-tiered/multiple warranty support
- Expense approval
- Expense reconciliation
- Expense reimbursement
- Transaction variance reporting
- Tiered and flat-rate labor pricing
- Unified transaction entry (material/labor/T&E)
- Data collection support
- Direct expense or WIP capability
- Service console
- SyteLine integration of inventory, purchasing, accounts receivable, accounts payable, general ledger

SYTELINE FASVIEW

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

SYTELINE RFQ (REQUEST FOR QUOTE)

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

SYTELINE REQUEST FOR QUOTE WEB ACCESS

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

SYTELINE IOF (INSTANT ORDER FULFILLMENT)

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

SYTELINE TAX INTERFACE ()**

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

SYTELINE BUSINESS INTELLIGENCE

Pre-built, role-based dashboards and reports, organized to support the most important aspects of your business, including:

- **Manufacturing**—Analyze critical aspects of your manufacturing operations, throughput, ongoing costs, and other critical variables. Monitor performance by product, department, cost center, and projects.
- **Finance**—Track costs and profitability according to customer, site, and time period. Compare current performance to past periods and monitor costs against budget.
- **Sales**—Review sales performance by product, channel, customer, representative, and region.
- **Inventory and purchasing**—View key statistics, including inventory cost by line item, vendor performance, receipts and returns, and cost by product code.
- Analyze buying patterns and better understand customers.
- Finely target marketing and sales strategies.
- Discover market and product opportunities.
- Pinpoint supply chain weaknesses.
- Minimize inventory and associated costs.
- Spot strategic trends in product mix or cost structure

SYTELINE FINANCIAL REPORTING – INFOR CPM

- Extends SyteLine's financial reporting capabilities
- Presentation quality financial reports.
- Embedded accounting intelligence with data integrity.
- Drilldown from report to transaction detail.
- Flexible reporting hierarchies.
- Consolidate multiple companies/accounts/calendars.
- Currency translation and reporting capability embedded in PM10

supporting IFRS, FASB52 and US GAAP.

- Import and export spreadsheet data.
- Electronic distribution options: e-mail & Web
- Easy to learn and also to create and maintain reports.
- Overall ease of use and flexibility.
- Created by accountants for accountants.
- Customized graphical reporting.

INFOR PLM DISCRETE

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

SYTELINE WORKBENCH SUITE ()**

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

SYTELINE INTEGRAL ENTERPRISE VIEWER (IEV)

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

SYTELINE SHIPPING AND LOGISTICS (TMS)

- Visibility of daily shipments (LTL, exports, parcel, etc.)
- Automated integration to carrier systems for labels and parcel shipping
- Automatically capture parcel cost and tracking numbers
- LTL shipping, Bill of Ladings and ProBill number capture
- Automated backorder management with shipping transactions and multiple shipments per order
- Export shipping and paperwork (i.e. Commercial Invoice, Certificate of Origin, etc.)
- Automated shipment email notices and online shipment tracking
- Shipment packing, container management, and labels / packing lists
- Inventory staging with directed picking

- Mobile barcode scanning and paperless operation via wireless / RF
- One-click freight quotes for shipping cost / times using management freight terms
- Full web based dash boarding on data resulting from shipments, containers and other transactions

SYTELINE SYTEPLAN – SALES AND OPERATIONS PLANNING

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

INFOR SALES PORTAL

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

INFOR 2D DESIGN AUTOMATION

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

INFOR ION

- Infor Ion Connect
 - Connect applications easily
 - Set up quickly
 - Operate efficiently

INFOR EXPENSE MANAGEMENT (XM)

- Improve employee compliance with spending policies
- Lower administrative costs
- Increase savings through effective vendor negotiation and rebate usage
- Reduce unnecessary travel and purchases
- Reduce people needed to process documents
- Reduce manager time spent on approvals
- Increase accuracy of time billed to clients and paid time off due employees
- Higher amounts of foreign taxes reclaimed
- Increased efficiency through effective domestic and nondomestic VAT identification
- Reduced employee time spent on travel planning, expense reporting, time capture, and purchasing of goods and services

Infor SyteLine Functionality List

INFOR ENTERPRISE ASSET MANAGEMENT (EAM)

- Features:
 - Graphical User Interface
 - Predefined Reports
 - Key Performance Indicators
 - Web Architecture
 - Minimal Hardware
- Modules:
 - Assets
 - Work Management
 - Preventive Maintenance
 - Materials Management
 - Purchasing
 - Mobile
- Deployment
 - On-Premise
 - Hosted
 - Subscription

INFOR EAM IPROCURURE

- Supplier services and catalog maintenance
- Capture, measure and manage spend
- Approval workflow
- Easy integration with Infor EAM solutions.

INFOR WAREHOUSE MOBILITY

- Real time data collection solution
- 30+ transactions to manage inventory and shop floor operations
- Supports multiple languages
- Web based administration tool to manage users, devices and transactions
- Extremely easy to use and provides real time feedback to users

INFOR TIME TRACK

- Collects attendance data, manages labor transactions, and organizes data for processing by your payroll and ERP applications
- Clock In and Clock Out Punches
- In and Out Punches for Lunch / Breaks
- Start and End - Jobs, Projects, Service Orders and Indirect Tasks

- Supervisor Dashboard
 - Review, edit and approve post labor data
 - Submit payroll information to Payroll Supervisors
- Administrators –
 - Maintain Users, Employees, Shifts, Schedules,
 - Manage Permissions

SYTELINE MOBILE ACCESS

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

INFOR XBRL REPORTING

- Report Builder
 - Create, validate, and update XBRL documents
 - Microsoft Office environment
 - Get alerts about inconsistencies and errors in XBRL reports
- Taxonomy Designer
 - Build, extend, and maintain taxonomies
 - User interface that offers multiple views
 - Supports all current XBRL specifications.
 - Meets the requirements of a wide variety of taxonomies

INFOR E-COMMERCE

- Your Customers / Partners can:
 - Do business with you
 - Ordering
 - Order History (all history not only e-Com)
 - Invoices
 - Order Sharing / Collaboration
 - Find information
 - Product information (Catalogs)
 - Online ATP & Pricing
 - Company Information
 - What do you want to show / Share
 - Collaboration
 - Order-collaboration & Order Sharing
 - More...
Role-based, Customizable, Brandable, B2B, B2C...

SYTELINE VENDOR PORTAL

Vendor Features

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

Communication

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

Account Management

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

SYTELINE CUSTOMER PORTAL

Shopping Features

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

Communication

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

Account History

- Order Status
- Estimates Listing
- RMA Listing
- A/R Balance

Account Management

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

Service

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

SYTELINE RESELLER PORTAL

Same Features as Customer Portal plus the following functionality:

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

INFORCE

- Share customer-centric information and processes between Salesforce and SyteLine
- Accelerate your CRM implementation by leveraging existing ERP information.
- Provides a complete customer profile that includes ERP-managed customer information, such as:
 - Customer contact information
 - Customer logistics such as ship-to, bill-to, and pay-from addresses
 - Detailed customer transactions including quotes, orders, shipments, invoices, payables, and returns
- ION technology facilitates two-way communication between ERP and Salesforce, so that relevant customer data entered in ERP automatically updates Salesforce, and vice versa.

INFOR ROAD WARRIOR

- Access customer information
- Contacts
- Products, Orders, & Quotes
- Invoices & Opportunities
- Notes
- Contextual "app awareness"
 - Skype™ & FaceTime integration for real-time collaboration
- Maps
 - Interact with your customers based on location
 - Punch out to Google Maps for driving directions
- Business Intelligence
 - Embedded in the user experience for quick insight and action

Industry Packs

**** Means Installed with Core SyteLine and turned on with a key**

PRINTING & PACKAGING()**

- Templates for print quotes
- Standard printing industry formulas
- Formula Workbench to create and save custom formulas
- Specify cost/price requirements and use Industry specific formulas to create an estimated Print Quote Price
- Copy the structure and information of a similar existing quote into the Workbench to create a new quote
- Compare costs to Print Quote Price
- Analyze material usage and estimate the quantity of materials used for printing, such as ink and oil, based on the Print Quote Price calculations
- Calculate the paper consumed by operations on a printing estimate job
- Determine operation setup time and run time for your machinery, based on the Print Quote requirements

Infor SyteLine Functionality List

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