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# ERP TECH

## SUMMIT 2024

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### Company and Software Introduction



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**Innovative Consulting Group**  
[www.ICGTechnology.com](http://www.ICGTechnology.com)

# Agenda



Introduction



ICG's Approach & Value We Deliver



Software History and Demo



Discussion & Next Steps

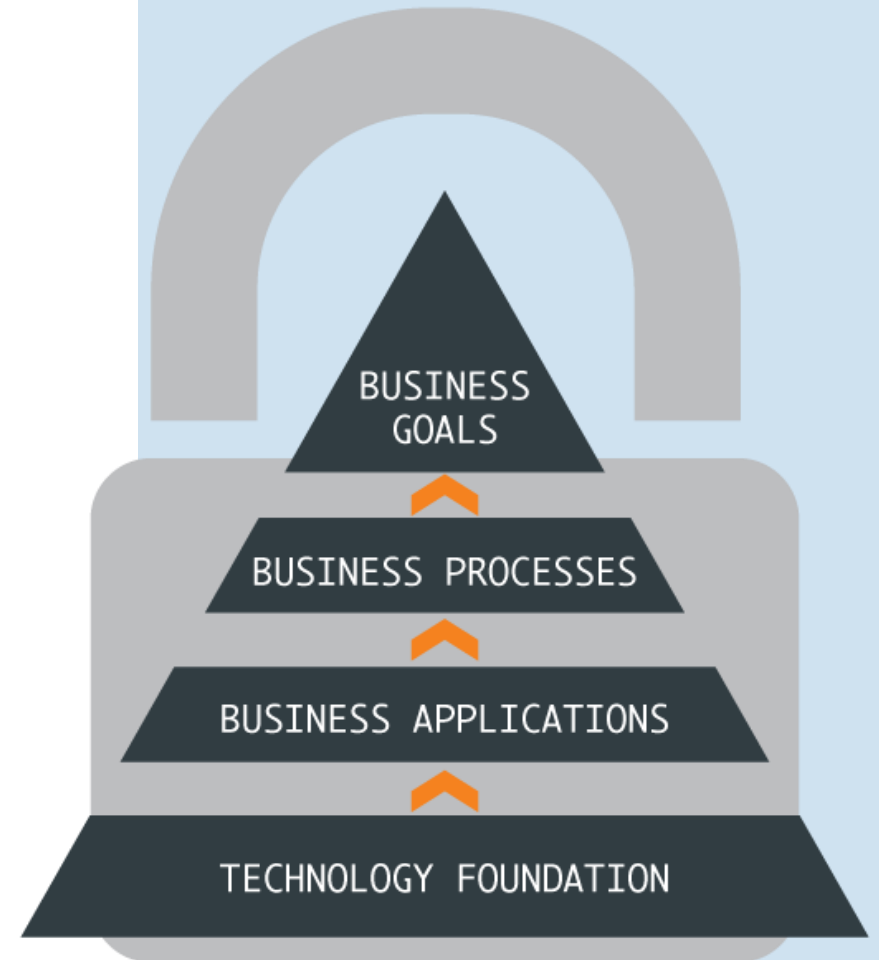
# The ICG Approach

## 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.

## OUR VISION:

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





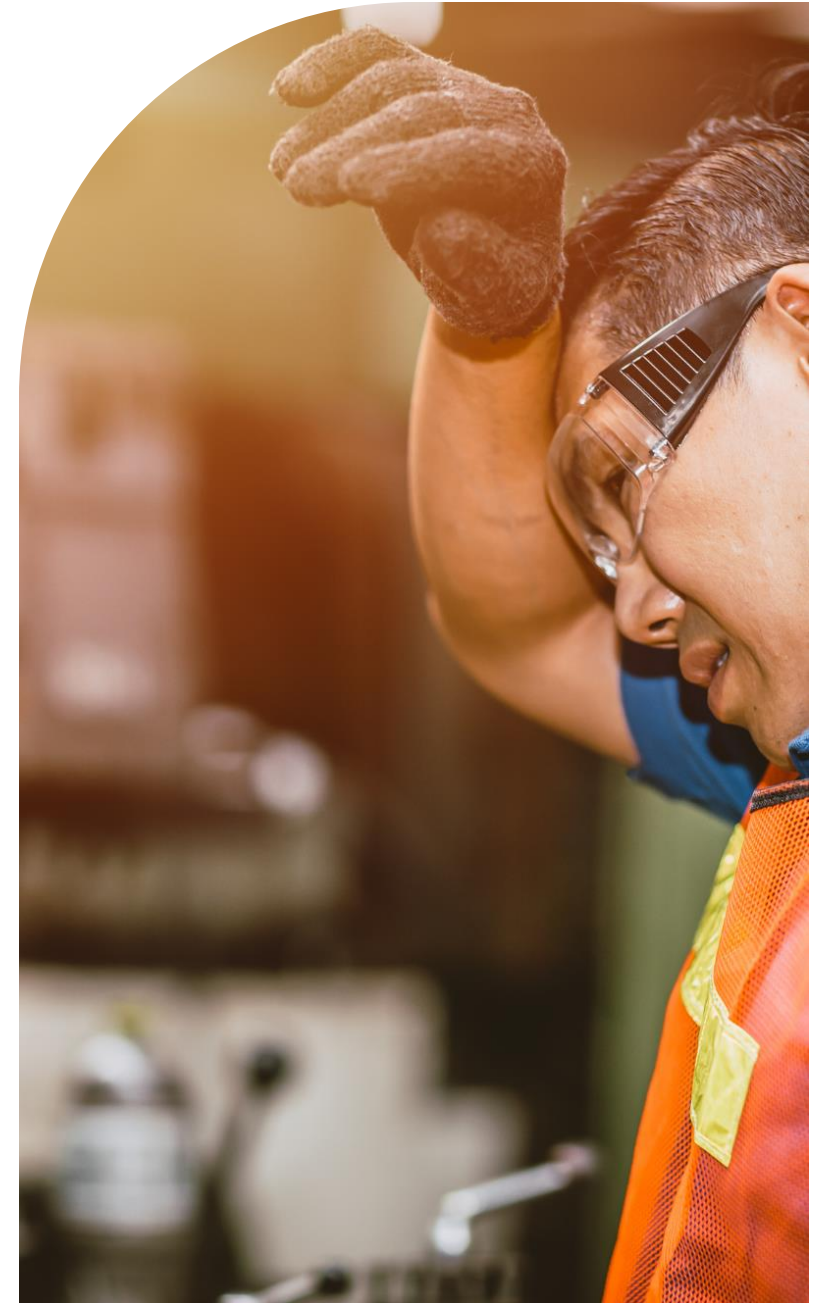
# Legacy ERP Issues

## ISSUES FACED BY MANUFACTURERS

- Dated user interface
- Diminished functionality in new releases
- No built-in Key Performance Indicators (KPI)
- No built-in report writer
- Minimal extensibility
- Limited consulting resources
- Limited application support from Infor
- And much more...

## **POOR OR NO DIRECT INFOR SUPPORTED SOLUTION FOR:**

- Logic-driven configuration
- Quality control
- E-commerce
- Complete EDI functionality
- Customer Relationship Management (CRM)
- Sales tax
- Credit card processing
- Break/fix service support
- And much more...



# VISUAL ERP Product Line History

<p><b>1993</b></p> <ul style="list-style-type: none"><li>• Initial release of Visual Manufacturing by Lilly Software Associates</li></ul>	<p><b>1994 through 2004</b></p> <ul style="list-style-type: none"><li>• Significant growth in sales along with product evolution over the next 10 years</li><li>• Visual Manufacturing renamed VISUAL ERP</li><li>• Visual Job Shop was released in 2003</li></ul>	<p><b>2004</b></p> <ul style="list-style-type: none"><li>• Infor Global Solutions acquires the Lilly Software Associates</li></ul>	<p><b>2005 to Present</b></p> <ul style="list-style-type: none"><li>• Both products continue with more of the development and marketing resources focused on VISUAL ERP</li></ul>

# Robust Partner Network & ERP Extensions

- ❖ ICG is a Top 3 Partner
- ❖ ICG's VISUAL Team (8 Consultants)
- ❖ ICG and others have ERP Extension Software that extends VISUAL ERP – Sales Tax, EDI, Credit Cards, and more
- ❖ VISUAL ERP has a mature feature set where most mid-tier Cloud Based products do not



# Drivers Influencing VISUAL Product Investments



## Market analysis

- Discrete manufacturing for SMB market
- Production scheduling
- Shop floor automation
- Supports growth - multi site, multi currency
- Technology adoption
- ST Cloud / managed services options



## Customers

- Enhancement requests
- Strategic customer alliances
- Channel partners
- User groups and conferences



## Industry 4.0

- Digitalization & mobility
- REST API - Extensibility
- Artificial intelligence / machine learning



## Thought Leadership

- On-time delivery
- Predictive analysis
- Lower cost, increased profits
- Automation



## Competitive Landscape

- Purpose built solution
- Time to value
- Ease-of-use
- Cost or ownership and data access

# VISUAL Roadmap Highlights



● Durability    
 ● Innovation    
 ● Customer    
 ● Experience

## VISUAL 11

## V11 Minor/SP release considerations

Scheduling & Shop Floor Automation

VISUAL Core / Manufacturing

	Q3 2024	Q4 2024	Beyond	
Scheduling & Shop Floor Automation	<ul style="list-style-type: none"> <li>● What-if work orders</li> <li>● Preserve frozen operations</li> <li>● Capacity predictions</li> <li>● Priority operation scheduling</li> <li>● UI - Infor Design System Controls</li> <li>● Camera Scan</li> <li>● Automated installer</li> <li>● Display started Ops first</li> <li>● Selected operation dispatching</li> </ul>	<ul style="list-style-type: none"> <li>● Scheduling Window visuals – priority, what-if ops, frozen ops</li> <li>● Global Scheduler logging preference</li> <li>● Work (operation) priority by resource</li> <li>● Connected database identifier</li> <li>● Administrative operation close</li> </ul>	<ul style="list-style-type: none"> <li>● Part ID &amp; Desc. On Resource grid</li> <li>● WO picture on Schedule Grid</li> <li>● List sub-assemblies(legs) on OP material list</li> <li>● Extensibility – URL Call</li> <li>● Prevent labor against closed operations</li> <li>● Secure scan mode by user</li> <li>● My WO tasks</li> <li>● Part image to PI form</li> <li>● Quantity verses Start/Stop reporting</li> </ul>	<ul style="list-style-type: none"> <li>● Scheduling Board Themes</li> <li>● Work Priority Queues</li> <li>● WO and Resource Down codes</li> <li>● Indirect ID by department</li> <li>● PO receipt scan mode</li> <li>● Shipping pack slip</li> <li>● Order UDF's on shipping form</li> <li>● Admin – labor threshold override</li> <li>● WO Issue All from WIP</li> <li>● Drill to trace details</li> <li>● Show closed WO on return</li> <li>● Inventory availability by default WH</li> <li>● Report Good Qty on setup</li> <li>● E-mailing</li> </ul>
VISUAL Core / Manufacturing	<ul style="list-style-type: none"> <li>● Preferred vendor operation update</li> <li>● Enhanced RFQ file name on e-mail</li> <li>● Created &amp; Modify by on part</li> <li>● Created by on vendor &amp; customer</li> <li>● Customer part pricing import</li> <li>● CO – customer filter to selling history</li> <li>● PO promise date in Planning Window</li> <li>● Deactivate locations</li> <li>● Display sequence on ship- to address</li> <li>● Waybill number increase</li> <li>● Deactivate indirect labor codes</li> <li>● PO enforcement on sales order</li> <li>● Drill to payable invoice from WO cost screen</li> <li>● Increase labor ticket search options</li> </ul>	<ul style="list-style-type: none"> <li>● Order Entry – Supply clarity when WO</li> </ul>		



# VISUAL Roadmap Highlights



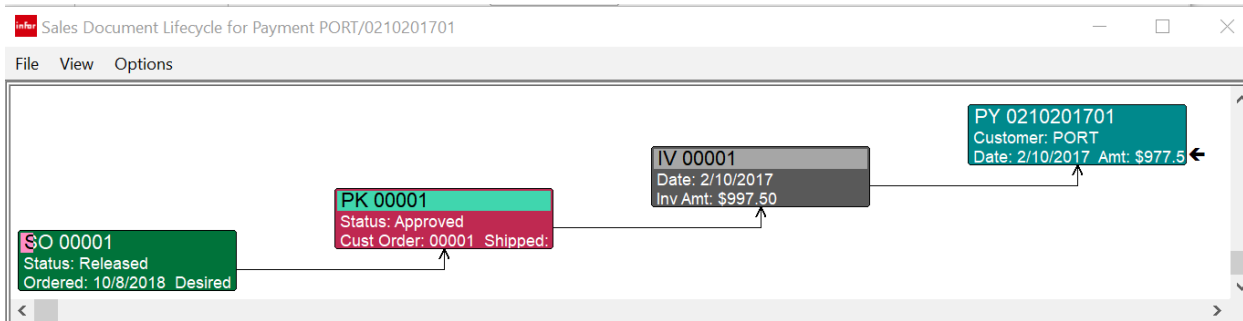
● Durability     
 ● Innovation     
 ● Customer     
 ● Experience

## VISUAL 11

## V11 Minor/SP release considerations

	Q3 2024	Q4 2024	Beyond	
Technology & Integrations	<ul style="list-style-type: none"> <li>● RESTAPI - Shop Floor base</li> </ul>	<ul style="list-style-type: none"> <li>● RESTAPI - Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>● CRM web Contact Center</li> <li>● CRM web Sales</li> <li>● RESTAPI – Financials</li> </ul>	<ul style="list-style-type: none"> <li>● CRM web Help Desk</li> <li>● CRM web Service</li> <li>● Infor CPQ integration</li> </ul>
Finance	<ul style="list-style-type: none"> <li>● G/L account for consumable on part</li> <li>● Wire &amp; Credit Card types</li> <li>● Credit limit check include tax &amp; freight option</li> <li>● Progress billing description on invoice</li> </ul>	<ul style="list-style-type: none"> <li>● VAT exempt by ship address</li> <li>● Deactivate Bank Account</li> <li>● Part ID column to Invoice Entry</li> <li>● Change FOB to Shipping Terms</li> </ul>	<ul style="list-style-type: none"> <li>● Cash Receipts – discount on goods only</li> </ul>	<ul style="list-style-type: none"> <li>● ACH – Standard Financials</li> <li>● Bank Statement Reconciliation – Standard Financials</li> </ul>
Security & Compliance	<ul style="list-style-type: none"> <li>● Menu &amp; Program permission off when adding user</li> </ul>	<ul style="list-style-type: none"> <li>● SSO – Special character additions</li> <li>● User licensing summary</li> </ul>	<ul style="list-style-type: none"> <li>● NIS2 Compliance - SBOM</li> </ul>	<ul style="list-style-type: none"> <li>● CMMC/NIST 800-171</li> <li>● NIS2 Compliance - encryption</li> </ul>

# Top Reasons to Migrate to VISUAL ERP



## Graphical Document Life Cycle

- Gives you an instantaneous 360-degree view of the status of every aspect of an order with complete drill-down to all levels of detail

The screenshot shows the Resource Schedule interface for Employee ID PAUL. The table displays work orders (WO) for S3 - SCHEDULING PART THREE, including Part/WO (OP), Part Picture, Status, Want Date/Flags, Want Date, Finish Date, OP Start Date, and OP Finish Date.

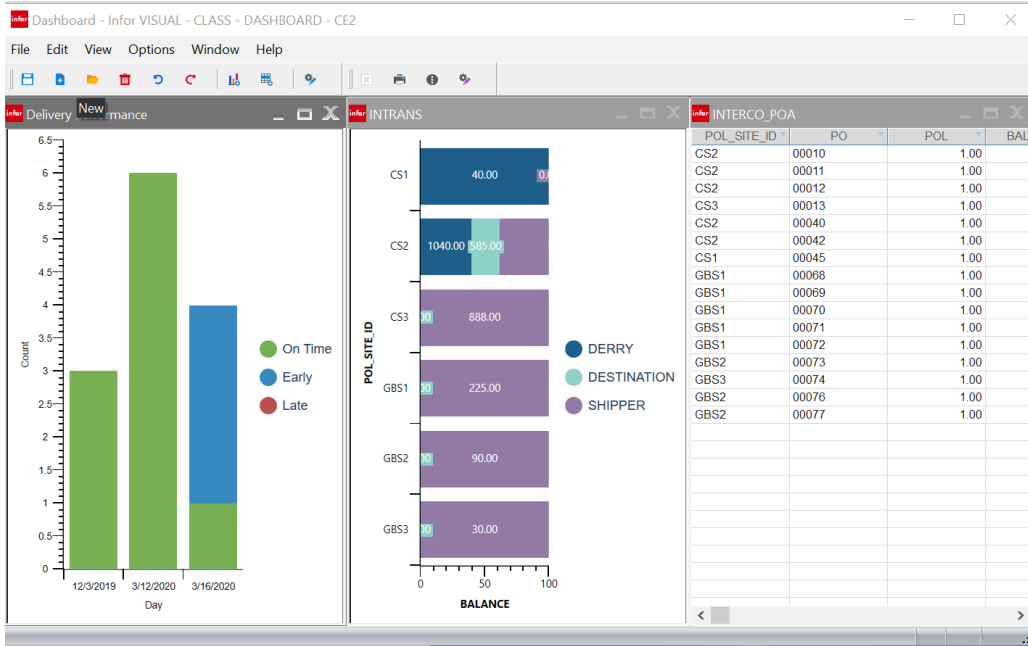
Select	Part/WO (OP)	Part Picture	Status	Want Date/Flags	Want Date	Finish Date	OP Start Date	OP Finish Date
	S3 - SCHEDULING PART THREE 00176/1(20*)		Released	1/29/20	1/29/20	6/28/21	6/10/21	6/28/21
	S3 - SCHEDULING PART THREE 00012/1(20*)		Released	9/30/18	9/30/18	3/23/21	3/15/21	3/23/21
	S3 - SCHEDULING PART THREE 00257/1(20*)		Released	3/11/21	3/11/21	7/15/21	6/29/21	7/15/21
	S3 - SCHEDULING PART THREE 00258/1(20*)		Released	3/23/21	3/23/21	8/2/21	7/15/21	8/2/21
	S3 - SCHEDULING PART THREE 00259/1(20*)		Released	4/3/21	4/3/21	8/19/21	8/3/21	8/19/21

## Shop-Floor Mobile Automation

(Optional Modules)

- Give your shop-floor personnel complete access to production schedules on mobile smart devices
- A visual view of work sequence, order status, and pending work
- Both material and labor can be reported directly from the mobile scheduling dispatch screen
- More Modules and Functionality added in Version 10

# Top Reasons to Migrate to VISUAL ERP



## User-Defined Dashboards

- Create personalized dashboards from a series of predefined or user-defined views
- All graphical views provide a series of selection criteria with complete drill-down to grid format
- providing you with visual alerts about potential issues and direct access to document details

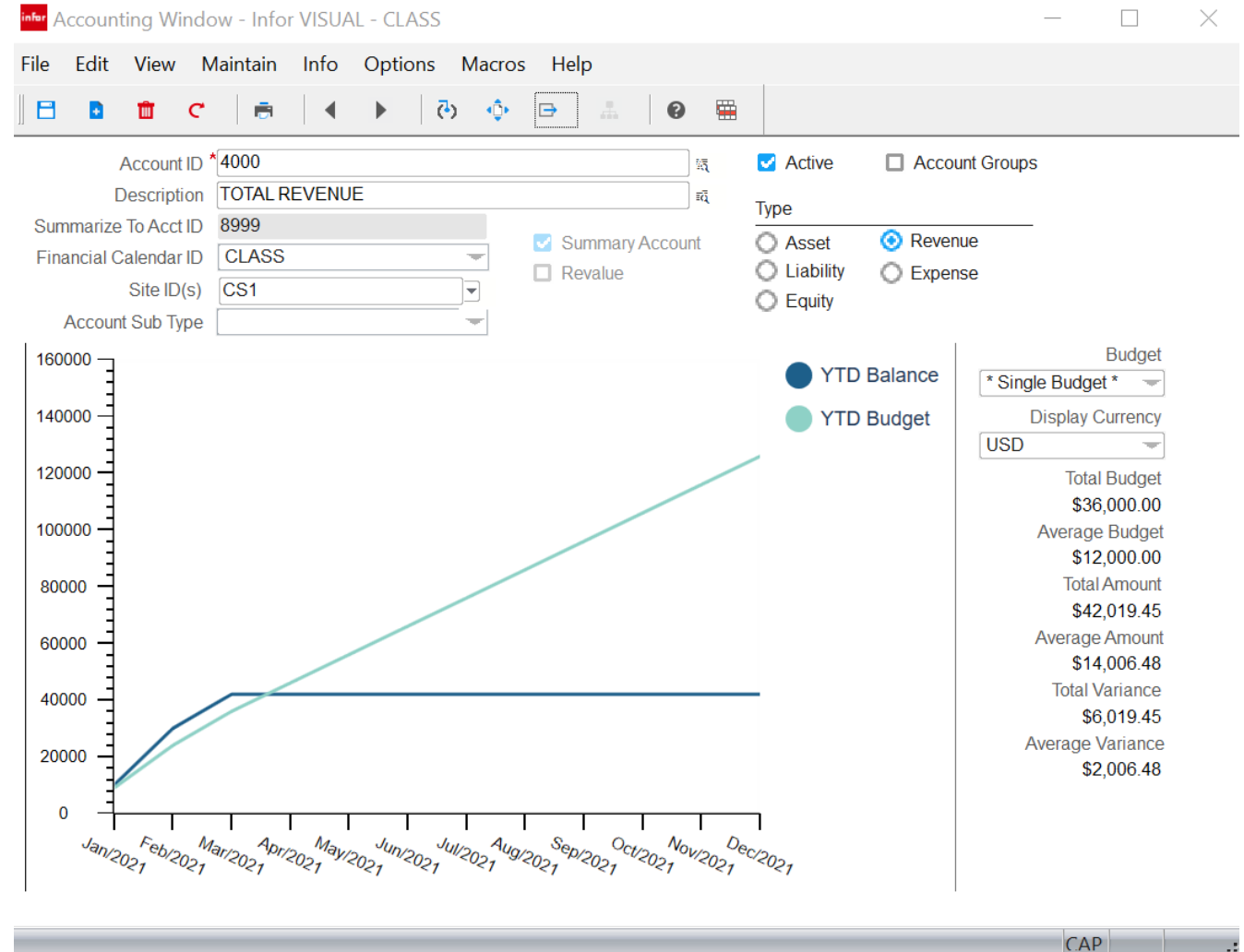
## Lifecycle Notifications

- Automated internal and external notifications can now be set up easily by your sales and purchasing personnel
- Allows key stakeholders to be alerted when an activity within an order's lifecycle occurs such as the shipment of an order

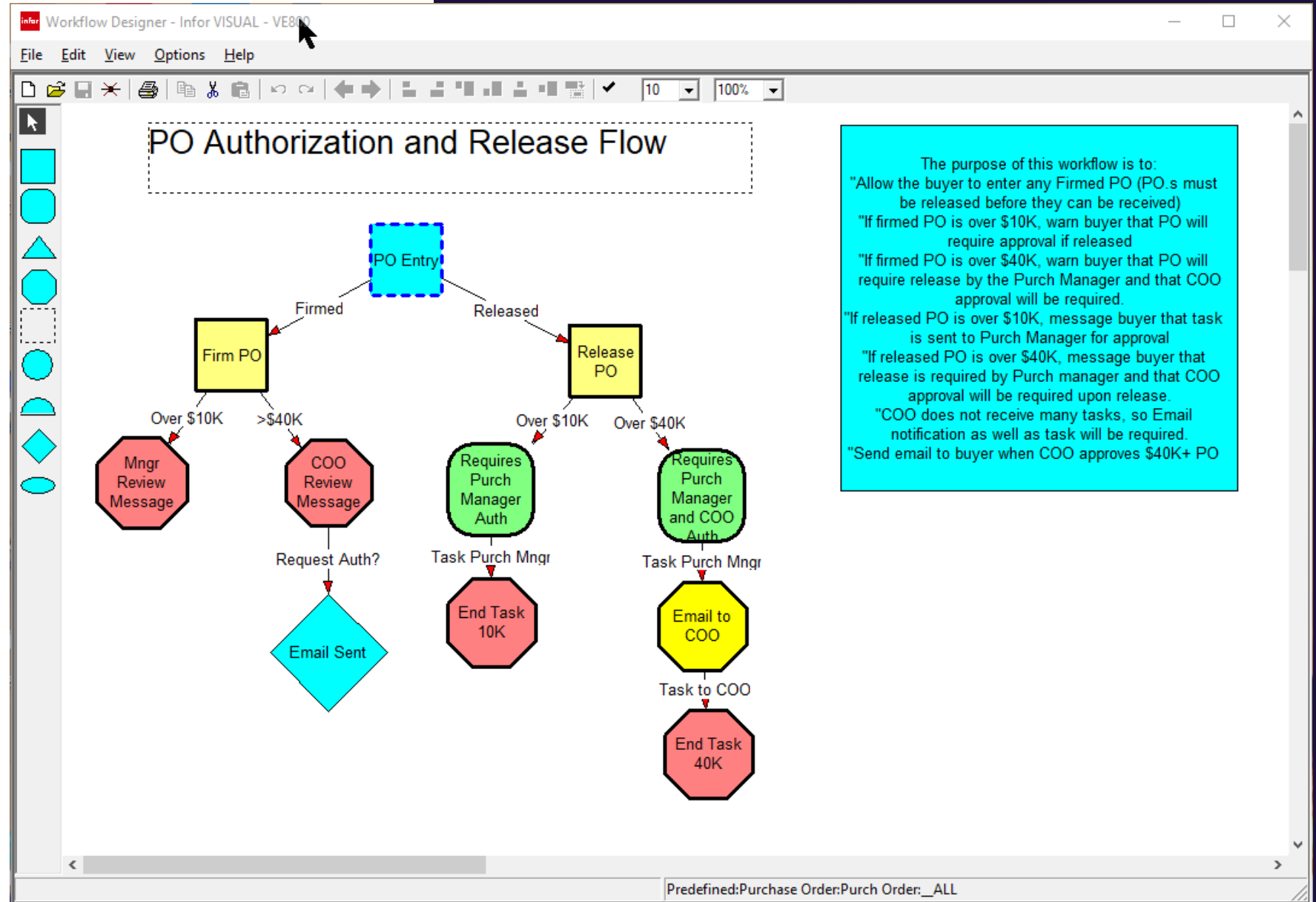
Activity ID	Reminder Date	Category ID	Relates To Type	Related ID	Activity Status	Subject	Activity Type	Create Date	Start Date	Due Date	Complete Date	Complete %	Comments	Priority Type
00001			Customer Order	00006	In Progress	test		9/14/2017	9/14/2017	9/14/2017		0%	Test to see visibility	Low
00002			Equipment	00003	In Progress	Demo Activity for Equipment		11/2/2020	11/2/2020	11/2/2020		25%	Demo Activity for Equipment.	Low

# Additional VISUAL ERP Features

- Integrated Full Feature Financials
- Engineering Change Management
- Document Vaulting
- Workflow Tools
- Notification Maintenance
- Receiving Inspection Management
- Multi-Warehouse
- Multi-Site Option
- Return Material Authorization
- Field Level Security
- Transaction Audits
- Automated Messaging
- Configurable Grids on All Screens
- Macros

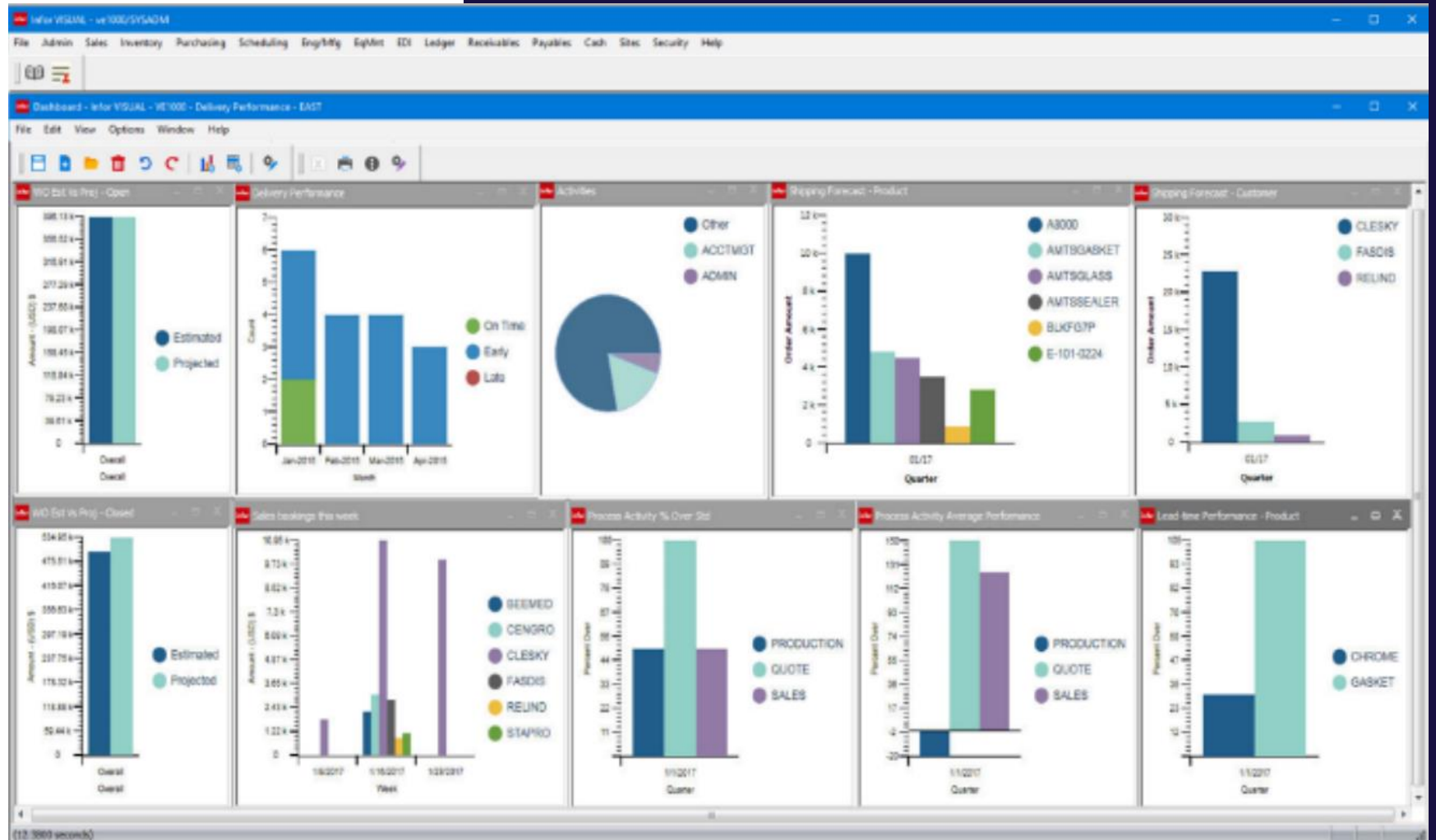


# Workflow Tools Define and Enforce Process Rules



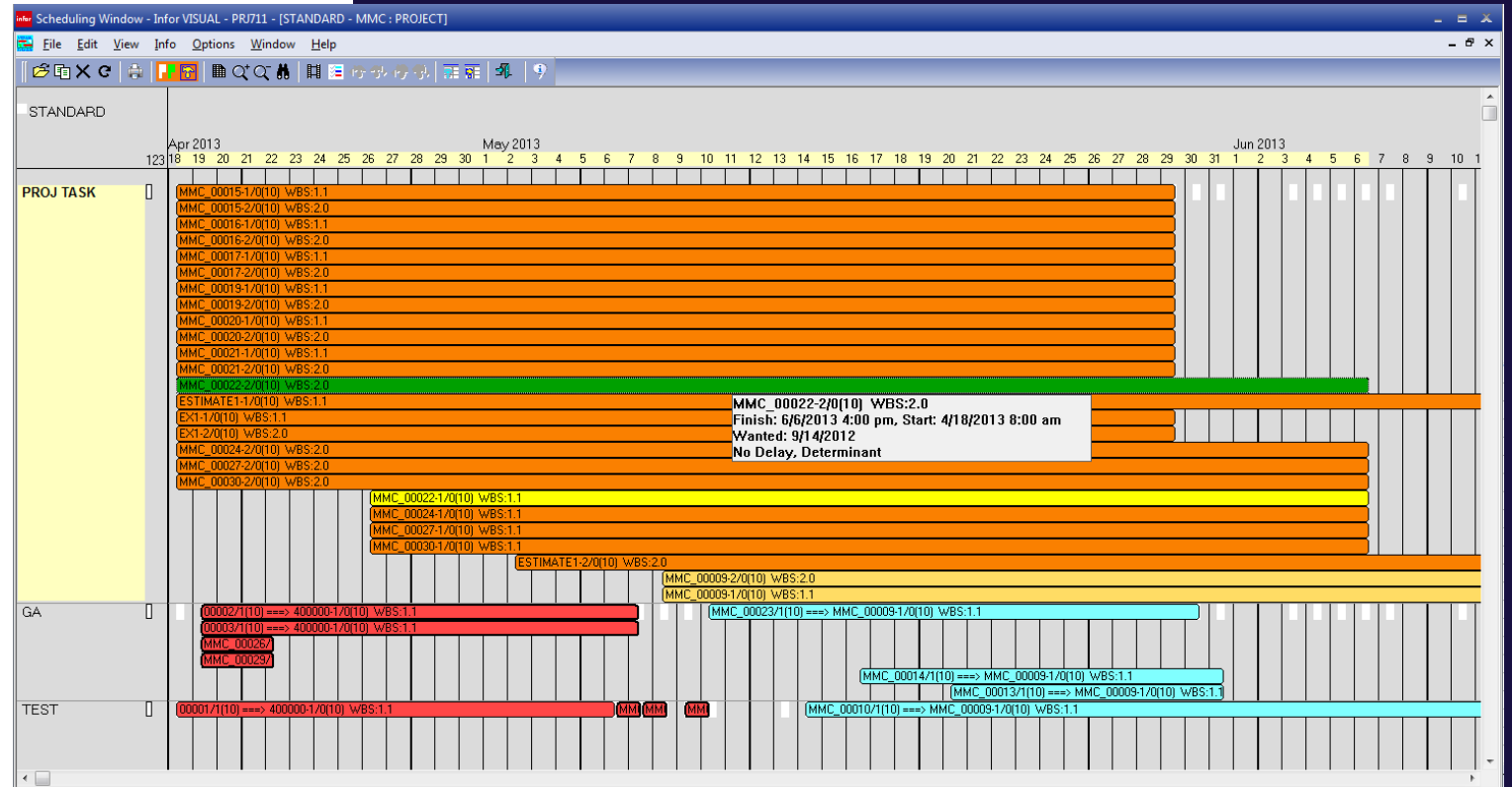
# Configurable Dashboards Based on User Role

VISUAL Dashboards measure the overall health of the business or your area of responsibility.



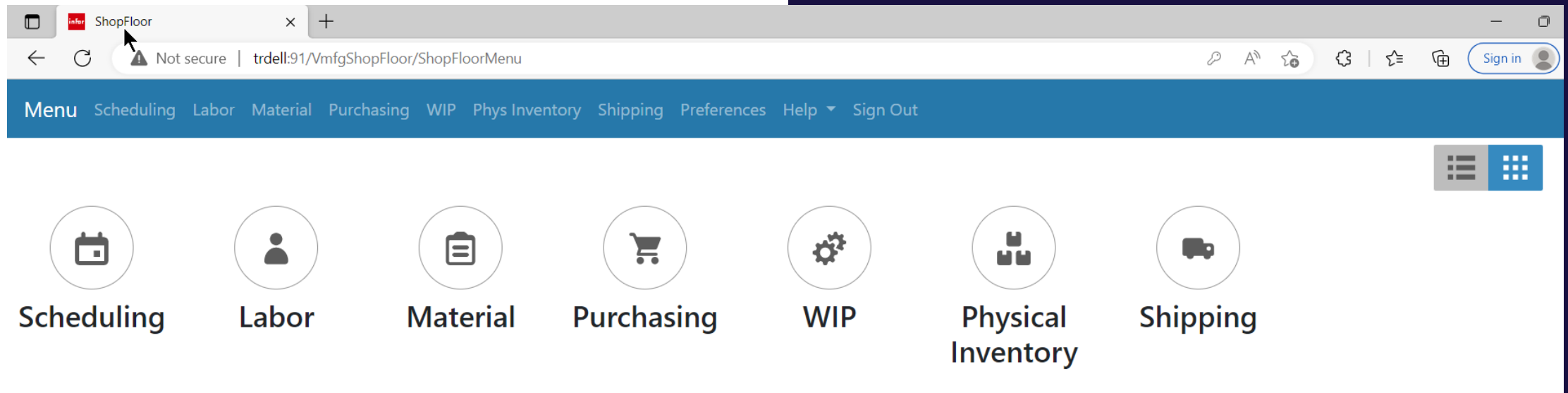
# Additional VISUAL ERP Optional Modules

- Shop Floor Mobile Deployment
- IQM
- CRM
- Product Configurator
- Design Link – Auto CAD and Solidworks Integration
- Visual Project



# Shop Floor Mobile – Addresses Labor, Material, & WIP

Shop Floor Mobile is available on your favorite device or browser. Navigate using mouse or touch. Configurable to present options based on job description.





# Shop Floor – Scheduling

Resource WO (OP)	Flags Employee ID	# of Ops	Late Ops	Rem Run Hrs	Rem Setup Hrs	Rem Hrs	User Defined 1
ASSEMBLY - ASSEMBLY		41	41	914.93	3	917.93	
TEST - TEST		18	18	234.85	0	234.85	
WC1 - WC1		4	4	262	0	262	Review Throughput
WC2 - WC2		5	5	430	0	430	
WC3 - WC3		5	5	450	0	450	

## Drill down to selected Resource

- Ability to set Priority value
- Adjust current schedule using drag and drop
- Flags/Icons to display status
- Additional functionality when using Labor or Material modules

## Key Features of Shop Floor Scheduling

- Initial View by either Shop View, Operation Type, or Resource Group
- Flags/Icons to display status

Select	Part/WO (OP)	Part Picture	Status	Want Date/Flags	Want Date	Finish Date	OP Start Date	OP Finish Date
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00176/1(20*)		Released	1/29/20 	1/29/20	6/28/21	6/10/21	6/28/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00012/1(20*)		Released	9/30/18 	9/30/18	3/23/21	3/15/21	3/23/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00257/1(20*)		Released	3/11/21 	3/11/21	7/15/21	6/29/21	7/15/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00258/1(20*)		Released	3/23/21 	3/23/21	8/2/21	7/15/21	8/2/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00259/1(20*)		Released	4/3/21 	4/3/21	8/19/21	8/3/21	8/19/21

# Shop Floor Automation – Labor & Material

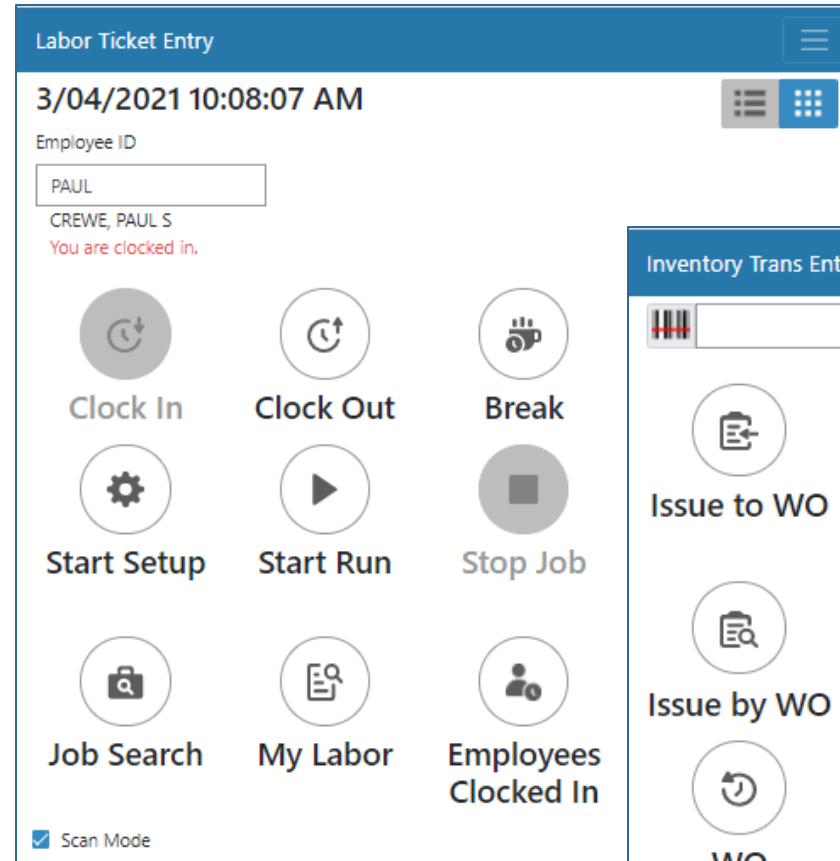


## Features

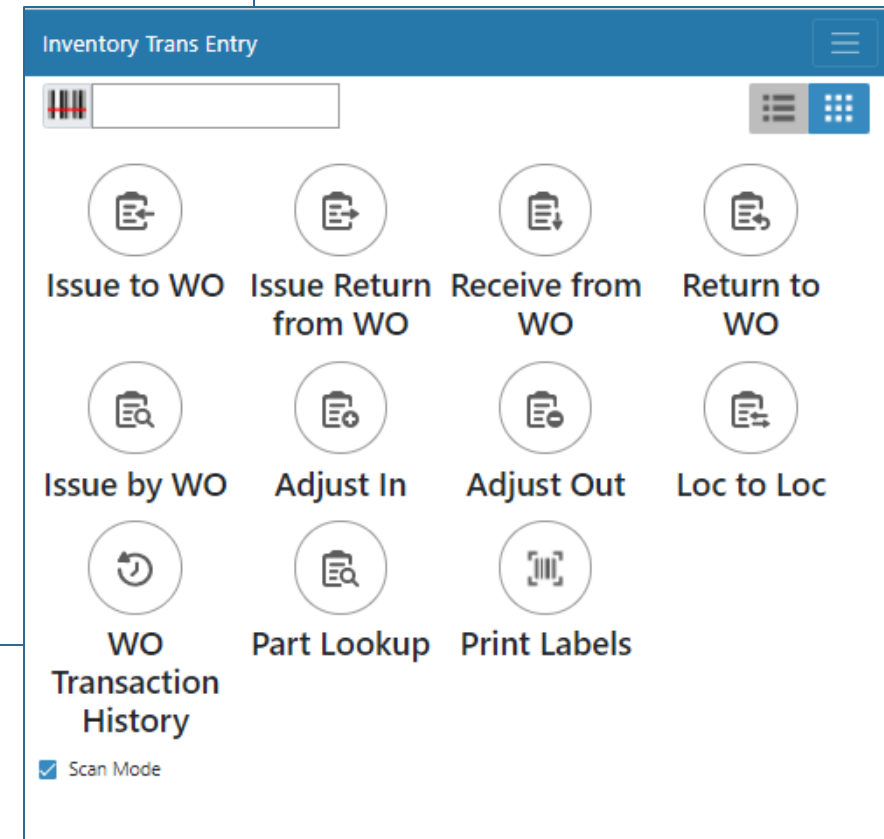
- New labor entry form
- New material entry form
- Scanning mode option for materials
- Compatible with any browser-based device

## Benefits

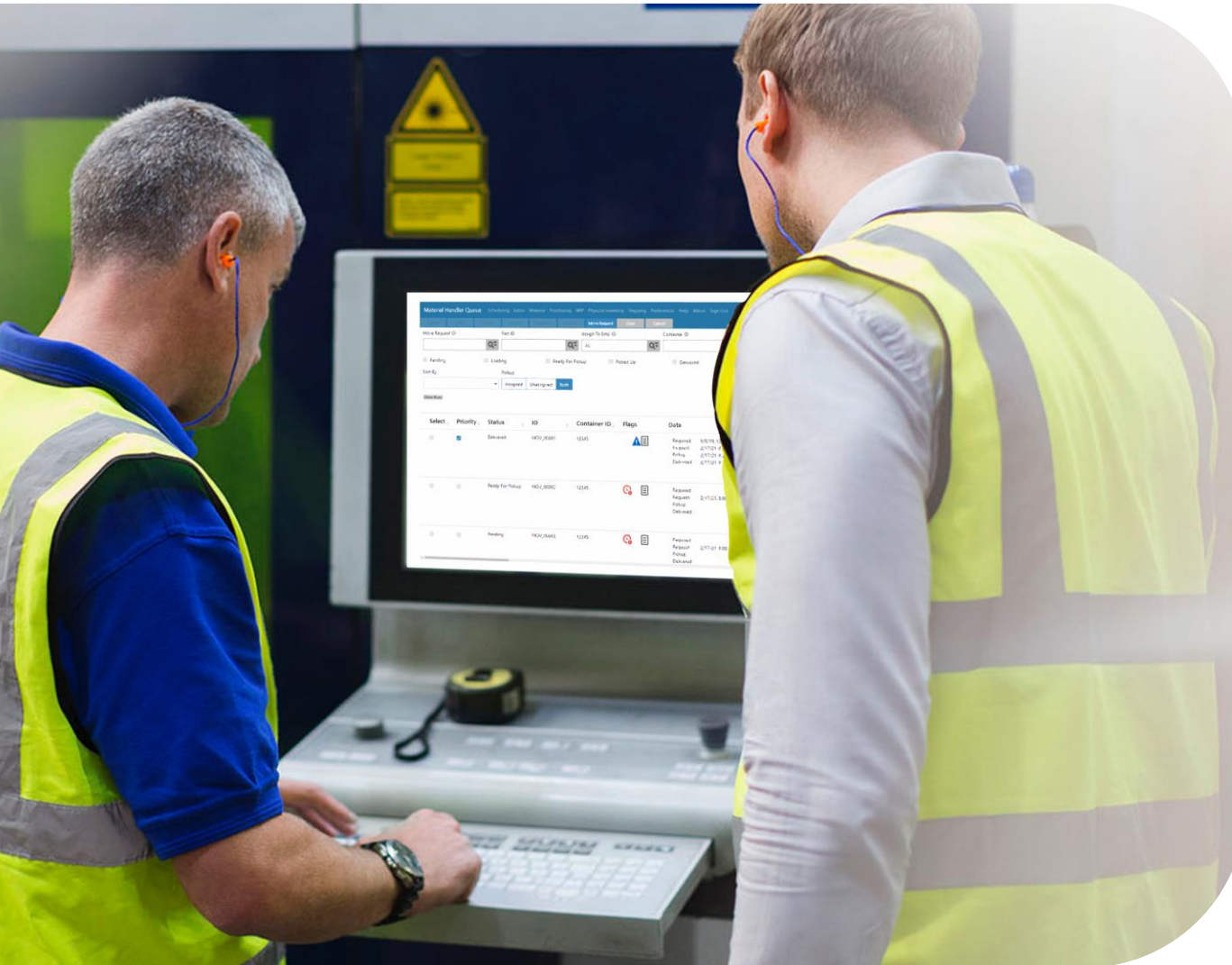
- Allows labor or material to be reported via any mobile device
- Can be used with compatible scanning devices
- Employees can verify their reported labor totals
- View material issued to a work order



Labor & Material can be managed with common wireless devices.



# WIP Tracking



## BASIC PROCESS FLOW

An employee creates a move request.

After the status of the move request is updated to Ready for Pickup, material handler picks up the parts.

After the parts are picked up, the status of the move request is updated to Picked Up, the material handler delivers the parts.

After the parts are delivered, the status of the move request is updated to Delivered.







# WIP Tracking – Material Handler Queue

Move Request ID  
 Part ID  
 Assign To Emp ID  
 Container ID

Pending
  Loading
  Ready For Pickup
  Picked Up
  Delivered

Sort By

Pickup

Select	Priority	Status	ID	Container ID	Flags	Date	Required Date	Request Date	Pickup Date	Delivered Date	Pickup Emp ID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Delivered	MOV_00001	12345	 	Required: 9/8/19, 12:00 AM Request: 2/17/21, 8:00 AM Pickup: 2/17/21, 8:20 PM Delivered: 2/17/21, 8:20 PM	9/8/19, 12:00 AM	2/17/21, 8:00 AM	2/17/21, 8:20 PM	2/17/21, 8:20 PM	AL <input "="" type="button" value="Q="/>
<input type="checkbox"/>	<input type="checkbox"/>	Ready For Pickup	MOV_00002	12345	 	Required: Request: 2/17/21, 8:00 AM Pickup: Delivered:		2/17/21, 8:00 AM			AL <input "="" type="button" value="Q="/>
<input type="checkbox"/>	<input type="checkbox"/>	Pending	MOV_00003	12345	 	Required: Request: 2/17/21, 8:00 AM Pickup: Delivered:		2/17/21, 8:00 AM			AL <input "="" type="button" value="Q="/>

# IQM – Infor Quality Management

Infor Quality Management helps address all your quality needs – from incoming, in process, and outgoing product to devices used and skill set of employees. Eliminate having to go through another painful audit by implementing IQM.



# VISUAL CRM

infor VISUAL CRM - [VE1000 - SYSADM]

File Edit View Tools Actions Reports Help

View: All Opportunities

Opportunities: History Tasks Contacts Competitors Quotes Estimates

Acct: Name	ID	Description	Amount	Salesre	Open Date	Close Date	Stage	Product	Prob%	Forecast	Lead	Sales Plan
ATLANTA PRIMARY CHILDREN	00001		10,000.00	TONY	1/16/2018		LEAD	GENERIC	75	<input type="checkbox"/>	Telemar	FAST
ATLANTA PRIMARY CHILDREN	00002		5,000.00	TONY	1/24/2018		LEAD	AUDIO_SYS	0	<input type="checkbox"/>	Our We	FAST
ATLANTA PRIMARY CHILDREN	00003		30,000.00	TONY	2/28/2018		PROSPECT	GENERIC	25	<input type="checkbox"/>	Referral	FAST
ZEBRA TECH	00004	Parts for legs	2,000.00	TONY	2/12/2018		LEAD	TELEVISION	75	<input type="checkbox"/>	Telemar	FAST
LIGHTING SERVICES	00005	Replacement parts	4,750.00	TONY	3/12/2018		PROSPECT	ELECTRONI	100	<input type="checkbox"/>	Newspa	
FOOTHILL VILLAGE	00006		18,000.00	MARK	3/20/2018		LEAD	GENERIC	75	<input type="checkbox"/>		FAST
AMAZON LTD	00007	Expressway Project Phase I	25,000.00	MARK	2/15/2018		LEAD		100	<input type="checkbox"/>		FAST
AMAZON							LEAD		75	<input type="checkbox"/>		FAST
BENEFIT							LEAD		25	<input type="checkbox"/>		FAST
GUTHRIE							LEAD		80	<input type="checkbox"/>	Trade S	FAST
CENTRI							LEAD	STAMPINGS	90	<input type="checkbox"/>		

### Sales PipelineChart

Site ID: MMC Month: June Update Chart

Sales Pipeline for: Territory Quarter: Year: 2018

Territory: NEW ENGLAND

Sales Stages

- Territory Suspect
- Qualified Suspect
- Qualified Prospect
- Selected Vendor
- Won the Account

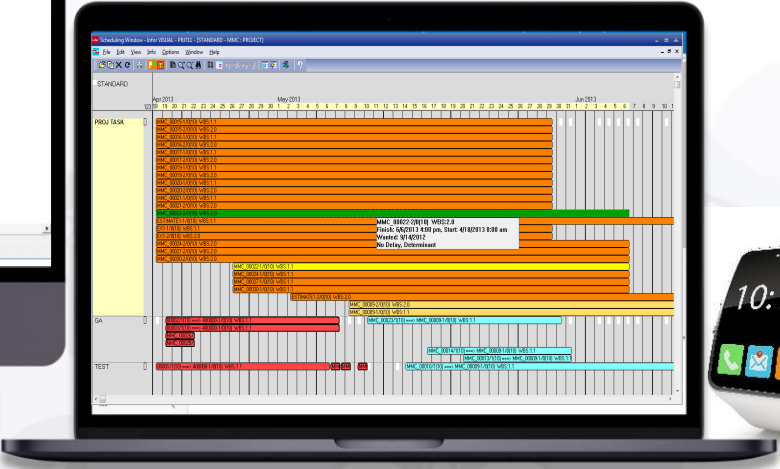
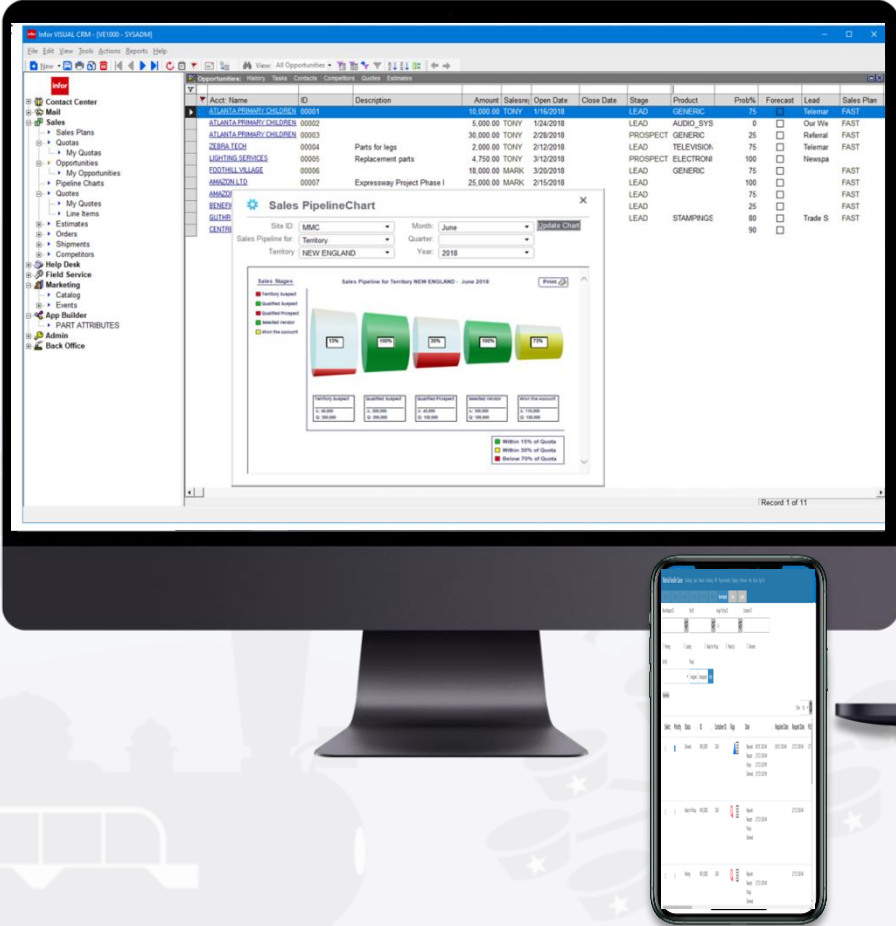
Territory Suspect	Qualified Suspect	Qualified Prospect	Selected Vendor	Won the Account
A: 48,000 Q: 300,000	A: 200,000 Q: 300,000	A: 48,000 Q: 100,000	A: 100,000 Q: 100,000	A: 110,000 Q: 100,000

Within 15% of Quota  
 Within 30% of Quota  
 Below 70% of Quota

Record 1 of 11



# Access From Anywhere on Any Device Delivered from a Private Cloud



# BI / Analytics

VISUAL's KPI and BI Capabilities delivered by Power BI, Synoptics, Infor Visual Dashboards, and more





# VISUAL ERP Intro Demo



Marty Wilkins  
Pre-Sales Engineer

The screenshot displays the 'Resource Schedule' interface for 'WC3 - WC3'. It includes a navigation menu at the top, a search bar for 'Employee ID' (PAUL), and a table of work orders. The table columns are: Select, Part/WO (OP), Part Picture, Status, Want Date/Flags, Want Date, Finish Date, OP Start Date, and OP Finish Date. The work orders listed are for 'S3 - SCHEDULING PART THREE' with various part numbers and dates.

Select	Part/WO (OP)	Part Picture	Status	Want Date/Flags	Want Date	Finish Date	OP Start Date	OP Finish Date
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00176/(120*)		Released	1/29/20 	1/29/20	6/28/21	6/10/21	6/28/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00012/(120*)		Released	9/30/18 	9/30/18	3/23/21	3/15/21	3/23/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00257/(120*)		Released	3/11/21 	3/11/21	7/15/21	6/29/21	7/15/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00258/(120*)		Released	3/23/21 	3/23/21	8/2/21	7/15/21	8/2/21
<input type="checkbox"/>	S3 - SCHEDULING PART THREE 00259/(120*)		Released	4/3/21 	4/3/21	8/19/21	8/3/21	8/19/21



# Discussion and Questions





**Thank You!**