



# Release Notes

*Infor ERP Xpert 4.1*

*Infor CRM ACmanager 4.1*

Overview of New Features and Enhancements

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This publication relates to Release 4.1 of the software systems *Infor ERP Xpert* and *Infor CRM ACmanager 4.1*. It is published by Infor Global Solutions Deutschland AG, Gerberstrasse 11, 79206 Breisach am Rhein.

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## Contents

Infor ERP Xpert 4.1 & Infor CRM ACmanager 4.1 .....	7
1 New Technologies .....	7
1.1 Release for IBM i5/OS V6R1 .....	7
2 Common Functions .....	8
2.1 Job scheduling .....	8
2.2 Ready for unicode print.....	8
2.3 Delete logical record lock automatically.....	8
2.4 Enhanced authorization control .....	8
2.5 Synchronization tool.....	9
2.6 New text editor .....	9
2.7 Variable master data in list view .....	9
2.8 Mailbox control of BOMs.....	10
2.9 Phantom structures for part types 6 – tools and 9 – purchased parts with subcontractor- issued material.....	10
2.10 Mandatory entry of classification in parts master .....	10
3 EDI.....	11
3.1 Surcharge/discounts in credit note processing.....	11
3.2 Check of job date, time and purchase order number .....	11
3.3 Changes for the new Ferrari company group .....	11
3.4 Credit note EDI to suppliers with consignment processing .....	11
4 Release Management .....	12
4.1 XJIS – Just in Sequence delivery .....	12
4.2 Shipping notification.....	12
4.3 Docking warehouse management .....	12
4.4 Delivery time window on Porsche goods tag.....	15
4.5 Compact view of manual invoice release .....	15
4.6 Start correction of required totals in contract as batch job .....	16
4.7 Round release quantities .....	16
5 Logistics.....	17
5.1 Enhanced inventory status logging.....	17
5.2 Warehouse and inventory valuation list with bonded stock.....	17
5.3 New transport order logistics .....	17
5.4 Subsequent processing of package numbers .....	18
5.5 Container application check.....	19
5.6 Backlog dates in shipping logistics .....	19
5.7 QA release scanner dialog .....	19
5.8 WH determination .....	19
5.9 Inventory label printing with altered containers .....	19
5.10 Inventory container status.....	20
5.11 Enter inventory data.....	20
5.12 Print inventory number and stock location as barcode.....	20
6 Shipping.....	21
6.1 Requirements from Release Management in critical mailboxes .....	21
6.2 ESP or customer address on label .....	21
6.3 Print goods tags for CT2 at pre-labeling.....	21
6.4 Enter shipments.....	21
6.5 Calculate shipments.....	21
7 Sales statistics.....	22
7.1 Report parameter selection criteria.....	22
Infor ERP Xpert 4.1 .....	24
8 Industry & Distribution .....	24
8.1 Print part descriptions 1 and 2 in one or two lines.....	24
8.2 Print due date on proforma invoice in line with order confirmation.....	24
8.3 Enhanced invoice printing.....	24
9 Procurement.....	24
9.1 Separate number sequence for RFQ suppliers - Modifications of RFQ management.....	24

9.2	Purchasing printing code - enhancement of the supplier master .....	25
9.3	Printing additional texts and text modules on Interform forms .....	25
9.4	Quotes for PUR dummy parts.....	25
9.5	Plan by part number.....	25
9.6	Fixed price for a purchase order position independent of the quantity.....	26
9.7	EDI mailbox for goods receipt.....	26
9.8	Automatic delivery schedule logging .....	26
9.9	MCS/ECS clearing method for purchasing invoices/credit notes with consignment warehouse processing .....	26
10	Production .....	27
10.1	Production order entry with midpoint scheduling.....	27
10.2	Modifying stock requisitions.....	27
11	Finance .....	28
11.1	Display debit notes for invoice audit .....	28
11.2	Compact view of invoice positions.....	28
11.3	Transfer documents to FACC .....	28
11.4	SAF-T fiscal legal requirements in Portugal .....	28
12	Valuation.....	30
12.1	Info Tool in costing.....	30
12.2	New base fields in actual costing.....	30
12.3	Calculation of SCO work cycles in the SFP valuation .....	30
12.4	Call of MACC closing .....	30
12.5	XCOI interfaces via SOI.....	30
12.6	Split transfer at number of documents.....	30

## Introduction

This publication provides an overview of the *new features and enhancements* for **Infor ERP Xpert 4.1** and **Infor CRM ACmanager 4.1**. The release **4.1** contains the functions of the Feature Pack 2 and Service Pack I.

Part A of the new features contains all functions concerning both the product **Infor ERP Xpert 4.1** and the product **Infor CRM ACmanager 4.1**.

This essentially includes functions from the application areas Release Management, EDI and logistics, because they are integral components of both **Infor ERP Xpert 4.1** and **Infor CRM ACmanager 4.1**.

In addition, the new features and enhancements described in the New Technologies and Common Functions sections also refer to both products.

Part B describes functions relevant for **Infor ERP Xpert 4.1** only, i.e., *not* those contained in **Infor CRM ACmanager 4.1**.

These Release Notes are intended for Infor employees as well as customers interested in information about new features in **Infor ERP Xpert 4.1** and/or **Infor CRM ACmanager 4.1**. They describe the basic functions assuming a certain amount of previous knowledge of the corresponding application area.

# Part A

**Infor ERP Xpert 4.1  
&  
Infor CRM ACmanager 4.1**

# Infor ERP Xpert 4.1 & Infor CRM ACmanager 4.1

## 1 New Technologies

### 1.1 Release for IBM i5/OS V6R1

*Infor ERP Xpert 4.1* was tested and released under IBM i5/OS V6R1.

## 2 Common Functions

### 2.1 Job scheduling

Job scheduling in Xpert has been enhanced with additional functions in *Infor ERP Xpert 4.1*. Access to iASPs (independent auxiliary storage pools) is now also supported in job schedule entries.

The following special features are to be noted in the definition of job schedule entries:

- If the iASP shown in the iASP Device field is not available, the job schedule entry is not performed.
  - If the job schedule entry is executed with \*SBMJOB, the iASP is checked before the start of the job schedule entry and the job schedule entry is not executed if this applies. As a result, the job status is set to \*FAILED. The date and time of the last start are not set. If the job schedule entry runs with time control, further attempts are made to start it.
  - If the job schedule entry is not executed with \*SBMJOB or the iASP in the background job is no longer available, the job status is set to \*FAILED. The job is not restarted.
  - If the iASP is also given in the job description, the job schedule entry is never set to \*FAILED, because the job cannot be started.
  - With job schedule entries of the \*SBMJOB type, the iASP from the job description is used for the new job and not the value from the iASP Device field. The job description must be managed correspondingly.
  - The check of the iASP can also be used if the job does not need the iASP at all.
- Also refer to Release Notes 4.0.2 about job scheduling in Xpert.

### 2.2 Ready for unicode print

The prerequisites for print management of Asian languages have been improved with *Infor ERP Xpert 4.1*. Adapting print forms for Asian languages is now possible in a simpler way.

### 2.3 Delete logical record lock automatically

With *Infor ERP Xpert 4.1*, logical record locks of specific files are set via the LOCK file (RHLX04 program). This file is updated regularly. As a result, logical record locks of files that are no longer valid (till now: TEIL, KDST, LIEF, WAKO, BEKO, LPLP) are cancelled automatically. This function was made available for other files (BEER, RPKO, RPPO, VTEI, AFVL).

### 2.4 Enhanced authorization control

With *Infor ERP Xpert 4.1*, enhanced authorization control is available, which reduces administration work in assigning individual user program authorizations considerably. An option was created to assign user program authorizations directly at program calls.

If a user is only to be permitted to call programs, for which he is explicitly authorized, a user/program authorization of the VTBN22 program must be created for him. A date-related authorization can be assigned to the user via the "Generate automatically" parameter of the VTBN22 program corresponding to create user/program authorizations automatically for the called programs.

Then you can call the programs under the user names, for example, for which this user is to be authorized. During these program calls, the error message "2096 - The user has no authorization for the XXXXXX program in the x/yyy company" is displayed, in which you can select "Create".

After the relevant program has been called and authorizations have been assigned, the authorization for automatic creation of authorizations must be withdrawn for the user via the VTBN22 program. This can be done manually or automatically once the *authorization date* has passed.

## 2.5 Synchronization tool

With the *synchronization tool* provided by Product Development in Breisach, correct master data and parameter settings are synchronized automatically, making this substantially simpler.

With the *synchronization tool*, parameter settings can be compared automatically in *Xpert*, as they exist in both the evaluation library and the comparison library.

After a comparison has been done using the *synchronization tool*, the respective pairs of parameters are listed next to each other. This makes a simple check of parameter settings in the evaluation library and comparison library possible.

Within the framework of checking parameter settings, corresponding measures can be taken directly in the *synchronization tool*. For example, values can be changed or excluded from future comparisons (set as fixed). In addition, comprehensive selection options are available to limit the number of parameters to be checked.

## 2.6 New text editor

### Text entry field

In *Infor ERP Xpert 4.1*, a new multi-line text editor is available with a multiple-line text entry field for entering body text.

For example, to enter and edit additional texts, the text cursor needs only to be positioned in the text field. Text is always entered in insert mode, never in overwrite mode.

You can navigate using the cursor keys in the text. You can paste copied text from the clipboard to the current position.

If more lines of text are entered than can currently fit in the displayed text field of the text editor, a vertical scroll bar is shown automatically.

If you select **Text module** in the context menu, you can select a text module and insert it. You **cannot** format the text.

If the cursor is positioned in the text, clicking **OK** stores the text. The **Enter** function key creates a line break in this case. Saving by pressing **Enter** only works if the cursor is not positioned in the text editor.

### Display of text in the application

When the text is displayed in the corresponding fields of the application, a line break is made automatically. Consequently, a line break is inserted at the end of a word in a longer text that no longer fits into one line with the current font.

As a result, the text is not wider than the field in the display. The actual width (in pixels) is relevant here, not the number of characters. A line break is inserted at the end of a line or a paragraph in a longer text.

### Handling proportional and monospace fonts

It is possible to change the character set. In particular, you can switch between proportional fonts (e.g., Arial) and monospace fonts (e.g., Courier).

In this way, you can work with precise positioning of lines and columns when exact positioning of characters is required and wanted, so that they are placed fitting on corresponding labels, for example.

The actual font is determined via code table **wF - Character sets** for monospace fonts. Then the font parameterized there is used in SmartClient.

Depending on the text type (e.g., Additional text for work cycle), you can store per parameter in the **wG - Character sets for text editors** in the code table whether proportional or monospace font is to be used. A text type thereby corresponds to a text number in code table wG, e.g., ARAG or BEKO. This applies to all programs using this text type.

## 2.7 Variable master data in list view

With *Infor ERP Xpert 4.1*, the **variable master data** have been redesigned (parts, customer and supplier master). Variable master data can be displayed in the form of a list.

This list view improves and simplifies maintenance of variable master data considerably. The old format is still available, but it will not be further developed. List views are also color-coded. All fields containing invalid values appear in red color. Noneditable fields are grayed out. In addition, the list view provides the option to branch directly into the field definition, field allocation and field logging via the context menu. Display of variable master data in list form can be configured via the parameter **Variable master data only as list** for the **R4BE10 Edit supplier master**, **R4BS01 Edit parts master costing**, **R4BS02 Edit parts master actual costing**, **R4DF25 Edit parts master** and **VTDF30 Edit customer master** programs.

## 2.8 Mailbox control of BOMs

The BOM of an assembly can be sent after editing by engineering to other department mailboxes (e.g., BOM Planning). The department responsible for editing the engineering BOM must be parameterized correspondingly via the code table **HC**. The departments, to which the BOMs are to be sent, are to be entered in the **2150 Mailbox processing + sequence number** parameters. The departments stored here are shown in the mailbox distribution list when you press function key **Shift+F1 Mailbox entry**. In addition, the mailbox distribution list is called automatically by engineering when you exit BOM editing if an **\*is entered in 0930 Distribution window**.

## 2.9 Phantom structures for part types 6 – tools and 9 – purchased parts with subcontractor-issued material

You can now also create phantom structures for part types 6 and 9.

## 2.10 Mandatory entry of classification in parts master

In the parts master base field **Classification** (TEKLNLR), the keyword **\*MATCHCODE** can be entered as default value, so that an entry is mandatory in this field when a parts master record is created.

## 3 EDI

### 3.1 Surcharge/discounts in credit note processing

The surcharges/discounts are now transferred into segment 825 during credit note processing (DFO4908 program). The code 03 according to VDA guidelines is given with surcharges/discounts for MCS. The surcharges/discounts for MCS are given in the **USR2513 ConditionType MCS Surch/Dscnt XZUL/XPPS** control parameter. All other surcharges/discounts are assigned the code 99 according to VDA guidelines.

### 3.2 Check of job date, time and purchase order number

A check of job date and time has been implemented in the DFDI02, DFDI03, DFDI10 and DFDI15 programs. If the job date or the time is greater than that in the message, the new error message **Caution: more current release exists** is displayed.

In addition, the code for overwriting the purchase order number is also checked in the DFDI10 and DFDI15 programs and - if the purchase order number changes - an error message is output.

### 3.3 Changes for the new Ferrari company group

Changes for the new Ferrari company group have been adopted. Ferrari works like Fiat with a few changes in the EDI converter.

### 3.4 Credit note EDI to suppliers with consignment processing

Additionally to the delivery note number, the respective goods receipt number in the VDA message 4908 is transferred into the credit note VDA, 821.

## 4 Release Management

### 4.1 XJIS – Just in Sequence delivery

The XJIS range of functions from XPPS 3.0 is now available in *Infor ERP Xpert 4.1*. This means that the corresponding "Just in Sequence" processes can be implemented here.

- EDI: receipt and integration of vehicle-related data of various OEMs (e.g., DELJIT/SYNCRO BMW SPAB to KOVP). Sending transport advices according to VDA4913.
- Vehicle mailboxes: editing of defective vehicles as well as manual entry of vehicles as alternative to EDI receipt.
- Vehicles on hand: display of vehicles currently on hand under consideration of various selection options.
- Sequence planning and container management: automatic and manual planning of vehicle modules in containers to be delivered.
- Tour scheduling: individual composition of containers to be delivered as well as provision of pickup sheets.
- Interfaces: provision of vehicle data for stock management and commercial processing. Import of vehicle-related data from external systems (e.g., WebSphere MQSeries).
- Labeling: provision of sequence and container labels

### 4.2 Shipping notification

#### General information

It is possible to make shipping notifications automatically in *Infor ERP Xpert 4.1*. When this is done, the forwarder is informed at an early stage per EDI or printout about the goods he is to transport. This enables an optimized transport process.

The shipping notification is normally made after the collation of the shipment. When this is done, it is possible to make a shipping notification for several deliveries for different customers. Of course, the goods must be delivered by the same forwarder as a prerequisite.

It is possible to make shipping notifications on the basis of picking orders or Release Management (LGSL order type 040) in *Infor ERP Xpert 4.1*.

#### BMW-DHL

BMW requires a shipping notification for DHL from its suppliers. This contains essential information also contained on the delivery note. The objective for BMW or DHL is to determine the advised delivery quantity and the associated container to make it possible to pick up the goods transport-optimized at the supplier's.

Two variants for collating the shipping notification are implemented in *Infor ERP Xpert 4.1*. These differ with respect to the point in time within the delivery process, at which the shipping notification is generated.

In variant 1, the shipping notification is generated within the framework of making a shipment. In variant 2, the shipping notification is created for picking orders.

### 4.3 Docking warehouse management

#### General information

The function of docking warehouse management has been integrated in *Infor ERP Xpert 4.1*.

Within the framework of the delivery process, the collation of the shipment, the pickup sheet printout, package processing and loading, as well as the loading process are documented and monitored in the system via receipt acknowledgment.

After delivery notes are created (except with scan to ship), the data of the containers are made available for further processing on the ramp/loading zone. Collation of the shipments

is independent of receipt acknowledgment and can be performed earlier or later in the process.

The functions of docking warehouse management are available in *Infor ERP Xpert 4.1* via the **Sales > Docking warehouse management** menu.

#### **Activation and control**

The functions of docking warehouse management can be activated via control parameter **USR1750 Docking warehouse management activated**.

Docking warehouse management cannot be activated if the control parameter **USR0694 Generate EDI + documents automatically at scanning** is activated simultaneously.

The Master Bill of Lading function can also be activated separately with control parameter **USR6100 US standard installed?**

The loading zones are stored in code table **VZ Loading zone**. The functions in docking warehouse management are controlled in detail using the parameters of the loading zones: **With receipt acknowledgment/Stock location management**, and **With loading control**.

To be able to display several loading zones in one plant, the possible stock locations are also defined here as from – to parameters **From stock location** and **To stock location**.

A loading zone can be entered for a shipping warehouse in the code table **V1 Allocation of shipping warehouse loading zones**. In this way, a loading zone can be allocated to several shipping warehouses.

The IDs of the loading docks are stored in the code table **VT shipping docks**. A dock can be allocated to a loading zone via a parameter.

The status for shipments with docking warehouse management are defined in code table **V2 - Status of shipments (SLDA)**.

#### **Collate shipments**

Collation of shipments was enhanced by functions for handling parcel service shipments. If the checkbox **Parcel service** of a forwarder is activated, an additional window for entering the parcel label numbers is displayed when a shipment is created.

#### **Receipt acknowledgment on a docking ramp**

In work with receipt acknowledgment, the container data are created or updated after creation of the delivery notes (Release Management).

In the scanner dialog for accepting packages on a docking ramp, the packaging is checked, and optionally a stock location is assigned. If a loading zone is stored via the parameter **Loading zone** of the **R4ZV05 Docking warehouse management of receipt acknowledgment** program, the package number is checked at scanning to determine whether there are already containers on the ramp for this customer and forwarder. Then a stock location is suggested for this.

#### **Change docking ramp zone**

In scanner dialog for transfer on the ramp, a package can be assigned to another stock location.

#### **Parcel service processing**

In scanner dialog with parcel service processing, reserved package numbers must be scanned for each package of a shipment at collation of the shipment.

Once all packages of a shipment have been recorded, the status of the shipment is set to 70. If no EDI data are stored for the customer, the status can be set immediately to 80 dependent on the parameterization.

In parcel service processing, the delivery note EDI must always be triggered manually, because there is no loading in the actual sense of the word.

#### **Shipping management**

In the **Docking warehouse management overview** screen, shipments with the same pickup sheet number and shipments without pickup sheet number for a forwarder with the same date and status are displayed together.

Using the selection criteria date, forwarder, dock, customer/shipping address, loading zone, pickup sheet number, shipment number and status from/to, various shipments can be displayed and edited.

### **Edit shipments**

Within a status range from **10 - Without receipt acknowledgment** to **30 - Loading release possible**, you can edit shipments using **Edit** in the context menu. In the **Docking warehouse management of shipments**, the shipments for a selected position can be edited or cancelled.

### **Create pickup sheets**

With a status **30 - Loading release possible**, you can create pickup sheets for a shipment using **Create pickup sheet** in the context menu. The shipments in question are displayed in the **Docking warehouse management - create pickup sheets** screen. The sequence of the loading the individual shipments is set with a sequence number. The numbers 1 - 99 are permitted: You can select the same numbers several times.

With **F7 Create pickup sheet**, a dialog box is opened, and then shipments assigned a number can be assigned to a (automatically generated) pickup sheet number and a dock for loading. In addition, the transfer date/time, means of transport number and delivery date/time are recorded. The entered data are stored when you click **OK**. The status is set to **40 - Pickup sheet created**.

For forwarders defined as parcel services, the error message **4346 – Forwarder is only approved for parcel shipments** is displayed.

### **Display functions**

With **Display** in the context menu, you access in display mode the **Docking warehouse management - shipments** screen. All shipments of the selected position with the same status, same forwarder and pickup sheet number are displayed there.

With the selection **Display** in the context menu, you access the display of the shipment data. The display of delivery positions is called when you press **Enter**.

With the selection **Display** in the context menu, you can call the detailed display for the delivery position.

The selection **Print pickup sheet** in the context menu in the display mode prints a test list of all selected shipments, also called preliminary pickup sheets, if the status = **30 - Loading release possible**. This means a stock on hand list of the stock represented by the selected shipments on the docking ramp.

The actual pickup sheet can only be printed once the shipments have been collated into a pickup sheet. This is not necessary with a preliminary pickup sheet.

The selection **Print bill of lading** in the context menu prints the bill of lading (including reprinting).

The selection **Print waybill** in the context menu prints the waybill (including reprinting).

### **Display stock locations**

You access the entry screen for displaying the containers via menu item **Sales > Docking warehouse management > Docking warehouse management - loading zone overview**. The selection fields loading zone, stock location, part number and package number are available.

When you enter the loading zone and stock location or package number, the **Display occupancy - by stock location** is displayed directly, in which the occupancy of the stock locations for the contents of the container on the docking ramp is shown.

When you enter the part number, a list of loading zones and stock locations is displayed with this part number. When you select **Container** in the context menu, you then access the **Display occupancy - by stock location** screen.

### **Print functions**

With a status **40 - Pickup sheet created**, you can print shipping documents using **Print pickup list** in the context menu. You can set whether all shipping documents (bill of lading and waybill) or only the pickup sheet or master bill of lading are to be printed.

Without loading control, the status is set to **70 - Loading completed, EDI still pending**.

#### **Send EDI**

With a status **70 - Loading completed, EDI still pending**, you can trigger the EDI delivery note using **Send EDI** in the context menu. You access the **Docking warehouse management - shipments** screen. Only shipments with status 70 and the corresponding forwarder are displayed there. You can then trigger the EDI delivery note. Then the status is set to **80 - Loading completed, EDI sent**.

#### **Cancellation functions**

With a status **40 - Pickup sheet created** and **50 - Pickup sheet printed**, you can cancel the loading release with **Cancel** in the context menu. The status is reset to **30 - Loading release possible**.

If the status is greater than **50 - Pickup sheet printed**, loading is cancelled. All packages of this pickup sheet number are reset to **50 - Pickup sheet printed**. If you work without shipping control, the status is reset to **40 - Pickup sheet created** (only possible if no EDI delivery note has been sent).

#### **Change dock number**

The **Edit dock allocation** dialog box is called with dock number in the context menu, in which you can change the dock allocation. This is only possible at status **40 - Pickup sheet created**.

#### **Loading control**

All packages of a pickup sheet are scanned at loading. If the packages of a pickup sheet have been scanned completely, the status of the shipments in this pickup sheet is set to **70 - Loading completed, EDI still pending**. You can only trigger the EDI delivery note thereafter.

You can set via the **Send automatic EDI** parameter of the **R4ZV40 Loading control in docking warehouse management** program that the EDI delivery note is triggered automatically once loading of a shipment has been completed. Then the status of shipments in the pickup sheet is set to **80 - Loading completed, EDI sent**.

## **4.4 Delivery time window on Porsche goods tag**

#### **General information**

With the VDA message 4915 for daily call-off data from customers to suppliers, the supplier receives information for the **EDI delivery address**, **EDI stock location** and **Point of consumption** fields. This information is transferred according to VDA 4904 and inserted on Porsche goods tags. The data transfer can contain blanks, which must be transferred as such.

With VDA message 4915, the supplier also receives information about the delivery time window (release date and release time). This information is inserted in the format day/month/time in the **EC level (design)** field on the Porsche goods tags.

#### **Master data**

The LPZU fields for the point of consumption (VERB) and the delivery time window (ANLI) must be allocated in the basic data of department 20 – Contract master data.

A new parameter for the delivery time is to be created in the basic data for the contract master for company group 007 – Porsche and record type 10 – basic data to make it possible to transfer the required date as delivery time window and activate printing in the contract master.

## **4.5 Compact view of manual invoice release**

The compact view of manual invoice release for Release Management can be activated via the new parameter **Activate compact view** of the **R4ZX23 Manual invoice release** program.

## 4.6 Start correction of required totals in contract as batch job

The **R4ZR01 Correct contract reqmts. total** program can now be started via the **Sales/special functions** menu in batch with display of the universal dialog for selecting the processing type. The program is called per company/plant.

## 4.7 Round release quantities

In the **R4ZX44 Rounding quantity calculation** program, the new function **M2** has been implemented. The minimum delivery quantity is set when the requirements are fewer than the minimum delivery quantity. Requirements are not changed when they exceed the minimum delivery quantity. Changes in the code table **ra Order quantity rounding**: The text for the entry **M1** was changed to **Minimum delivery quantity with offsetting**. The entry **M2** is new and designates the **Minimum delivery quantity without offsetting**.

## 5 Logistics

### 5.1 Enhanced inventory status logging

With inventory in a conventional warehouse in *Infor ERP Xpert 4.1*, a record with status **50 - Discrepancy list printed** is logged at printing of the inventory discrepancy list.

### 5.2 Warehouse and inventory valuation list with bonded stock

When you print the warehouse and inventory valuation list in *Infor ERP Xpert 4.1*, you can determine and print the bonded stock. Available stock on hand and bonded stock are always printed in separate lines. If both stocks are to be printed, the bonded stock is printed in the second line of the detailed data.

Using the **With bonded stock?** parameter of the **R4LB30 Print warehouse valuation list** program, you control whether bonded stock is also printed.

Using the **With bonded stock?** parameter of the **R4IN70 Warehouse valuation list** program, you control whether bonded stock is also printed.

In control parameter **USR0913 Devaluation percentage for bonded stock**, a general devaluation percentage can be stored for the warehouse and inventory valuation, so that all bonded stocks can be devalued equally.

In this case, it not necessary to expand the warehouse valuation criteria with entries for bonded stock.

### 5.3 New transport order logistics

#### General information

The functions for entering, managing and acknowledging transport orders with subsequent transfer transactions have been integrated in the standard version of *Infor ERP Xpert 4.1*. Subsequent transactions mean in this context that a transport order is first created, on the basis of which there is a transfer transaction with stock transaction code **32 - Transfer to warehouse**. This process differs from the traditional process in working with transport orders in Xpert in that there is first a transfer transaction and then transport orders are created with report of the issue and receipt. To differentiate the new transport order logistics from the conventional one, transport orders are named **transport requests** in the new logistics.

The new transport logistics include three functions:

- Transport requests can be entered and edited using the management program (R4CLTA Edit transport requests).
- Transport requests are committed to the transport order warehouse using the transaction program (R4CLTA Commit transport requests). There is a transaction from the warehouse of origin to the transport order warehouse. Here, the warehouse of origin is the warehouse where a container is located before the transfer transaction. The transport order warehouse is a virtual warehouse for containers, which have been issued from the warehouse of origin based on a transport request, but which have not been acknowledged in the destination warehouse yet (material is being transferred). Warehouse of origin, destination warehouse and virtual warehouse can be random-access or container-driven. The virtual warehouse must be stored in control parameter **USR7002 Virtual transport request warehouse**.
- Materials are transferred from a transport order warehouse to a destination warehouse using the program for acknowledging transport requests (R4CLT2 Acknowledge transport requests). The destination warehouse is the warehouse to which the container is to be transferred.

These programs are called in *Infor ERP Xpert 4.1* via the **Warehouse management > Stock management > Transport requests** menu.

#### **Edit transport requests**

Transport requests are only entered manually in the system.

Currently, no control is required to distinguish work with transport requests from conventional transport order logistics.

If a transport order acknowledgment is set in the warehouse master, only transactions with the new transport order logistics are generated when you call the corresponding menu item.

Transport requests are always committed as transfer transactions. Pure issue and receipt transactions are not supported in this context.

There is no stock location block at committing transport requests.

The **Edit transport requests** screen is called via menu item **Warehouse management > Stock management > Transport requests > Edit transport requests**, in which an overview of transport requests is displayed.

Selection fields are available for selecting transport requests on the tabs **Selection 1 to 3**. You access the **Edit** screen with the **Edit** menu item in the context menu, in which you can edit transport requests.

The stock location occupancy of the warehouse of origin is displayed when you press function key **F2 Occupancy**.

The available stock locations in the destination warehouse are displayed when you press function key **F6 Free locations**.

Pressing **F7 Update** saves the changes.

The transport request is deleted using menu item **Delete** in the context menu.

You access the detailed display of the transport request using menu item **Display** in the context menu.

You create a new transport request when you press function key **F6 Create**.

#### **Commit transport requests**

The **Receipt via transport requests** screen is called via menu item **Warehouse management > Stock management > Transport requests > Commit transport requests**, in which an overview of the transport requests to be committed from the warehouse of origin is displayed. You switch to the **Receipt via container entry** screen when you press function key **F2 Switch mode** to access via the container ID.

To commit a transport request in the **Receipt via transport requests** screen, select this with **Select** in the context menu. You access the **Detailed view** screen, in which you can commit the transport request with **F7 Commit**.

Enter the destination warehouse and the container ID in the **Receipt via container entry** screen. Press **F7 Commit** to carry out the transaction.

#### **Acknowledge transport requests**

The **Acknowledge transport requests** screen is called via menu item **Warehouse management > Stock management > Transport requests > Acknowledge transport requests**, in which you can enter a container ID

Press **F7 Commit** to carry out the transaction.

## **5.4 Subsequent processing of package numbers**

The external package number of the supplier can be scanned additionally at goods receipt. If no unambiguous allocation of an internal container ID can be determined via the container ID with barcode prefix, then a screen for scanning the external package number is displayed. This makes it possible to address the internal container ID and initiate subsequent processing.

The **R4CM17 Retrieve internal CT ID** program for determining the internal container ID is called for this. The **Default customer/supplier code** parameter of the program is to be set to 2 = supplier.

The **With barcode identifier** parameter of the **R4LB90 Display stock transactions** program is to be set to 1, so that container IDs must be entered with the associated barcode identifier.

## 5.5 Container application check

The **R4CMVP CT application check – scan** program was created with the parameters **Container with identifier** and **Commit automatically** to check the usage of containers.

## 5.6 Backlog dates in shipping logistics

Backlog dates are highlighted to optimize planning of requirements not sufficiently covered in shipping logistics.

In the shipping logistics mailboxes, the backlog date is displayed instead of the staging date in the **Requirement date** column. The backlog date is displayed in red.

## 5.7 QA release scanner dialog

You can now call menu item **Materials management > Goods receipt > QA release - scanner dialog** for the scanner dialog for QA release of containers in goods receipt. You access the **QA inspection** screen for the scanner dialog for QA release.

The **R4BE6L - QA release - scanner dialog** program was created with the following parameters:

### **Explicit container release**

If containers are to be released or blocked explicitly, the respective editing step must be confirmed using function key **F02 Release container** or **F04 Block container**. If containers need not be released explicitly, editing is triggered directly during scanning.

### **CT2 scanning permitted**

This parameter sets whether it is permitted to scan CT2 directly in dialog.

### **Remark required**

Entry of a remark for QA editing can be forced with this.

### **Collective release/blocking**

This parameter determines whether the function keys **F07 Block complete GR** and **F08 Release complete GR** are activated.

### **Scanning with identifier**

This parameter sets whether scanning should be performed with barcode identifier.

### **Commit automatically**

Triggers automatic commitment of data during scanning.

## 5.8 WH determination

Fifteen warehouses could be stored previously in the parameters for the **R4BP11 WH determination** program. This number has now been increased to 225. Fifteen warehouses can be stored each in the parameters **Warehouse 001 - 225**. The warehouse numbers must always be entered as 2 digits without blanks.

## 5.9 Inventory label printing with altered containers

When you commit inventory in a container-driven warehouse, it is now possible to print a corresponding label for altered containers. The corresponding printing program can be specified in the **Printing program for documents** parameter of the **R4CMI8 Commit inventory (XLHM)** program.

## 5.10 Inventory container status

You can control via the new parameter **Container status 90 permitted** of the **R4CLII Ent. count.qty (MDE)/new logic** program whether entering counted quantities for containers with status 90 is permitted.

## 5.11 Enter inventory data

You can control via the **Function key 11 active** parameter of the **R4CLI3 Enter inventory data** program whether function key F11 is active. If inventory only relates to one stock location, you can prevent with this - if needed - that all previously recorded container data are deleted if you press the function key by mistake.

## 5.12 Print inventory number and stock location as barcode

You can control via the **Print inventory no. and stock location as barcode** parameter whether inventory number and stock location are to be printed additionally as barcode (R4CLI1, R4CLI1P1, R4CLI7, R4CLI7P1, R4CLI8, R4CLI8P1, R4CLI9 and R4CLI9P1 programs).

You can control via the **Print inventory no. as barcode** parameter whether the inventory number is to be printed additionally as barcode (R4CMI7, R4CMI7P1, R4CMI8, R4CMI8P1, R4CMI9 and R4CMI9P1 programs).

## 6 Shipping

### 6.1 Requirements from Release Management in critical mailboxes

When commissions from the Release Management application area are in the critical mailbox and the requirements are changed per EDI with new delivery schedules or manually, the message **Caution! The requirements were updated** is displayed when you select **Edit, Immediate disposition** or **Generate picklist**. If a data record again for the same contract is selected again, you can continue work in the normal way. It is the responsibility of the user to adjust the new requirement to the commission. Restarting batch disposition is the easiest procedure.

### 6.2 ESP or customer address on label

You can now control in ESP processing via the new variable additional field (LPZU) **VEAD Shipping address on goods tag** whether the shipping address and the EDI shipping address of the customer are to be printed instead of the ESP address. Activate this control if the ESP delivers to the customer without repackaging.

### 6.3 Print goods tags for CT2 at pre-labeling

Printing of CT2 labels at pre-labeling can be activated via the new parameter **Print goods tags for CT2** of the **R4CLPA Print picklist** program.

### 6.4 Enter shipments

Normally, there is a check at entry of unplanned shipments in shipping logistics to determine whether the shipping date is within the disposition horizon. If this is not the case, the record is placed in the shipping manager's mailbox. There is now a new parameter **Without disposition horizon** of the **R4ZL41 Enter shipments** program. When this parameter is set, this check is skipped and the shipment is put directly in the commissioning mailbox or critical mailbox.

### 6.5 Calculate shipments

You can now set via the new parameter **Horizon via shipping calendar** of the **R4CV30 Calculate shipments** program that the release and disposition horizon is calculated via the shipping calendar instead of via the capacity calendar. If the parameter is not set, the calculation is performed via the capacity calendar as previously.

## 7 Sales statistics

### 7.1 Report parameter selection criteria

In the **VTRP10 Generate report params. (batch)** program, selection criteria entered by the user are now set right-justified automatically when you press **Enter**, as is required for subsequent processing. This simplifies entry for users.

# Part B

## Infor ERP Xpert 4.1

## Infor ERP Xpert 4.1

### 8 Industry & Distribution

#### 8.1 Print part descriptions 1 and 2 in one or two lines

You can control via control parameters **USR219A Print part descriptions 1 + 2 in two lines (order confirmation)**, **USR221A (packing slip)**, **USR227A (delivery note)**, **USR231A (invoice)**, **USR233A (collective invoice)**, **USR235A (proforma invoice)**, **USR241A (return delivery)**, **USR243A (deleted order)**, **USR301A (internal order confirmation)** and **USR304A (quote)** whether part descriptions 1 and 2 are printed in one or two lines.

#### 8.2 Print due date on proforma invoice in line with order confirmation

##### **VTAF51 Internal order confirmation**

You set via control parameter **USR2200 Print due date on order confirmation?** whether due date 1 or 2 is to be printed on the order confirmation (except with a reference to the invoice, because the delivery note date is printed in that case).

##### **VTFK51 Print proforma invoice**

Dependent on the setting of the control parameter **USR2360 Print due date on proforma invoice?**, the proforma invoice of the delivery date 1 or 2 is printed if values are available.

#### 8.3 Enhanced invoice printing

In the **VTDF11 Edit Industry & Distribution order types** program, the **Print invoices** parameter has been enhanced with the feature **3 = Print invoice after DN printing** (one invoice per delivery note).

### 9 Procurement

#### 9.1 Separate number sequence for RFQ suppliers - Modifications of RFQ management

In *Infor ERP Xpert 4.1*, the new supplier number can be assigned from the separate number sequence **ALNUMM** when an RFQ supplier is created.

You control printing of the supplier number of an RFQ supplier on the request via the **Print RFQ supplier** parameter of the **R4AN96** program.

The cited functions are activated via control parameter **USR0217 Create RFQ supplier using separate number sequence**.

RFQ suppliers can be transferred as normal suppliers via the new selection **Transfer RFQ supplier** in the context menu within the **Purchasing quotes – price overview** screen.

The RFQ supplier can be transferred as normal supplier in the supplier master using the function key **Shift+F4 RFQ supplier**.

At the transfer of RFQ suppliers, the supplier number is changed in existing requests and quotes into the newly assigned supplier number.

The status of the supplier is then displayed with **2 – RFQ supplier** in the supplier master and in other purchasing screens.

##### **Number sequence for RFQ suppliers**

The number sequence **ALNUMM** for RFQ suppliers is to be selected so that the numbers are higher than those of normal supplier numbers. Only in this way can it be ensured that the assignment of the next supplier number for normal suppliers functions properly.

### Supplier master status

The supplier status **2 – RFQ supplier** is displayed by default when an RFQ supplier is created. This status should not be modified, because distinction between RFQ suppliers and normal suppliers is only possible in this way. This ensures that nothing can be ordered from an RFQ supplier yet.

## 9.2 Purchasing printing code - enhancement of the supplier master

In *Infor ERP Xpert 4.1*, new base fields have been introduced for form-related print modes in the supplier master:

- LIDRF1 Printing code for single purchase order (R4BE76)
- LIDRF2 Printing code for DLS and DCO orders (R4BE78/R4BE79)
- LIDRF3 Printing code for reminders (R4BE98)
- LIDRF4 Printing code for RFQs (R4AN96)
- LIDRF5 Printing code for contract confirmations (R4BE96)
- LIDRF6 Printing code for credit notes (R4RP25)
- LIDRF7 Printing code for debit/credit notes (R4RP87/R4RP91)
- LIDRF8 Free field
- LIDRF9 Free field

These fields were allocated to the departments PO - purchasing supplier master and RFQ - supplier master requests in the supplier master (under the LIDRFL printing code field). The LIDRF8 and LIDRF9 fields were not allocated to any department.

## 9.3 Printing additional texts and text modules on Interform forms

### General information

With *Infor ERP Xpert 4.1*, it is now possible to print documents generated via Interform in an attractive layout (line breaks and use of the complete page width). This concerns additional texts and text modules for printing purchase order (R4BE76) and delivery schedule (R4BE78) forms. As a result, texts with a line length up to 75 characters can be printed.

### Additional texts on purchase order (R4BE76)

You control the width with which texts are printed via the parameters **Width of text lines - purchase order text** and **Width of text lines - text modules** of the **R4BE76 Print purchase orders** program. A value between 40 and 75 is possible here. A value between 40 and 70 characters is possible for additional texts, and a value between 50 and 75 is possible for text modules.

### Additional texts on delivery schedule (R4BE78)

You control via the parameters **Width of text lines - purchase order text** and **Width of text lines - text modules** of the **R4BE78 Print DLS purchase orders** program with which width texts are printed. A value between 40 and 75 is possible here. A value between 40 and 75 characters is possible for additional texts, and a value between 50 and 75 is possible for text modules.

## 9.4 Quotes for PUR dummy parts

Quotes can now also be entered for PUR dummy parts (R4AN20 and R4AN26 programs). A single purchase order can be created via the price overview with reference to a quote.

## 9.5 Plan by part number

The blocking of lines in a list has been implemented in planning by part number (R4BE55 program). This is required for DCO and PUS contracts. Entries in the lists and the selections of the context menu are evaluated and processed separately. This prevents

deleting lines with quantity changes when a line is deleted. Additional lines can be added if needed using the new function key **Shift+F11 Additional lines** in the **Plan by part number** screen.

## 9.6 Fixed price for a purchase order position independent of the quantity

A new price unit code **G** has been introduced in code table **04** for calculating the purchase order position value. Using this price unit, a fixed price for a purchase order position can be entered independent of the quantity. The value of the parameter **0106 Price unit without quantity unit** is set to 1 for this. The value of the parameter **0821 Value** should be zero, because this is used for calculating the unit.

## 9.7 EDI mailbox for goods receipt

In the EDI mailbox for goods receipt (R4ZX15 program), the following columns have been added: Purchase order number, Shipment number and HGV number.

## 9.8 Automatic delivery schedule logging

For the **R4BP90 XPPS - Display MRP error log** program, the **Error numbers 01 - 21** parameter has been created, in which up to 21 error codes can be stored, which are edited in the display of error records. You set in the **Error numbers inclusive/exclusive 1/0** parameter whether error records should be included or excluded. In the **Display AutoDLS log** screen, the error codes are set as defaults on the tab **Additional selections**. The user can change this selection. If one single error code is entered on the **Selection** tab, the error codes on the tab **Additional selections** are ignored.

## 9.9 MCS/ECS clearing method for purchasing invoices/credit notes with consignment warehouse processing

A new clearing method **5 - Date - consignment warehouse issue** has been created in code table **E2 Precious metal clearing method**. This clearing method is only used for material surcharges. The date of the warehouse issue from the consignment warehouse is used for determining current quotations.

This clearing method cannot be used for precious metal surcharges, because the date of the consignment warehouse issue serves as calculation basis instead of the delivery note date as in the clearing method **3 Date – delivery note**.

## 10 Production

### 10.1 Production order entry with midpoint scheduling

Midpoint scheduling of work cycles is now available in *Infor ERP Xpert 4.1*. In the **Scheduling** screen, the dialog box **Scheduling** is displayed for entry of a start or end date in the context menu at selection of a work cycle with **Scheduling**.

### 10.2 Modifying stock requisitions

In the **R4WA86 PrOrd info<material>(dft/XMAF)** program, additional stock requisitions are only checked if the new parameter **Stock requisition = required quantity** of the program is activated. If no further stock requisitions are possible, a message is displayed.

## 11 Finance

### 11.1 Display debit notes for invoice audit

The new column **Debit note** is displayed in the **R4RP51** program. **Yes** is displayed in this column if a debit for the document exists and **No** if not. There is no distinction between header and position levels.

### 11.2 Compact view of invoice positions

A new compact view is available for the **R4RP43 Edit invoice positions** program. This can be activated with the parameter **Compact view is initial screen** of the program.

### 11.3 Transfer documents to FACC

The administrative work for transferring documents to FACC has been reduced substantially with *Infor ERP Xpert 4.1*. The transfer of incoming and outgoing invoices from the application areas *Industry and Distribution* and *Release Management* to FACC can be done via a menu item triggering determination of control data and documents per company/plant, and starting the corresponding programs.

Documents transferred to FACC are monitored via a comparison of the so-called audit lists with the logged transfer information. The workflow is as follows: Before transfer of the documents to FACC, a log is created of the relevant documents per company/plant. Then the incoming and outgoing invoices are transferred to FACC. While this is done, transfer logs with the respective number of documents are created separated according to the application areas *Industry and Distribution* and *Release Management*.

Third-party documents are also contained in this (e.g., invoices from QSC).

This enables you to check whether the documents relevant for FACC have been processed correctly and completely. These audit lists can also be created for periods in the past.

The control parameter **JSA001 Create SAF-T** sets the call parameters for the **R4SA02** program for creating credit notes from goods receipts.

In addition, new parameters for transferring documents to accounting have been implemented for the **R4BU30/003** program:

- You control with the parameter **Multiple transfer permitted** whether data can be transferred to accounting several times.
- Parameter **Transfer on error** determines whether data may be transferred even if errors occur. There are checks of existing general ledger accounts and recordings in Table I3 for the tax code if this parameter is deactivated.
- If you activate the parameter **Check subledger accounts**, you can check whether subledger accounts have been transferred to FACC.
- If you activate the parameter **Print error log immediately**, an error log can be printed immediately on transferring the documents to FACC and additionally saved to a file. This error log can also be reprinted later via a corresponding menu item.

### 11.4 SAF-T fiscal legal requirements in Portugal

With *Infor ERP Xpert 4.1*, the SAF-T interface is available via SOI. SAF-T stands for "Standard Audit File for Tax Purposes". This refers to EU guidelines concerning reporting obligations for data from ERP and finance systems of companies for audits relevant to taxes. This reporting obligation has been introduced in Portugal for the first time. Other countries in the EU are to follow.

Use of the SAF-T interface in *Infor ERP Xpert 4.1* requires setting or adapting various control parameters, code tables and program parameters:

- The company ID for SAF-T Portugal has to be stored in control parameter USR4701. This should be a concatenation of responsible regional commercial registry offices and the commercial registry number.
- Enter the audit file version used in control parameter USR4702.
- The output directory of the XML data for sending is stored in control parameter USR4703. Enter the path starting from the SOI root directory.
- Information for the job submit types immediately, batch and night of the R4RP23 program are contained in control parameter JSA0001 (job description, job name and message queue name), which is used to make the SAF-T data available in the background.
- The code tables IF and B4 must have been created.
- Corresponding settings must be stored in the tax codes in the fifth description field in code table I3.
- The mail addresses to which the SAF-T file (XML format) is to be sent can be stored in code table MA.
- The R4SA01 program for creating SAF-T data is called via menu item Finance > Interface > Special functions > Create SAF-T in *Infor ERP Xpert 4.1*.

## 12 Valuation

### 12.1 Info Tool in costing

You can set via the new parameter **Info Tool with XCLK data** of the **R4DF95 Info Tool** program whether data from the respective costing environment or the productive system are to be displayed when the Info Tool is called from costing.

### 12.2 New base fields in actual costing

The base fields RANG, RANC, NIWT, NIWC and DPR3 are now also available in actual costing.

The RANG field now applies to all part types. RANG/RANC denotes the price sequence, whereby the sequence must be set via the program totals code RANG. The difference between RANG and RANC is that the parts master is the basis of the price fields in RANG, while the basis is the COKW file in RANC. The first price not equal to zero is used in the sequence.

Analog to that, the base fields NIWT/NIWC (parts master lowest value/COKW lowest value) are made available for determining the lowest price. The lowest value of the price fields allocated to the program totals code NIWT is used for this.

With the base field DPR3, the last average price deviating from zero of the corresponding price field from the parts master is always made available for the valuation. The TEDPR3 field (from the parts master) is populated by material accounting with the last value deviating from zero and should always be filled after this initialization.

### 12.3 Calculation of SCO work cycles in the SFP valuation

It is now possible in SFP valuation (R4RK12 program) to consider internal reports of SCO work cycles or SCO reports of internal work cycles in the calculation.

### 12.4 Call of MACC closing

In the **R4MB10 Start monthly closing** and **R4MB12 Start daily closing** programs, the function key **Shift+F9 company/plant** has been implemented for changing the company/plant level.

### 12.5 XCOI interfaces via SOI

In *Infor ERP Xpert 4.1*, the target systems IGF (Infor Global Finance), Portolan and COI Light are supported. The following processes are currently provided:

- LB04CO, actual materials, IGF, Portolan, COI Light
- LB04C1, target materials, IGF, Portolan, COI Light
- LB04C3, planned materials, IGF, Portolan, COI Light
- BW01CO, actual activities, IGF, Portolan, COI Light
- LB04C2 target activities, IGF, Portolan, COI Light
- LB04C4, planned activities, IGF, Portolan, COI Light
- BW04CO, scrap transactions, Portolan, COI Light
- LB04FB, material transactions to FACC, Portolan
- FB01CO, accounting data to controlling Portolan, (IGF via FACC interface with FACC transactions)

Also refer to Release Notes 4.0.2.

### 12.6 Split transfer at number of documents

The number of documents is set via the new control parameter **USR4516 XCOI - Transfer splitting of number of documents**, at which the **R4CO30 XCOI - Integrate transfer to CACC data** program is to split the transfer of XCOI transactions to a system via SOI (Standard Open Interface). The recommended value is 500 here. A smaller value should

be selected if you use a larger number of data pools for only one of the transactions to be transferred. Splitting is only performed at document breaks, so that a transfer always contains the complete document.

## Index

### A

Automatic delivery schedule logging • 26

### B

Backlog dates in shipping logistics • 19

### C

Calculate shipments • 21

Calculation of SCO work cycles in the SFP valuation • 30

Call of MACC closing • 30

Changes for the new Ferrari company group • 11

Check of job date, time and purchase order number • 11

Collate shipments • 13

Commissioning order • 12

Compact view of invoice positions • 28

Compact view of manual invoice release • 16

Container application check • 19

Credit note EDI to suppliers with consignment processing • 11

### D

Delete logical record lock automatically • 8

Delivery time window on Porsche goods tag • 15

Display debit notes for invoice audit • 28

Docking warehouse management • 12

### E

EDI mailbox for goods receipt • 26

Enhanced authorization control • 8

Enhanced inventory status logging • 17

Enhanced invoice printing • 24

Enter inventory data • 20

Enter shipments • 21

ESP or customer address on label • 21

### F

Fixed price for a purchase order position independent of the quantity • 26

### I

Info Tool in costing • 30

Inventory container status • 20

Inventory label printing with altered containers • 20

### J

Job scheduling • 8

### L

Loading • 13

### M

Mailbox control of BOMs • 10

Mandatory entry of classification in parts master • 10

MCS/ECS clearing method for purchasing invoices/credit notes with consignment warehouse processing • 26

Modifying stock requisitions • 27

### N

New base fields in actual costing • 30

New text editor • 9

New transport order logistics • 17

### P

Phantom structures for part types 6 – tools and 9 – purchased parts with subcontractor-issued material • 10

Plan by part number • 26

Print due date on proforma invoice in line with order confirmation • 24

Print goods tags for CT2 at pre-labeling • 21

Print inventory number and stock location as barcode • 20

Print part descriptions 1 and 2 in one or two lines • 24

Printing additional texts and text modules on Interform forms • 25

Production order entry with midpoint scheduling • 27

Purchasing printing code - enhancement of the supplier master • 25

### Q

QA release scanner dialog • 19

Quotes for PUR dummy parts • 26

### R

Ready for unicode print • 8

Receipt acknowledgment • 13

Release for IBM i5/OS V6R1 • 7

Report parameter selection criteria • 22

Requirements from Release Management in critical mailboxes • 21

Round release quantities • 16

### S

SAF-T fiscal legal requirements in Portugal • 28

Separate number sequence for RFQ suppliers - Modifications of RFQ management • 24

Shipping notification • 12

Split transfer at number of documents • 31

Start correction of required totals in contract as batch job • 16

Subsequent processing of package numbers • 18

Surcharge/discounts in credit note processing • 11

Synchronization tool • 9

### T

Transfer documents to FACC • 28

### V

Variable master data in list views • 9

### W

Warehouse and inventory valuation list with bonded stock • 17

WH determination • 19

### X

XCOI interfaces via SOI • 30

XJIS – Just in Sequence Delivery • 12

