Infor VISUAL ERP Overview/Demo

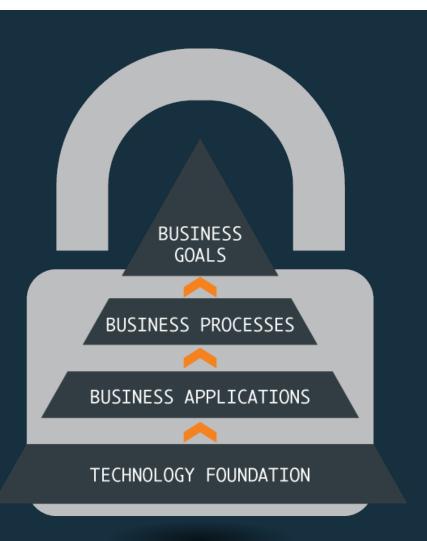Jeff Bronson, Ken Kellenberger, and Len Ashley

FOURTH SHIFT SUMMIT 2023 • KNOXVILLE, TN

The ICG Approach

Technology plays a crucial role in the success and operations of businesses across all industries and sectors.

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

ICG

BUSINESS GOALS

BUSINESS PROCESSES

BUSINESS APPLICATIONS

TECHNOLOGY FOUNDATION

OUR MISSION:

[Deliver innovative and reliable business and technology solutions that exceed our client's expectations, resulting in reduced cost, improved efficiency, and a guaranteed ROI.]

ICG

OUR VISION:

[Enable enterprises of all sizes to leverage technology for business growth and success.]

Value We Deliver

ERP Solutions

One-Stop-Shop:
- Sell
- Host
- Develop/Customize
- Implement
- Optimize
- Upgrade
- Train
- Provide professional services for Visual ERP, Acumatica Cloud ERP, and Fourth Shift ERP
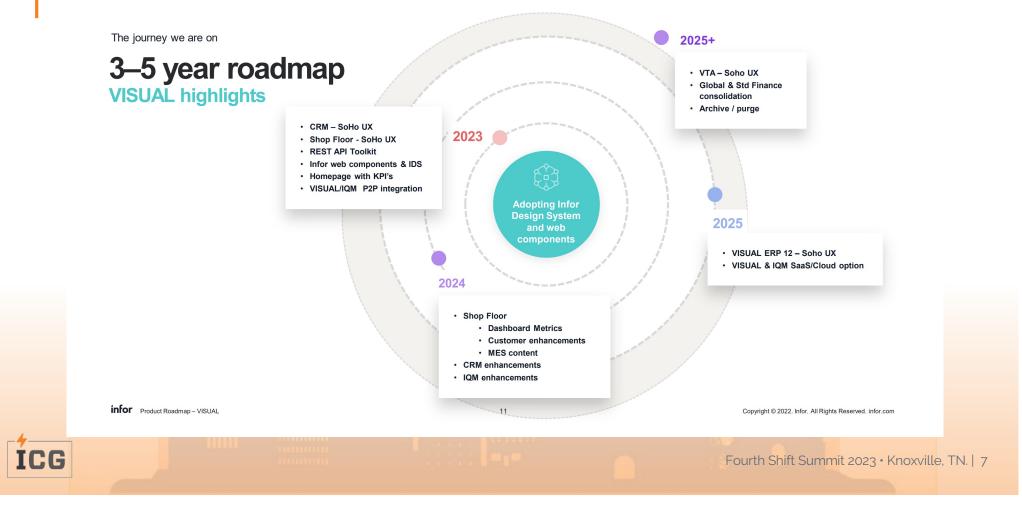
ICG

IT Services

We Do What It Takes:
- We provide end-to-end IT services and technology solutions for small to large-sized businesses:
  - Managed services
  - Cybersecurity
  - Business Intelligence
  - Backups & Recovery
  - … and more
- We consult and we partner
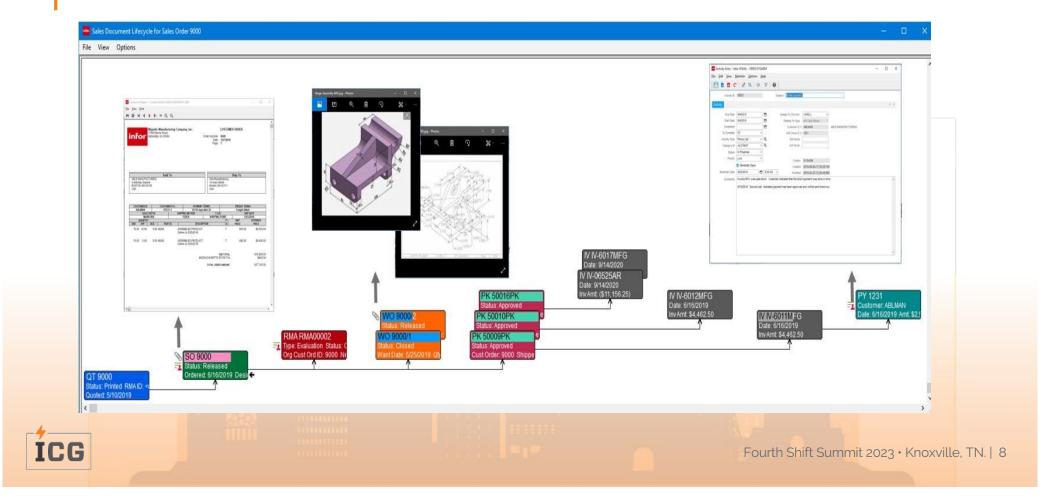- IT Provider Since 2004

Visual ERP Solution Footprint

Visual ERP Roadmap

The journey we are on

3—5 year roadmap
VISUAL highlights

- CRM – SoHo UX
- Shop Floor - SoHo UX
- REST API Toolkit
- Infor web components & IDS
- Homepage with KPI's
- VISUAL/IQM P2P integration

2023

2025+
- VTA – Soho UX
- Global & Std Finance consolidation
- Archive / purge

Adopting Infor Design System and web components

2025
- VISUAL ERP 12 – Soho UX
- VISUAL & IQM SaaS/Cloud option

2024
- Shop Floor
  - Dashboard Metrics
  - Customer enhancements
  - MES content
- CRM enhancements
- IQM enhancements

infor   Product Roadmap – VISUAL

11

Visual ERP Sales Opportunity to Cash

VISUAL ERP - Sales

- Quote to Cash
- Prospect Management
- Estimating & Quote Management
- Sales Order Management
- Shipping & labeling
- Invoicing
- Cash Receipts
- Capacity to Promise
- Material Availability
- Price Book Configurator

- Delivery lines with delivery schedules
- Sales document lifecycle 360 view
- Demand Supply allocations
- Electronic Data Interchange
- Customer Consigned Inventory

ICG

VISUAL ERP - Procurement

• Request for Quote

• Supplier pricing

• Requisitions

• Purchase Orders

• Receiving & Inspection

• Interbranch Transfers

• Outside service dispatching

• Supplier Consigned Inventory

VISUAL ERP - Financials

- General Ledger
- Multi-Entity/Site
  - Multi-Currency
  - Consolidation
  - Allocations
  - Budgets
  - G/L Dimensions
  - Account Groups
- Accounts Receivable
- Accounts Payable

- Cash Management
- Cost Accounting
- Project Accounting
- Financial Reporting
- G/L Report Writing
- F-9 Intregration

VISUAL ERP – Performance Management

- Dashboard Analytics
- User Defined Dashboard Analytics
- Supplier Performance
- Throughput Management
- Document Lifecycle
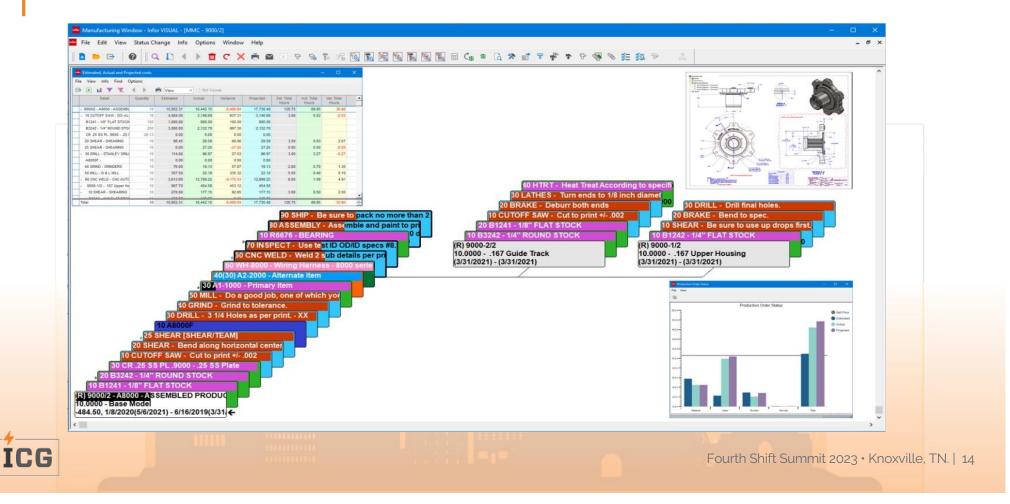- Lead-time Performance
- Financial Reporting

VISUAL ERP – Manufacturing & Engineering

- Engineering Master – combined multi-level BOM and routing
- Manufacturing Window
  - Graphical WO status
  - WO Estimate, actuals, and projected cost and hours
  - Material availability
  - One-click labor reporting
  - On-click material reporting
  - One-click purchase to Job
  - WO schedule view
  - Deep dive drill to all WO details
- Engineering Change Control

ICG

VISUAL ERP – Manufacturing & Engineering

VISUAL ERP – Inventory Mgmt. & Planning

- Warehouses & Locations
- Buy, sell, stock U/M Conversion
- Inventory Costing – Actual, Average, Standard, FIFO, LIFO
- Material Requirements Planning (MRP)
- Master Scheduling
- Forecasting
- Material Planning Window – Supply Demand Netting
- Serial Number Control
- Lot Control
- Dimensional Inventory
- Physical Inventory
- Interbranch transfers

VISUAL ERP – Capacity Management

- Resource Management
- Outside service management
- Concurrent Finite Scheduling
- Rate-based Scheduling
- Infinite scheduling
- Graphical Scheduling Window
- What-if drag & drop scheduling
- Mobile Production Schedule
- Labor Reporting

VISUAL ERP – Enhanced Features

- Aerospace & Defense / Project Management
- Lean Manufacturing / Scheduling
- Plant & Equipment Maintenance – Internal & Customer
- Advanced Planning
- Global Financials
- Payroll and Human Resources
- Business Intelligence (Visual Dashboards, Synoptix and Tableau)
- Shop Floor Mobility Execution and Automation (Browser Based)

VISUAL ERP – Enhanced Features

- Time & Attendance

- Labor Scan Kiosk

- RF Device Mobility – Material & Labor reporting

- Smart Device Mobility
  - Manufacturing and Inventory Operations

- VISUAL CRM

  - Contact Center

  - Sales

  - Service

  - Help Desk

  - Marketing

VISUAL ERP – Enhanced Features

- Infor Quality Management (IQM)

  - Supplier and Customer Management

  - Employee Management

  - Preventative Maintenance

  - Calibration Maintenance

  - Advanced Product Quality Planning (APQP)

  - Production Part Approval Process (PPAP)

  - Inspection Plans

  - Document Management

  - Process Management
  - Data Collection
  - Non-Conformance
  - Corrective Action
  - Audit Management
  - Cost of Quality
  - SPC, Study, Reports

- **uniPoint** Quality Made Simple Quality Management

VISUAL ERP – Enhanced Features

Infor Companion Products

• Enterprise Asset Management (EAM)

• Infor CRM

• Infor OS (ION)

• CADLink

  • AutoCAD - AutoCAD Electronics – SolidWorks – Inventor

  • Altium

  • CATIA

  • Creo

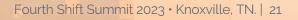 • DxDesigner

  • Nx

VISUAL ERP - Platform

- SQL Server and Oracle Database Support

- Macros
  - Available most screens
  - Extends Application Functionally
  - On-Save, On-AfterSave, On-Load, On-New, On-Delete, On-After Delete, Save Process

- Object Nationalizer
  - Screen Customization

- User Defined Fields

- Display Database Source of Fields in Screens

- Print Database Schema

- Ability to Customize any Canned Report and add Extended Queries

Visual ERP

Visual ERP Product Demo

Why does VISUAL ERP make sense for YOU

- Strong Roadmap for the future

- Fully Funded by Infor

- Fully Supported by Infor

- Multi-entity Multi-site (single database)

- Over 4k Installations Worldwide

- Multi-Lingual

- Healthy Partner Network – ICG top 3 partners

- Full Modern Dashboards – Intregrated and Externally Connected

- Preserves Investment in Shop Floor and Workorder Automation

- VISUAL Meets or Exceeds all Fourth Shift Functions and Features

- Accelerated Implementation with ICG support

- Moves your Business Forward

ICG

Questions

Thank You