

Fourth Shift ERP ...and Beyond Roadmap

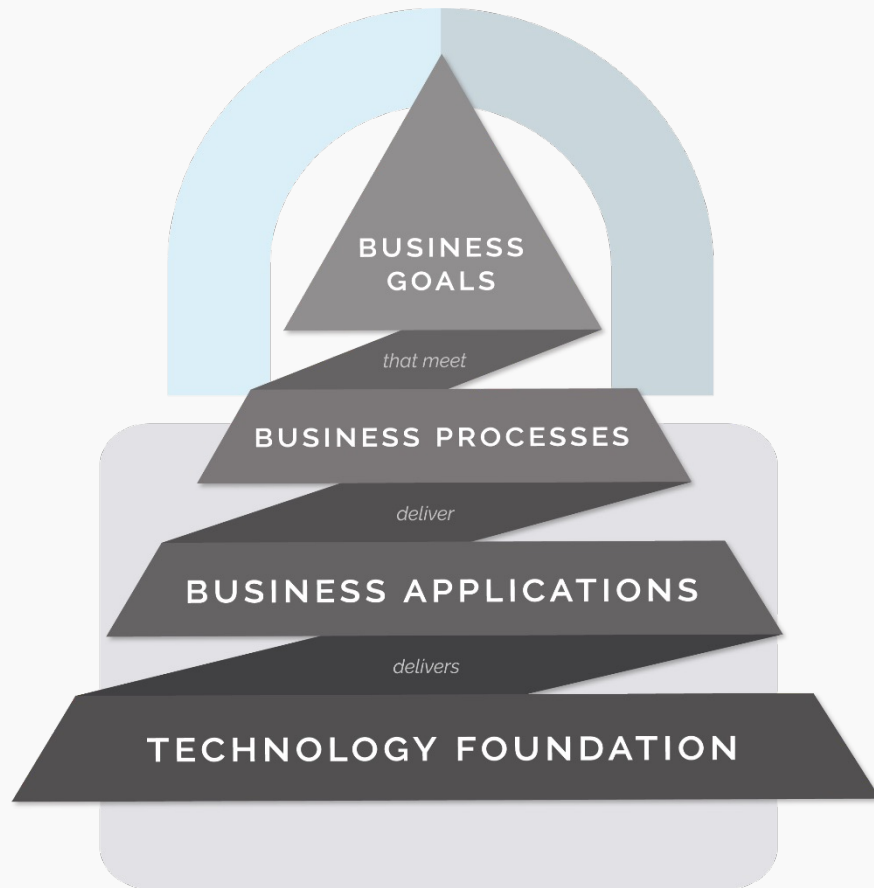
Intro by Jeff Bronson
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Fourth Shift Summit
Sponsored by:



- 01** Fourth Shift End of Life?
- 02** Current Release & Product Roadmap
- 03** Product Specifics – 8.00 thru 8.00C
- 04** Release 8.00D Status Update
- 05** Roadmap Beyond



The ICG Approach

To compete, technology must be core to the foundation of your business. Without a solid & flexible technology foundation, your business—no matter what you do—will struggle to deliver business applications & processes. ICG's approach is to architect a secure technology foundation that delivers all business applications & processes. This is referred to as perpetual evolution and allows businesses to continually upgrade their digital capabilities and the foundation underneath them.

Fourth Shift End of Life?

Here we go again...

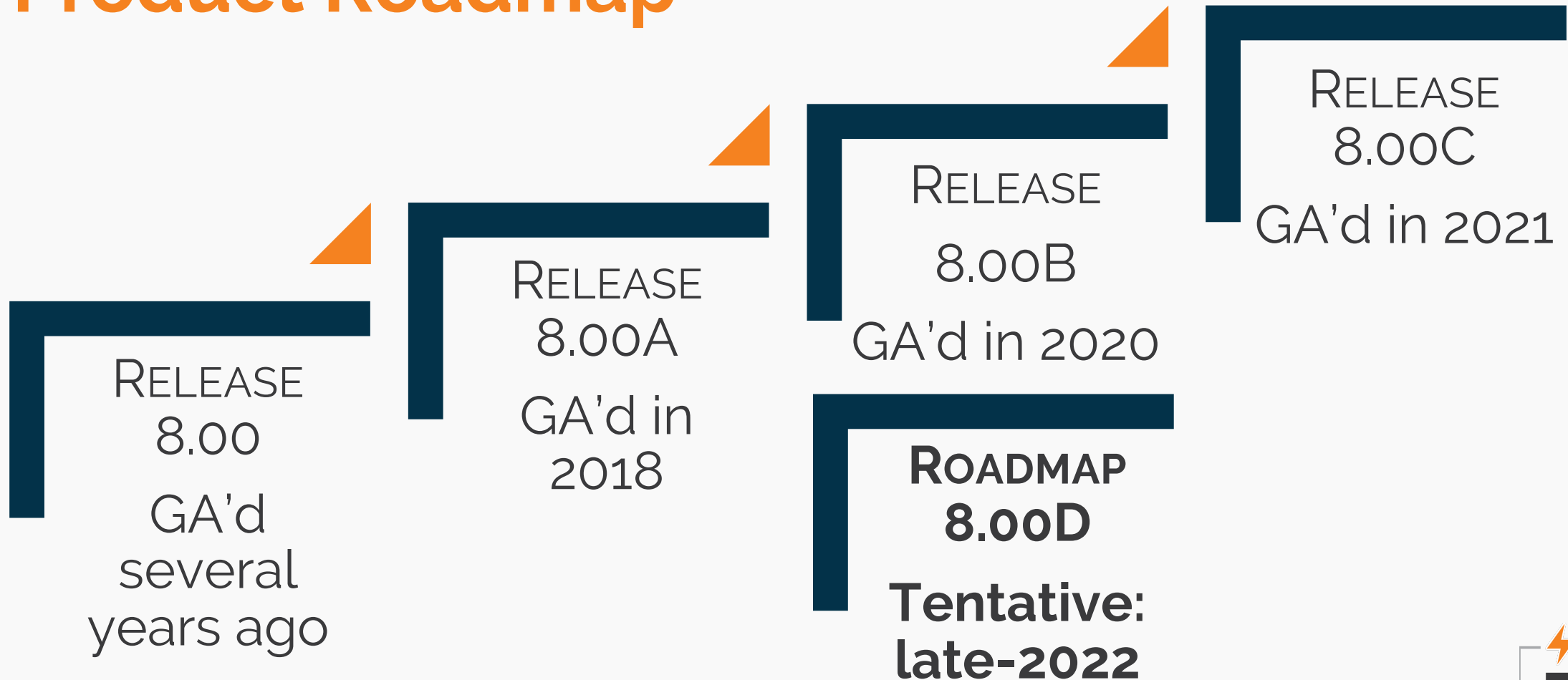
This is a topic ICG addresses with customers on a regular and recurring basis. Contrary to what you may have heard from others, including several Infor inside sales reps, there has been no end-of-life announcement for the Fourth Shift product from Infor.

The current roadmap, just released from the Fourth Shift product manager this September, shows continued development with 8.00D looming on the horizon – more about this later.

Warning however – there are issues to be concerned with regarding the pace and content of upgrades and the overall degraded level of support customers seem to be receiving from Infor.



Current Release and Product Roadmap



Infor KB 2197265

Fourth Shift: Support for Microsoft unsupported versions

Customers running Fourth Shift 7.5D and earlier, without a Microsoft (ESU) program are running a Microsoft unsupported platform.

Infor Support is unable to troubleshoot customer reported issues operating with Microsoft unsupported versions.


If you register a support ticket and your Fourth Shift application is running on a Microsoft platform that is no longer supported, Infor Support will troubleshoot the issue using the closest Microsoft supported platform to your release.

As we deliver Interim Service Releases (minor releases), we expect to continue to support (from a development hot-fix standpoint) the current and immediately previous major Fourth Shift versions, which are currently 7.50F and 8.00C.

Product	Mainstream	*Extended	**Extended Security Update (ESU) Year 3
Windows Server 2016	Jan 11, 2022	Jan 12, 2027	tba
Microsoft SQL Server 2016	Jul 13, 2021	Jul 14, 2026	tba
Windows Server 2012 R2	Oct 9, 2018	Oct 10, 2023	Oct 13, 2026
Microsoft SQL Server 2012	Jul 11, 2017	Jul 12, 2022	Jul 8, 2025
Windows Server 2008 R2	Jan 13 2015	Jan 14 2020	Jan 10, 2023
Microsoft SQL Server 2008	Jul 11, 2014	Jul 9, 2019	Jul 12, 2022

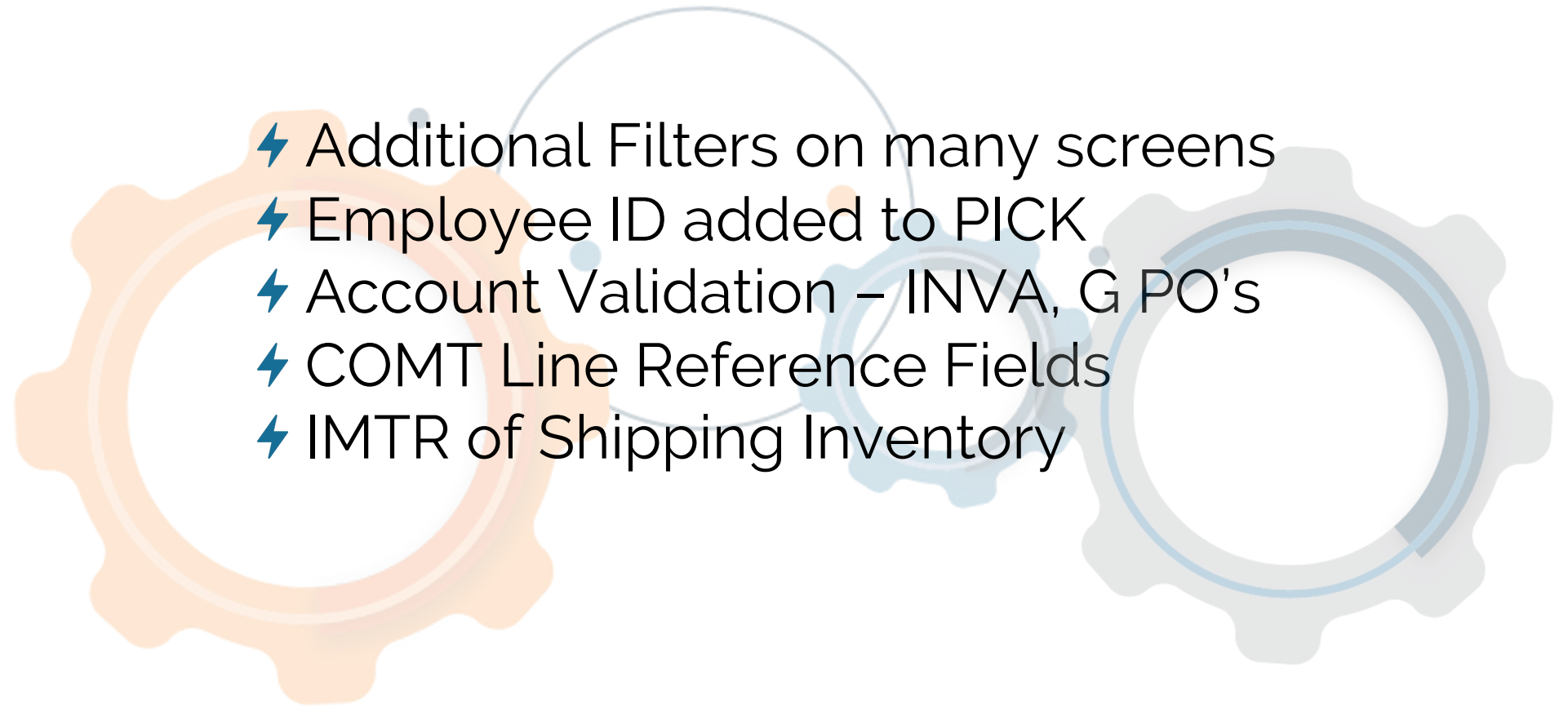


Fourth Shift 8.00 – 8.00B Technology Synopsis

- 
- ⚡ SQL Server 2016, 2017, 2019
 - ⚡ Win Server 2012, 2016, 2019
 - ⚡ Windows 10 Client
 - ⚡ Office 2016 and Office 365
 - ⚡ IE 11 Client for Workplace
 - ⚡ VisiBar Android Client

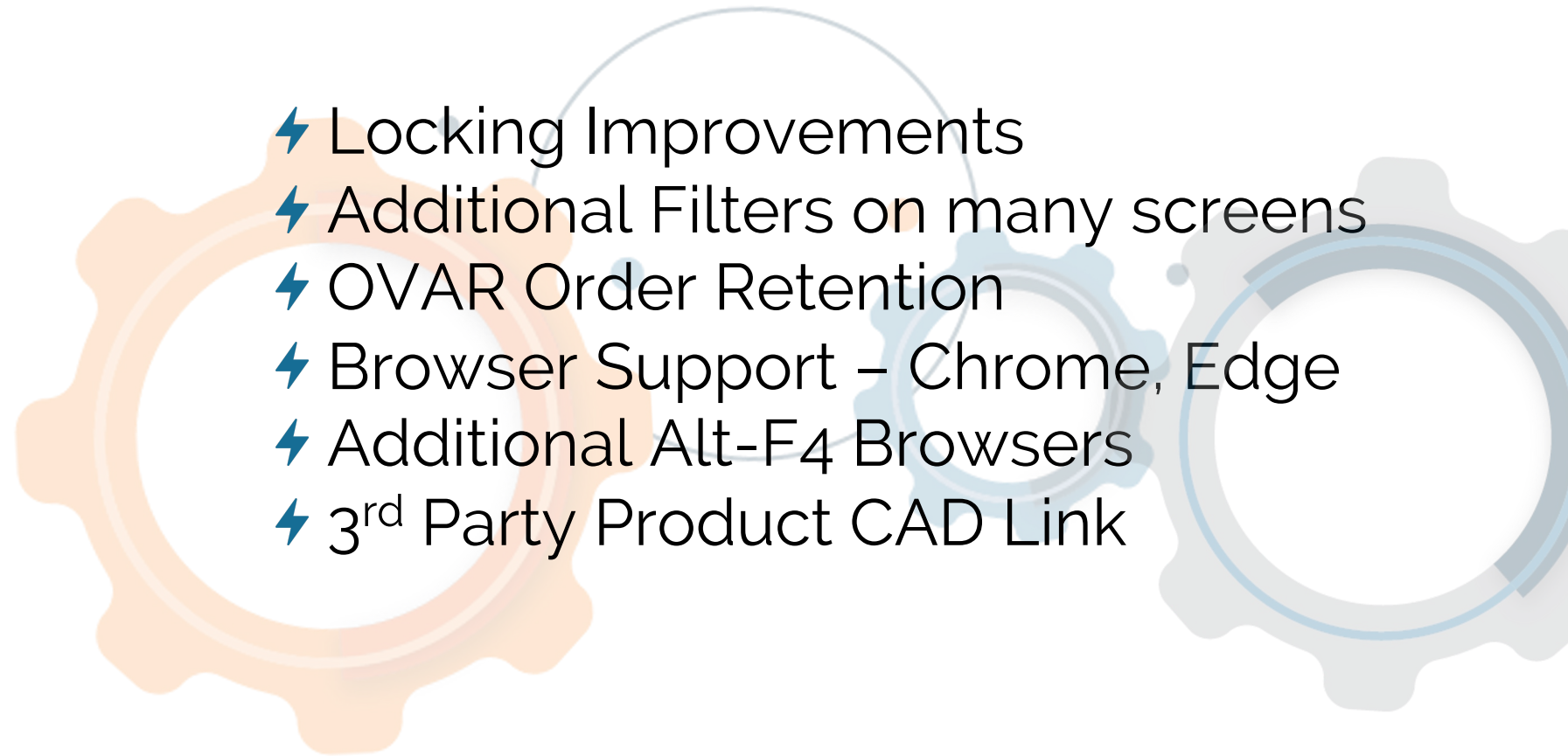
TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00 – 8.00B Functionality Synopsis

- 
- ⚡ Additional Filters on many screens
 - ⚡ Employee ID added to PICK
 - ⚡ Account Validation – INVA, G PO's
 - ⚡ COMT Line Reference Fields
 - ⚡ IMTR of Shipping Inventory

TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00 – 8.00B Technical Functionality Synopsis

- 
- ⚡ Locking Improvements
 - ⚡ Additional Filters on many screens
 - ⚡ OVAR Order Retention
 - ⚡ Browser Support – Chrome, Edge
 - ⚡ Additional Alt-F4 Browsers
 - ⚡ 3rd Party Product CAD Link

TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00B – MO Pick with Employee ID



Picklist

Order Source: **M** Manufacturing Order
Issue Type: **I** Issue

Employee Id:

Mo Number	Plnr	Sta	Mo Rev	Gateway	Wc	Wc Name
MO-FINISH1	AAA	REL	051718	000000		

Ln#	Order Qty	Um	Sta	Ln#	Typ	Item	Start	Date
001	10	EA	4	M		123F		051818

Description: FINISHED FABRIC

Starting: Com Typ: **N** Pt Use: Ln#/Seqn: **000** Component:

Pt Use	Seq	Component	Remaining Required Quantity	Quantity	Stk	Bin	Ic	Issue Quantity
00000	000	WC[R]FINISHED	.00					
00000	000	123D	10	90	FG	A100	O	10

Lot:

Fourth Shift 8.00B – GL INVA and G-Type PO Controls

G/L Configuration

Unit No: 001

Periods: 12

Posting Error Handling: R

Master Account Number: Header: DV-PL-DT-ACCNT

Curr Prd: 10 - 17

Mfg To G/L Error Handling: I

Mask: DD-PP-TT-AAAAA

Bdgt Prd 13: N

Mfg To G/L Trans Limit: Y

Default: 01-

Validate Po Exp: Y

Validate Inv Adj: Y

Last Batch No: 000563

iscal Year End Dates-

2018 2019

013118 013119

022818 022819

G/L Chart Of Accounts

Starting G/L Account Group/No:

Account Group/No	Account Group/No Description	A T	C T	A I	User Code 1	User Code 2	Consld G/L Account No
10100	PETTY CASH	A	P	A			1010
▶ 10210	CASH, YOUR BANK #1	A	P	A			1021
10220	CAS						022
10230	CAS						023
10240	CAS						024
10241	PER						024
11100	ACC						110
11200	ACC						120
11300	BAD						130
12000	INVENTORY, PREPRODUCTION	A	P	A			1200

G/L Account Attributes

User Code

Curr Code

USD

Allow Po Exp:

Allow Inv Adj:

Fourth Shift 8.00B – CO Line Detail References

Standard Product Detail											
Co Number		Customer		Ord	Co Rev						
Id		Csr	Sta	Date	Customer Name						
CO 01		100030	140	REL	092421		THE BIKE CHAIN				
Ln#	L	Prom			Tr	Ln#	R				
Ln#	Typ	S	Item	Order Qty	Um	Dlvry	Lt	Sta	Unit Price	Extd Price	F
001	C	S	19-BLACK	10	EA	100617	0	4	10.000	100.000	Y
Descr: 19" FRAME, BLACK											
Tax Exempt: Fed: <input type="checkbox"/> State: <input type="checkbox"/> County: <input type="checkbox"/> Muni: <input type="checkbox"/> Date Last Ship: 100517											
Commission Code: 140 Ovr: <input type="checkbox"/> Shipped Quantity: 10											
Price Adjustment: S/D: <input type="checkbox"/> 90.00 % Price Source: M In Shp Qty: 0											
Reqst Dlvry: 100617 Cust Po Ln#: <input type="text"/>											
Customer Item											
Conv	Order Qty	Um	Unit Price					Trt: <input type="text"/>			
1	10	EA	10.000	Item: 19-BLACKTEST							
				Description: 19-BLACK BIKE							
Text No: <input type="text"/>											
Ext Text: N											
Reference											
<input type="text"/>											
<input type="text"/>											
<input type="text"/>											

Fourth Shift 8.00C Technology



⚡ IE 11+ Only Supported

⚡ SQL Server 2012, 2014, 2016, 2017, and 2019

⚡ Win Server 2012, 2016, 2019

⚡ Win 8.1, 10, 2012, 2016, 2019

TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00C Functionality

⚡ ITMB – Last inventory Activity fields

- ⚡ Last inventory consumed date
- ⚡ Last inventory transaction date

⚡ IRS 1099

- ⚡ Expand Vendor Tax Code/ID
- ⚡ NEC 1099 Form – Print & eTransfer
- ⚡ Print option for MSC or NEC form

⚡ Customer & Vendor Payment Terms

- ⚡ Allows discount up until due date

TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00C – ITMB Plng Detail – Inventory Transaction Dates

Item Master Planning Detail										
Item	Description	Um	Rev	M	I	S	L	S	Ord	Insp
				B	T	T	T	R	Pol	Reqd
19-FRAME	FRAME, UNPAINTED - 19" ROAD BIKE	EA		M	N	A	Y	N	3	N
Pln <-----Lead Time----->										
Plnr	Buyr	Pol	Run	Fix	Insp	<-----Qty----->				
310	BYR	N	5	0	0	Lot Size Day : 1				
						Lot Size Qty : 1				
						Safety Stock : 0				
						Lot Size Min : 0				
						Lot Size Mult : 0				
Stk Bin						LI Cd: 3				
Preferred Loc:						Fst Prd: W				
Fst Cd: 2						Dmnd Fnc: 000				
Yield: 100 %						Rpln Cd:				
Dec Pre Cd: 0						Revw Date: 080922				
Atp: N						Plng Fnc: 000				
Gateway Wc: FAB						Purchase Order Autoclose Tolerance: %				
						Manufacturing Order Autoclose Tolerance: %				
Last Inventory Consumed Date: 072722						Last Inventory Transaction Date: 072722				
Text No:										

Fourth Shift 8.00D Technology Candidates

- ⚡ SQL Server 2022
- ⚡ Windows 11 Client



TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00D Functionality Candidates

- ⚡ INVA Reason Code Control – INRC
- ⚡ SHIP – Allow Returns
- ⚡ ITMB Control BKFL Activity
- ⚡ PASS – Ctrl-Enter confirmation if Sys Admin changes a policy field
- ⚡ Cust Item Inactive Control



TECHNOLOGY & FUNCTIONALITY

Fourth Shift 8.00D – INVA Reason Code Control

User can configure the reason code control from CNFG setup screen.

The default is set to “N”, which would behave identical to 8.0 functionality. Other options will be the system level control and by product line control.

New screen INRC will maintain the “system level control” defined reason code.

Starting Reason Code: XX

RC	Description	Active	Allow Product Line Override	Manual Input of Account	Master Account Number
C	Cycle count adjustment	Y	N	N	01-00-00-10100
S	Serialized item return	Y	N	N	01-00-00-10200
R	Return to vendors	Y	Y	N	01-00-00-10300
L	Test Code 1	Y	N	Y	
M	Test Code 2	N	Y	Y	
N	Test Code 3	N	N	N	01-00-00-10400

Fourth Shift 8.00D – SHIP Allow Returns

Allow return from customer (SHIP V) to be done for a customer order line at status 4 and 6.

Return from a status 6 customer order line will create a credit memo and qty returned will be back into inventory (equivalent of return to vendor on a closed PO).

Return from a status 4 customer order line should prompt for qty returned and qty scrapped where only the qty returned will be back into inventory and update the shipped quantity (also similar to PORV V for a status 4 PO).

FSMR - Fourth Shift - Shipping

File Edit Tools Options Help

SHIP

Ship

Order Type: C Issue Type: V

Co Number: CO200 Shipment: No: 000000008 Ref: Status: 4 Date: 072117

Cust Id: 100010 Ship To Id: 000000 Modified: N

Name: COLORADO BIKE AND SKI Name: COLORADO BIKE AND SKI

Addr: 62 BASELINE DRIVE

----- Order Related Information -----

Po No: Frt Code: 1 City: DENVER St: CO

Pcs: 0 Frt: .00 Zip: 80223 C: USA

Wgt: 0 Ord/Ship Sta: 4 Carrier: UNITED AIR FREIGHT

Vol: 0 Text No:

Starting Ln#: 001

Ln#	Ln#	Type	Item	Quantity Due	Ship Date	Stk	Bin	I	C	Return Quantity	Clo Req
▶	001	C	PAINT-100	8.0	072017	PN	050	O			
	002	C	PAINT-200	8.8	072017	PN	050	O			

Lot: Scrap Quantity: Replace Quantity

You May Make Entries In Highlighted Areas Status: CHG 07/21/2017

Fourth Shift 8.00D – ITMB Control Backflush Activity

Currently, an item can be backed flush by the receipt of CORV, MORV, PORV and PICK transactions.

In this enhancement, the Item Master needs an new field to Control only CORV/MORV/PORV Backflush Activity. Back Flush function (batch task) will not consider PICK transaction.

Control component backflush with new setting to indicate that that component can never be backflushed. If there is an order dependent bill for a parent that has this component, when backflush runs, it would not backflush any of these components with this setting.

Parent Item	To Location	Function	Receiving/Issue Type
Manufactured	stock	MORV Receipt/Reverse	E
Custom product	stock	CORV Receipt/Reverse	E
Custom product	staged	PICK	E
Custom product	mode of transport (shipped from WIP) Stk-Bin = none	PICK	E
Sub-contract (Ln# Typ = S)	stock	PORV	E

Fourth Shift 8.00D Miscellaneous Additional Candidates

- ⚡ Report Config Tool to reset paths for WebServer, ReportPath, & OutputPath
- ⚡ Add component item number to OVAR batch detail fields
- ⚡ Show foreign currency value on APUV



TECHNOLOGY & FUNCTIONALITY

Transitional Thoughts

- Infor is continuing to support current platform technology for Fourth Shift
- The addition of new functionality has slowed markedly, and the content has been reduced to limited minor enhancements
- Customer Support for Fourth Shift has declined since it was outsourced to HCL – ICG provides much of the support
- It's apparent there are still at least one or two more years – and at least one new release, 8.00D – before Infor decides to tell customers that it's time to move on



Why Change Now?

- Infor's focus is companies with \$300M annual revenue and higher – their older ERP products are relegated to ERP obsolescence
- Infor's lack of budget and resources for Fourth Shift have placed the product in the Compass Group with no real representation
- Infor's goal is to keep Fourth Shift customers 'in the family' and have you move to CloudSuite Industrial
- If you have not been thinking about moving from Fourth Shift to a modern ERP – it's time to do more than just thinking about it
- Keep in mind – ICG is NOT abandoning Fourth Shift or our customers who rely on it – but we are pivoting our company for the future as change is inevitable



The Roadmap To Beyond

- Why we chose Acumatica – the company, the culture, the focus
- How is Acumatica a better solution than Fourth Shift?
 - Customer focused and product focused
 - Built for the cloud from the ground up
 - Modern user interface – anywhere & any device
 - Built-in process automation
 - Easily personalized to meet the needs of the business
 - Two-level Customer Support – Partner and Acumatica
 - Open Platform – Partner Friendly – Significant Extensions
 - Deep and rich core functionality
 - Industry-unique consumption pricing model
- It's time to stop being Fourth Shift refugees!



Questions?

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