



GUIDE  
PRODUCT  
STORE

Customer driven. Guide designed.



Complementary Solutions to Your Infor CloudSuite  
Industrial ERP

# Guide Product Store



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# CloudSuite Industrial

## Production Bundle Features

### Bundle of Personalization

Replaces individual personalizations with a supported product.

#### Benefits

- Lower cost of implementation.
- Less time required to implementation.
- Reduced implementation time.

### Copy Routing/BOM in Batch Mode

Allows for mass copying of Routings/BOMS onto Job Orders.

#### Benefits

- Saves time in releasing new job orders and their sub-jobs.

### Serial Number Assignment Management

Improves usability of Serial Numbers.

#### Benefits

- Provides flexibility for companies to define Serial Number nomenclature by Type, Format, and Length.
- Saves time with item setup.
- Eliminates the risk of item setup of incorrect preassigned Serial Number format.
- Minimizes errors in Serial Number assignment

### Related Items Management Tools

Provides filtering, reporting and mass updating capabilities for related product functionality.

#### Benefits

- Saves time in managing related items across product groups.
- Saves time in identifying related items.
- Improves ability to reference related items on reports.
- Improves up-sale opportunities potentially increasing revenues.

### Job Order Close Utility

Closes multiple sub-jobs for a parent job number and issues the material to the parent in the correct sequence.

#### Benefits

- Saves time in job closing.
- Reduces data entry time and data errors.
- Improves inventory and Job Cost accuracy by validating all material and labor transacted to Job

### Best Practice Processes

Leverage the learning of other companies in implementation.

#### Benefits

- Reduced implementation time.
- Operational improvements in materials

### Change Item Revision Batch Processing

Allows for Bill of Manufacturing revisions to be archived with "old" revision, while allowing mass changes to current operations and materials.

#### Benefits

- Saves time in updating multiple Bill of Manufacturing.
- Reduces the manual entry of Engineering Change Notices.
- Reduces manual entry of changing Item Revision one at a time.

### Steel Heat Code Tracking

Allows both a Vendor and an Internal Heat Code number to be generated at the time of Purchase Order Receiving or Miscellaneous Receipt.

#### Benefits

- Reduced implementation time.
- Operational improvements in materials management and production control.
- Improves traceability of vendor heat numbers.
- Saves time identifying jobs related to a vendor heat # in the case of quality problems.



# CloudSuite Industrial Operation Bundle Features

## Bundle of Personalization

Replaces individual personalizations with a supported product.

### Benefits

- Lower cost of implementation.
- Less time required to implementation.
- Reduced implementation time.

## Regional Value Content (RVC) Calculation for NAFTA Reporting

Replaces manual calculations for NAFTA reporting with a system generated report.

### Benefits

- Saves time in meeting regulatory reporting requirements.
- Minimizes errors in reporting.

## Best Practice Processes

Leverage the learning of other companies in implementation.

### Benefits

- Reduced implementation time.
- Operational improvements in materials management and production control.
- Lower cost of implementation.

## Item Revision Requirements Validation for Individual Customers

Ensures right product revisions are shipped to customers.

### Benefits

- Reduced implementation time.
- Operational improvements in materials management and production control.
- Eliminates shipping errors.
- Reduces the number of customer returns.
- Saves time in order entry and shipping.

## Special Charges Utilization with Consolidated Invoices

Improves usability of consolidated invoicing.

### Benefits

- Reduced implementation time.
- Eliminates manual entry of special charges.
- Reduces the number of customer debit memos for missed charges.
- Eliminates overlooked special charges, which can contribute to increased revenue potential.
- Reduces the number of invoices, which lowers administrative costs in the collections



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# CloudSuite Industrial Factory Track Bundle Features



## Bundle of Personalization

Replaces individual personalizations with a supported product.

### Benefits

- Lower cost of implementation.
- Less time required to implementation.
- Reduced implementation time.

## Improve Job Close Reporting

Allows the end run transaction to close operations and complete job orders.

### Benefits

- Reduces the number of “clicks” to complete transactions.
- Saves time by combining transactions.

## Best Practice Processes

Leverage the learning of other companies in implementation.

### Benefits

- Reduced implementation time.
- Operational improvements in materials management and production control.
- Lower cost of implementation.

## Kanban Automation

Automates the manual process of requesting, picking, staging, and receiving of Kanban items.

### Benefits

- Reduces data entry time and data errors.
- Saves time in identifying requirements.
- Improves inventory accuracy.

## Multi-Item Stockroom Material Issues

Improved method for job order issuing and returning of material from the stockroom.

### Benefits

- Reduces errors of recording picking and return transactions.
- Saves time for picking by stockroom personnel.
- More accurate inventory at warehouse locations.
- Reduces chances of pulling the wrong material when picking.





# Click Mail

## ‘Simplifying Email for CSI Users’

Email within Infor CSI is cumbersome and inefficient. Instead of aiding in production and completions of tasks, it creates numerous business issues.

### Business Issues

- CSI generated documents (Purchase Order Report, Invoice, etc.) can only be sent to a pre-defined list of email addresses.
- The Subject and body of emails cannot be customized.
- The ‘From’ email address shows a generic email address like [noreply@anycompany.com](mailto:noreply@anycompany.com).
- There is no easy way to see if an email was sent or if it was undeliverable.
- Documents pertaining to a particular record (Customer Order, RMA, etc.) have to be manually attached .
- No functionality exists for maintaining vendor contacts, similar to Sales Contacts.

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Click Mail seamlessly integrates with CSI and makes emailing within the system easy and efficient.

### What it Does

- Provides an email editor to dynamically add recipients.
- Ability to edit the email including the subject and body.
- Ability to import email recipients from multiple sources, add manually, or select from a drop-down list of contacts linked to the vendor or customer.
- Provides email To, CC, and BCC functionality.
- Provides a series of pre-defined templates (including email recipients, subject and body), users pick from the drop down menu when generating an email.
- Variables are supported to allow, for example, adding the Customer Order number to the Subject line of an email sending the Order Verification Report
- Ability view and easily searchable using reference fields which include the Customer, Vendor, CO, PO, Estimate, RMA, or Invoice numbers depending on the document sent.
- Provides functionality for creating / maintaining Vendor Contacts and associating them to a Vendor.



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Click Mail is a user-friendly application that delivers missing email functionality in standard Infor CSI.

### Application Benefits:

- Quickly create and edit email that includes a CSI generated document.
- Allows users to track multiple vendor contacts vs. only one as allowed in standard Infor CSI.
- Personalized templates can easily be created and rapidly updated by using predefined templates.
- Ability to keep historical records of emails and documents sent to customer and vendor contacts.
- Tracking of email history and the ability to search history on a specific email.
- Users receive notice of bounced and undelivered emails with proper configuration between CSI and Email Server.



We believe you should get the most out of your ERP. Guide products address common needs, enabling you to get the most out of your Infor CSI investment.

### Main

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