

The Infor logo, consisting of the word "infor" in white lowercase letters on a red square background.

ERP TECH

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SALES MANAGER

*Alternative Order Entry for Fourth Shift Sales
and Order Processing Module (SOPM)*

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Agenda



Introduction



ICG's Approach & Value We Deliver



SOPM Has Been Replaced!



Demo

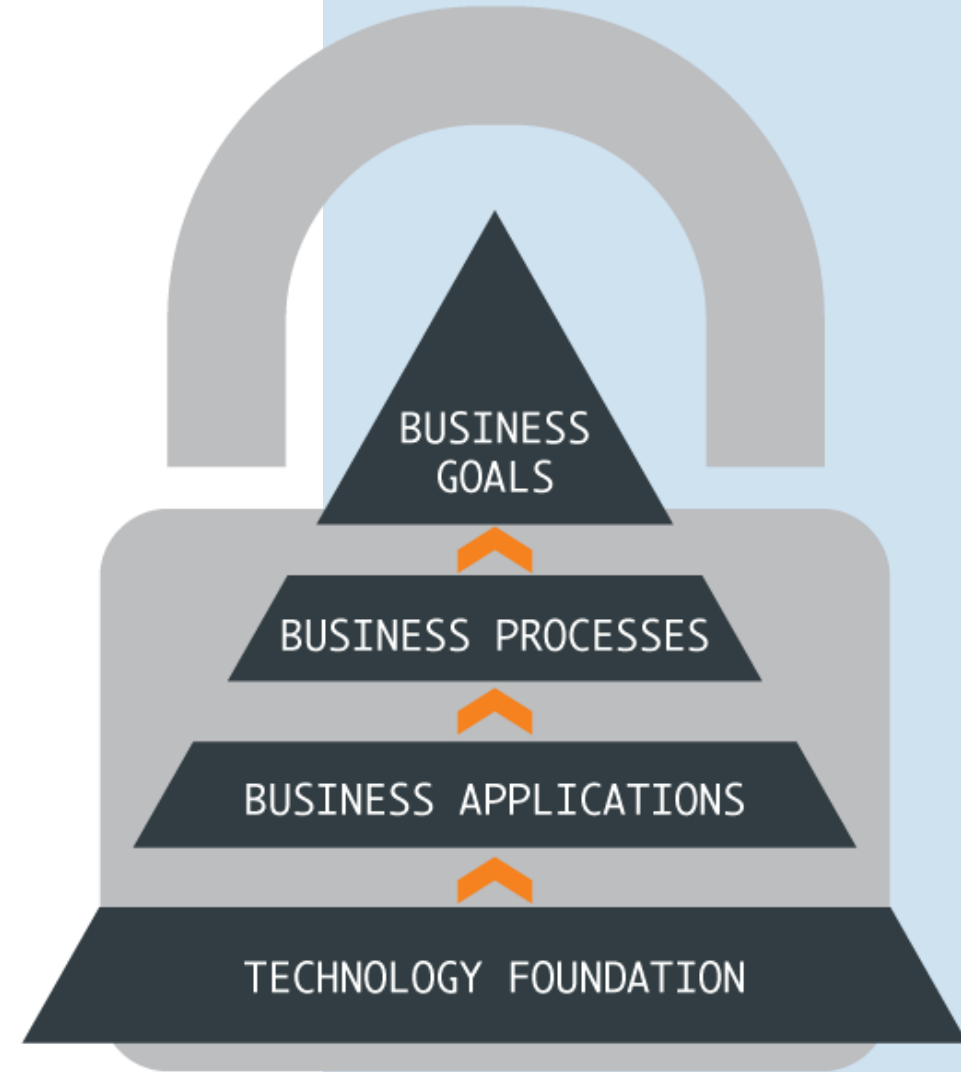


Discussion & Next Steps

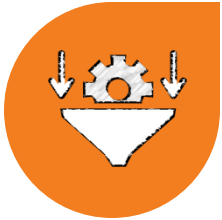
The ICG Approach

A solid **technology foundation** delivers your **business applications** when and where you need them. These two combined implement your unique **business processes**, allowing you to reach your **goals**.

ICG is a process-driven business technology company that ensures your IT platform securely delivers your applications and processes whenever and wherever you need them.



SOPM – It's Just Frustrating!



Deficient

- Lack of Updates
- Dated UI
- Clunky – Kludgy
- Limited Rules Based Pricing



Communications Workflow Manual

- Customers
- Engineering
- Production - Shipping
- Email Extremely Limited



Searching – Very Limited

- Rudimentary Searching
- No Order Status Information
- No Shipment Status
- No Invoices – Sales History – Payment History, etc.
- Need to visit multiple screens or return to the core FS application or Visit Reports/Spreadsheets



SOPM – It's Just Frustrating!



Not Part of the Core FS Application Set

- You need 2 licenses for each user of SOPM – FSGUI & SOPM
- Bouncing between applications is inefficient
- What does it take to look up simple status of a customer



You're Stuck! No Customization/Personalization

- Locked in to how it works
- No 3rd party integrations – Sales Tax, Credit Cards, etc.
- Cannot change the UI
- Email functions very minimal



Quoting

- Rudimentary quoting at best
- No revisions
- Cannot copy quotes or orders





Sales Manager Solves the Problem



- ✓ Modern Single Interface for:
 - ✓ Quoting, Order Entry, Customers, Pricing, Documents, and Workflow
- ✓ Real-time & Fully Integrated with Fourth Shift
- ✓ Proven Technology and Supported Software
- ✓ Fixed Annual Costs. No Surprises
- ✓ Always Fast – Always Accessible
- ✓ Well-Designed – Built and Used by Customer Service Groups for over 17 years.
- ✓ Integrated with ICG E-Commerce

The screenshot displays a software interface with a top navigation bar containing 'Search', 'Order Entry', and 'Exit' buttons, along with a '***LIVE***' status indicator. Below the navigation bar, there are several summary tables and a main data grid.

A/R Balances				Unapplied Balances		Post A/R
Current	1-30 Post Due	31-60 Post Due	60+ Post Due	Total	Cash	Credit
\$275.25	\$0.00	\$0.00	\$0.00	\$475.25	\$0.00	\$1,320.75

Credit Line	Released Exp.	Total Exposure	Avail. Days To Pay	Hold Order Total
\$10,000.00	\$80,436.00	\$90,436.00	0	\$27,746.75

Invoice Detail (Red - Post Due, Green - Paid, Black - Current)											
Line Code	Invoice No.	CO Number	PO Number	Sales	Freight	Less	Invoice Total	Post Total	Last Payment	Open Amt	Notes
PA-1280	CO-20041227-001	PO-20041227-02		\$219.79	\$0.00	\$0.00	\$219.79	\$0.00NA		\$219.79	
PA-1280	CO-20041227-001	PO-20041227-02		\$3.95	\$0.00	\$0.00	\$3.95	\$0.00NA		\$3.95	
PA-40005	000002	HD-00000015	PO-20041227-02	\$208.05	\$0.00	\$0.00	\$208.05	\$0.00NA		\$208.05	
PA-40005	000004	Q001235-001		\$0.00	\$0.00	\$0.00	\$1.00	\$0.00NA		\$1.00	(\$1.00) (Bress is not going to pay. Placconard writing the invoice off. Stated he has not received what he ordered now several lines. Interworking how he is keeping the product though)
FD-0000		SUPPLY-100		\$10.00	\$0.00	\$-50.00	\$0.00	\$0.00NA		\$0.00	
FD-0000 \$ 45.00 AM		HD-00000042	1204	\$219.20	\$0.00	\$0.00	\$219.20	\$0.00NA		\$219.20	
FD-0000 \$ 45.00 AM		CCRY_ORCER		\$219.20	\$0.00	\$0.00	\$219.20	\$0.00NA		\$219.20	
FD-0000 \$ 45.00 AM		HD-00000015		\$208.05	\$0.00	\$0.00	\$208.05	\$0.00NA		\$208.05	
FD-0000 \$ 45.00 AM		HD-00000015		\$208.05	\$0.00	\$0.00	\$208.05	\$0.00NA		\$208.05	
FD-0000 \$ 45.00 AM		HD-00000005		\$219.00	\$0.00	\$0.00	\$219.00	\$0.00NA		\$219.00	
PA-40005	000001	CO-20041227-001	PO-20041227-02	\$1,724.02	\$1.00	\$0.00	\$1,725.02	\$0.00NA		\$1,725.02	
PA-50005 12:05:47 PM		HD-00000015		\$208.05	\$0.00	\$0.00	\$208.05	\$0.00NA		\$208.05	

Sales			Credits		
Current Mo.	Price Mo. 1	Price Mo. 2	Current Mo.	Price Mo. 1	Price Mo. 2
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Price Mo. 3	Price Mo. 4	Price Mo. 5	Price Mo. 3	Price Mo. 4	Price Mo. 5
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Price Mo. 1	Price Mo. 2	Price Mo. 3	Price Mo. 1	Price Mo. 2	Price Mo. 3
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00



Sales Manager Solves the Problem



✓ Easy to Manage

- Built by Xtern/ICG in Collaboration with Customers
- Speed and Efficiency at the Forefront
- 100% INCREASE IN ORDER ENTRY
- Unifies Fourth Shift & Sales Manager Datasets

✓ Supported Integrations

- Custom Products
- Options Assistant
- Sales Tax (Vertex-Avatax)
- Credit Card Services Integrated

✓ Additional Features

- **Business Logic Layer** (Java Script) Facilitates Customization, Personalization, Workflow Management
- Customizable UI

The screenshot displays the Sales Manager software interface. The top window shows order details for Order ID 02000, including customer information (BEGELE, 91234) and shipping details (SHIP TO address, HSS TRUCK). Below this is a table with columns for Line, Quantity, Supply Status, Supply Type, Lot ID, Job ID, Split ID, Sched. Fresh Date, New W/O, Part ID, # Pieces, Length, Width, Height, and Dem ID. A second window titled 'Native Card Services - Customer Credit Cards' is open, showing the customer email address KEIRD@XTERNSOFTWARE.COM and a table of credit cards.

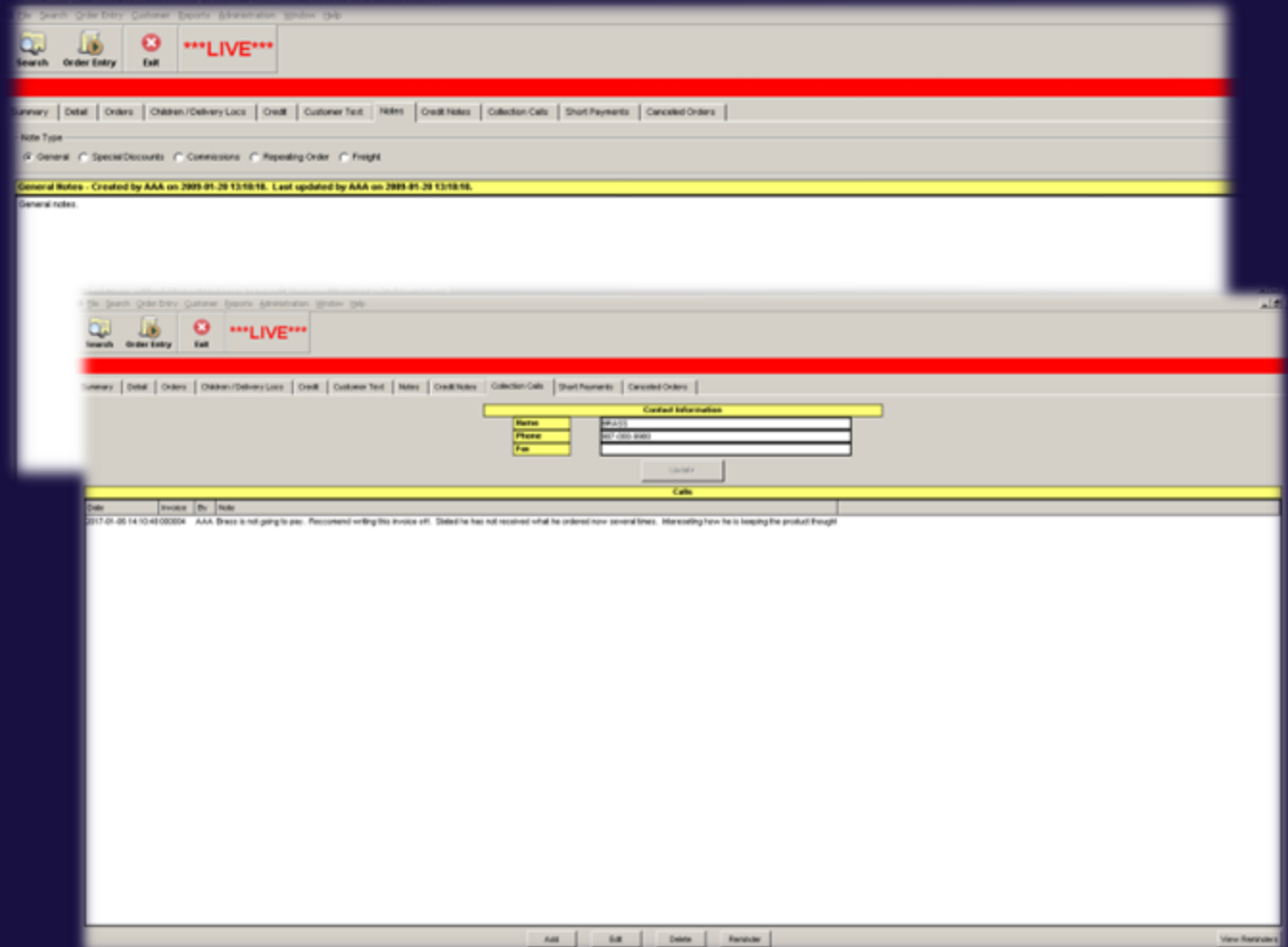
Card No	Exp Date	Card Type	First Name	Last Name	Company	Address	City	State	Zip	Country
XXXX0027	2025-01	Visa			ACME FURNITURE	212 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX0006	2025-01	DinersClub			ACME FURNITURE	212 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX0012	2025-01	Discover			ACME FURNITURE	212 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX1111	2025-01	Visa			ACME FURNITURE (EDIT)	212 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX1111	2019-01	Visa			ACME'S NAME	212 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX1111	2019-01	Visa			ACME'S NAME	213 HIGH ST.	POTTSTOWN	PA	19464	USA
XXXX1111	2024-01	Visa								



Sales Manager Solves the Problem



- ✓ **Customize to Your Processes**
 - UI Customization Allowed to Support Your Business
 - Visual Cues & Color Coding Throughout
 - Integrate with ANYTHING!
- ✓ **Eliminate Manual Processes**
 - Focus on YOUR CUSTOMER not the System!
 - Order Entry Efficiency – The Sky's the Limit
- ✓ **Notes, Notes, and MORE NOTES**
 - Notes are Everywhere You Want or Need Them
 - Set Reminders
- ✓ **Meaningful Metrics**
 - Dashboards/screens for Sales Data
 - Credits
 - Inventory
 - ARTB/ARIC Built-In
 - Collection Information
 - Reminders
 - And More....





Sales Manager Demo





Discussion and Questions

