



Infor SyteLine
(CloudSuite Industrial)
Sales & Customer Service

LOGICDATA®

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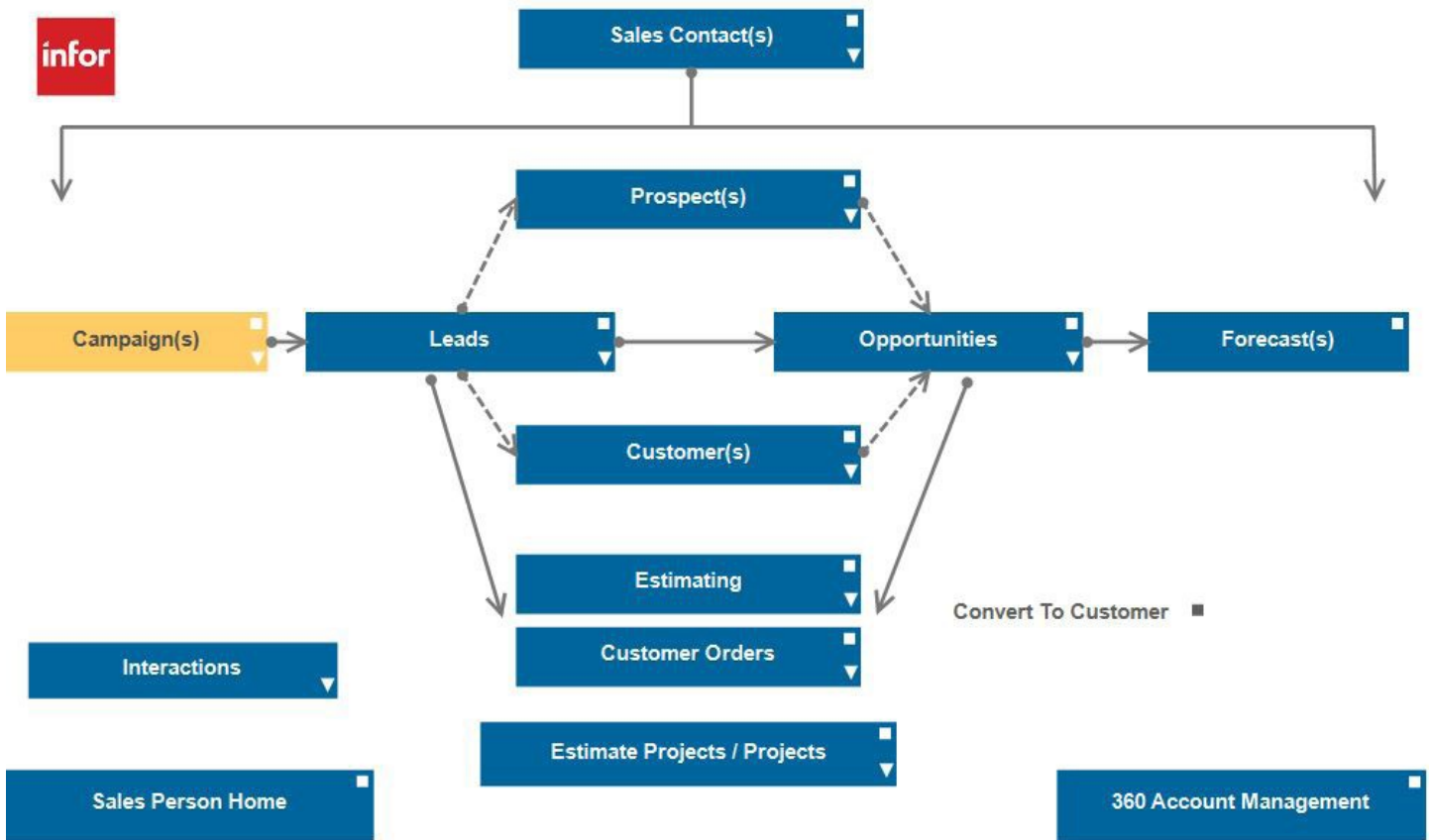
SyteLine (CloudSuite Industrial)

Customer Relationship Management (CRM)

CRM is a customer relationship management module that provides an efficient method for managing the entire sales process from customer lead origination and sales opportunity tracking through converting prospects to customers and placing the order, all within SyteLine.

The features in CRM provide an integrated solution between your front and back offices. It delivers productivity gains by streamlining sales and customer service processes, decreasing the cost of sales and cost to serve, and ultimately increasing revenue.

- Track all elements of a marketing or sales campaign through Opportunities
- Manage all tasks associated with an opportunity using the Opportunity Tasks form
- Manage contact information and basic company information of your competitors
- Create and manage campaigns
- Track estimate orders assigned to prospects or customers
- Maintain territory information, SIC code, company revenue and number of employees for each customer
- Cross reference your sales contacts with customers and prospects
- Assist prospects and customers from initial interest through order placement using the Prospects and Leads forms
- Convert prospects to customers
- Organize prospects and customers by territories
- Create and manage sales teams for customers, prospects, and opportunities
- Track communications with sales contacts, prospects, and customers
- Maintain basic information about your sales contacts
- Create sales forecasts
- Add opportunities to a sales forecast
- Create sales periods
- Salesperson homepage
- Mail merge and email blasts
- Visibility into the lifecycle of a customer order through the Customer Order Document Lifecycle form
- Determine how much money and time current promise-and-expedite scheduling is costing your company by using the Customer Service Impact form



SyteLine (CloudSuite Industrial)

Estimating

SyteLine Quoting and Estimating capabilities allow you to create professional and comprehensive quotations and turn these quotes into sales orders. You can create Estimates quickly and easily by copying an existing work order, or a Bill of Material (BOM) from another Estimate, then modifying the new Estimate to match the customer's specifications.

SyteLine computes a cost estimate that includes material, labor, burden, and outside services. When awarded a contract, simply create both a sales order and a work order from the Estimate. SyteLine lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

- Engineering Sandbox Development
- Quoting and Cost Analysis
- Copy an Estimate from another Estimate, a work order, or Bill of Material, and then make modifications as necessary
- What-if Scheduling
- Pricing tables
- Multiple Price Breaks
- Estimate Status to reflect Customer acceptance
- Estimates Quick Entry Form
- Estimate Response Form for customers

Estimates Quick Entry

Estimate: DE00000002 Status: **Quoted** Quote Date: 8/18/2014
Customer: 1 Coordinated Manufacturing Expiration Date: 9/17/2014
Ship To: 1 Coordinated Bicycles - North Salesperson: GIB
Prospect: Taken By: Jim
Opportunity: Total Price: 1,540.92

Estimate

- Quick Response Form
- Quick Worksheet
- Generate Document

Line

- Source
- Get CTP
- Reprice
- Configure
- Printing Estimate

Line	*Item	Customer Item	Item Description	Qty Ordered	*U/M	Unit Price	Extended Price	Net Price	*Due Date	Status
1	1 FA-10000	XRT-001XT	Bicycle,Model-30,26"	1.00	EA	555.22285	555.22	524.69	9/16/2014	Quoted
2	2 BK-27000-0005		Bicycle,Customized,27"	1.00	EA	800.00	800.00	800.00	9/16/2014	Quoted
3	3 CP-10000		Seat,Padded	1.00	EA	12.25	12.25	11.33	9/16/2014	Quoted
4	4 MB-10000		Bicycle,Model-200,Mountain,Black	1.00	EA	238.00	238.00	238.00	9/16/2014	Quoted

SyteLine lets you track events that occur during the Estimating process and can keep all documentation involved attached to the Estimate.

SyteLine (CloudSuite Industrial)

Customer Order Entry and Invoicing

Infor CloudSuite Industrial Customer Order Entry and Invoicing features allow you to access complete sales order information instantly, while providing your customer service representatives with online support to enter and track customer orders and create invoices. CloudSuite Industrial is fully integrated from the point of customer quotes through customer order entry, engineering, production, costing, shipping, and customer service.

This integration allows customer service representatives to take action on credit problems, reschedule requirements, and release orders in a timely manner to meet required shipment dates. It also provides access to crucial data including general customer information and credit status, order backlog, material and resource availability, order acknowledgments, commissions, percentage of completion, and shipping information. Comprehensive sales analysis reports help decision makers track everything from customers to sales representatives.

- 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

- Three-tier Customers (Corp—Bill To, SoldTo(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, including invoices
- Foreign currencies
- Sales tax calculations: VAT & GAT
- Progressive billings
- Customer Document Profiles
- Letters of credit
- Order acknowledgments
- Advanced Shipping Notices
- Consolidated invoicing
- Drop ship orders (direct from vendor)
- Customer Service Homepage
- 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

Customer Orders Quick Entry

DC00000382 Order Date: 9/30/2015

Claymore Distribution

Originating Site: DAL5
Status: Ordered

Order Info General Contacts Amounts Tax Info

Order: DC00000382

Customer: 3 Claymore Distribution

Ship To: 1 Claymore Bicycles

Cust PO: 3099-000756

LCR:

Est Total Price: 27,503.41 USD

Consignment

Demanding Site:

Demanding Site PO:

Order Date: 9/30/2015

Status: Ordered

Warehouse: MAIN

Salesperson: JFS

Taken By: SA

Originating Site: DAL5

Order

Quick Order Verification

Quick Pick List

Order Shipping

Order Invoicing

Generate Document

Line

Source

Get CTP

Reprice

Configure

Line	*Item	Qty Ordered	*U/M	Due Date	Unit Price	Projected	Net Price	Unit Cost	*Status	*Ship Site	*Warehouse	Currency	Description
1	TA-70000	5,19	EA	10/28/2...	0.198	12/9/2015	1,029.01	0.055	Planned	DALS	MAIN	USD	Spokes, 16"
2	FA-10000	56.00	EA	10/28/2...	376.00	1/11/2016	18,950.40	254.4...	Planned	DALS	MAIN	USD	Bicycle, Model-30, 26"
3	FA-10000	22.00	EA	10/28/2...	380.00	12/9/2015	7,524.00	254.4...	Planned	DALS	MAIN	USD	Bicycle, Model-30, 26"

Sales & Customer Service

Point of Sale (POS)

Infor CloudSuite Industrial Point of Sale (POS) module is used in retail applications to manage over-the-counter cash transactions or phone-in requests where customers pick up or are shipped product/materials. POS stream-lines the Order Entry, Order Fulfillment, Order Invoicing and Order Payment process speeding data entry of sales transactions.

The POS transaction process automatically prints an in-voice and posts payments at the same time. POS supports multiple cash drawers generating invoices simultaneously. Standard CloudSuite Service Management service repair orders (SRO) are created for POS transactions making it possible to add items to an order at a later time. For material transactions, visibility into item availability by warehouse, location, or lot is also provided.

A complete audit trail is kept and maintained aiding in cash drawer reconciliation. Built-in security supports

multiple types of payment on each transaction including cash, credit card, on account, and check.

- Convenience — Record materials, labor, and miscellaneous charges and payment transactions from a single screen
- Payment types — Supports multiple types of payments, including cash, credit card, on account and check
- Inventory updates — Item availability status automatically updated as items are added to a customer's POS order
- Visibility — Access details on each of the items being purchased from the POS Entry screen
- Easy order updates - Add, change or delete items to the customer order from the Point of Entry screen
- Integration - Seamless integration to Syteline allows all POS data to flow through to other financial and service reports

The screenshot displays the 'Point of Sale Entry' interface. At the top, it shows 'Drawer: D1', 'Drawer #1', and 'User Name: sa'. Below this are tabs for 'Customer', 'General', 'Material', 'Labor', 'Miscellaneous', and 'Payments'. The 'Customer' tab is active, showing a dropdown for 'Customer' with '9' selected. A 'Bill to Address' section lists 'Carolina Frames, Inc.' with address '280 Meeting St, Charleston SC 29401, USA'. A 'Ship To' section is checked and shows 'Carolina Frames, Inc.' with address '1150 Anderson Drive, Charleston, SC 29401, USA'. A 'Contact Information' section lists 'George Randall' as the contact with phone '803-555-4488'. At the bottom, a summary table shows 'Ordered' and 'Current' amounts for Sales Amount, Sales Tax, Sales Tax2, Freight, Misc Charges, Discount Amount, Prepaid Amt, Total Due, and Total Paid, all currently at 0.00. 'Process' and 'Cancel' buttons are at the bottom right.

	Sales Amount	Sales Tax	Sales Tax2	Freight	Misc Charges	Discount Amount	Prepaid Amt	Total Due	Total Paid
Ordered:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Current:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

You can access details on each of the items being purchased from the POS Entry screen.

SyteLine (CloudSuite Industrial)

Return Material Authorization (RMA)

Infor CloudSuite Industrial allow companies to manage Return Material Authorizations (RMAs); documents that control the return of parts previously sold and shipped to a customer. Easily tailored to your particular business, CloudSuite Industrial offers codes and parameters that allow you to define your processes or to track important issues.

Many times, Customer Returns must be routed through multiple groups within your organization. CloudSuite Industrial RMA capabilities allow you to easily manage the steps of a returned part. RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material. You can also repair the returned item using a rework order.

CloudSuite Industrial provides access to the business information created through your day-to-day transactions of customer returns. This information can help you identify problems quickly, track issues, verify progress, and improve processes.

- Generate a unique RMA number automatically
- Receive returns to non-nettable locations
- Create customer credit memos based upon receipt of returned items
- Add notes or documents to RMAs

- Manage cost of returned product by linking to the original order shipped
- Issue repair or replacement orders for returned materials
- Track information that will help you improve both customer service and overall part quality
- Maintain documented control over the return of parts

Use Extended Dispositions to specify multiple disposition codes for one RMA line. These codes identify the next steps for the returned material. Each disposition code has one of these disposition types.

- ***Scrap:*** The material is damaged beyond repair and must be thrown away.
- ***Return to Inventory:*** The material can be put back in inventory so that it can be resold on another customer order or used as a material on another job.
- ***Return to Vendor for Repair:*** The item can be re-turned to the vendor either for credit or repair.
- ***Return to Vendor for Credit:*** The items can be re-turned to the vendor for credit that automatically creates a voucher adjustment.
- ***Rework:*** If your system is licensed for the Service Management module, material can be cross-referenced to a service order to repair the item.

Sales & Customer Service

RMA Line Items ×

RMA	Custc
1	DA00000001
2	DA00000001
3	DA00000002
4	DA00000003
5	DA00000003
6	DA00000004
7	DA00000005
8	DA00000006
9	DA00000007
10	DA00000008
11	DA00000009

RMA: DA00000001	RMA Date: 8/12/2014	Status: Closed
Customer: 10	Engineered Products	Currency: USD

Line: 1	Qty To Return: 5.00 EA	Status: Closed
Item: MB-11000	Bicycle,Model-200,Mountain,Silver	
Cust Item:		

General | Amounts | Disposition | Replacement Lines | EU VAT | User Defined | **RMA**

Order:		0	0
	<input checked="" type="checkbox"/> Return	<input checked="" type="checkbox"/> Warranty	
Original Invoice:			
Tax Code:			
DO:		Incident:	

Qty Credited:	5.00	Reason
Qty Received:	5.00	
Last Return:	9/23/2014	

RMA supports you in performing such basic tasks as authorizing returns, issuing credit, sending a replacement, and receiving returned material.

SyteLine (CloudSuite Industrial)

Credit Card Interface

Not available as SaaS option

Cash flow is the lifeblood of any enterprise, especially for manufacturers that invest significant capital bringing products to market. Although business-to-business transactions are traditionally invoiced and billed, businesses - including manufacturers - are increasingly offering credit card options to customers. The benefits are numerous. Perhaps the most important is the significant improvements in cash flow that accepting credit card payments can provide. Accepting credit card payments against open invoices can reduce the administrative collections costs. It means cash in the bank account in hours, rather than weeks or more. Also, accepting credit card payments at order entry virtually eliminates late payments and long outstanding accounts receivables.

For manufacturers looking to initiate a new credit card processing system or upgrade their current manual credit card processing system, SyteLine Credit Card Interface offers an integrated, efficient system to process transactions conveniently for the customer and cost-effectively for the manufacturer. Integrating with a hosted gateway solution of your choice, Credit Card Interface offers customers a safe and convenient payment method. Because the payment is processed directly through SyteLine, the transaction smoothly flows through to the financials without any cumbersome manual data entry or reconciliation of accounts. It's fast, easy, and secure.

Credit Card Interface also provides a positive customer experience, contributing to overall improved customer satisfaction. Customers especially appreciate the convenience when purchasing after-market services or spare parts or using payment cards that accumulate points or cash back.

There are no per transaction charges associated with the CloudSuite Industrial Credit Card Interface, only the normal credit card processing fees from your bank's merchant parts account and transactional fees from the gateway software of your choice.

- Increase the efficiency of your order entry and collections administration
- Speed cash flow
- Improve the profitability of spare parts and repair services
- Eliminate redundant data entry
- Reduce data entry errors
- Support centralized and decentralized order entry models

Sales & Customer Service

Credit Card Transactions ×

Sequence	Card S
1 ▶ 23	T
2 22	T
3 21	T
4 20	T

Sequence: 23
Customer: 1
Date: 8/3/2015 8:05:53 AM
 Success
Original Site: DALS
Original Site Sequence: 23

Card System ID: T
Credit Card System: T-Gate
Transaction Type: Sale
Total Amount: 24.00 USD
Customer Reference: Jane Francis

Response

Good
Response: Approved
Approval Code: OK409C
Reference Number: 1113001
AVS Match: Address Match + 5 Zip
CV Match:

Auth Code: OK409C
Reference: Invoice
Reference Num: 346
Expiration Date: 10/19

Remote Transaction: 1113001
Created By: sa
Card Type: VISA

Improve customer satisfaction by offering the convenience of credit card payments.

