

FACTS 9.4

NEW FEATURES



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NEW FEATURES FACTS 9.4

1. Column Ordering in Three-level Entry, Document Inquiry, and Inquiry List Views

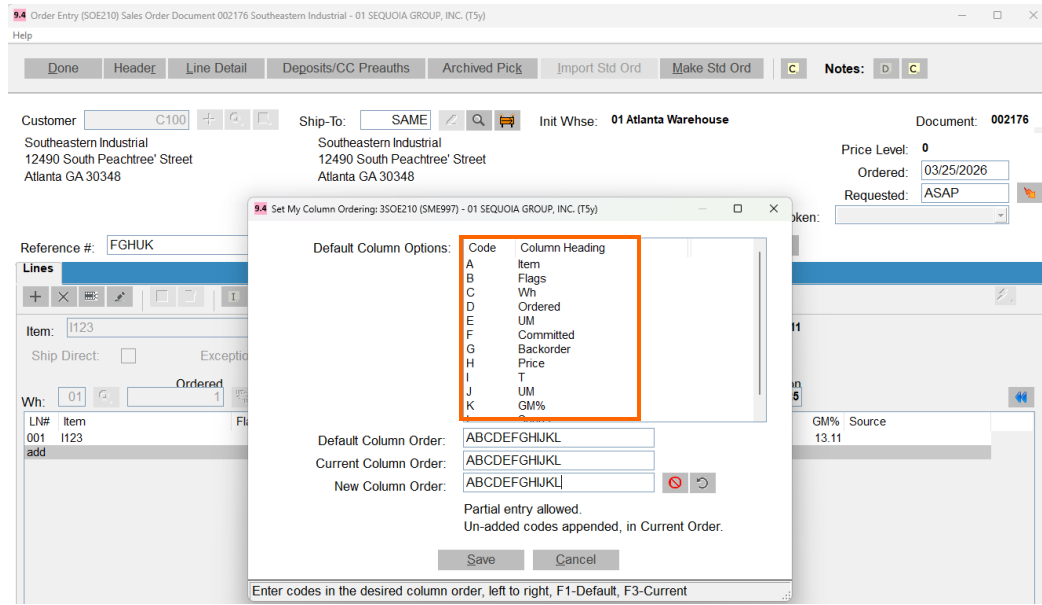
Column Ordering is shared across Three-Level Entry, Document Inquiry, and Inquiry List Views. Users can rearrange columns to match their workflow. These settings are saved in the user profile and applied system-wide, so the same column order is maintained across all areas.

- To change the column order, right-click anywhere in the line-item area and select **My Column Order**. The example shows a Three-level Entry window:

The screenshot shows a software window titled "9.4 Order Entry (SOE210) Sales Order Document 002176 Southeastern Industrial - 01 SEQUOIA GROUP, INC. (T5y)". The window contains various fields for customer information, shipping details, and a table of line items. A context menu is open over the line-item table, with the "My Column Order" option highlighted.

LN#	Item	Flags	Wh	Ordered	UM	Committed	Backorder	Price	T	UM	GM%	Source
001	I123		01	1	EA			15.25	S	EA	13.11	
	add											

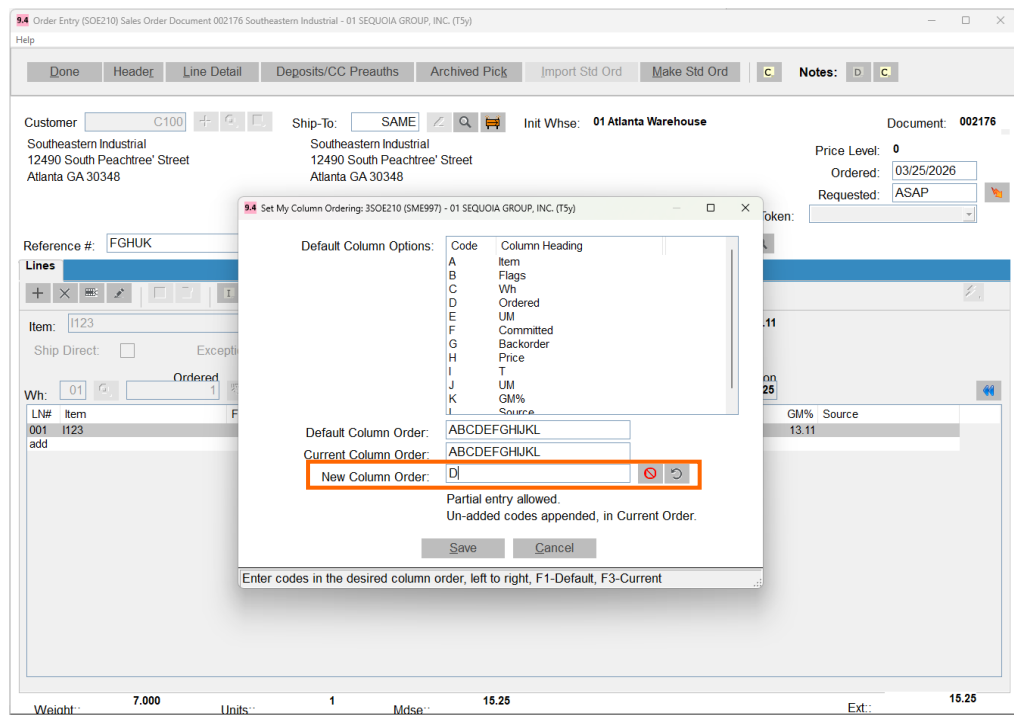
- Inside the **Set My Column Ordering** window, is displayed the codes for all available columns.



- To rearrange the columns, enter the desired order using the column codes in the **New Column Order** field.

For example, if you want the **Ordered** column to appear first, type **'D.'**

**You do not need to enter the remaining columns, any columns not specified will automatically be placed after 'D' in their original order.*



- Click **Save** to apply the changes. The list box will then update, displaying the **Ordered** column at the beginning.

9.4 Order Entry (SOE210) Sales Order Document 002176 Southeastern Industrial - 01 SEQUOIA GROUP, INC. (T5y)

File Edit View Options Go To Help

Done Header Line Detail Deposits/CC Preauths Archived Pick Import Std Ord Make Std Ord Notes: D C

Customer: C100 Southeastern Industrial 12490 South Peachtree Street Atlanta GA 30348
 Ship-To: SAME Southeastern Industrial 12490 South Peachtree Street Atlanta GA 30348
 Init Whse: 01 Atlanta Warehouse Document: 002176
 Price Level: 0
 Ordered: 03/25/2026
 Requested: ASAP
 Turbo Token:

Reference #: FGHUK Ship Via: FEDEX P2 Contact:

Lines

Item: H123 20 gal Waste Container 19.5 x 23; 7lb GM %: 13.11
 Ship Direct: Exceptional Sale: Usage Date:

Wh: 01 Ordered 1 Committed 1 Backordered 0 Price 15.25 Extension 15.25

LN#	Ordered	Item	Flags	Wh	UM	Committed	Backorder	Price	T	UM	GM%	Source
001	1	H123		01	EA	1	0	15.25	S	EA	13.11	

- In programs that support multiple sort orders (such as *Item Inquiry* with options like Date, Customer, etc.), each sort order maintains its own column arrangement. *Any changes you make to column ordering will apply only to the currently selected sort order.*
- For example, to change the column order for the **Date** sort, if you want **Reason** to appear as the first column, enter '**R**' in the **New Column Order** field.

Item: I100 Pallet Loading Hand Trucks 1000 lb capaci Item by Alpha Warehouse 01 Item Type: Stocked

Views:

- Activity
- Blanket SO
- Cost
- General
- Interchange
- Ledgercards
- LIFO/FIFO Cost
- MSDS/DOT
- Orders
- 1-Package
- Price
- Purchasing
- Receipts
- Restocking
- Serial/Lot
- Warehouse
- Transfer
- Timeline
- Usage
- Quotes
- 3-Std Part Num
- 2-Production
- Vendor
- Companions
- Notes
- 4-User-Defined
- Turns
- Planning Requests
- Equip Rental
- Lost Sales

Lost Sales for Item I100, Pallet Loading Hand Trucks

Customer	Name	N...	Date	Reason	Quantity	UM
C100	Southeastern Industrial	01	12/20/2024	NS	15	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	09/13/2024	NS	1	EA
C100	Southeastern Industrial	01	08/22/2024	NS	1	EA
C100	Southeastern Industrial	01	08/22/2024	NS	1	EA
C100	Southeastern Industrial	01	08/21/2024	NS	1	EA
C100	Southeastern Industrial	01	08/21/2024	NS	1	EA
C100	Southeastern Industrial	01	06/26/2024	NS	3	EA
C100	Southeastern Industrial	01	06/26/2024	NS	1	EA
C100	Southeastern Industrial	01	06/26/2024	NS	1	EA
C100	Southeastern Industrial	01	06/26/2024	NS	1	EA
C100	Southeastern Industrial	01	06/26/2024	NS	1	EA
C100	Southeastern Industrial	01	06/26/2024	NS	1	EA
C100	Southeastern Industrial	01	04/22/2024	NS	1	EA
C100	Southeastern Industrial	01	12/06/2022	NS	1	EA
C100	Southeastern Industrial	01	11/18/2014	NS	1	EA
C100	Southeastern Industrial	01	04/26/2013	NS	2	EA
C111	Cowboy World	01	11/30/2022	NS	1	EA

Start from: C - Customer

Select the list view sort order

- To make **Reason** the first column in the **Customer** sort, you must update the column order for that sort individually.

2. Inquiry List View Filters

Inquiry List View Filters are used to narrow the records shown in Inquiry List Views (such as Customer Inquiry or Item Inquiry). Apply filters based on criteria like warehouse, customer, or document type to focus on specific data.

- To apply a filter, right-click anywhere in the list view and select **My Inquiry View Filter**.

- Click **Continue** to apply the filter. A results window will appear showing the filtered records.

Item: I100 Pallet Loading Hand Trucks 1000 lb capaci Item by Alpha

Change Filters View Filter: Warehouse 01 Item Type: Stocked

Views:

- Activity
- Blanket SO
- Cost
- General
- Interchange
- Ledgercards
- LIFO/FIFO Cost
- MSDS/DOT
- Orders
- 1-Package
- Price
- Purchasing
- Receipts
- Restocking
- Serial/Lot
- Warehouse
- Transfer
- Timeline
- Usage
- Quotes
- 3-Std Part Num
- 2-Production
- Vendor
- Companions
- Notes
- 4-User-Defined
- Turns
- Planning Requests
- Equip Rental
- Lost Sales**

Lost Sales for Item I100, Pallet Loading Hand Trucks

Date	N...	Reason	Quantity	UM	Price	UM	Cost	UM	Cus
06/26/2024	01	NS	3	EA	200.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	

Start from: D - Date

- To add another filter, right-click any row in the results and select **My Inquiry View Filter**. Then enter the additional criteria. In this example, we are adding a filter for **Quantity = 3**.

Item: I100 Pallet Loading Hand Trucks 1000 lb capaci Item by Alpha

Change Filters View Filter: Warehouse 01 Item Type: Stocked

Views:

- Activity
- Blanket SO
- Cost
- General
- Interchange
- Ledgercards
- LIFO/FIFO Cost
- MSDS/DOT
- Orders
- 1-Package
- Price
- Purchasing
- Receipts
- Restocking
- Serial/Lot
- Warehouse
- Transfer
- Timeline
- Usage
- Quotes
- 3-Std Part Num
- 2-Production
- Vendor
- Companions
- Notes
- 4-User-Defined
- Turns
- Planning Requests

Lost Sales for Item I100, Pallet Loading Hand Trucks

Date	N...	Reason	Quantity	UM	Price	UM	Cost	UM	Cus
06/26/2024	01	NS	3	EA	200.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	

9.4 Set My Inquiry View Filters: 1-SOLOSUI (SMC909) - 01 SEQUOIA GROUP, INC. (T5w)

Default Column Order

Code	Column Heading	Filter Value
D	Date	6/26
W	Wh	
R	Reason	
Q	Quantity	
U	UM	

9.4 Edit Inquiry Filter (SMC909) - 01 SEQUOIA GROUP, INC. (T5w)

Current Filter: []

New Filter: 3

Continue

Enter value column must contain., F1-None, F3-Current

Item: I100 Pallet Loading Hand Trucks 1000 lb capaci Item by Alpha

Change Filters View Filter: Warehouse 01 Item Type: Stocked

Views:

- Activity
- Blanket SO
- Cost
- General
- Interchange
- Ledgercards
- LIFO/FIFO Cost
- MSDS/DOT
- Orders
- 1-Package
- Price
- Purchasing
- Receipts
- Restocking
- Serial/Lot
- Warehouse
- Transfer
- Timeline
- Usage
- Quotes
- 3-Std Part Num
- 2-Production
- Vendor
- Companions
- Notes
- 4-User-Defined
- Turns
- Planning Requests
- Equip Rental
- Lost Sales**

Lost Sales for Item I100, Pallet Loading Hand Trucks

Date	M...	Reason	Quantity	UM	Price	UM	Cost	UM	Cus
06/26/2024	01	NS	3	EA	200.00	EA	115.010	EA	

9.4 Set My Inquiry View Filters: 1-SOLOSII (SMC909) - 01 SEQUOIA GROUP, INC. (T5w)

Default Column Order

Code	Column Heading	Filter Value
D	Date	6/26
W	Wh	
R	Reason	
Q	Quantity	3
U	UM	
P	Price	
u	UM	
C	Cost	
m	UM	

Suspend Filtering Clear All

Continue

Start from: D - Date

- Click **Continue** to view all records again, as if no filter were applied. You can then modify your filter as needed.
- To remove all filters, right-click any row, select **My Inquiry View Filter**, and click **Clear All**.

Item: I100 Pallet Loading Hand Trucks 1000 lb capaci Item by Alpha

Change Filters View Filter: Warehouse 01 Item Type: Stocked

Views:

- Activity
- Blanket SO
- Cost
- General
- Interchange
- Ledgercards
- LIFO/FIFO Cost
- MSDS/DOT
- Orders
- 1-Package
- Price
- Purchasing
- Receipts
- Restocking
- Serial/Lot
- Warehouse
- Transfer
- Timeline
- Usage
- Quotes
- 3-Std Part Num
- 2-Production
- Vendor
- Companions
- Notes
- 4-User-Defined
- Turns
- Planning Requests
- Equip Rental
- Lost Sales**

Lost Sales for Item I100, Pallet Loading Hand Trucks

Date	M...	Reason	Quantity	UM	Price	UM	Cost	UM	Cus
06/26/2024	01	NS	3	EA	200.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	
06/26/2024	01	NS	1	EA	228.00	EA	115.010	EA	

9.4 Set My Inquiry View Filters: 1-SOLOSII (SMC909) - 01 SEQUOIA GROUP, INC. (T5w)

Default Column Order

Code	Column Heading	Filter Value
D	Date	6/26
W	Wh	
R	Reason	
Q	Quantity	3
U	UM	
P	Price	
u	UM	
C	Cost	
m	UM	

Suspend Filtering **Clear All**

Continue

Start from: D - Date

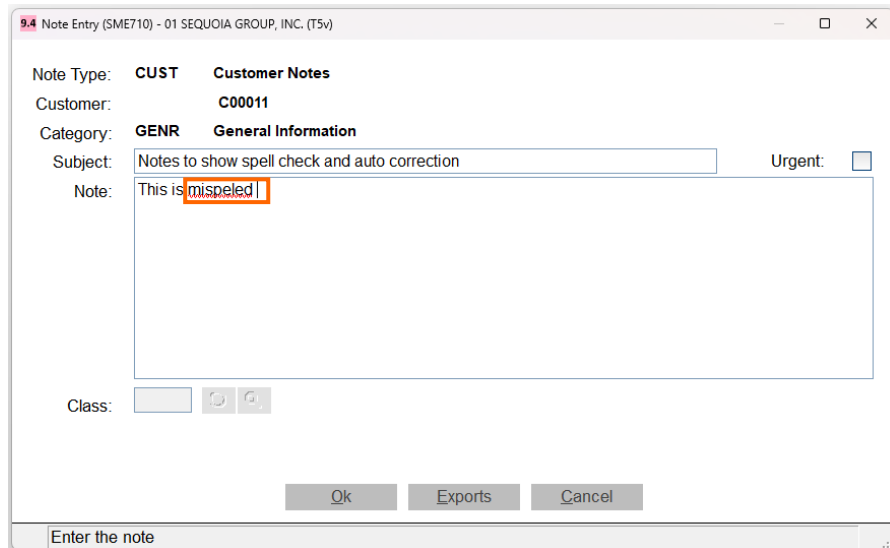
Exit

- This will remove all applied filters.

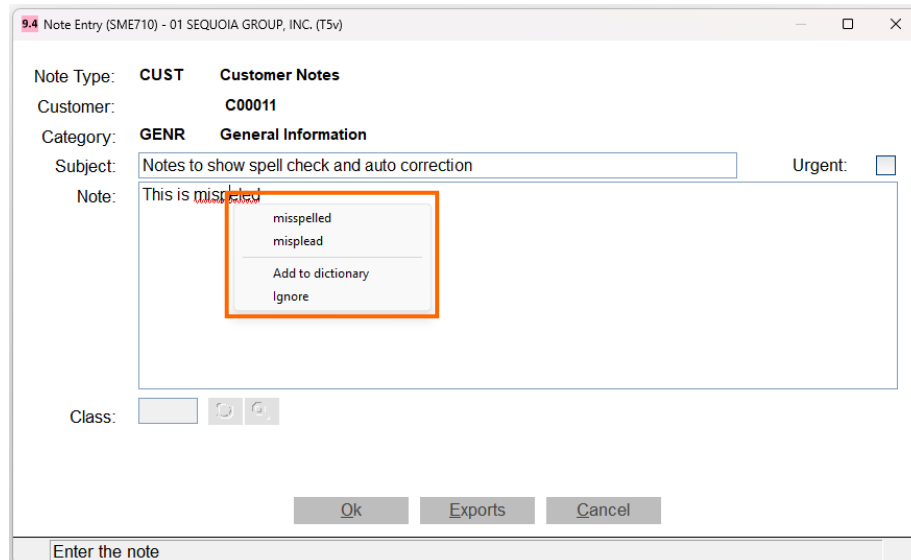
3. Spell check and auto correction in paragraph entry fields

Paragraph entry fields (such as Notes) now include spell check and auto-correction.

- For example, in **Note Entry**, any misspelled word will appear with a red underline.



- Right-click a misspelled word to view suggested corrections or add the word to the dictionary.



- If the misspelling is obvious, it will be automatically corrected.

9.4 Note Entry (SME710) - 01 SEQUOIA GROUP, INC. (T5v)

Note Type: **CUST** Customer Notes
 Customer: **C00011**
 Category: **GENR** General Information

Subject: Notes to show spell check and auto correction Urgent:

Note: This word

Class:

Enter the note

- As soon as you press the **spacebar**, the word is automatically corrected.

9.4 Note Entry (SME710) - 01 SEQUOIA GROUP, INC. (T5v)

Note Type: **CUST** Customer Notes
 Customer: **C00011**
 Category: **GENR** General Information

Subject: Notes to show spell check and auto correction Urgent:

Note: This word

Class:

Enter the note

4. Side Bar Enhancements

4.1 My Column Order

This feature allows users to rearrange the sequence of columns in a grid based on their workflow or preferences. The system saves the custom order and restores it in future sessions.

- After opening a document (Sales Order Document), expand the sidebar by clicking the **double-blue** arrow on the right side of the window.

Customer: C100 Southeastern Industrial
12490 South Peachtree' Street
Atlanta GA 30348

Ship-To: SAME Southeastern Industrial
12490 South Peachtree' Street
Atlanta GA 30348

Init Whse: 01 Atlanta Warehouse Document: 002165

Price Level: 0
Ordered: 07/07/2025
Requested: ASAP

Reference #: test Ship Via: FED EX P2 Contact:

Lines

Item: 1100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 49.56

LN#	Ordered	Item	Wh	EA	Committed	Backordered	Price	Extension
001	1	1100	01	EA	1	0	228.00	228.00

- In the sidebar, right-click and select **My Column Order**.

Customer: C100 Southeastern Industrial
12490 South Peachtree' Street
Atlanta GA 30348

Ship-To: SAME Southeastern Industrial
12490 South Peachtree' Street
Atlanta GA 30348

Init Whse: 01 Atlanta Warehouse Document: 002165

Price Level: 0
Ordered: 07/07/2025
Requested: ASAP

Reference #: test Ship Via: FED EX P2 Contact:

Lines

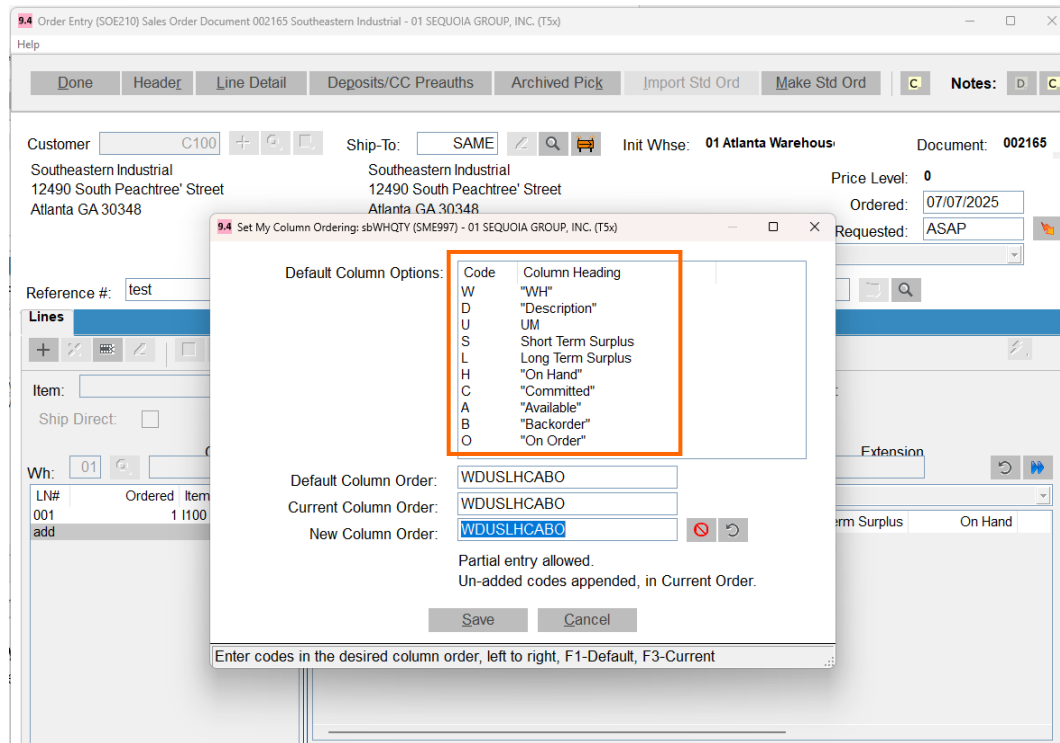
Item: 1100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 49.56

LN#	Ordered	Item	Wh	EA	Committed	Backordered	Price	Extension
001	1	1100	01	EA	1	0	228.00	228.00

W - Warehouse Quantities

Wh	Description	UM	Short Term Surplus	Long Term Surplus	On Hand	Con
01	Atlanta Warehouse	EA		N/A	1279	
02	Dallas W			N/A	24	

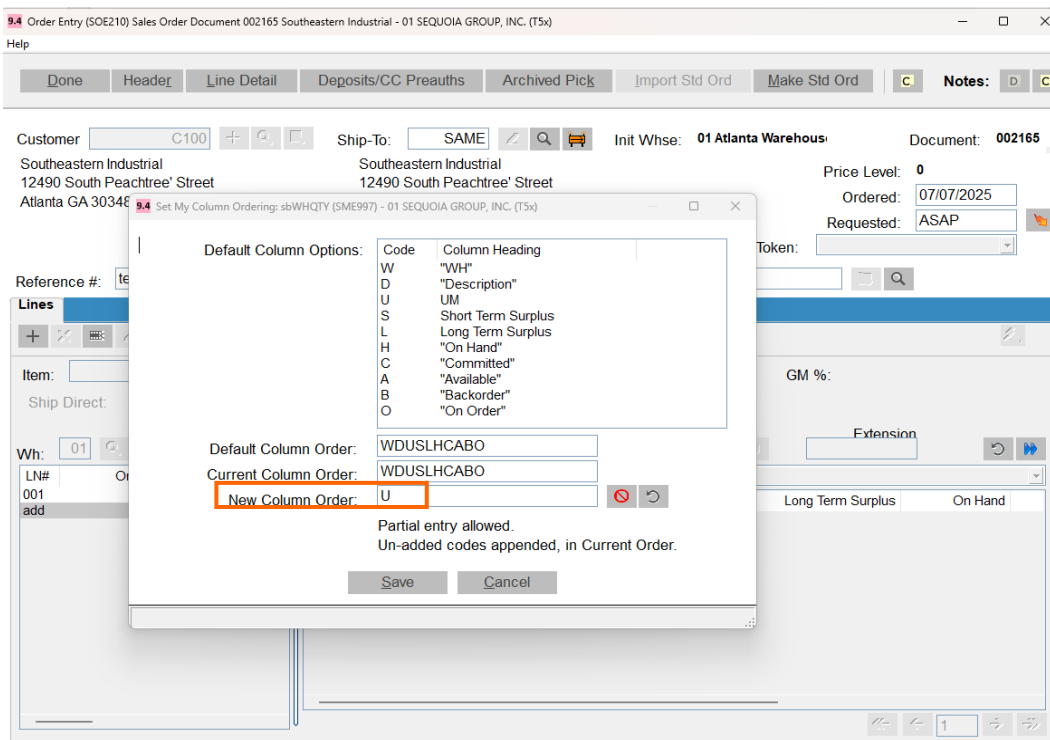
- Inside the 'Set My Column Ordering' window, is displayed the codes for all available columns.



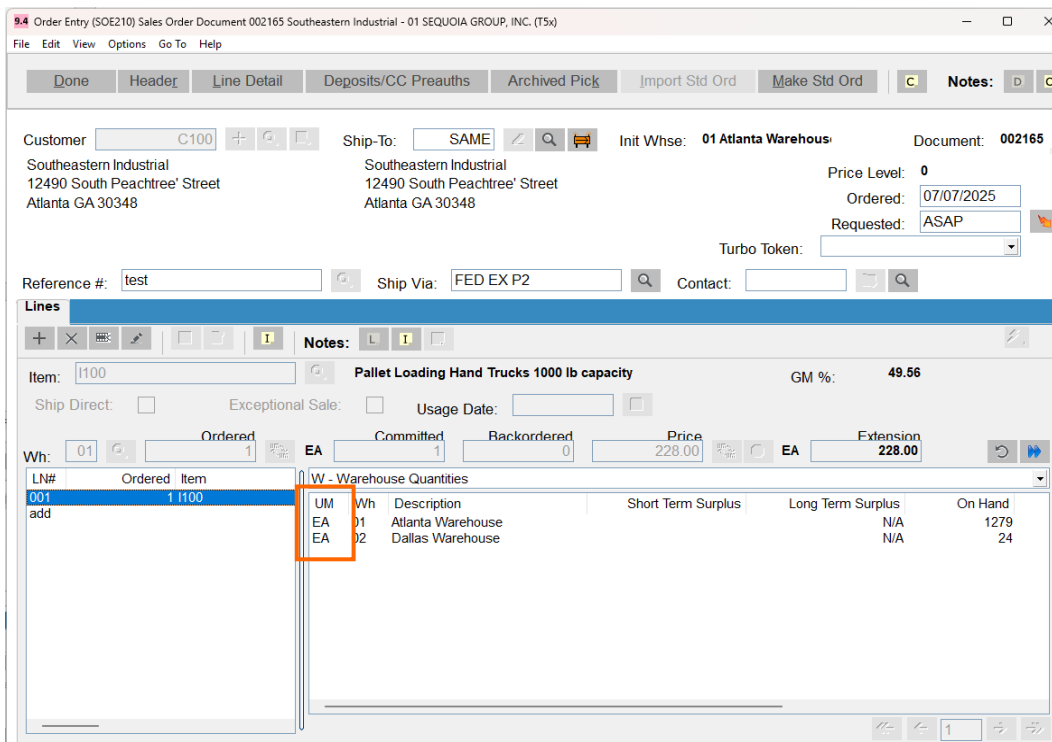
- To rearrange the columns, enter the desired order using the column codes in the **New Column Order** field.

For example, if you want the **Unit of measure(UM)** column to appear first, type 'U'.

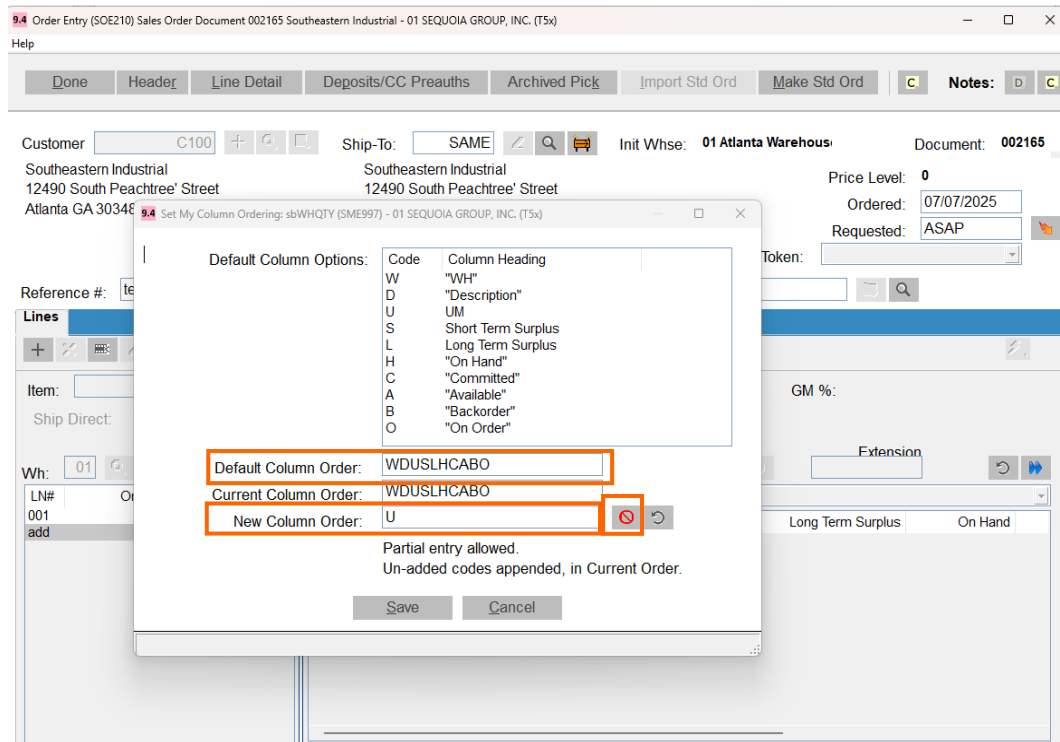
**You do not need to enter the remaining columns, any columns not specified will automatically be placed after U in their original order.*



- Click **Save** to apply the changes. The sidebar will then refresh, showing the **UM** column at the beginning.



- To restore the default order, either copy the **'Default Column Order'** into the **'New Column Order'** field or click the **red circle** button and then press **Save**.



4.2 My Side Bar Filter

This feature allows users to filter Side Bar list box lines by specifying text values in one or more columns. Filters are applied dynamically to narrow the data shown in the Side Bar. Multiple filters can be combined for more precise results.

- To apply a filter, right-click anywhere in the side bar and select **My Side Bar Filters**.

Customer: C100 Southeastern Industrial, 12490 South Peachtree' Street, Atlanta GA 30348

Ship-To: SAME Southeastern Industrial, 12490 South Peachtree' Street, Atlanta GA 30348

Init Whse: 01 Atlanta Warehouse Document: 002165

Price Level: 0

Ordered: 07/07/2025

Requested: ASAP

Reference #: test Ship Via: FED EX P2 Contact: []

Item: 1100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 49.56

Order ...	Line	Original Ord...	Ordered	Committed	Backordered	Shipped	Total Shipped	UM
002140	002	1	1	1	0	0	0	EA
002140	003	5	5	5	0	0	0	EA
002141	002	1	1	0	1	0	0	EA
002141			5	0	5	0	0	EA
002142			1	0	1	0	0	EA
002142			5	0	5	0	0	EA
002143			1	0	1	0	0	EA
002143			5	0	5	0	0	EA

- Inside the **My Side Bar Filters** window, all available columns to filter are displayed.

Customer: C100 Southeastern Industrial, 12490 South Peachtree' Street, Atlanta GA 30348

Ship-To: SAME Southeastern Industrial, 12490 South Peachtree' Street, Atlanta GA 30348

Init Whse: 01 Atlanta Warehouse Document: 002165

Price Level: 0

Ordered: 07/07/2025

Requested: ASAP

Reference #: test

Item: 1100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 49.56

Extension: 228.00

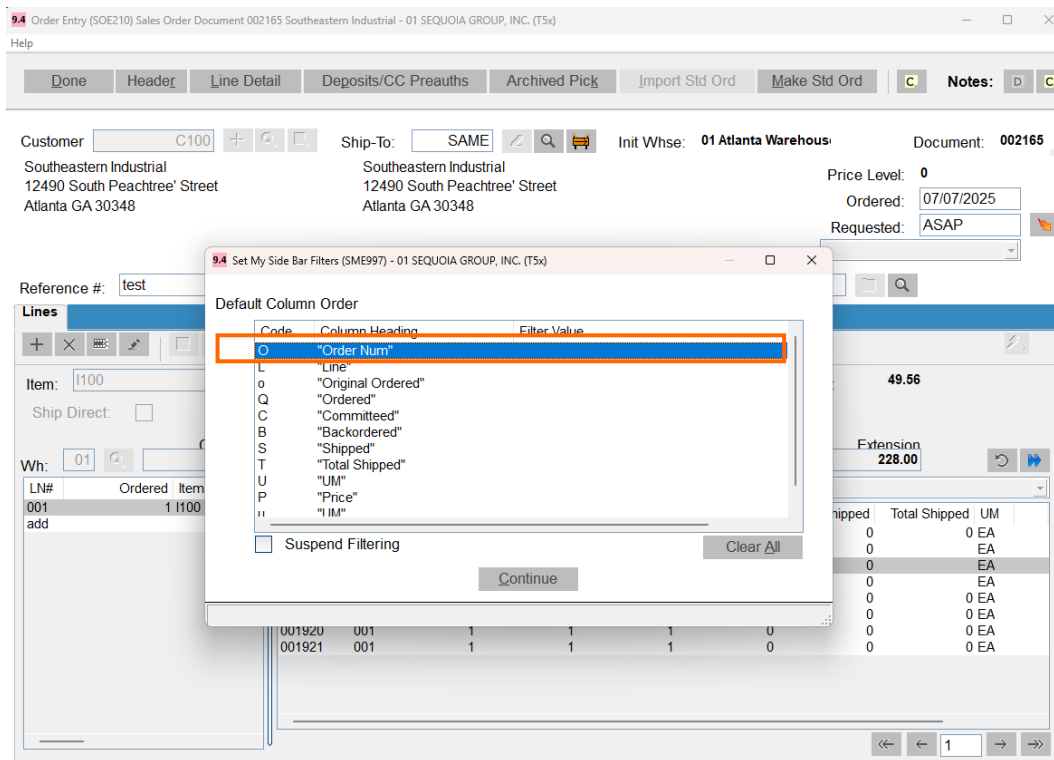
Default Column Order

Code	Column Heading	Filter Value
O	"Order Num"	
L	"Line"	
o	"Original Ordered"	
Q	"Ordered"	
C	"Committed"	
B	"Backordered"	
S	"Shipped"	
T	"Total Shipped"	
U	"UM"	
P	"Price"	
	"TIM"	

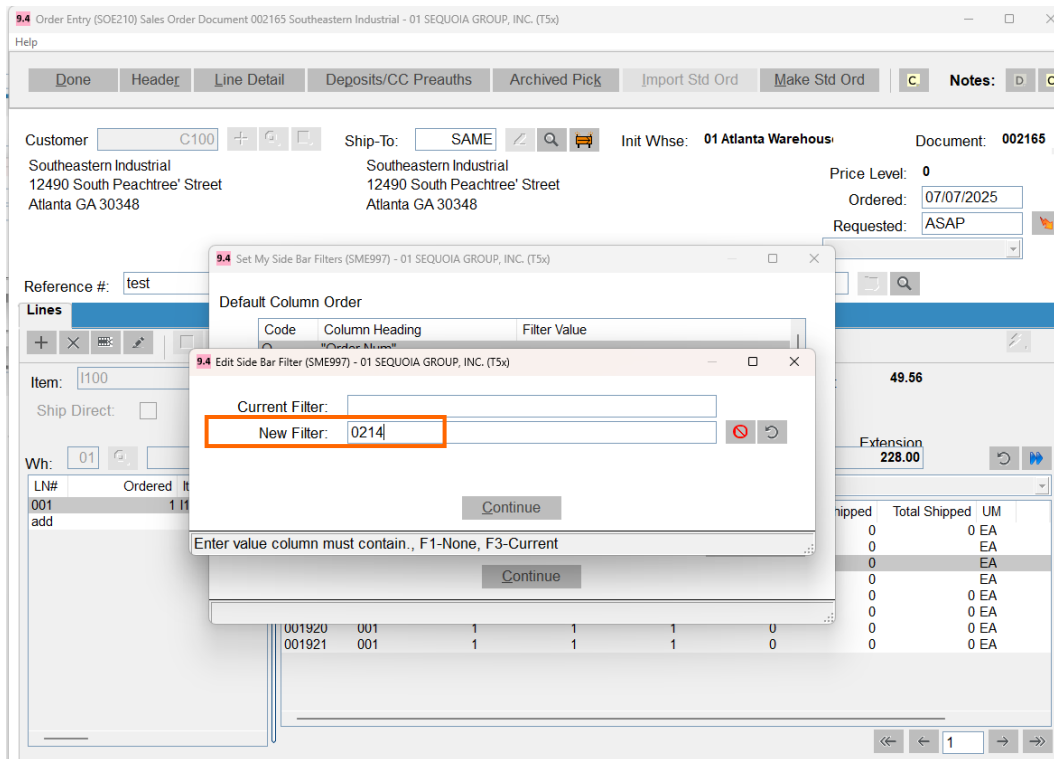
Suspend Filtering Clear All

Continue

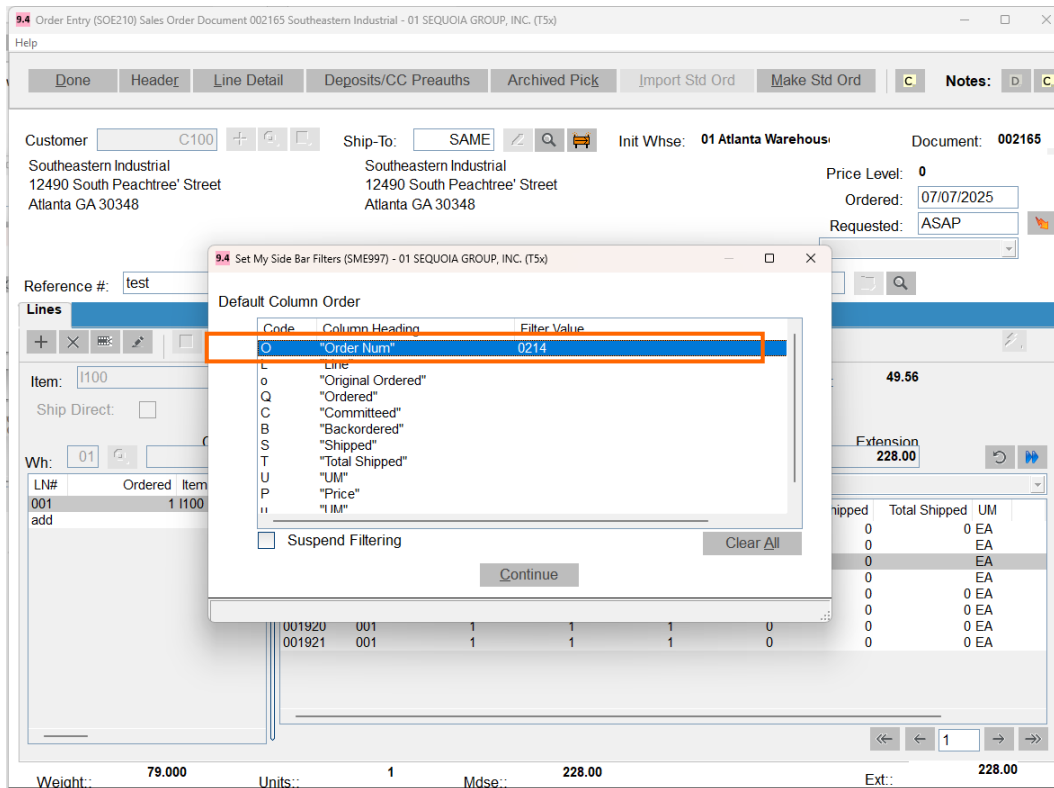
- To filter the list, click a row that contains the value you want to filter by. For example, to filter by **OrderNum**, select the **OrderNum** column.



- The **Edit Side Bar Filter** window appears; enter **0214** to show only records with that value in the **Order Num** column.



- Click **Continue**. A window will appear showing the column and the filter being applied to it.

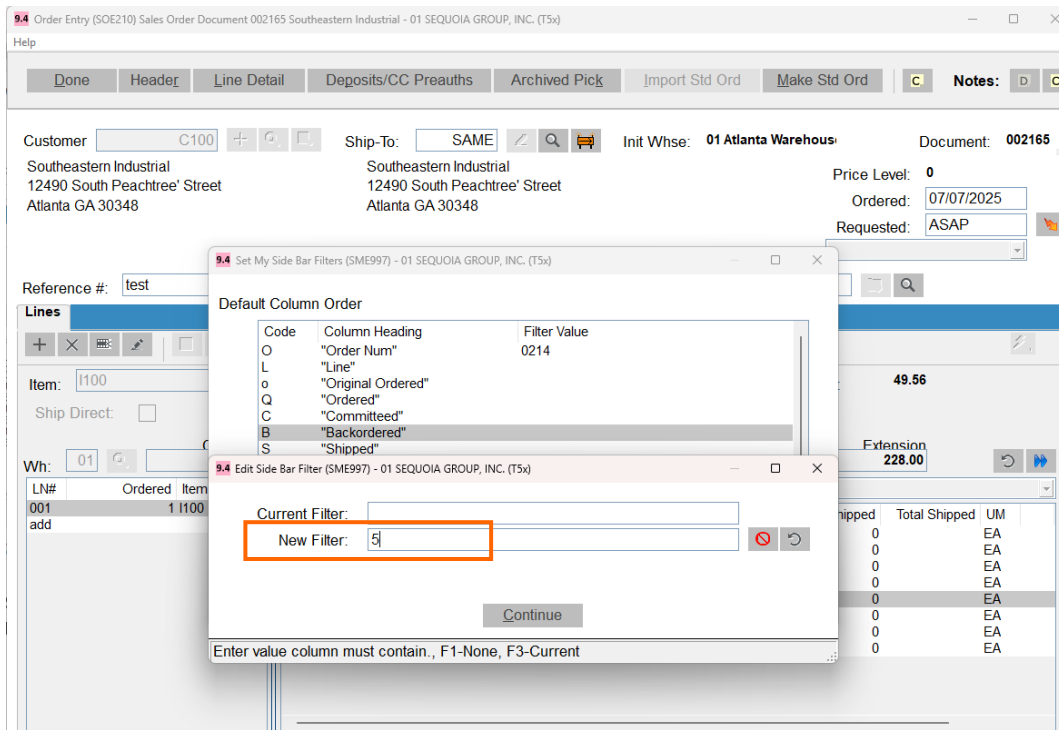


- Click **Continue** to apply the filter. A results window will appear, showing the filtered records.

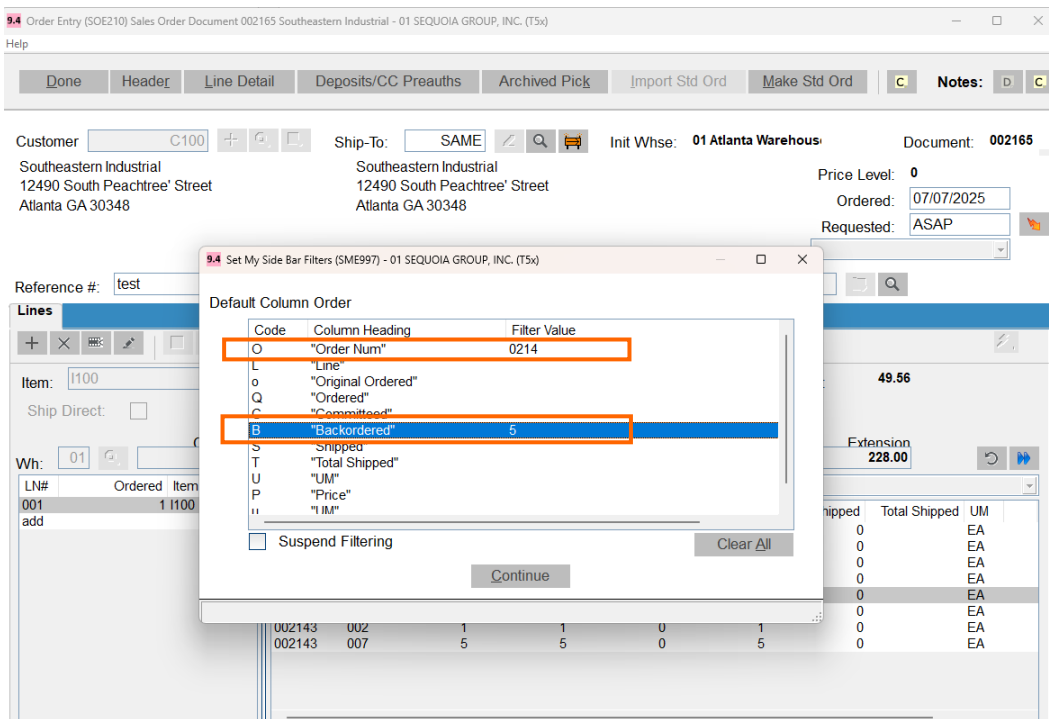
The screenshot shows the SAP Order Entry interface for document 002165. The 'Lines' window is open, displaying a table of order lines. The 'D - On Order' window is also open, showing a filtered list of order lines. The 'Backordered' column is highlighted with an orange box, indicating the filter applied.

Order ...	Line	Original Ord...	Ordered	Committed	Backordered	Shipped	Total Shipped	UM
002140	002	1	1	1	0	0	0	EA
002140	003	5	5	5	0	0	0	EA
002141	002	1	1	0	1	0	0	EA
002141	007	5	5	0	5	0	0	EA
002142	002	1	1	0	1	0	0	EA
002142	007	5	5	0	5	0	0	EA
002143	002	1	1	0	1	0	0	EA
002143	007	5	5	0	5	0	0	EA

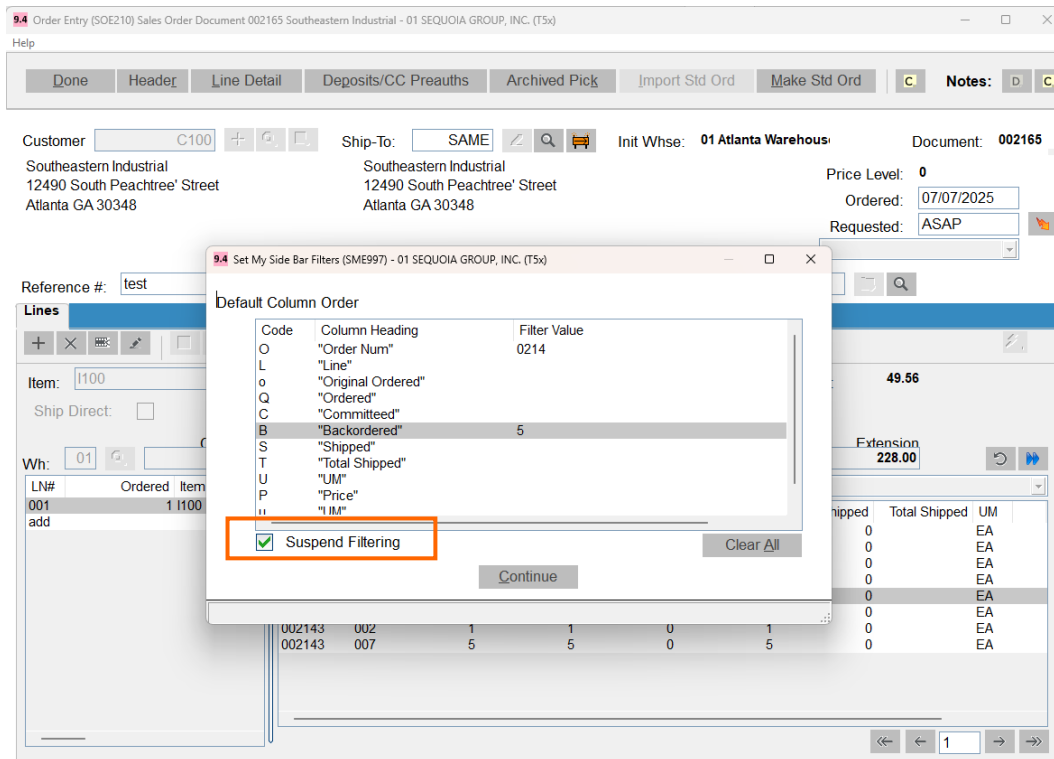
- To add another filter, right-click any row in the results and **select My Side Bar Filter**. Then enter the additional criteria. In this example, add a filter for **Backordered =5**.



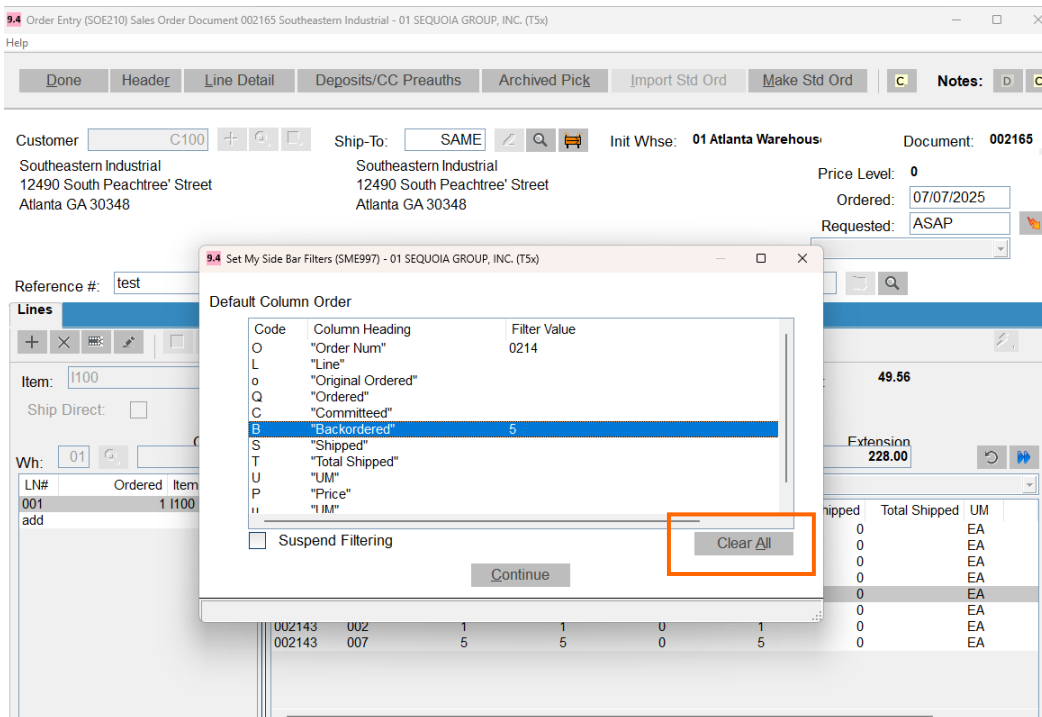
- Click **Continue**. A window will appear showing the two filters currently applied.



- If the filtered results do not match your expectations, right-click any row, select **My Side Bar Filter**, and then select **Suspend Filtering** to temporarily remove the filter.

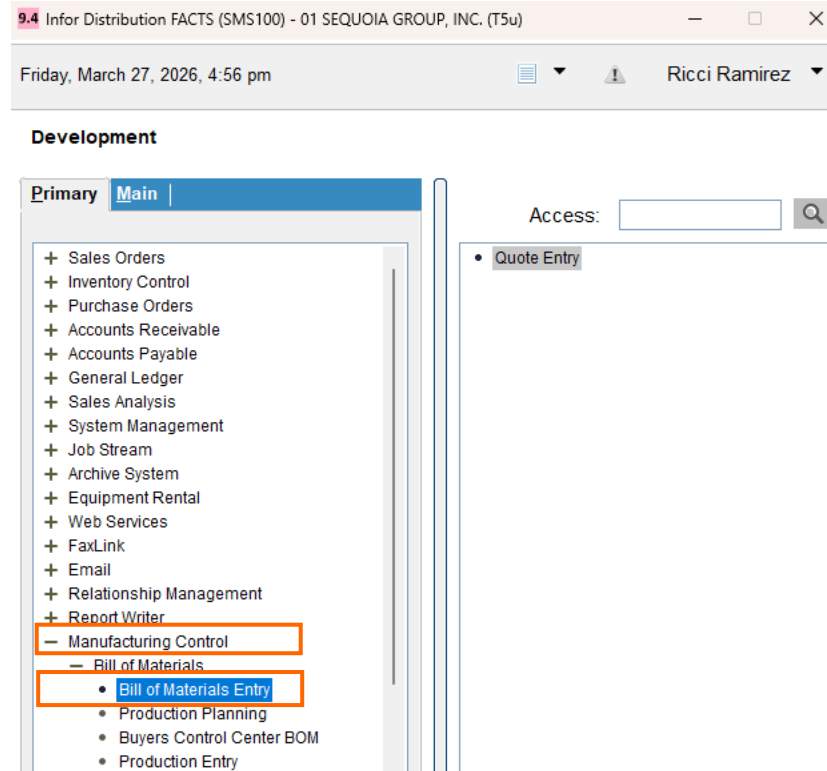


- Click **Continue** to view all records again, as if no filter were applied. You can then modify your filter as needed.
- To remove all filters, right-click any row, select **My Side Bear Filter**, and click **Clear All**.

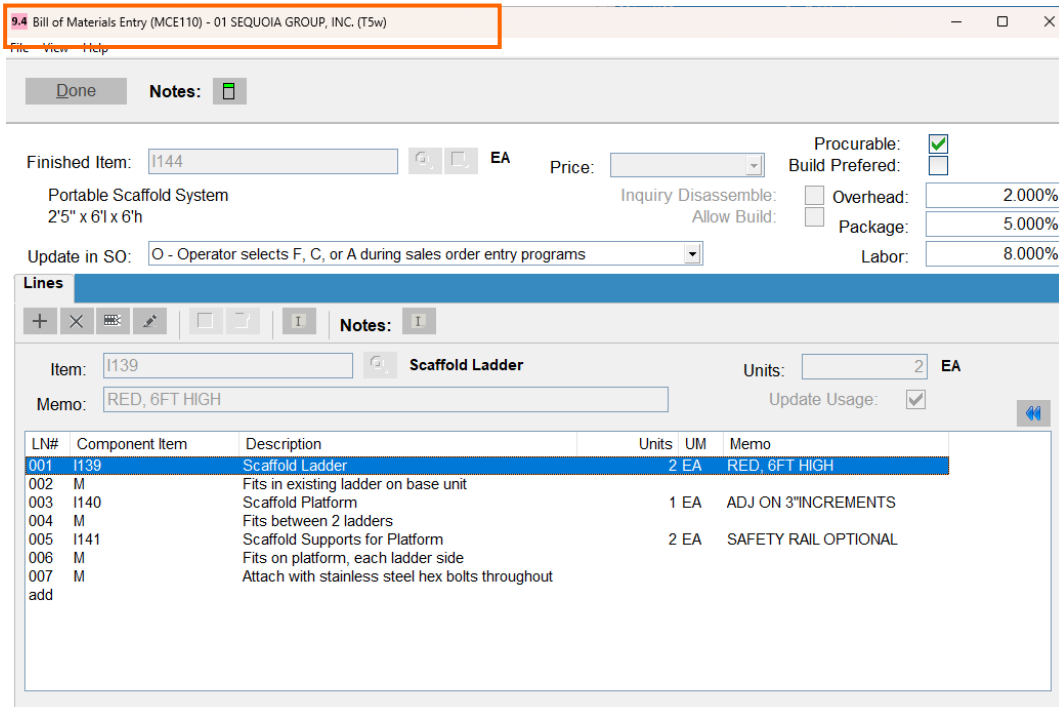


5. Side Bar added to the Manufacturing Control module

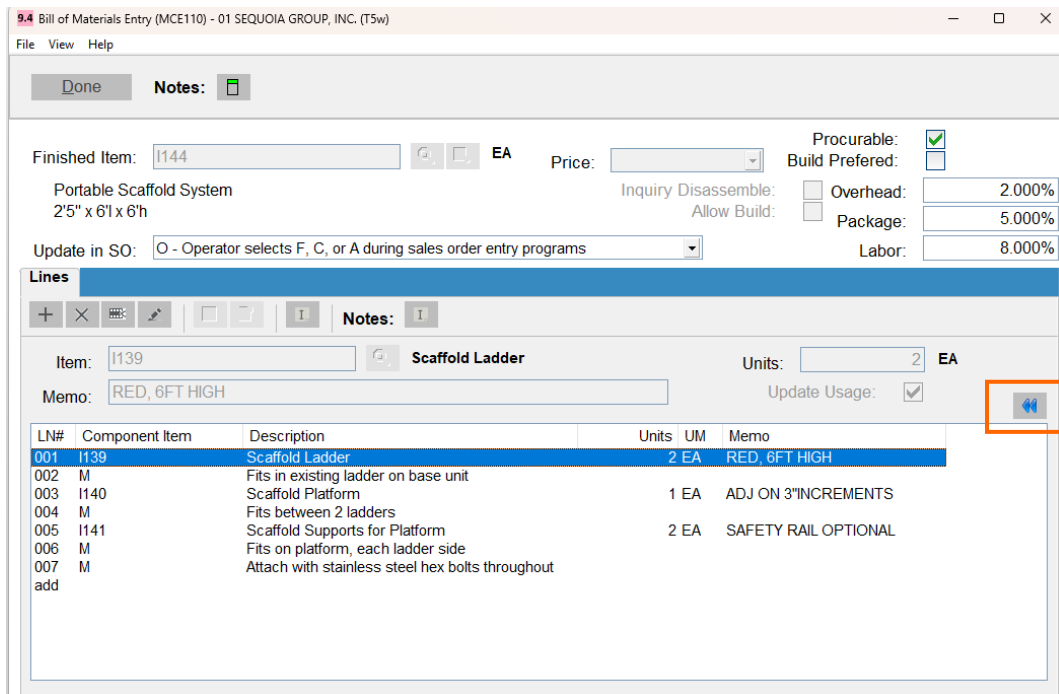
- Navigate to **Manufacturing Control module**→ **Bill of Materials Entry** (program MCE110).



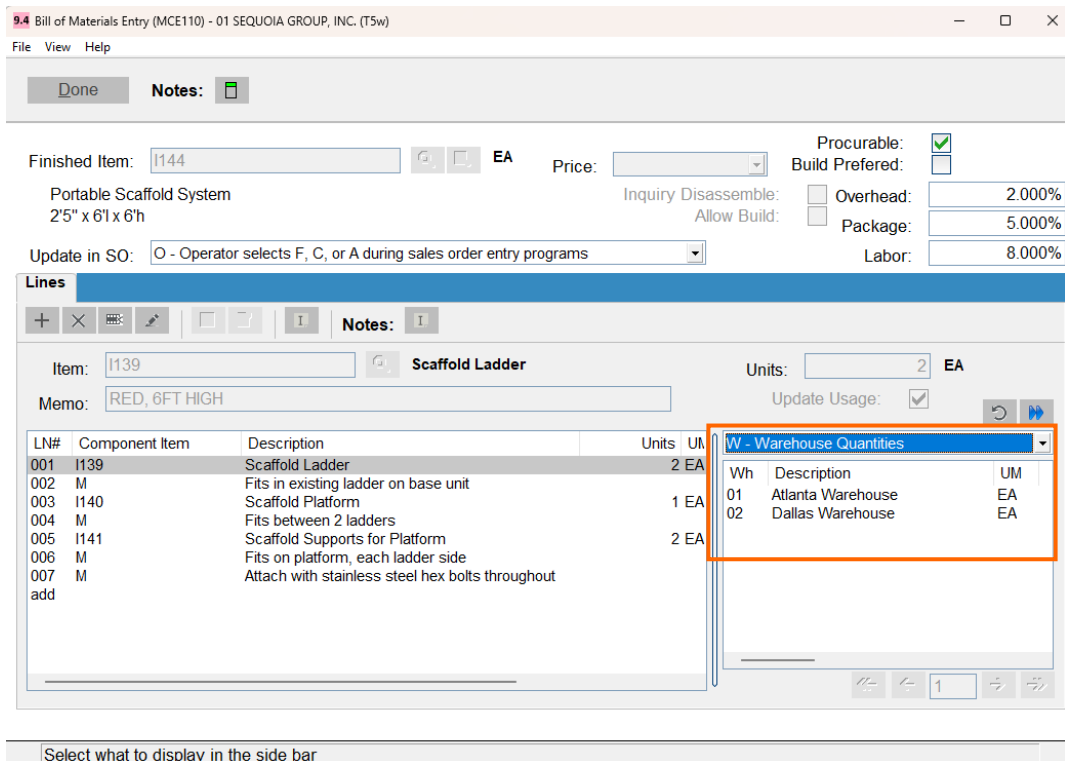
- Open an item. For this example, we are selecting the **finished item I144**.



- A new **double-blue** arrow icon has been added to the right side of the window.

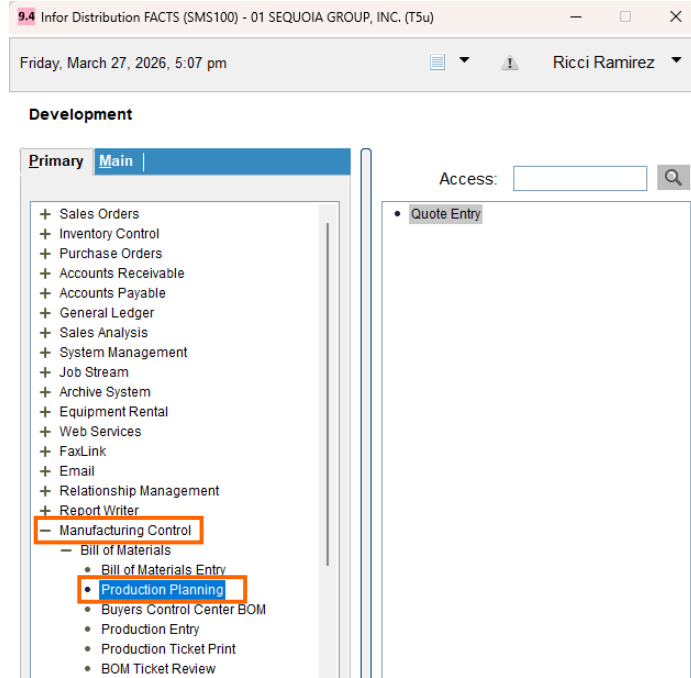


- Click the **double-blue** arrow icon to expand the **Side Bar** and bring it into view.

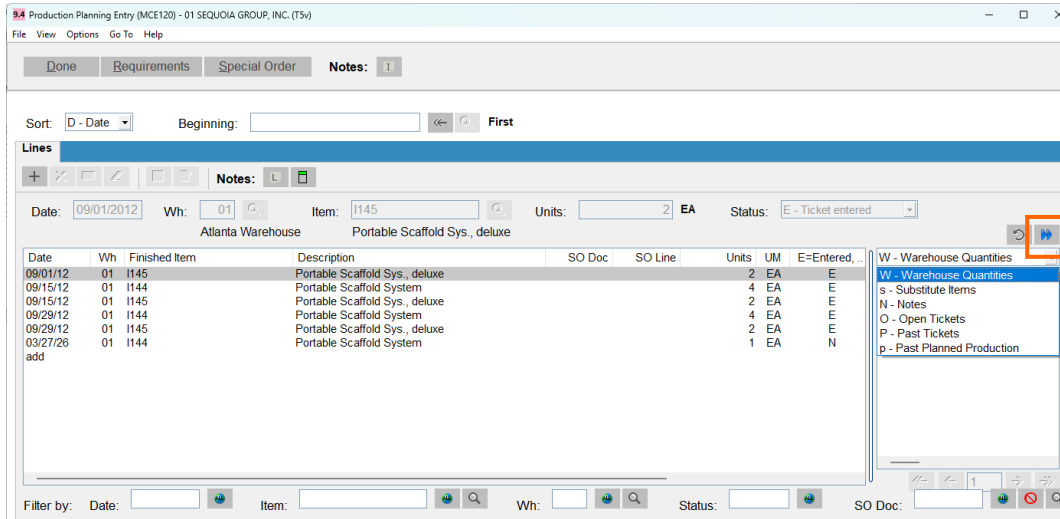


**The options in the Side Bar are specific to the Manufacturing Control module. These options appear throughout the entire module, and each one uses the same underlying data. Therefore, if an administrator changes how that information is populated, the change is reflected everywhere in Manufacturing Control.*

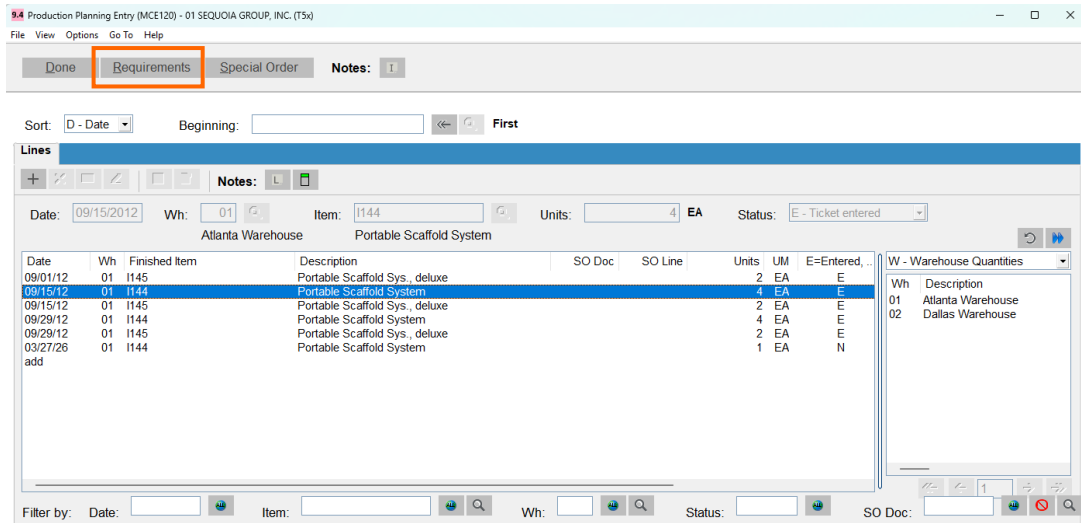
- Navigate to **Manufacturing Control module** → **Production Planning** (program MCE120).



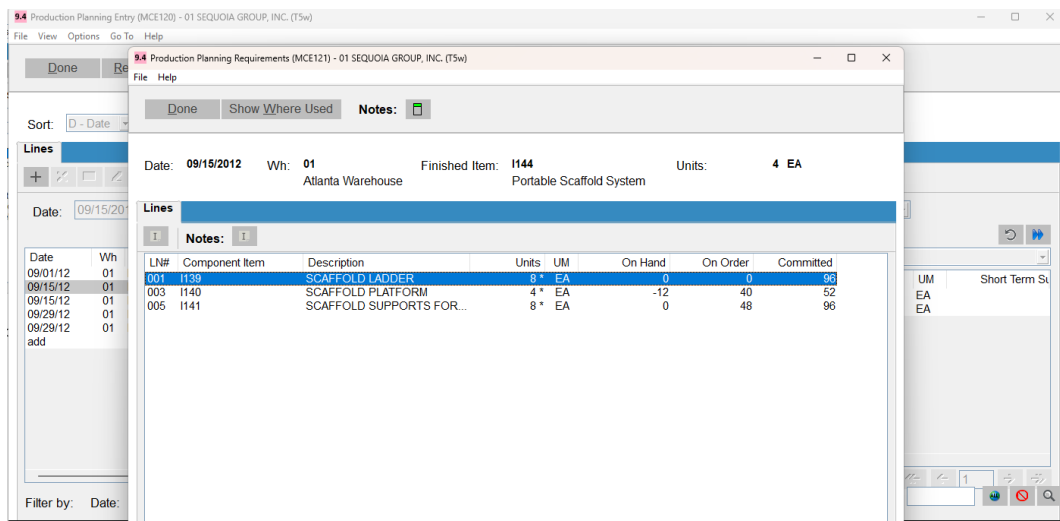
- The **double-blue** arrow icon for expanding the **Side Bar** has also been added.



- Click **Requirements**.

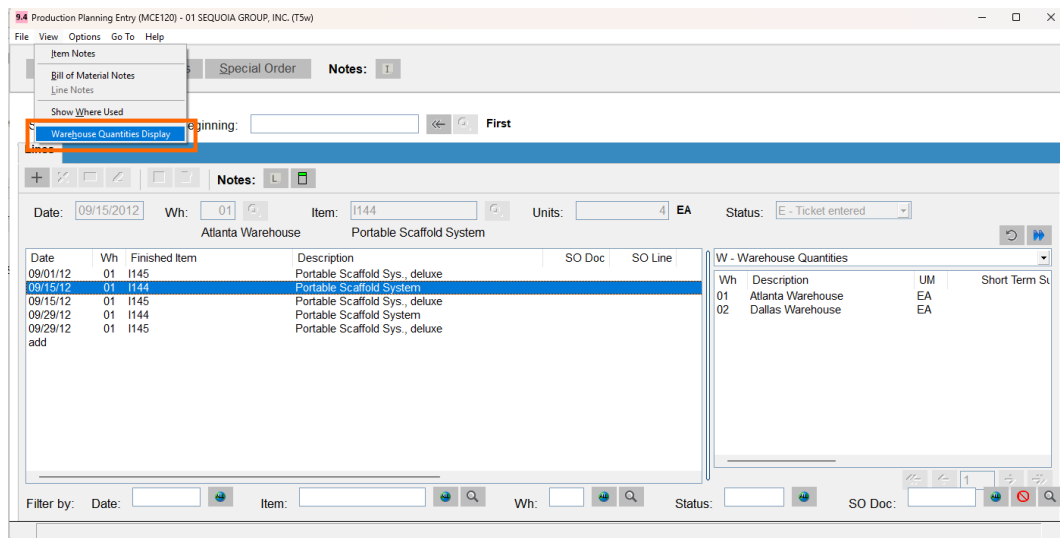


- After opening the **Requirements** screen, you'll notice that there is no **Side Bar** icon because this is a **display-only**, three-level entry screen.

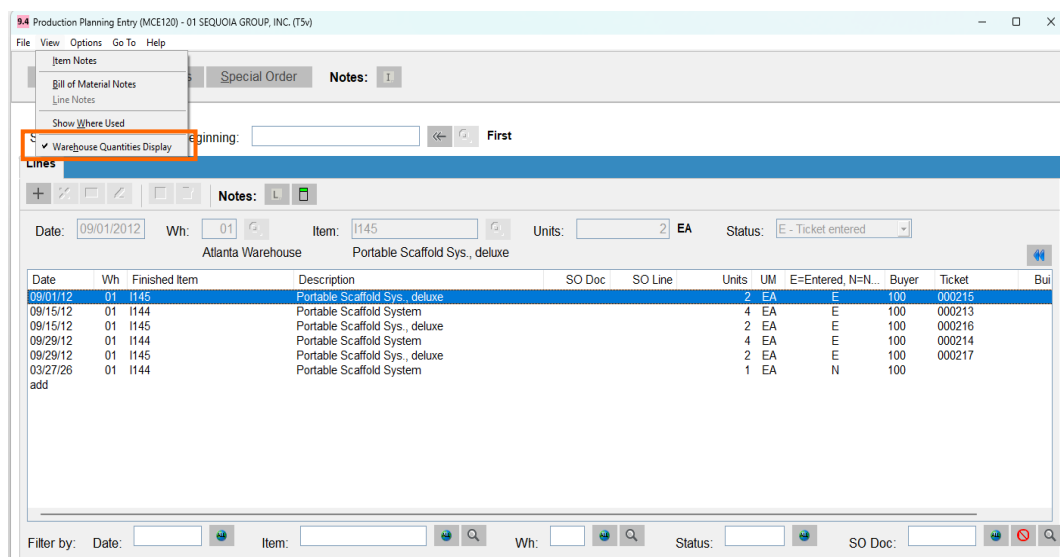


* If a window lacks the Add, Delete, or Edit icons (as the Requirements screen does), the Side Bar will not be available on that screen.

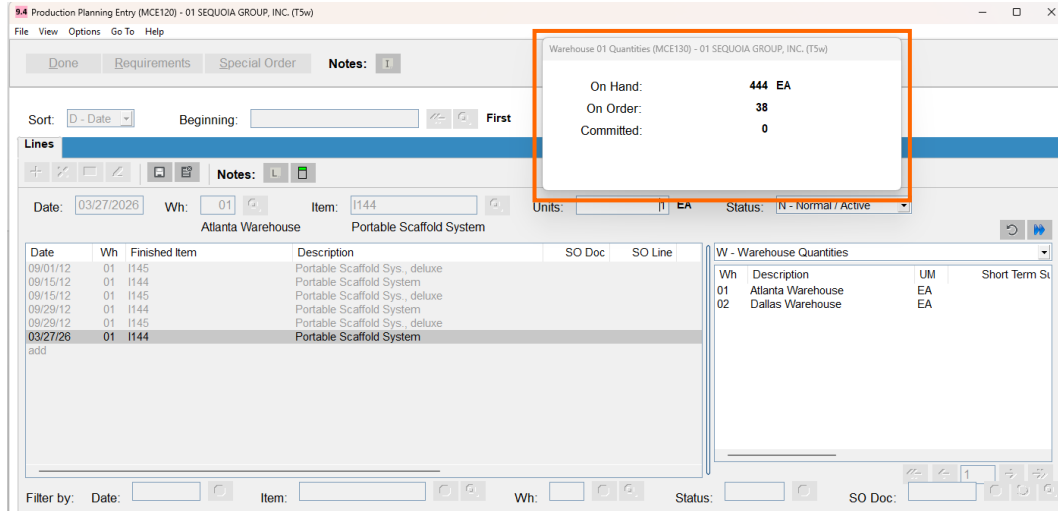
- Another new feature is that the **pop-up** is **toggle-able**; when you edit or create a line that includes a pop-up window, the user can control (show or hide) that window. For example, if you click **View**, a **Warehouse Quantities Display** option appears that can be toggled on or off.



- If you click **View** again, you will see that the **Warehouse Quantities Display** option is checked.

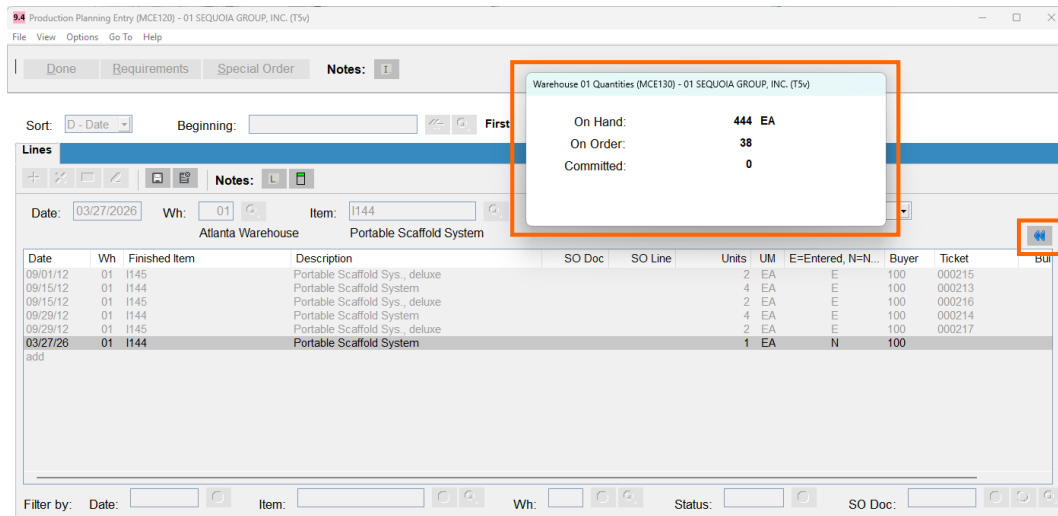


- Press **Enter** while the line is selected, and the **Warehouse Quantities** pop-up window will appear.



The standard behavior on screens that contain a **Units field is to open the **Warehouse Quantities** window when the line is selected (e.g., by pressing **Enter**).*

- Now that the application includes a **Side Bar**, the same **Warehouse Quantities** information is shown in two places.
- If you keep the **Side Bar** closed, you can still use the pop-up window by leaving the **Warehouse Quantities Display** option checked.



- If you turn off **Warehouse Quantities Display** and rely on the **Side Bar** (which provides more detailed information), the pop-up window will no longer appear.

Production Planning Entry (MCE120) - 01 SEQUOIA GROUP, INC. (T5v)

File View Options Go To Help

Done Requirements Special Order Notes: 1

Sort: D - Date Beginning: [] First

Lines

Date: 09/01/2012 Wh: 01 Item: I145 Units: 2 EA Status: E - Ticket entered

Atlanta Warehouse Portable Scaffold Sys., deluxe

Date	Wh	Finished Item	Description	SO Doc	SO Line	W - Warehouse Quantities
09/01/12	01	I145	Portable Scaffold Sys., deluxe			Wh Description UM Short Term St
09/15/12	01	I144	Portable Scaffold System			01 Atlanta Warehouse EA
09/15/12	01	I145	Portable Scaffold Sys., deluxe			02 Dallas Warehouse EA
09/29/12	01	I144	Portable Scaffold System			
09/29/12	01	I145	Portable Scaffold Sys., deluxe			
03/27/26	01	I144	Portable Scaffold System			
add						

Filter by: Date: [] Item: [] Wh: [] Status: [] SO Doc: []

- A new feature adds **filtering fields** that let you display the information for the specific item you're working with. For example, you can set a filter to view only **item I144**.

Production Planning Entry (MCE120) - 01 SEQUOIA GROUP, INC. (T5v)

File View Options Go To Help

Done Requirements Special Order Notes: 1

Sort: D - Date Beginning: [] First

Lines

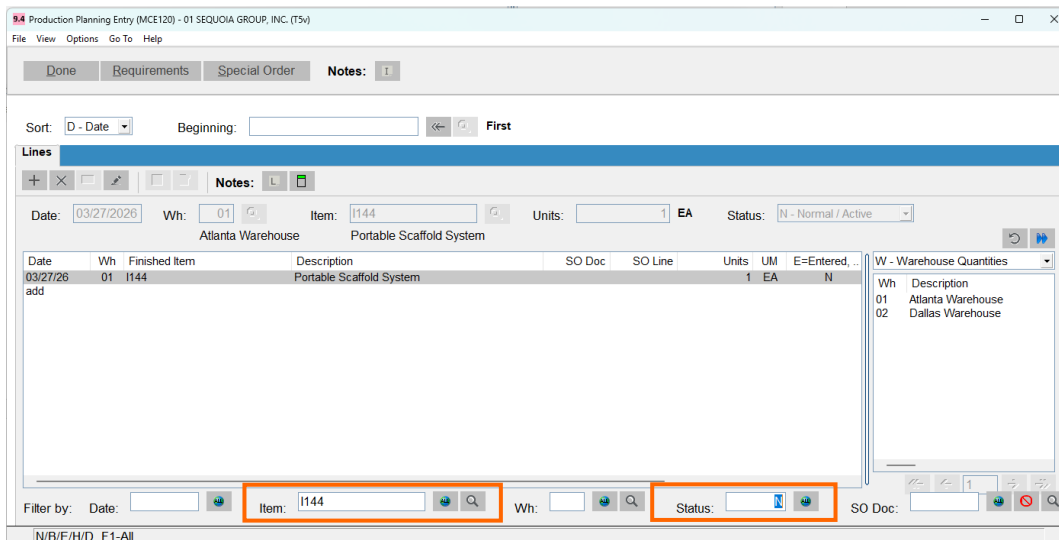
Date: 09/15/2012 Wh: 01 Item: I144 Units: 4 EA Status: E - Ticket entered

Atlanta Warehouse Portable Scaffold System

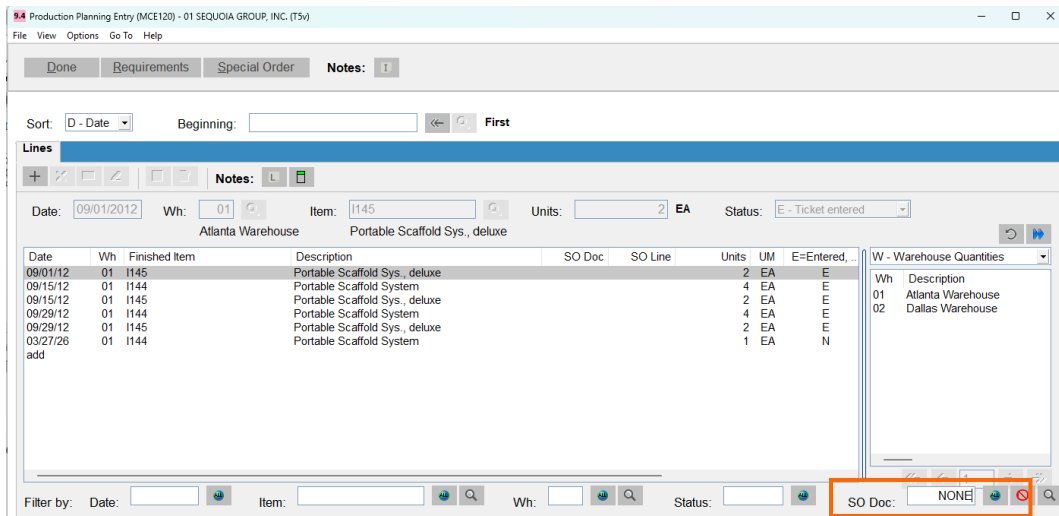
Date	Wh	Finished Item	Description	SO Doc	SO Line	Units	UM	E=Entered...	W - Warehouse Quantities
09/15/12	01	I144	Portable Scaffold System			4	EA	E	Wh Description
09/29/12	01	I144	Portable Scaffold System			4	EA	E	01 Atlanta Warehouse
03/27/26	01	I144	Portable Scaffold System			1	EA	N	02 Dallas Warehouse
add									

Filter by: Date: [] Item: I144 Wh: [] Status: [] SO Doc: []

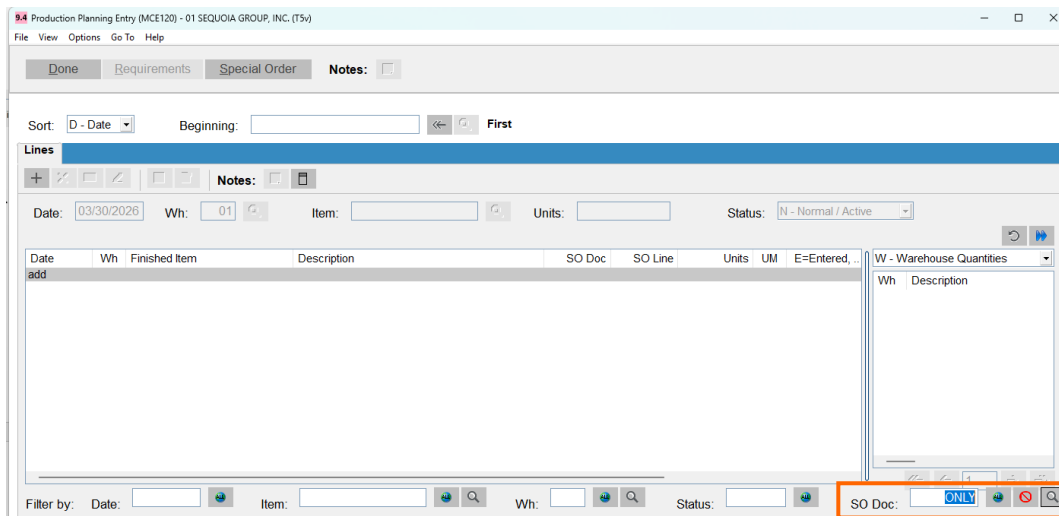
- Additional filters can be configured. For this example, the filter is set to **Item I144** and **Status N**.



- **Special Orders** that were previously added can be searched using the **SO Doc** field. For example, you can apply a filter to **exclude** all special orders if you don't want any to appear.

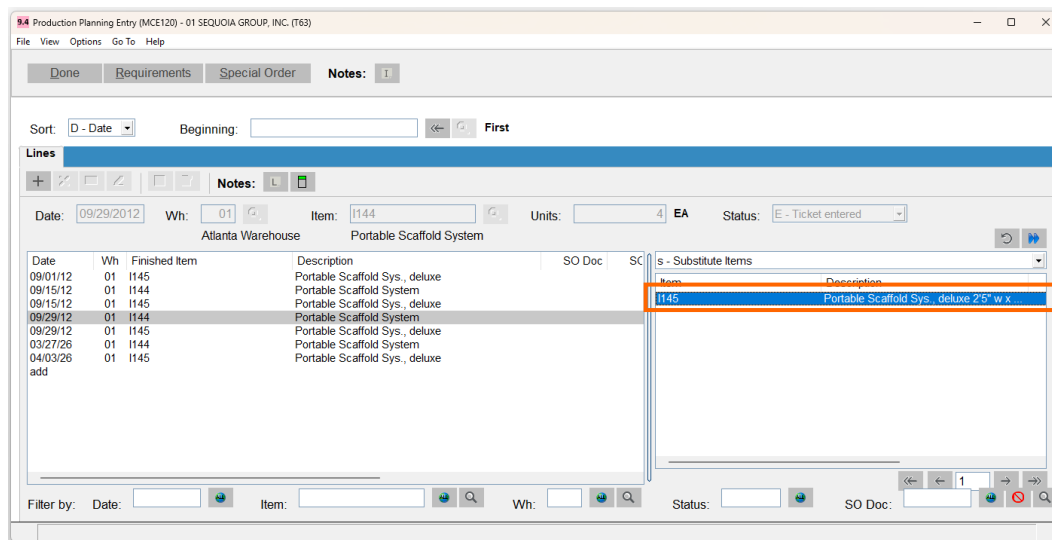


- Or, if you want to view only the **Special Orders**, filter the list using **SO Doc** field.

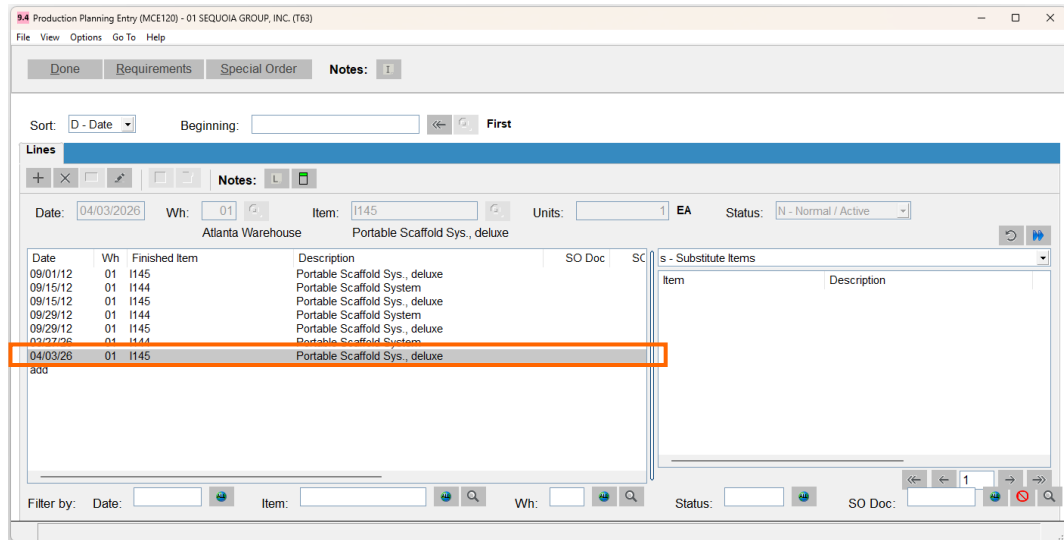


**If you have several documents and need a specific one, type the complete document number to retrieve it. The search works only with the full number; entering only part of the number will not return a result.*

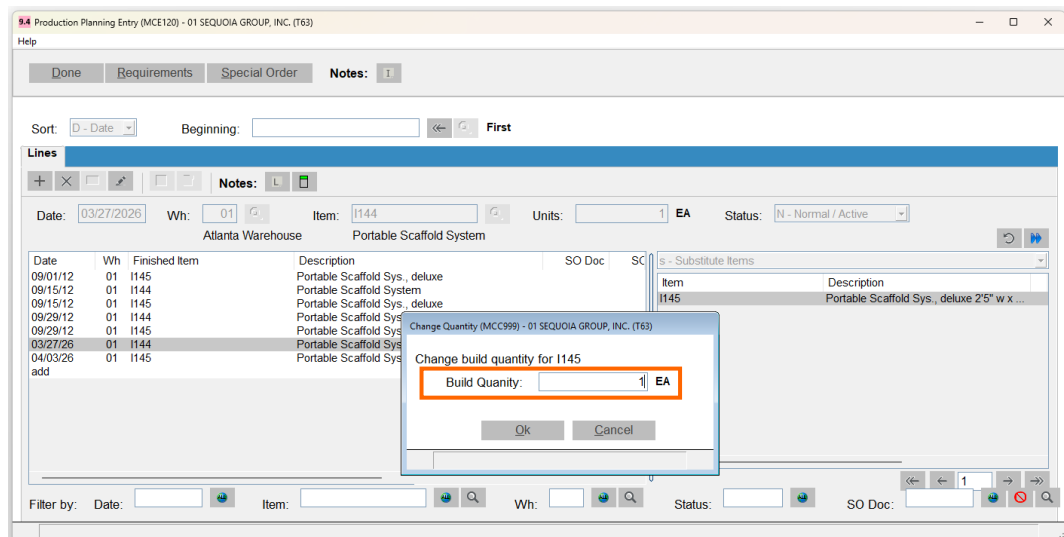
- For substitute items the field is drag-and-drop, but because we are only working with manufacturing items that are themselves set up as a Bill of Materials (BOM), only those items will appear in the list. In our example, **I145** is a valid BOM for the item **I44**.



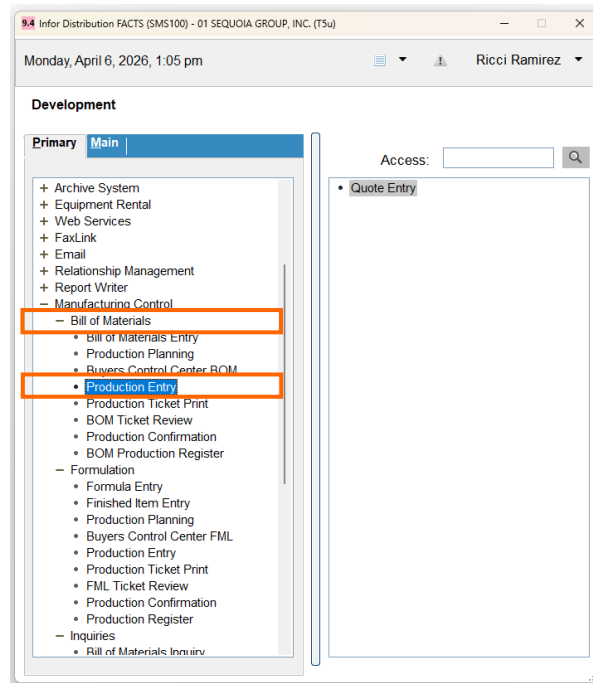
- A new record can be created by dragging an item. In this example, we are using item **I145**.



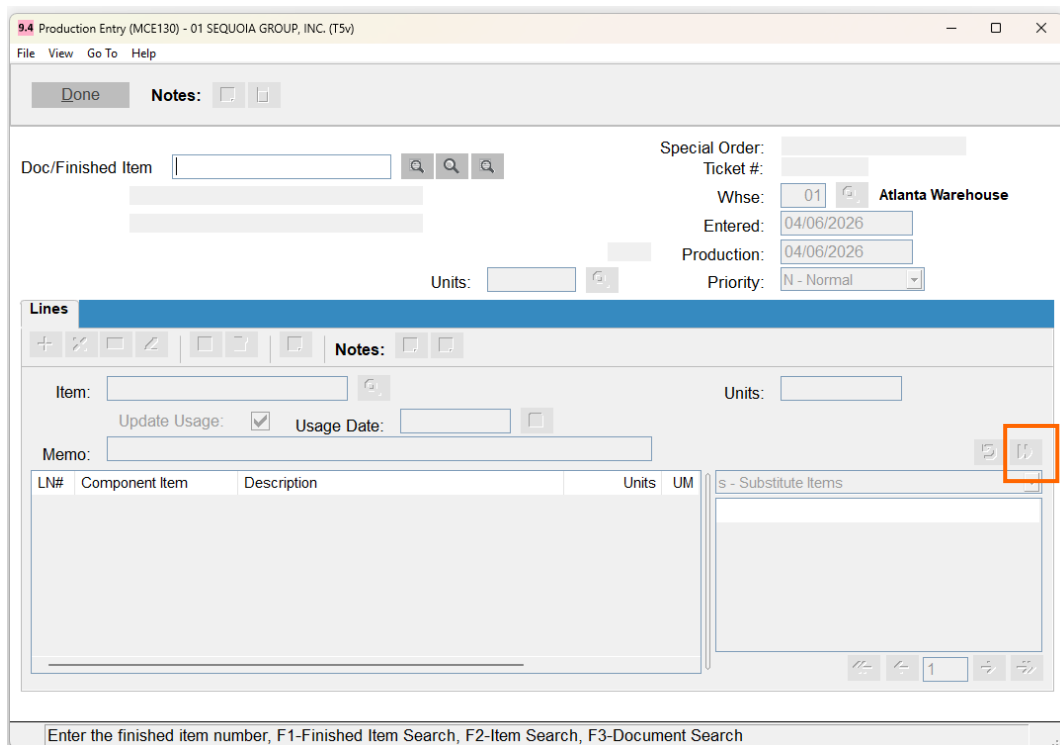
- For **Production Planning Bill of Materials**, the warehouse is not stored in the **Side Bar** record. As a result, when you drag and drop an item, the system automatically uses the warehouse assigned to the currently highlighted line.
- Additionally, because the quantity is not predefined anywhere in the system, you can adjust it by double-clicking the item in the **Side Bar**. This allows you to set the desired quantity in advance, so when you drag and drop the item, the correct quantity is already applied.



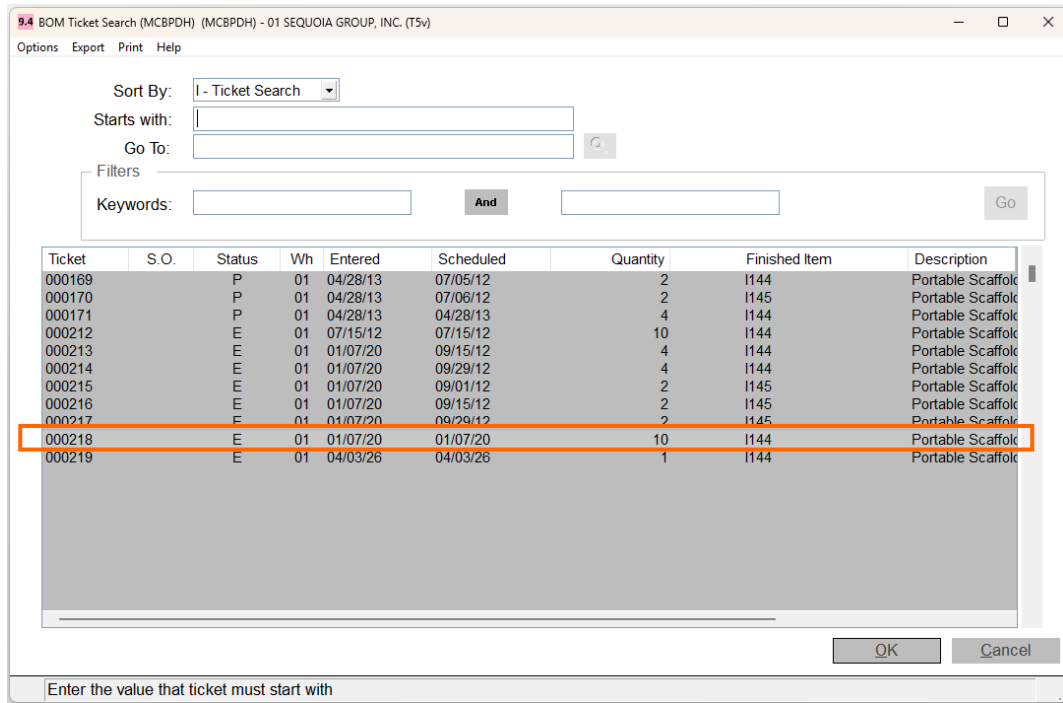
- Navigate to **Manufacturing Control** → **Bill of Materials** → **Production Entry** (program MCE130).



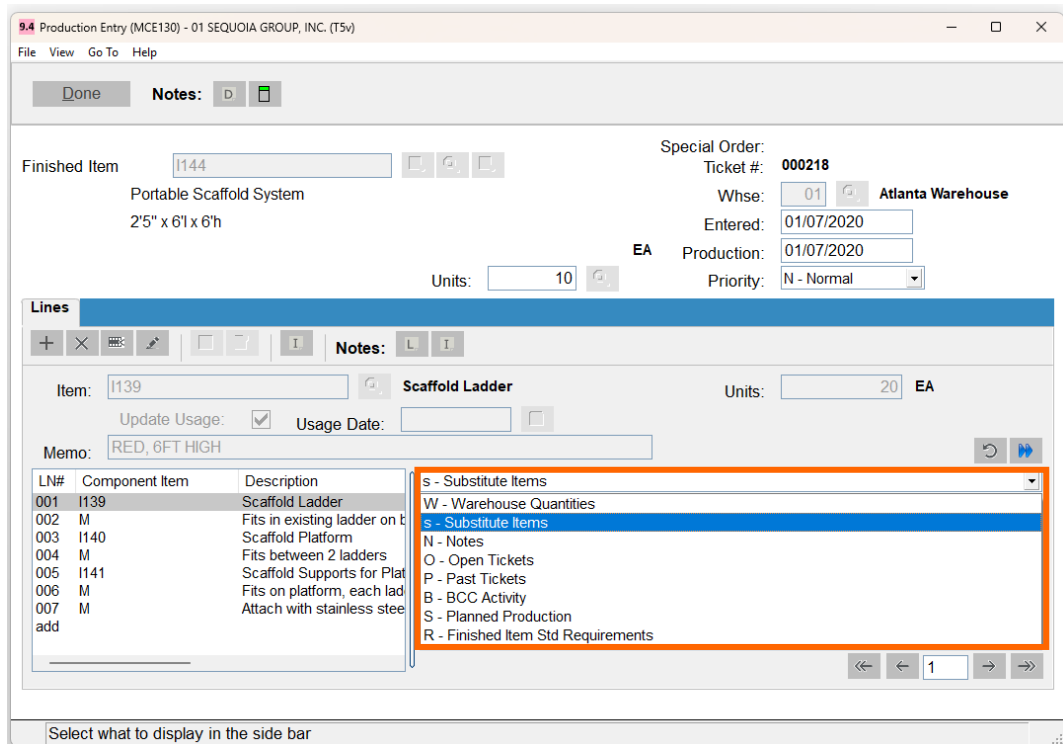
- Open **Production Entry**. This window also includes the sidebar icon.



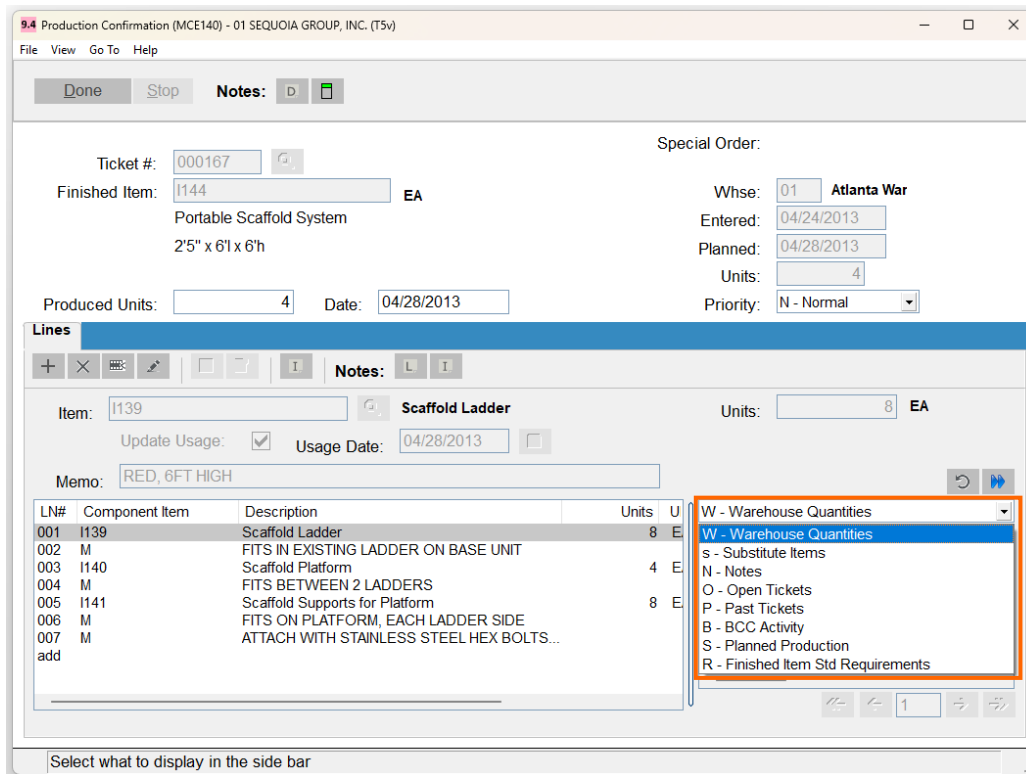
- Click the **Search** button to locate the record.
- Select the desired record.



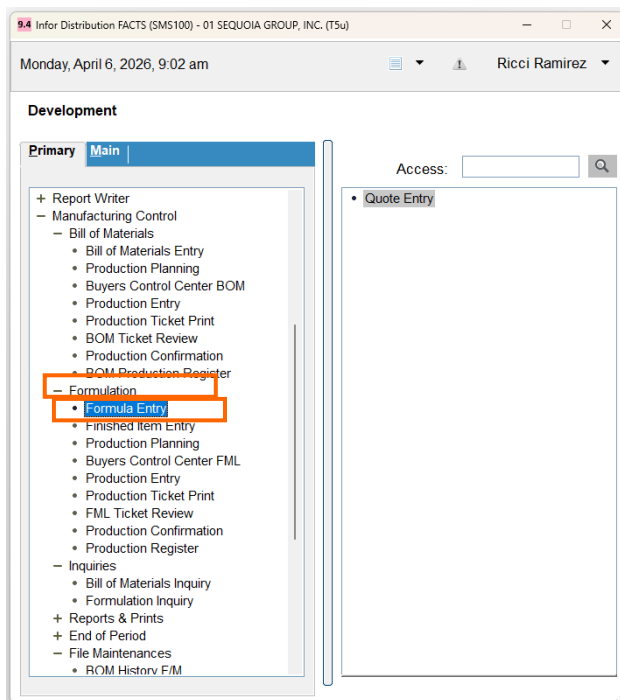
- Notice that the options in the sidebar are the same.



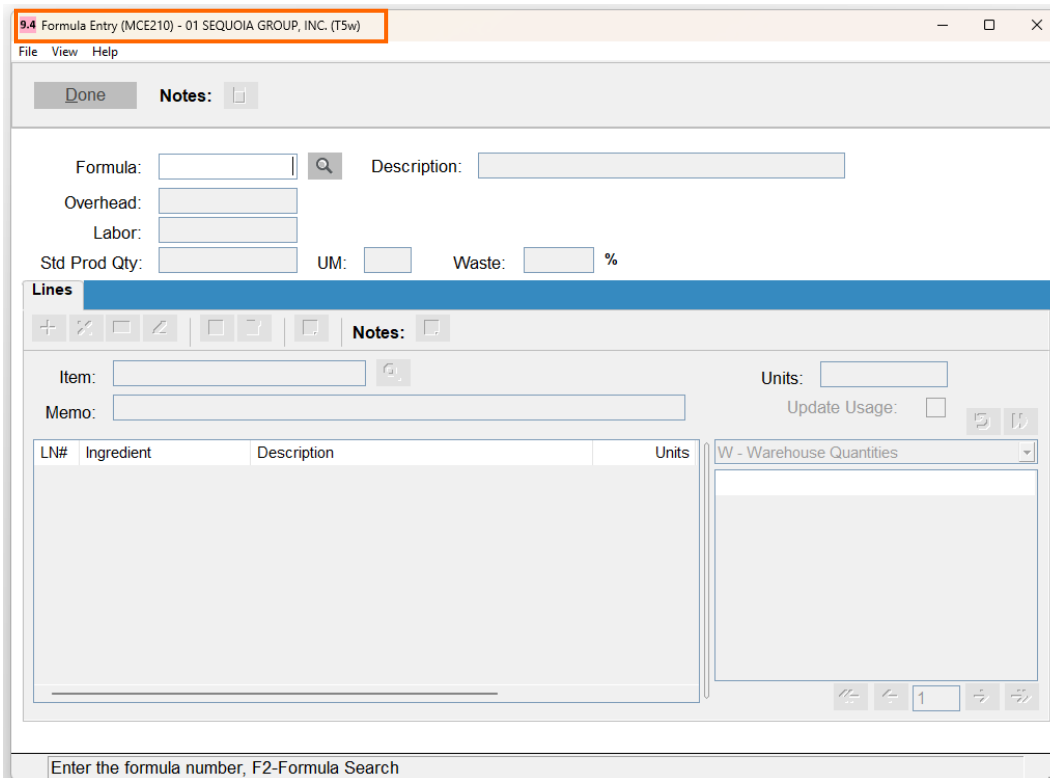
- The same applies to **Manufacturing Control** → **Bill of Materials** → **Production Confirmation** (program MCE140). The same options are available in the sidebar.



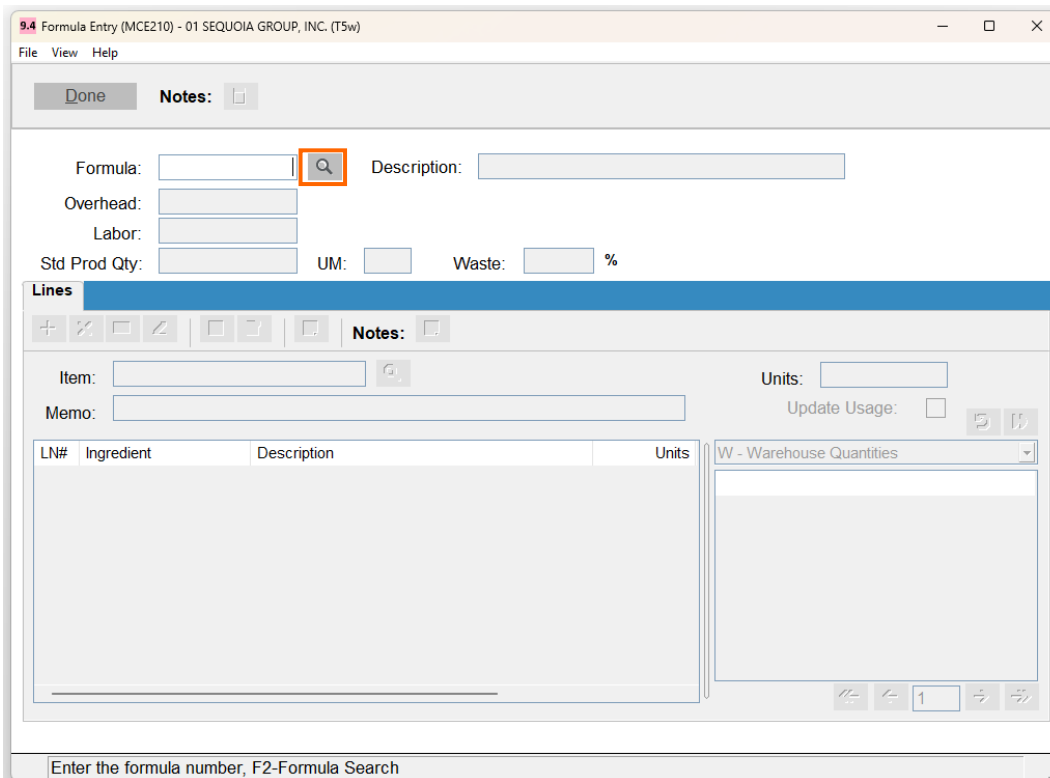
- Navigate to **Manufacturing Control** → **Formulation** → **Formula Entry** (program MCE210).



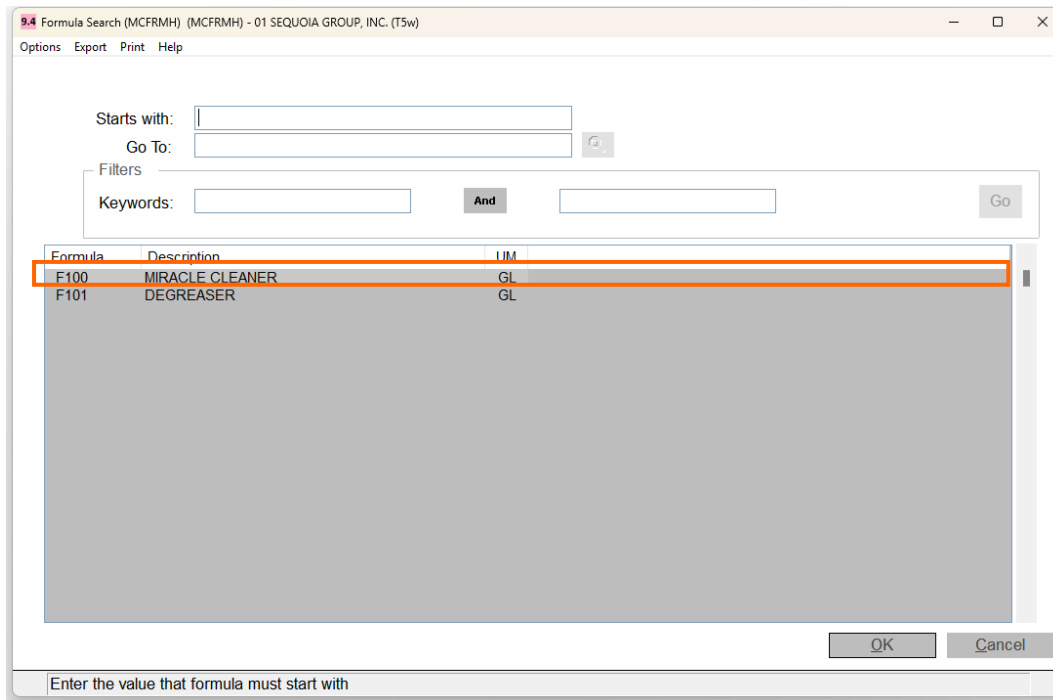
- Open **Formula Entry**.



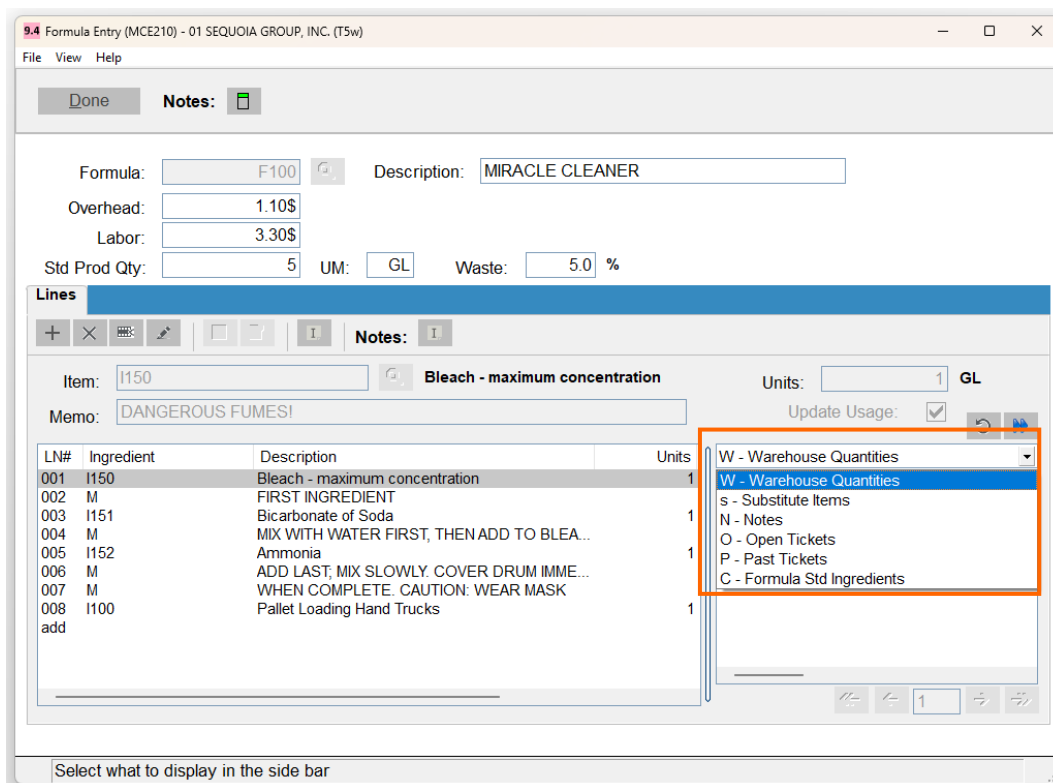
- Click the **Search** button to locate an item.



- For this example, we are selecting formula **F100**, then we press **OK**.



- On the right side of the window, there is also a **Side Bar** icon where you can view additional information.



- On the **Side Bar**, you can find the **Formula Std Ingredients** option.

- This is a display-only mirror of the information shown on the left-hand side. The dropdown is used later to support drag-and-drop functionality, allowing you to update or compare the standard ingredients with what is currently on the ticket. This works similarly to the **Bill of Materials** example we reviewed earlier.

Formula: F100 Description: MIRACLE CLEANER

Overhead: 1.10\$

Labor: 3.30\$

Std Prod Qty: 5 UM: GL Waste: 5.0 %

Lines

Item: I150 Bleach - maximum concentration Units: 1 GL

Memo: DANGEROUS FUMES!

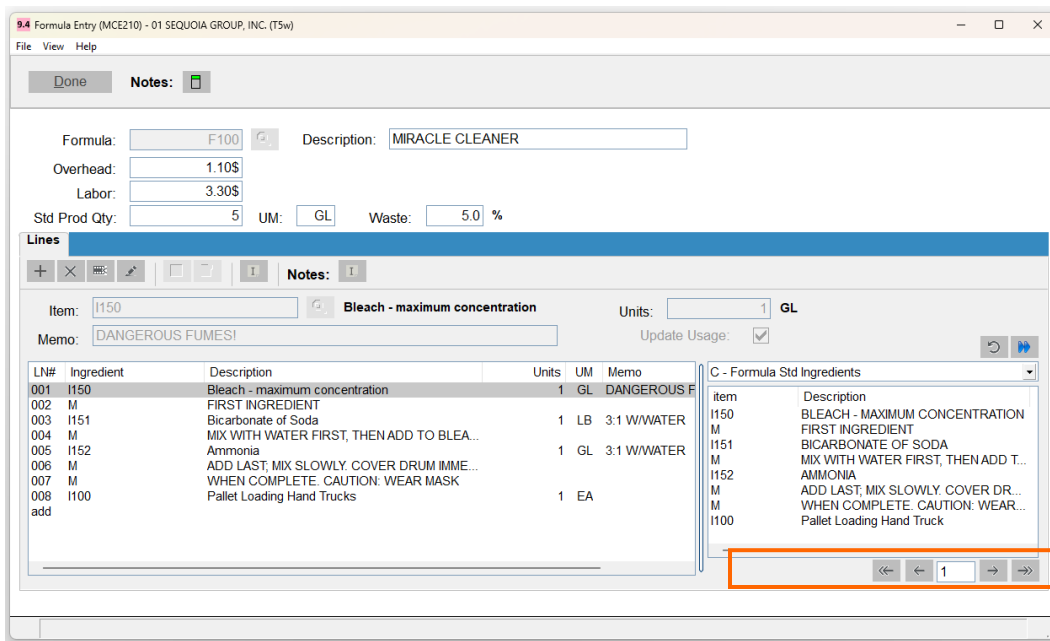
LN#	Ingredient	Description	Units
001	I150	Bleach - maximum concentration	1
002	M	FIRST INGREDIENT	
003	I151	Bicarbonate of Soda	1
004	M	MIX WITH WATER FIRST, THEN ADD TO BLEA...	
005	I152	Ammonia	1
006	M	ADD LAST, MIX SLOWLY. COVER DRUM IMME...	
007	M	WHEN COMPLETE. CAUTION: WEAR MASK	
008	I100	Pallet Loading Hand Trucks	1
	add		

Dropdown menu options:

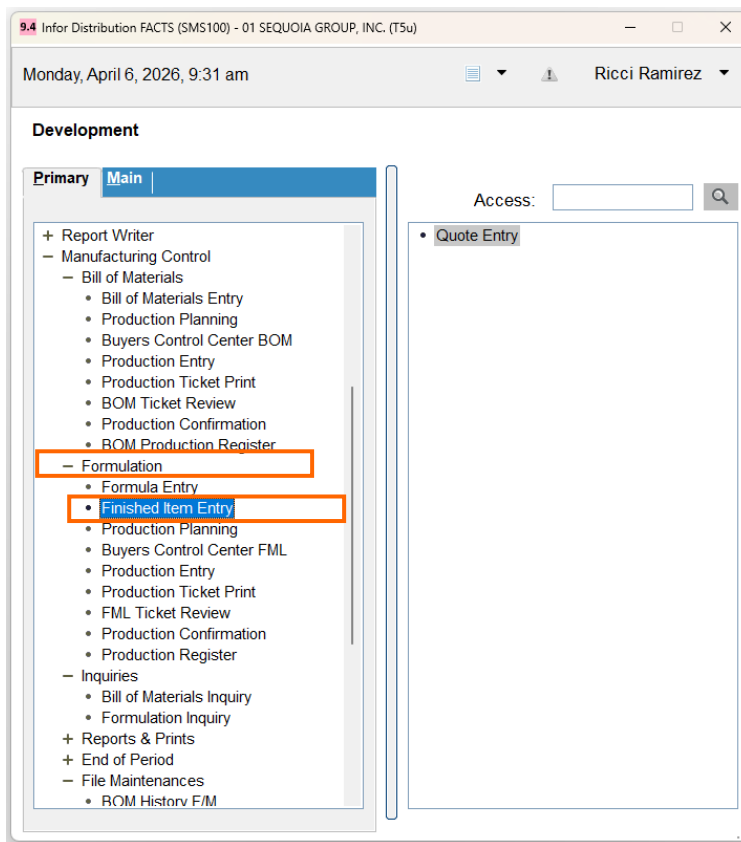
- s - Substitute Items
- W - Warehouse Quantities
- s - Substitute Items
- N - Notes
- O - Open Tickets
- P - Post Tickets
- C - Formula Std Ingredients**

Select what to display in the side bar

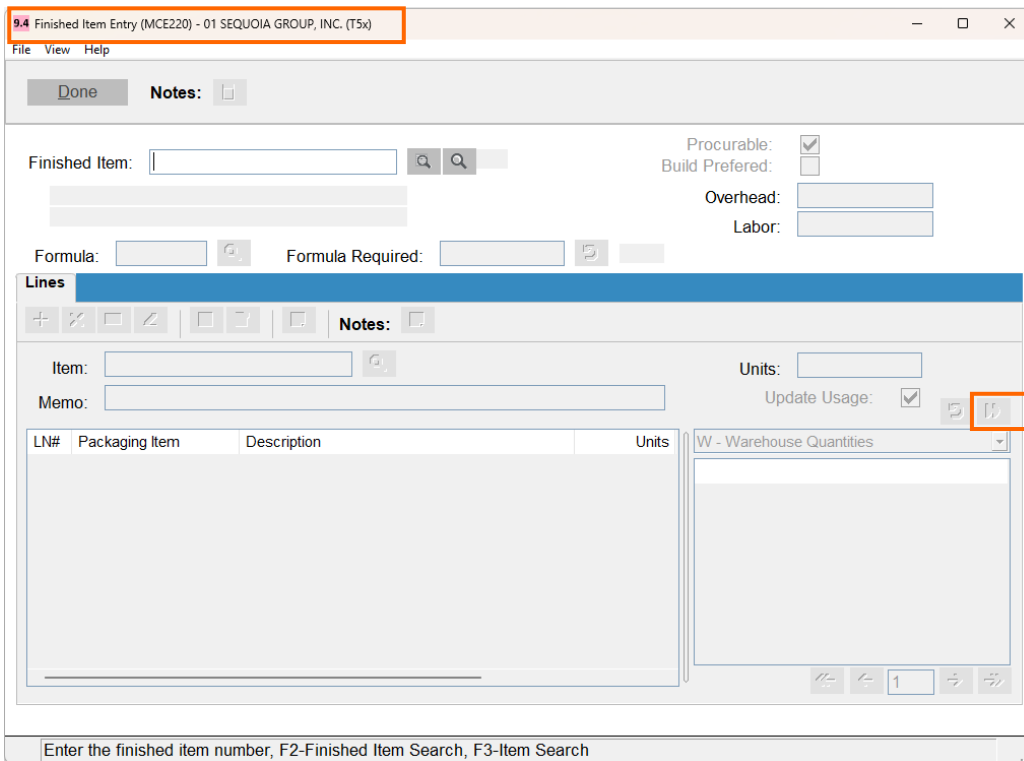
- The sidebar also includes an option to scroll through records, in this case, standard ingredients.



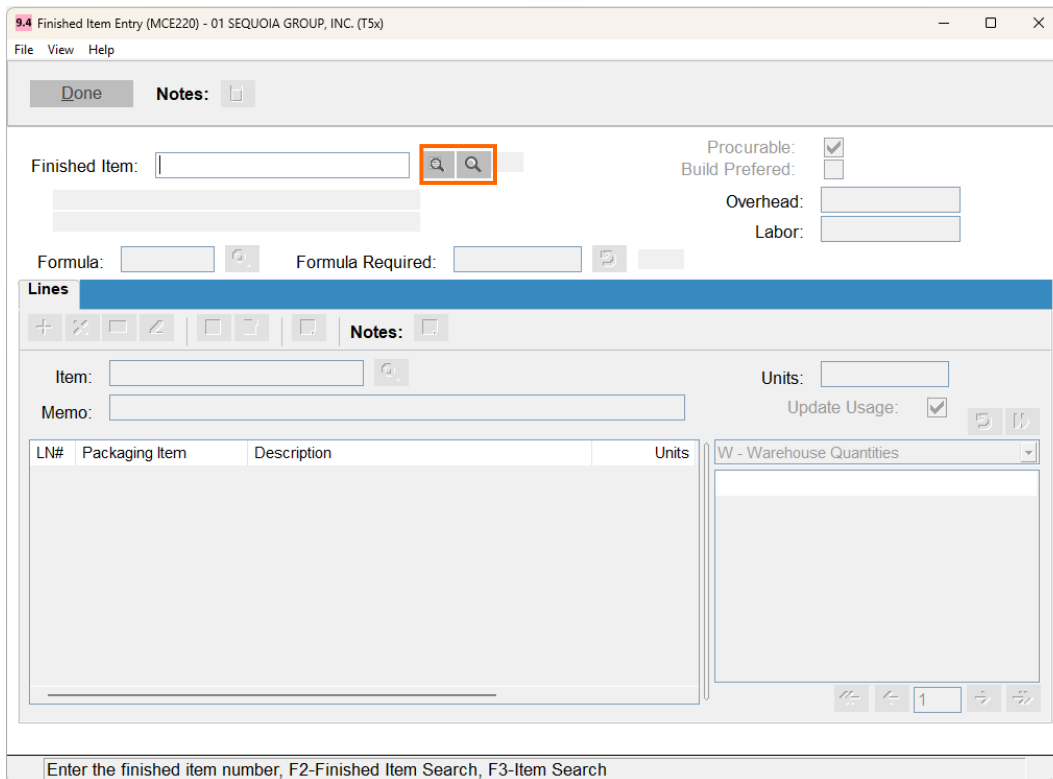
- Navigate to **Manufacturing Control** → **Formulation** → **Finished Item Entry** (program MCE210).



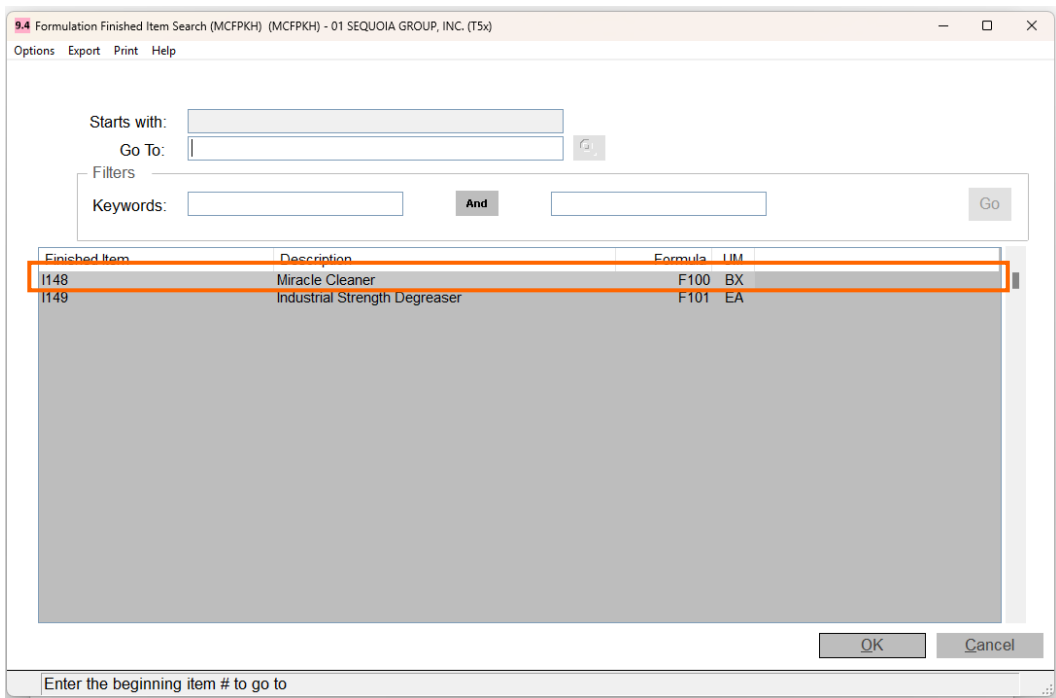
- Open **Finished Item Entry**. You will notice that the **Side Bar** button is also available.



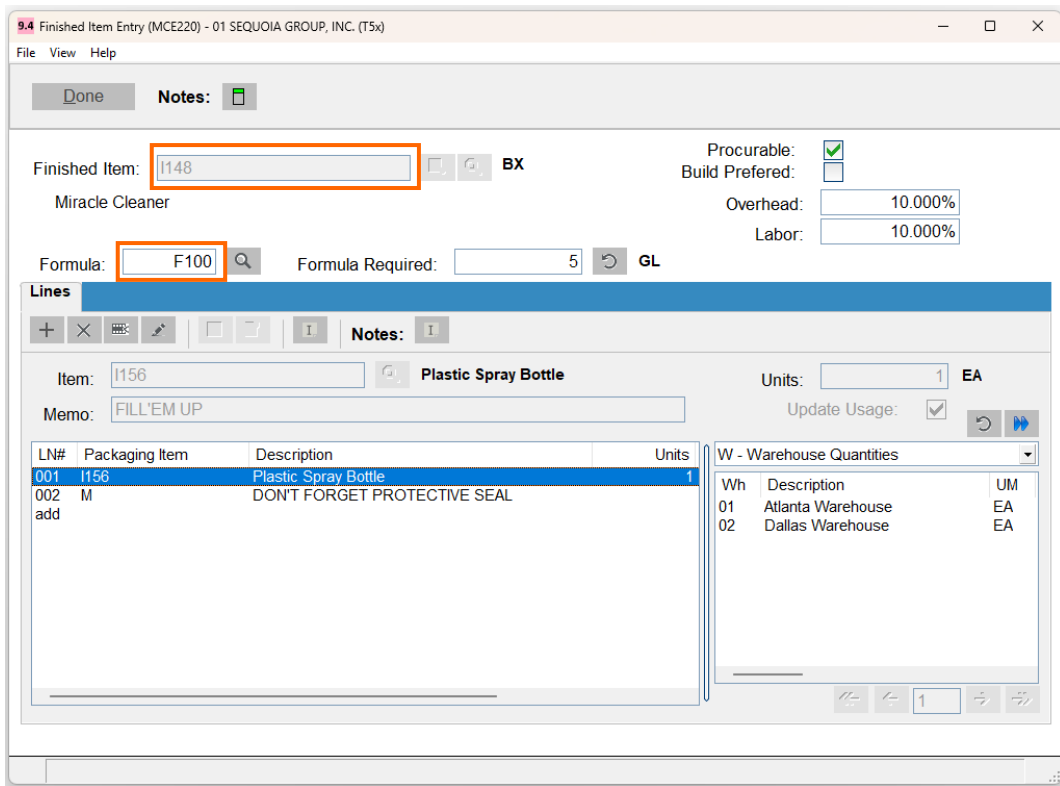
- Click the **Search** button to locate an item.



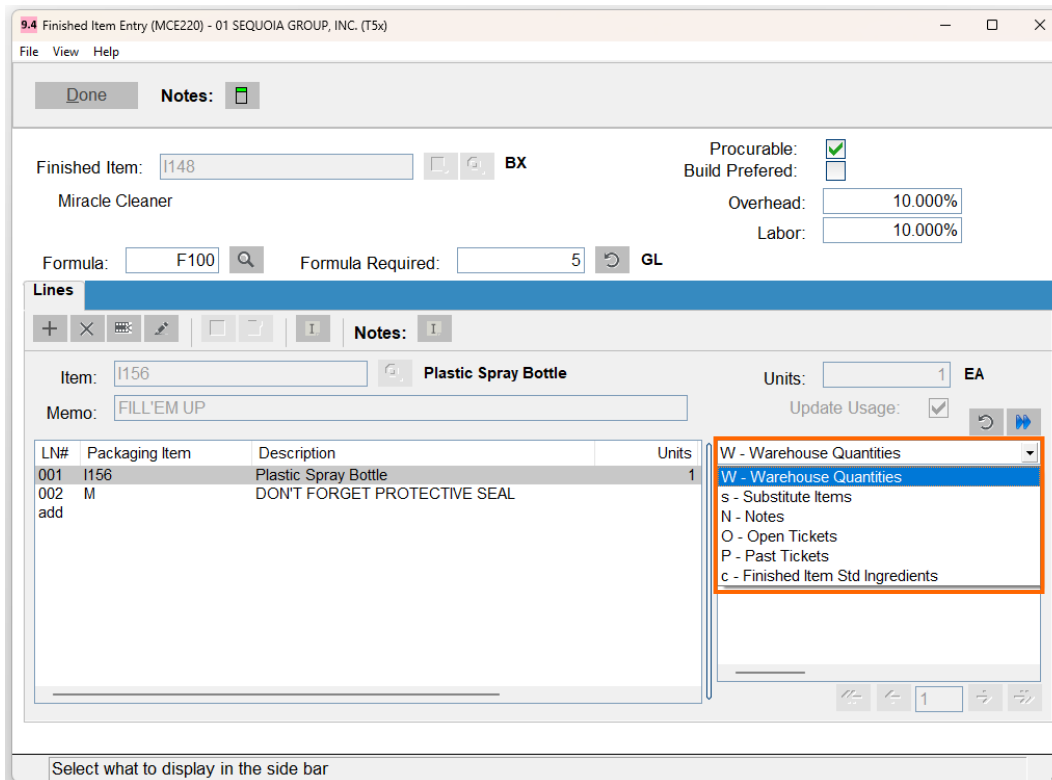
- For this example, we are choosing item **I148**.



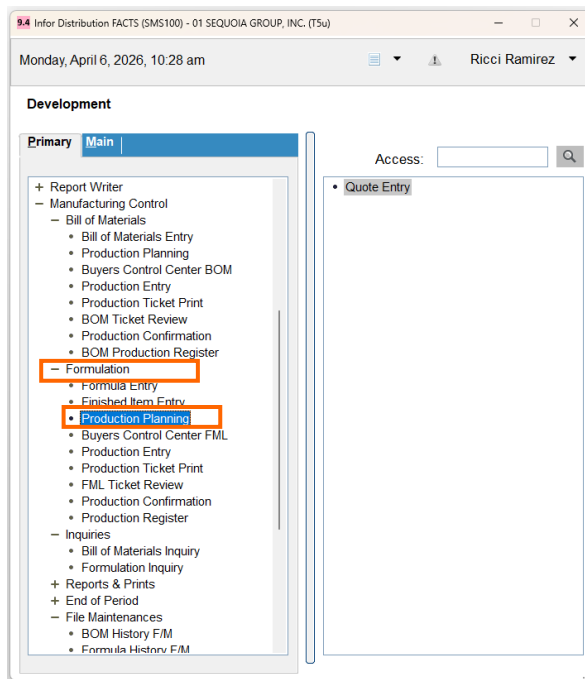
- A window will appear where you can see that item **I148** is tied to formula **F100**. This is how the connection from **Finished Items** (as seen in the previous example) is established.



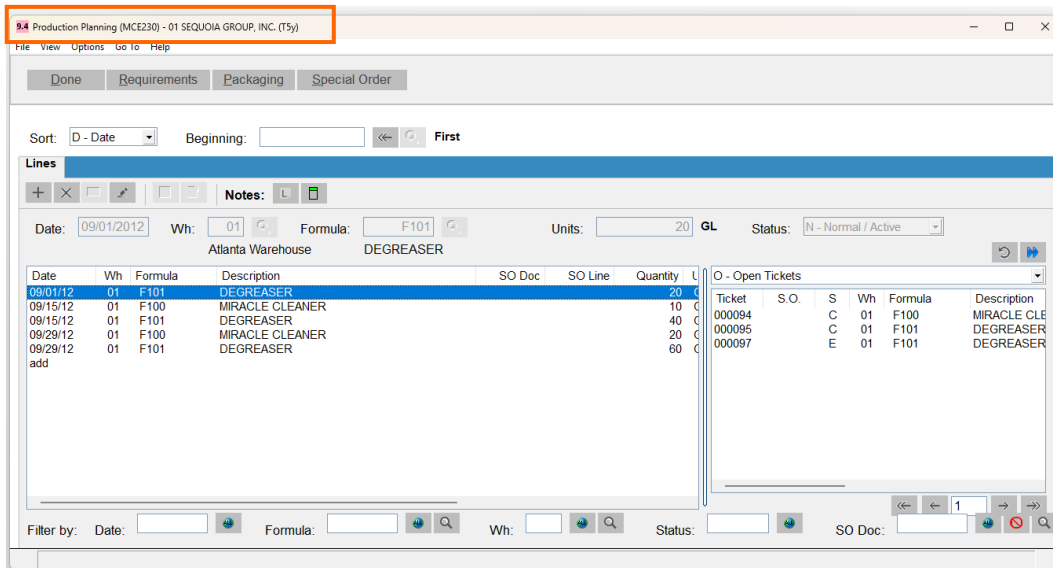
- If you open the **Side Bar**, you can see that the same options are available.



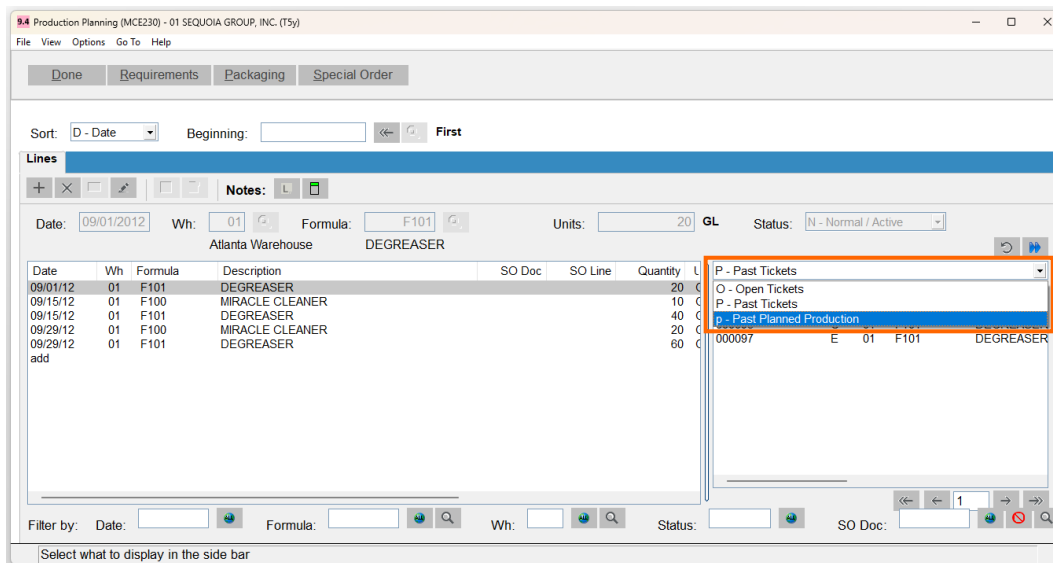
- Navigate to **Manufacturing Control** → **Formulation** → **Production Planning** (program MCE230).



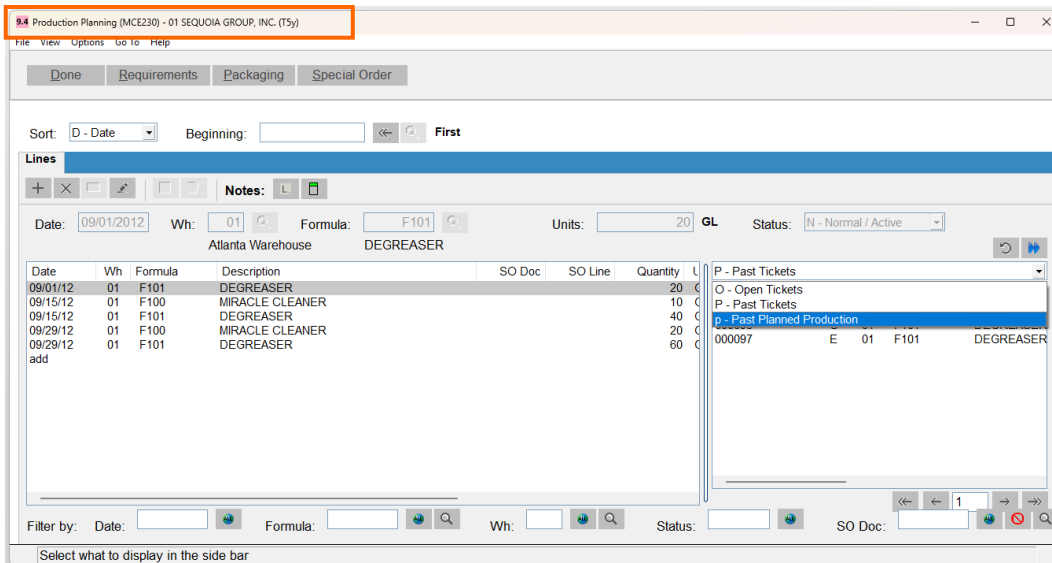
- Open the **Production Planning** window.



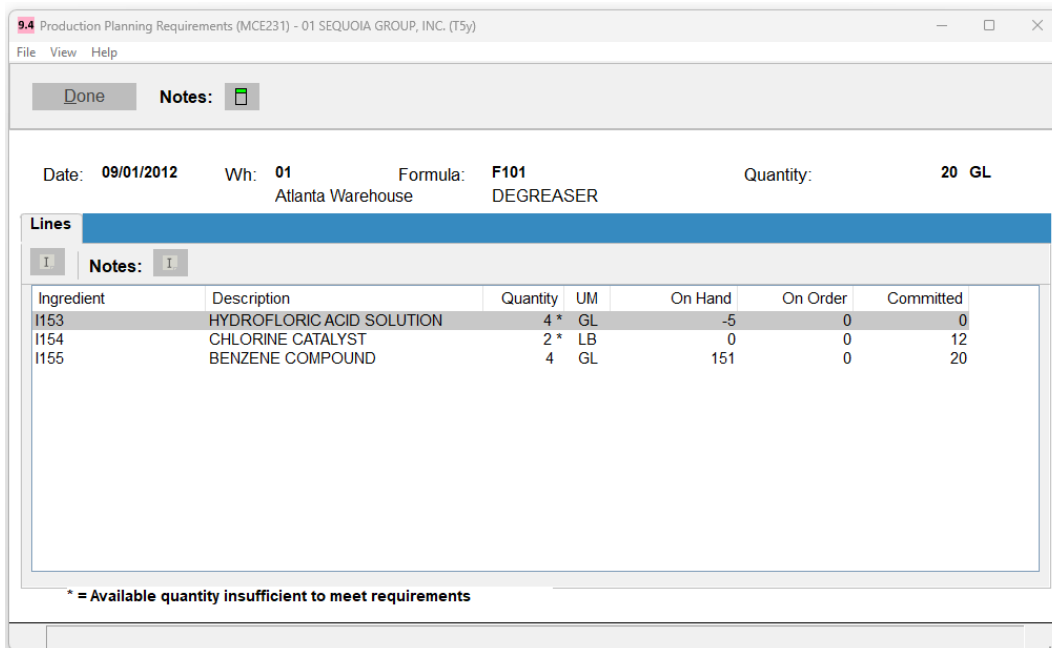
- As you can see, the sidebar is also present. In this case, warehouse information is not available because formulation data is not stored in historical files. This is a **Manufacturing Control (MC)**–only function, so the sidebar options are limited compared to **Inventory Control (IC)** entries.



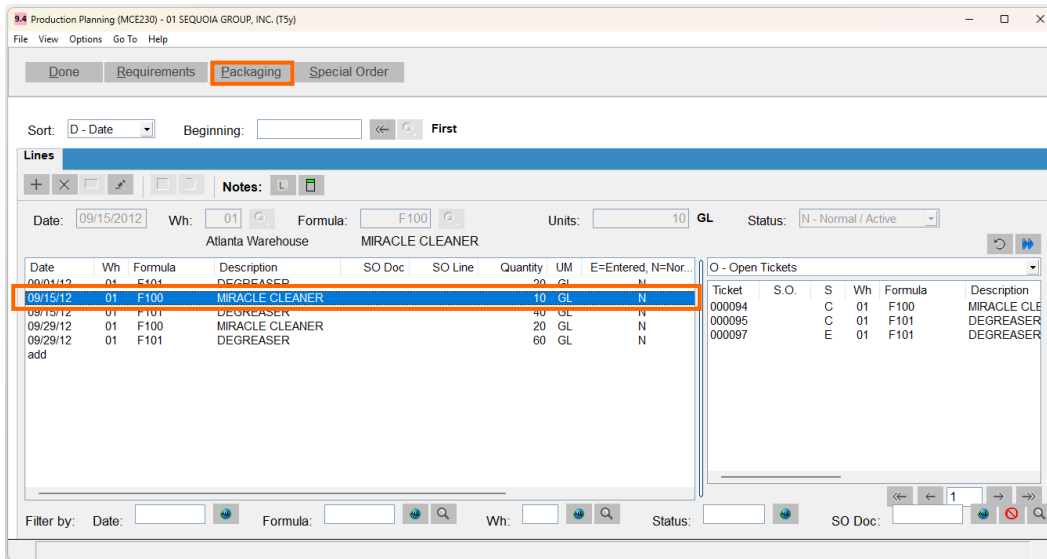
- Click **Requirements**.



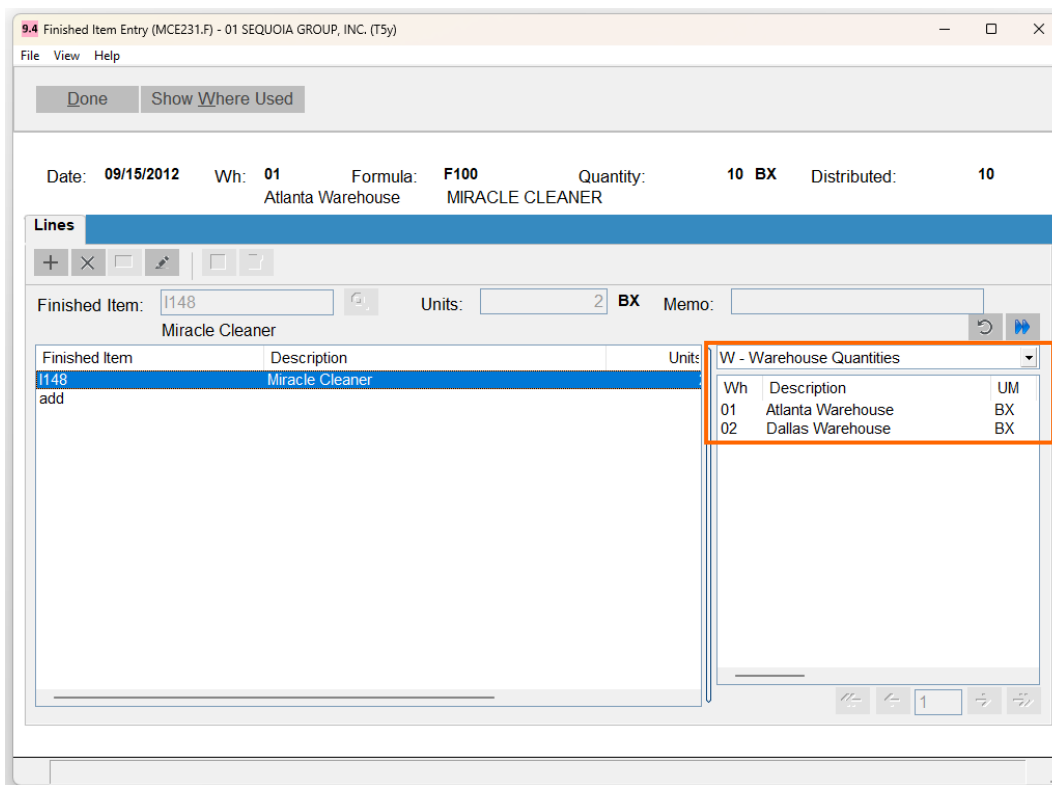
- The **Requirements** window is display-only (not editable), so it does not include the sidebar.



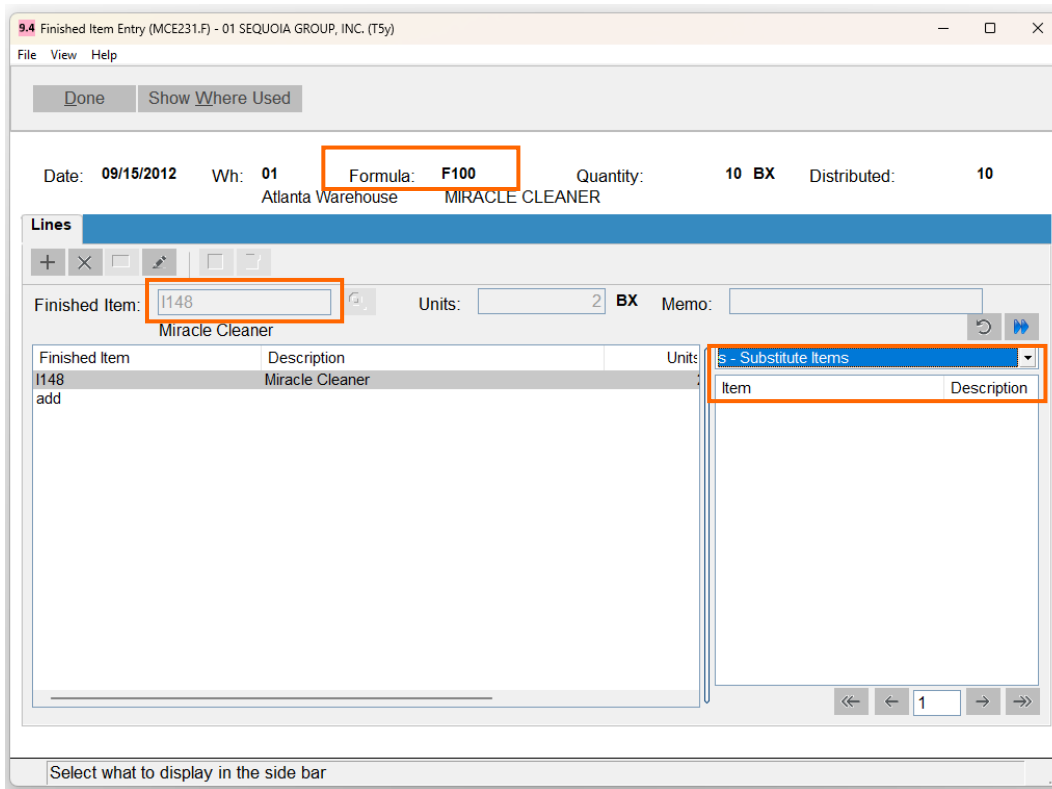
- Click **Packaging** for an item whose **Plan Status** is **Normal (N)**.



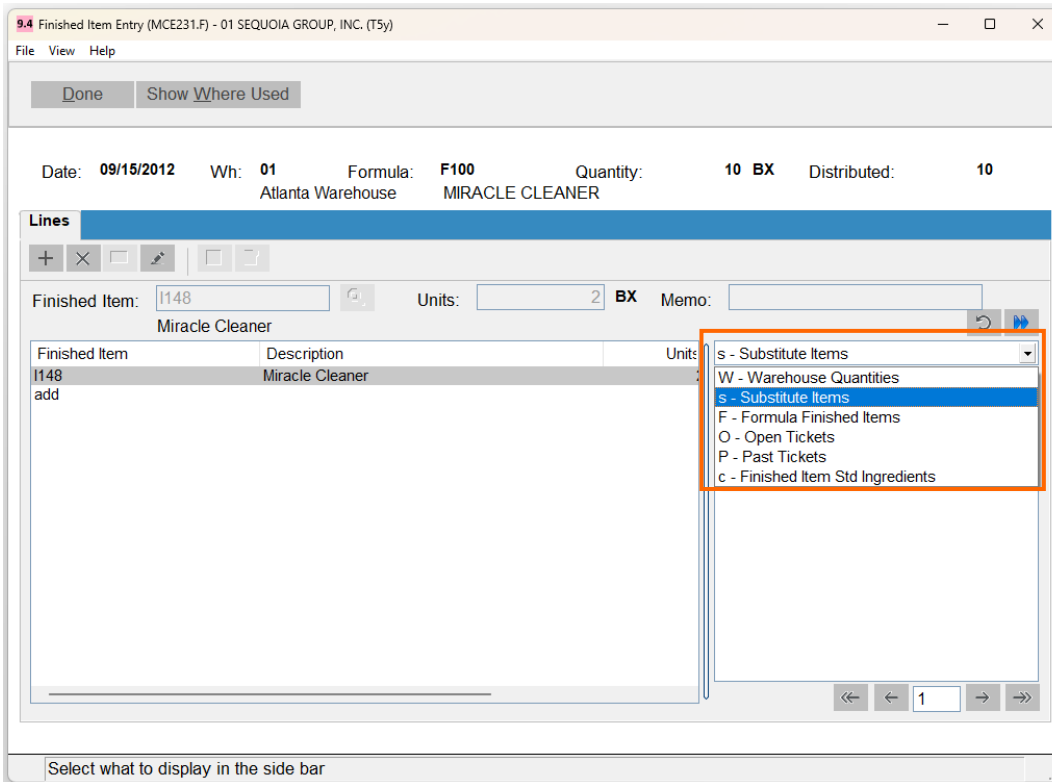
- The window that appears will include the **Side Bar**.



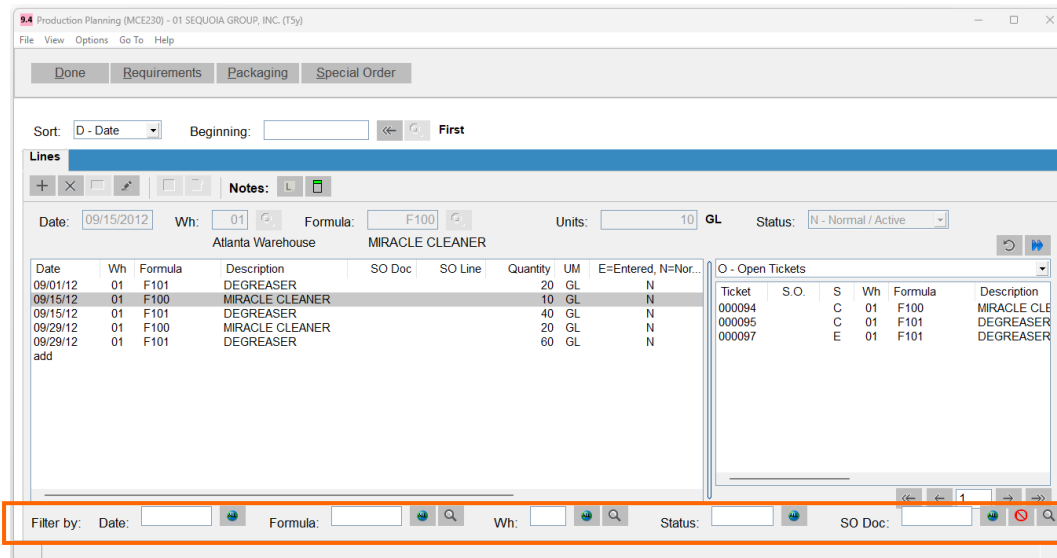
- If you check **Substitutes**, you will see that, for this example, there are no substitutes for formula **F100** for this finished item (**I148**).



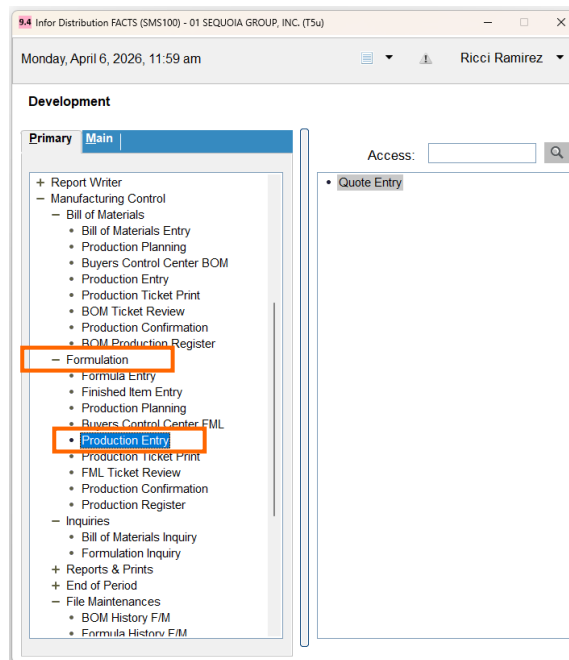
- Additionally, the **Side Bar** displays important information for this finished item (**I148**).



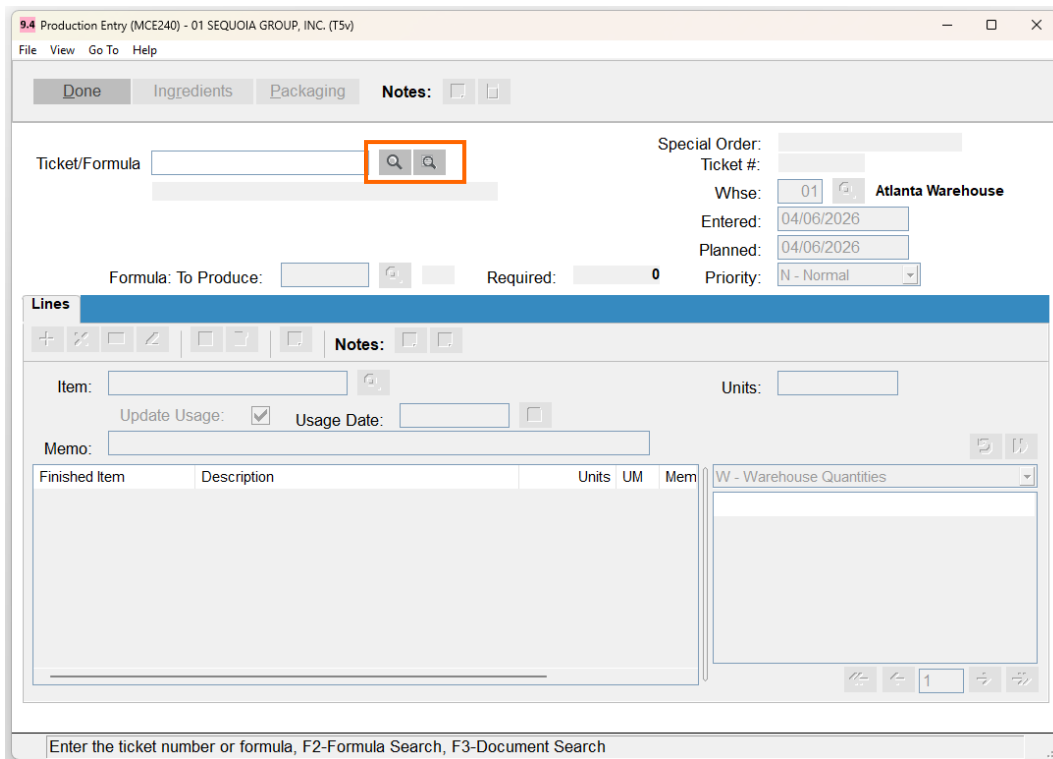
- This window, like **Bill of Materials**, includes filtering to help you review and redisplay records more effectively.



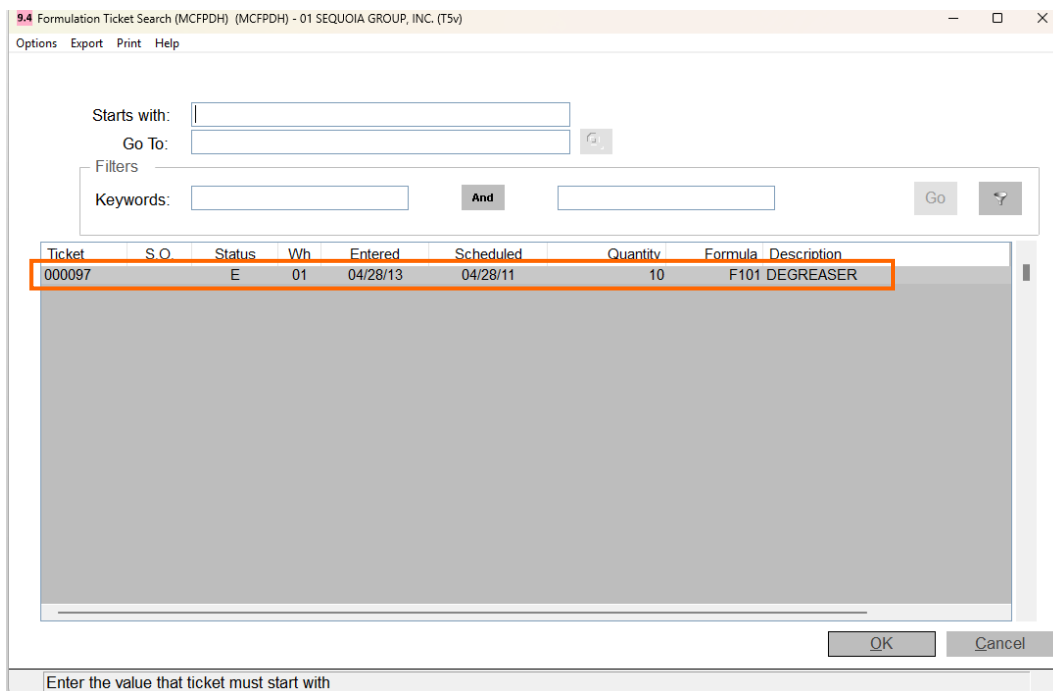
- Navigate to **Manufacturing Control-> Formulation-> Production Entry** (program MCE240).



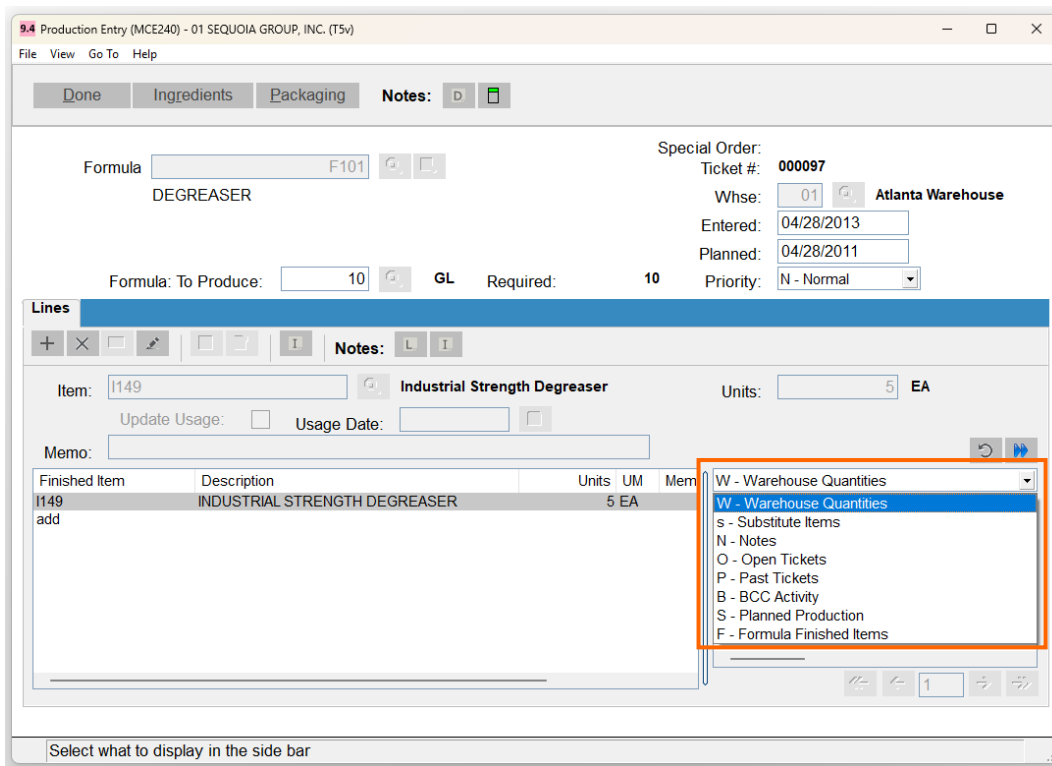
- Click the **Search** button to locate a record.



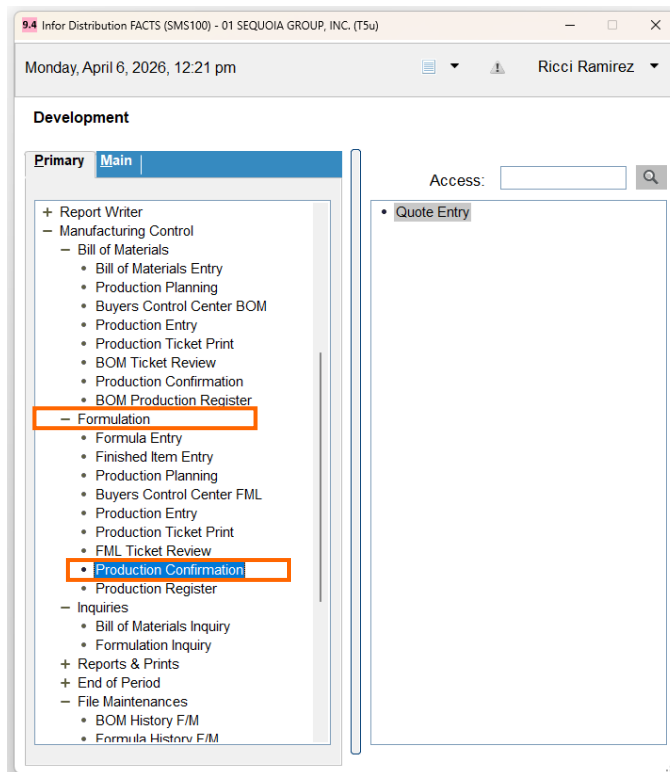
- Select the desired record.

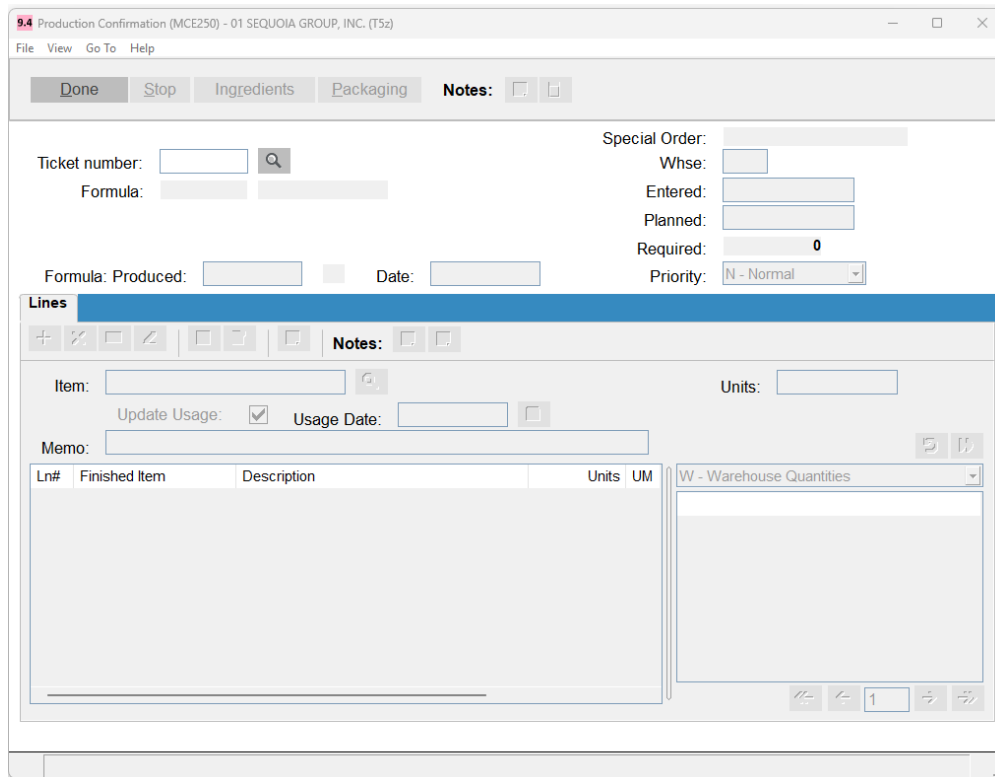


- The window will display relevant information in the **Side Bar** for the selected record.



- Navigate to **Manufacturing Control->Formulation->Production Confirmation** (program MCE250).





- Open the **Production Confirmation** window.



9.4 Production Confirmation (MCE250) - 01 SEQUOIA GROUP, INC. (T5z)

File View Go To Help

Done Stop Ingredients Packaging Notes: [D] [M]

Ticket number: 000094
Formula: F100 MIRACLE CLEANER

Special Order:
Whse: 01 Atlanta Warehouse
Entered: 04/28/2013
Planned: 04/28/2011
Required: 10
Priority: N - Normal

Formula: Produced: 10 GL Date: 04/28/2011

Lines

Item: I148 Miracle Cleaner Units: 2 BX
Update Usage: [] Usage Date: []
Memo: PRESOLD TO CUSTOMER

Ln#	Finished Item	Description	Units	UM
001	I148	MIRACLE CLEANER	2	BX

add

W - Warehouse Quantities

Wh	Description	UM
01	Atlanta Warehouse	BX
02	Dallas Warehouse	BX

- Click **Ingredients** to view the ingredient details.

9.4 Production Confirmation (MCE250) - 01 SEQUOIA GROUP, INC. (T5z)

File View Go To Help

Done Stop **Ingredients** Packaging Notes: [D] [G]

Ticket number: 000094
 Formula: F100 MIRACLE CLEANI

Special Order:
 Whse: 01 Atlanta Warehouse
 Entered: 04/28/2013
 Planned: 04/28/2011
 Required: 10
 Priority: N - Normal

Formula: Produced: 10 GL Date: 04/28/2011

Lines

+ × [] [] [] [] Notes: [L] [I]

Item: I148 **Miracle Cleaner** Units: 2 BX
 Update Usage: Usage Date: [] []
 Memo: PRESOLD TO CUSTOMER

Ln#	Finished Item	Description	Units	UM
001	I148	MIRACLE CLEANER	2	BX
add				

W - Warehouse Quantities

Wh	Description	UM
01	Atlanta Warehouse	BX
02	Dallas Warehouse	BX

- The **Side Bar** displays the ingredients for the selected formula.

9.4 Production Entry - Ingredients (MCE241.I) - 01 SEQUOIA GROUP, INC. (T5z)

File View Help

Done Notes: [D] [M]

Formula: **F100** Whse: **01 Atlanta Warehouse** Entered: **04/28/2013**
 MIRACLE CLEANER Planned: **04/28/2011**
 Formula: To Produce: **10 GL** Required: **10**

Lines

Item: I150 Bleach - maximum concentration Units: 2 GL
 Update Usage: Usage Date: 04/28/2011
 Memo: DANGEROUS FUMES!

LN#	Ingredient	Descr	Quantity	UM	Memo
001	I150	BLEACH			
002	M	FIRST I			
003	I151	BICARB			
004	M	MIX WIT			
005	I152	AMMON			
006	M	ADD LA			
007	M	WHEN C			
	add				

Select what to display in the side bar

- Review the **Side Bar** to see the available options.

9.4 Production Entry - Ingredients (MCE241.I) - 01 SEQUOIA GROUP, INC. (T5z)

File View Help

Done Notes: [D] [M]

Formula: **F100** Whse: **01 Atlanta Warehouse** Entered: **04/28/2013**
 MIRACLE CLEANER Planned: **04/28/2011**
 Formula: To Produce: **10 GL** Required: **10**

Lines

Item: I150 Bleach - maximum concentration Units: 2 GL
 Update Usage: Usage Date: 04/28/2011
 Memo: DANGEROUS FUMES!

LN#	Ingredient	Descr	Quantity	UM	Memo
001	I150	BLEACH			
002	M	FIRST I			
003	I151	BICARB			
004	M	MIX WIT			
005	I152	AMMON			
006	M	ADD LA			
007	M	WHEN C			
	add				

Select what to display in the side bar

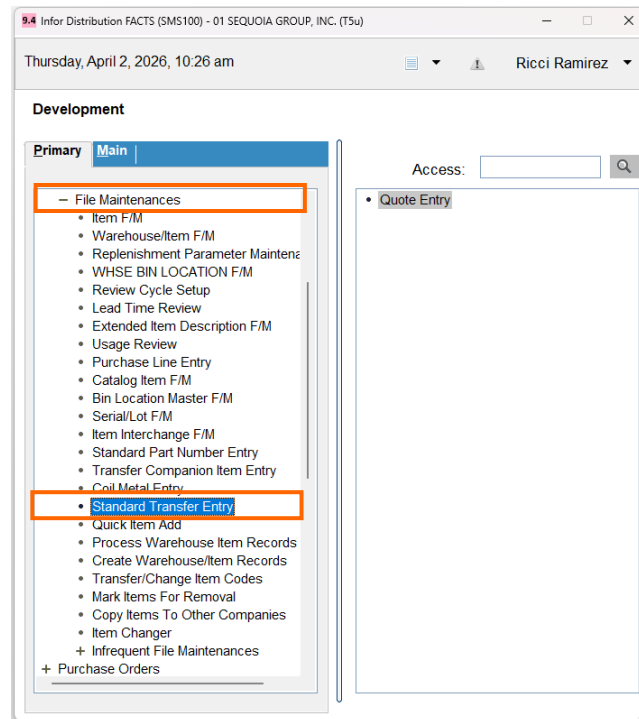
6. Standard Transfers

Standard Transfers are pre-defined transfer ‘templates’ stored in the Standard Transfer file. For a given **To-warehouse** (and optionally a specific **From-warehouse**), they store one or more lines that include:

- ✓ Item, quantity, unit of measure, and an optional note
- ✓ Pricing information (costs are factored when the transfer is later added to a purchase order)

Because these lines are saved, they can be reused, edited, copied, or imported without needing to re-enter the same data each time.

- Navigate to **File Maintenances-> Standard Transfer Entry** window (program ICE450).



- Open **Standard Transfer Entry** window (program ICE450).

9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

File Help

Done Previous Next Copy To Remove From

To-Warehouse:

From-Warehouse:

Lines

+ Notes

Item	Description/Memo	Qty	UM	Note
------	------------------	-----	----	------

Enter the receiving warehouse, F2-Search, F3-Search

- In the **Standard Transfer Entry** window, you can specify the source warehouse (the 'From' warehouse) and the destination warehouse (the 'To' warehouse) to which the items are being transferred.

9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

File Help

Done Previous Next Copy To Remove From

To-Warehouse:

From-Warehouse:

Lines

+ **Notes:**

Item	Description/Memo	Qty	UM	Note

Enter the receiving warehouse, F2-Search, F3-Search

- Press **F2** (or click the first search button) to search all warehouses.

9.4 Standard Transfer Search (ICSTDH-T) (ICSTDH-T) - 01 SEQUOIA GROUP, INC. (T5v)

Options Export Print Help

Sort By: S - Standard Transfer Search

Starts with:

Go To:

Filters

Keywords: **And**

To Warehouse	To Description	From Warehouse	From Description
01	Atlanta Warehouse	02	Dallas Warehouse
02	Dallas Warehouse	01	Atlanta Warehouse

OK Cancel

Enter the beginning standard transfer to go to

- Press **F3** (or click the second search button) to search only the warehouses that are currently defined as standard transfers.

9.4 Standard Transfer Search (ICSTDH-F) (ICSTDH-F) - 01 SEQUOIA GROUP, INC. (T5v)

Options Export Print Help

Starts with:

Go To:

Filters

Keywords: And Go

From Warehouse	From Description
02	Dallas Warehouse

OK Cancel

- For our example enter **'01'** for **To-Warehouse** field and **'02'** for **From-Warehouse** field and press **enter**.

9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

File Help

Done Previous Next Copy To Remove From

To-Warehouse: 01 Atlanta Warehouse
From-Warehouse: 02 Dallas Warehouse

Lines

+ × [grid] [edit] Notes: I

Item	Description/Memo	Qty	UM	Note
NEW TEAM		1	EA	MY NOTE
WEITUNB	Adjustable Height Steel Stool	1	EA	
I155	Benzene Compound	1	GL	
I300	3-Socket Emergency Lamp	1	EA	One note

- To add an item, click the **plus (+) sign**.

9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

File Help

Done Previous Next Copy To Remove From

To-Warehouse: 01 Atlanta Warehouse
From-Warehouse: 02 Dallas Warehouse

Lines

+ × [grid] [edit] Notes: I

Item	Description/Memo	Qty	UM	Note
NEW TEAM		1	EA	MY NOTE
WEITUNB	Adjustable Height Steel Stool	1	EA	
I155	Benzene Compound	1	GL	
I300	3-Socket Emergency Lamp	1	EA	One note

- A window will appear where multiple items can be added. In this example, **Item I150**, **Quantity 1**, and **Note: My note** are entered. Then, **OK** is pressed.

The screenshot shows a software window titled "9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)". At the top, there are navigation buttons: "Done", "Previous", "Next", "Copy To", and "Remove From". Below these, the "To-Warehouse" is set to "02 Dallas Warehouse" and the "From-Warehouse" is set to "01 Atlanta Warehouse".

The main area is titled "Lines" and contains a table with the following items:

Item
I301
I990
I117

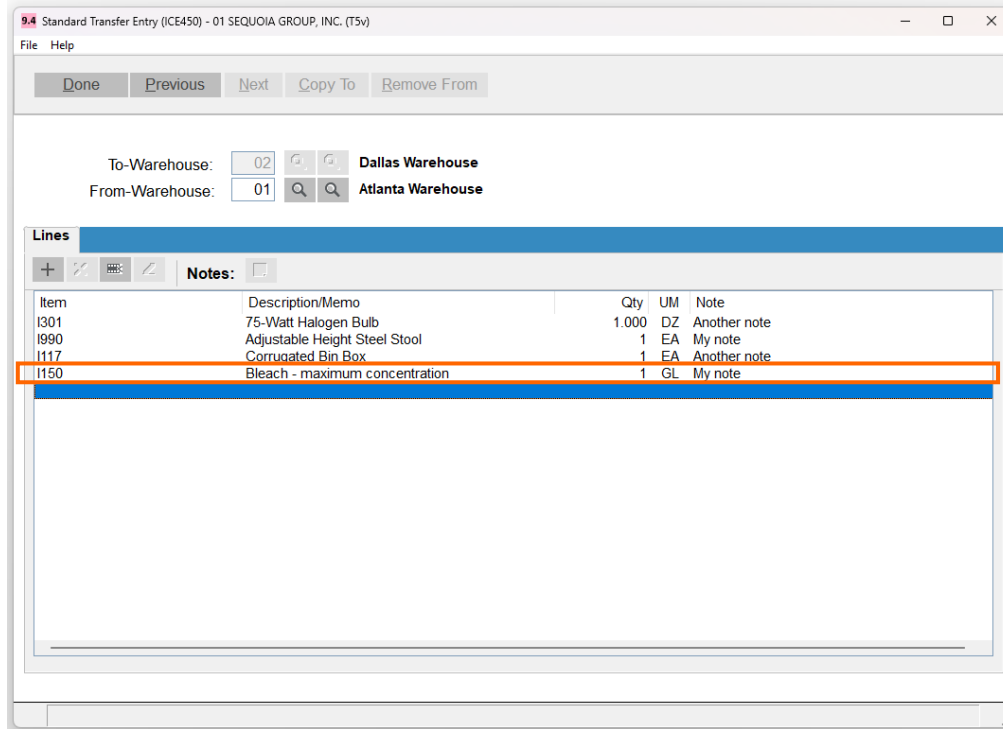
A modal dialog box is open over the table, titled "Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)". It contains the following fields:

- Item:** I150 (with a search icon) → **Bleach - maximum concentration**
- Quantity:** 1
- UM:** GL (with a search icon)
- Note/Memo:** My note

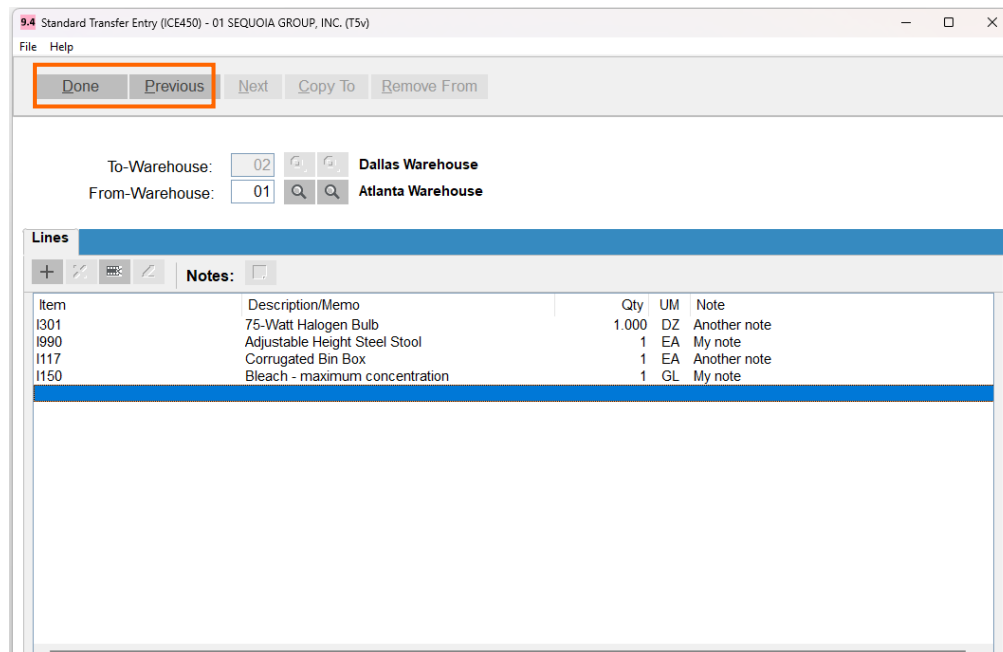
At the bottom of the dialog box are "Ok" and "Cancel" buttons. Below the dialog box, there is a text input field labeled "Enter the note".

At this point the system does **not validate whether the item actually exists in the selected warehouse, because you may be creating a standard transfer before the item-warehouse maintenance record (or the warehouse record) has been set up. Consequently, you can enter items that are not yet valid.*

- Now you can see the item you just added for the transfer.



- This window also includes **Previous** and **Next** buttons that let you scroll through the records.



- The window also includes a **Copy To** button.

9.4 Standard Transfer Entry (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

File Help

Done Previous Next **Copy To** Remove From

To-Warehouse: 01 Atlanta Warehouse
From-Warehouse: 02 Dallas Warehouse

Lines

Notes: I

Item	Description/Memo	Qty	UM	Note
NEW TEAM		1	EA	MY NOTE
WEITUNB	Adjustable Height Steel Stool	1	EA	
I155	Benzene Compound	1	GL	
I300	3-Socket Emergency Lamp	1	EA	One note

- This button allows you to create a new record based on an existing one.

9.4 Copy to (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

Copy this standard transfer line(s) to another standard transfer.

Copy To-Warehouse: 01 Atlanta Warehouse
Copy To From-Warehouse: 02 Dallas Warehouse
Copy To All From-Warehouse:
Create Standard Transfer:

Lines to select for copy to: All None

Copy	Ln#	Item#	Description	Quantity	UM	Note/Memo
<input checked="" type="checkbox"/>	001	NEW TEAM		1	EA	MY NOTE
<input type="checkbox"/>	002	WEITUNB	Adjustable Height Steel Stool	1	EA	
<input type="checkbox"/>	003	I155	Benzene Compound	1	GL	
<input type="checkbox"/>	004	I300	3-Socket Emergency Lamp	1	EA	One note

Ok Cancel

Enter the receiving warehouse, F2-Search, F3-Search

- The **Remove** button allows you to delete any selected **From** or **To** entry.

9.4 Remove From (ICE450) - 01 SEQUOIA GROUP, INC. (T5v)

Remove this standard transfer line(s) from another standard transfer.

Remove From To-Warehouse: Atlanta Warehouse

Remove From From-Warehouse: Dallas Warehouse

Remove From All From-Warehouse:

Ignore Memo/Note Text:

Ignore Quantity:

Ignore UM:

Lines to select for removal:

Remove	Ln#	Item#	Description	Quantity	UM	Note/Memo
<input checked="" type="checkbox"/>	001	NEW TEAM		1	EA	MY NOTE
<input type="checkbox"/>	002	WEITUNB	Adjustable Height Steel Stool	1	EA	
<input type="checkbox"/>	003	I155	Benzene Compound	1	GL	
<input type="checkbox"/>	004	I300	3-Socket Emergency Lamp	1	EA	One note

Enter the receiving warehouse, F1-All, F2-Search, F3-Search

- The **Standard Transfer Entry** has its counterpart in **Standard Buy Entry** (program POE250). **Open Standard Buy Entry** and you'll see that both screens look similar, but **Standard Buy Entry** is used specifically for purchasing.

9.4 Standard Buy Entry (POE250) - 01 SEQUOIA GROUP, INC. (T5w)

File Help

Vendor:

Ship-from:

Lines

Active	Item	Description/Memo	Qty	UM	Note
--------	------	------------------	-----	----	------

Enter the vendor number, F2-Search, F3-Search

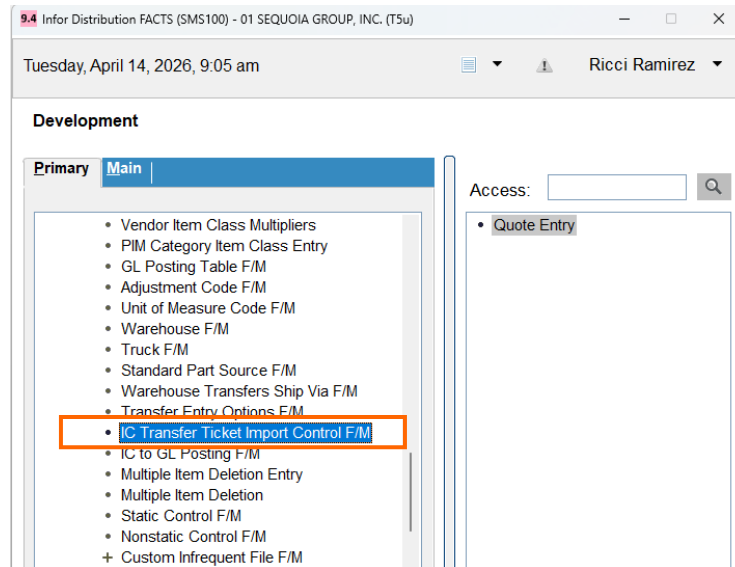
- The same applies to **Standard Order Entry (S0E250)**. It contains almost the same information as **Standard Transfer Entry**, but it is used for orders placed by customers. **Open Standard Order Entry** to view it.

7. Option to import lines in Transfer Ticket Entry

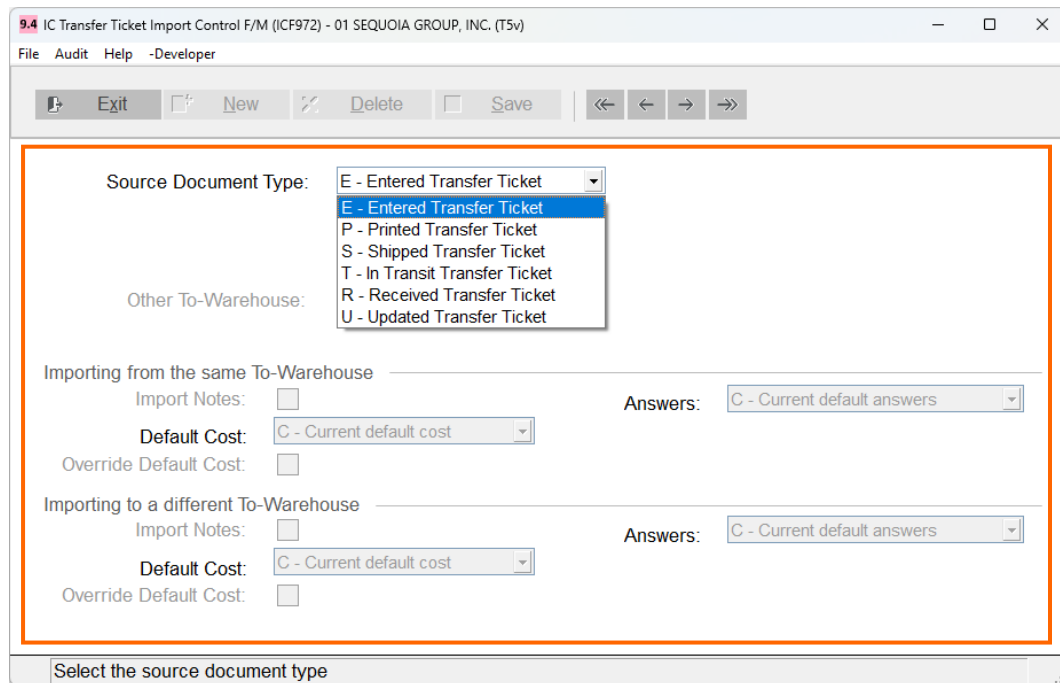
The Import Items option pulls line items from existing transfer documents (entered, printed, or received) into a new transfer ticket or shipment confirmation.

Before importing lines into transfer tickets or confirmation programs, configure the Frequent File Maintenance for Transfer Ticket Import Control. This setup screen controls the rules and limitations for the Import Items tool.

- Navigate to **Inventory Control -> File Maintenance-> Infrequent File Maintenance-> IC Transfer Ticket Import Control F/M** (program ICF972).

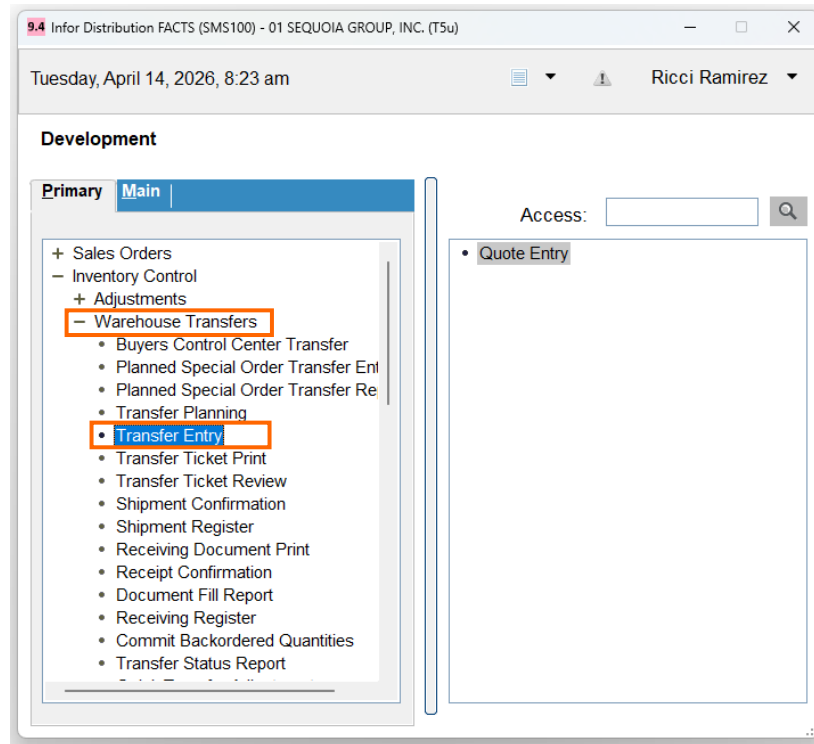


- Open **IC Transfer Ticket Import Control F/M**.



- **In this window, you can:**
 - ✓ Define the allowed **source document** types and limit them by status (entered, printed, received, or updated).
 - ✓ Set **cost override** permissions to control whether users can override item costs.
 - ✓ Configure **note** importing to determine if notes from the source document are included.

- ✓ Set the **warehouse** matching rules to require the same 'to warehouse' or allow other warehouses.
- Navigate to **Inventory Control ->Warehouse Transfers ->Transfer Entry** (program ICE320)



- Open **Transfer Entry** and select a ticket.

9.4 Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5v)

File Edit View Options Go To Help

Done Header Import Std Transfer Make Std Transfer Notes: D

From Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147 Nonskid Floor Paint grey - with rubber particles

Requested: 2 Committed: 2 Backordered: 0

LN#	Item	Flags	Requested	UM	Committed	Backorder	Order#
001	I147		2	GL	2		

F - From Warehouse Quantities

Wh	Description	UM	Short
01	Atlanta Warehouse	GL	

- Click **Options**, then select **Import Items**.

9.4 Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5v)

File Edit View Options Go To Help

Done Header Detail Import Planned Special Order Transfers Import Items Standard Transfer... Surplus Transfer Make Std Transfer Notes: D

From Whse: Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147 Nonskid Floor Paint grey - with rubber particles

Requested: 2 Committed: 2 Backordered: 0

LN#	Item	Flags	Requested	UM	Committed	Backorder	Order#
001	I147		2	GL	2		

S - Standard Transfer

Item	Description
I301	75-Watt Halogen Bulb
I990	Adjustable Height Steel St
I117	Corrugated Bin Box 12" w
I150	Bleach - maximum conce

Select what to display in the side bar

- A window will appear where you can choose the **source document**. Use filters to narrow the search by status (entered, printed, received, or updated). Select the desired document, then click **OK**.

9.4 Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5v)

Done Header Import Std Transfer Make Std Transfer Notes: D

From Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147
Requested
Lead Time: 2

LN# Item Flag
001 I147 add

Select Document (ICC551) - 01 SEQUOIA GROUP, INC. (T5v)

Document Type: **E - Entered Transfer Ticket**
Default Cost:
P - Printed Transfer Ticket
S - Shipped Transfer Ticket
T - In Transit Transfer Ticket
R - Received Transfer Ticket
U - Updated Transfer Ticket

Select the document type

Transfer

Description
75-Watt Halogen Bulb
Adjustable Height Steel St
Corrugated Bin Box 12" w
Bleach - maximum conce

1990
1117
1150

- Click the **Search** button to locate the document. Select the document, then click OK.

9.4 Entered Transfer Ticket Search (ICC551EY) (ICC551EY) - 01 SEQUOIA GROUP, INC. (T5v)

Options Export Print Help

Starts with:

Go To:

Filters

Keywords: **And** **Go**

In Use	Ticket	Ship#	Status	Entered	Requested	From	To	Reference
*	T00339		E	04/04/2013	04/04/2013	01	02	
	T00360		E	03/01/2023	03/01/2023	01	02	
	T00369		E	04/13/2023	04/13/2023	01	02	
	T00370		E	04/13/2023	04/13/2023	01	02	
	T00372		E	06/05/2023	06/05/2023	01	02	
	T00373		E	06/05/2023	06/05/2023	01	02	
	T00378		E	06/05/2023	06/05/2023	01	02	
	T00380		E	06/30/2023	06/30/2023	01	02	
	T00392		E	07/28/2023	07/28/2023	01	02	
	T00393		E	07/28/2023	07/28/2023	01	02	
	T00400		E	04/24/2024	04/24/2024	01	02	
	T00402		E	04/24/2024	04/24/2024	01	02	
	T00406		E	04/30/2024	04/30/2024	01	02	
	T00407		E	04/30/2024	04/30/2024	01	02	
	T00410		E	04/09/2026	04/09/2026	01	02	
	T00413		E	04/13/2026	04/13/2026	01	02	

OK Cancel

Enter the value that ticket must start with

- The system will display a toggling screen. You can review the items from the source document. Toggle items on or off to select what to bring over, and edit the quantities if needed.

- Click **Done** to bring the selected lines into the current transfer ticket.

- On the main ticket screen, the system populates the **Number**, **Line Number**, and **Source** columns. This indicates the lines were imported and not entered manually.

Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5v)

File Edit View Options Go To Help

Done Header Import Std Transfer Make Std Transfer Notes: D

From Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147 Nonskid Floor Paint grey - with rubber particles

Requested Committed Backordered

Lead Time: 2 GL 2

LN#	Item	Flags	Requ...	UM	Committed	Backorder	Order#	Ln#	Source	Description 1
001	I147	...	2	GL	2	0	T00339	001	Transfer Import	Nonskid Floor Pa
002	I104	...	10	EA	10	0	T00339	001	Transfer Import	Rubber Tire Mat

S - Standard Transfer

Item Description
I301 75-Watt Halo
I990 Adjustable He
I117 Corrugated B
I150 Bleach - max

- If you need to import from **Standard Transfer**, click the **Import Std Transfer** option.

Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5v)

File Edit View Options Go To Help

Done Header Import Std Transfer Make Std Transfer Notes: D

From Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147 Nonskid Floor Paint grey - with rubber particles

Requested Committed Backordered

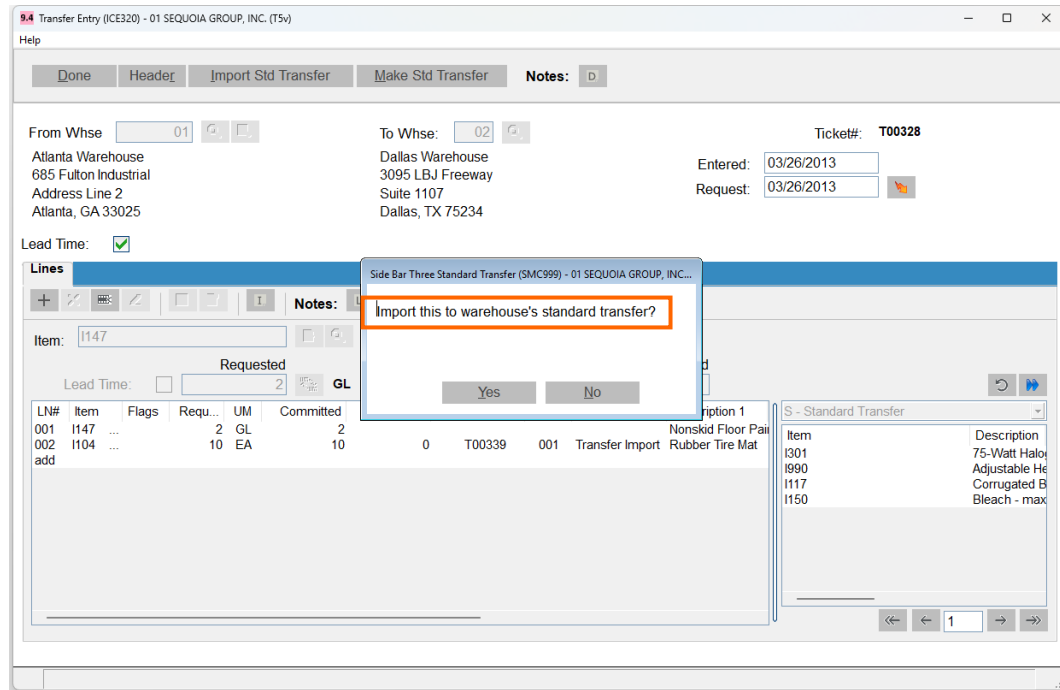
Lead Time: 2 GL 2

LN#	Item	Flags	Requ...	UM	Committed	Backorder	Order#	Ln#	Source	Description 1
001	I147	...	2	GL	2	0	T00339	001	Transfer Import	Nonskid Floor Pa
002	I104	...	10	EA	10	0	T00339	001	Transfer Import	Rubber Tire Mat

S - Standard Transfer

Item Description
I301 75-Watt Halo
I990 Adjustable He
I117 Corrugated B
I150 Bleach - max

- A window will appear asking you to confirm the import of the warehouse Standard Transfers.



- When importing from a Standard Transfer, review the **Source** column. It will display **Companion Import**, indicating the line was pulled from a standard transfer template and not entered manually.

Transfer Entry (ICE320) - 01 SEQUOIA GROUP, INC. (T5u)

Done Header Import Std Transfer Make Std Transfer Notes: D

From Whse: 01
Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

To Whse: 02
Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

Ticket#: T00328
Entered: 03/26/2013
Request: 03/26/2013

Lead Time:

Lines

Item: I147 Nonskid Floor Paint grey - with rubber particles

Requested Committed Backordered

LN#	Item	Flags	Requ...	UM	Committed	Backorder	Order#	Ln#	Source	Description 1
001	I147		2	GL	2				Transfer Import	Nonskid Floor Paint
002	I104		10	EA	10		T00339	001	Companion L...	Rubber Tire Mat
003	I301		1	EA	1				Companion L...	75-Watt Halogen Bulb
004	I117		1	EA	0				Companion L...	Corrugated Bin Box
005	I150		1	GL	1				Companion L...	Bleach - maximum c

S - Standard Transfer

- Click **Done** to complete the process.
- Navigate to **Inventory Control-> Warehouse Transfers-> Shipment Confirmation** (program ICE320)

Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Tuesday, April 14, 2026, 10:21 am Ricci Ramirez

Development

Primary Main

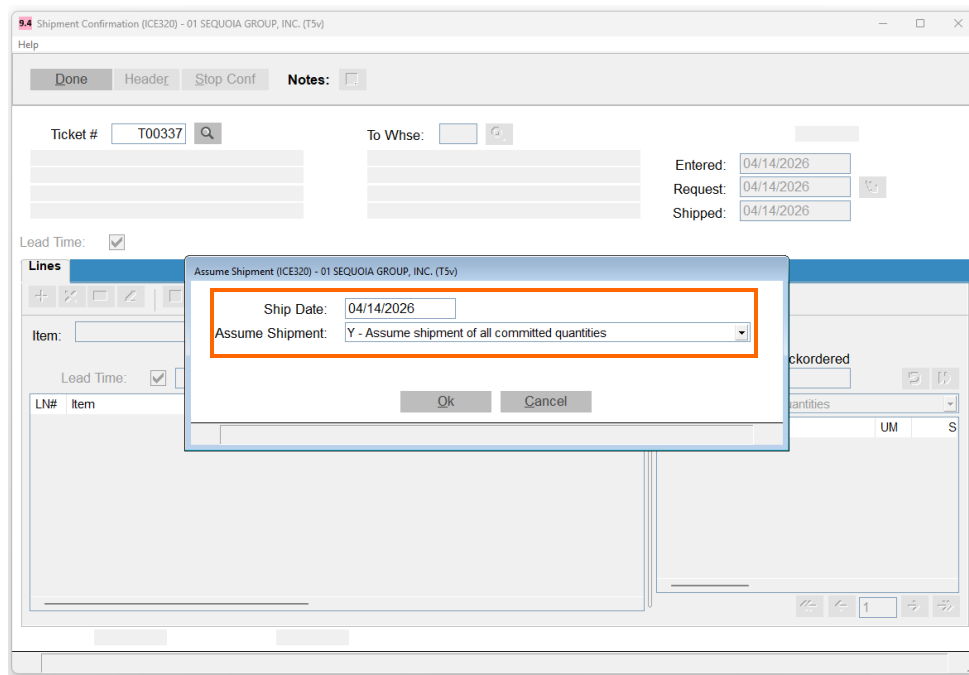
- + Sales Orders
- Inventory Control
- + Adjustments
- Warehouse Transfers
 - Buyers Control Center Transfer
 - Planned Special Order Transfer Entry
 - Planned Special Order Transfer Report
 - Transfer Planning
 - Transfer Entry
 - Transfer Ticket Print
 - Transfer Ticket Review
 - **Shipment Confirmation**
 - Shipment Register
 - Receiving Document Print
 - Receipt Confirmation
 - Document Fill Report
 - Receiving Register
 - Commit Backordered Quantities
 - Transfer Status Report
 - Quick Transfer Adjustment

Access:

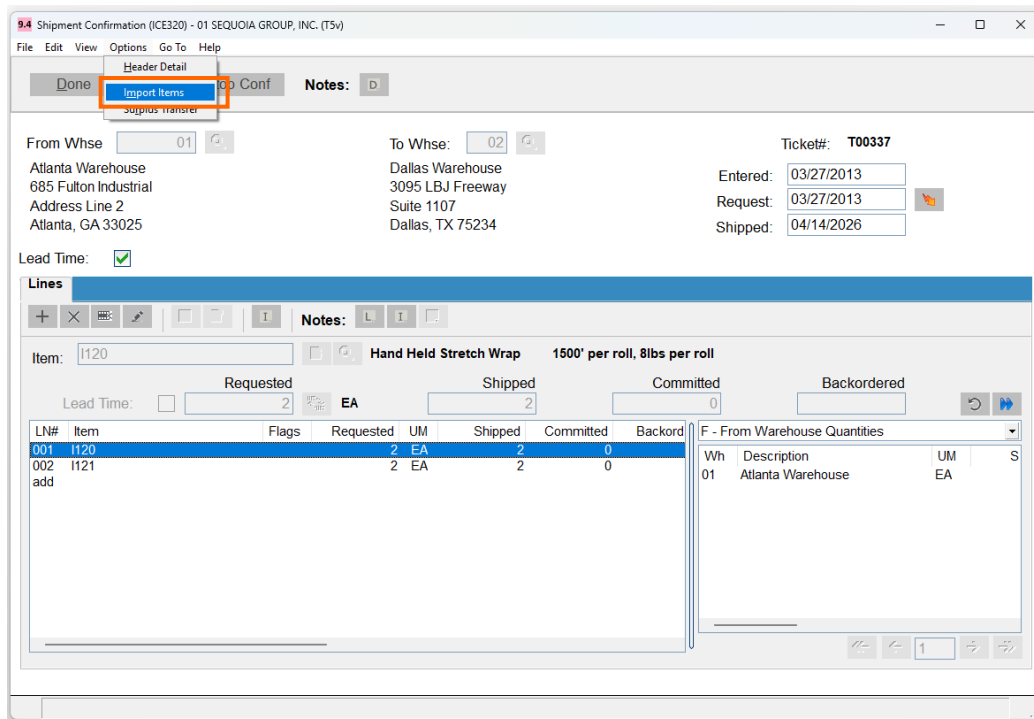
- Quote Entry

- **Shipment Confirmation** does not include Standard Transfer buttons. These are only used when creating a transfer, not during the Shipment Confirmation process.

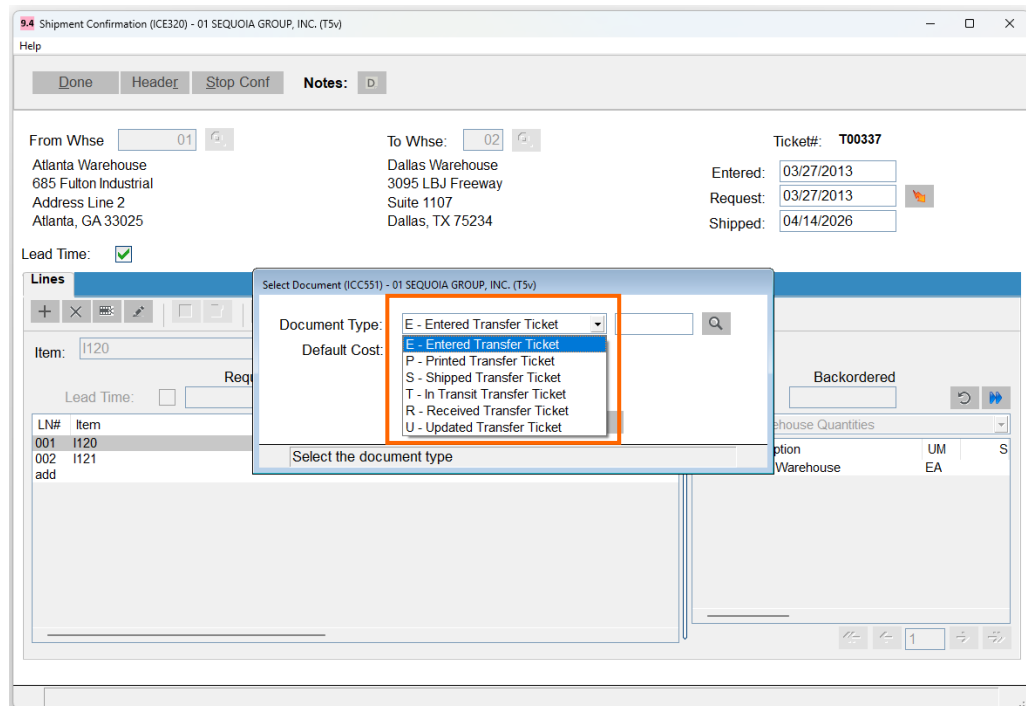
Select the ticket and complete the required information.



- Click **Options** and select **Import Items** option.



- A window will appear where you can choose the **source document**. Select the desired document, then click **OK**.

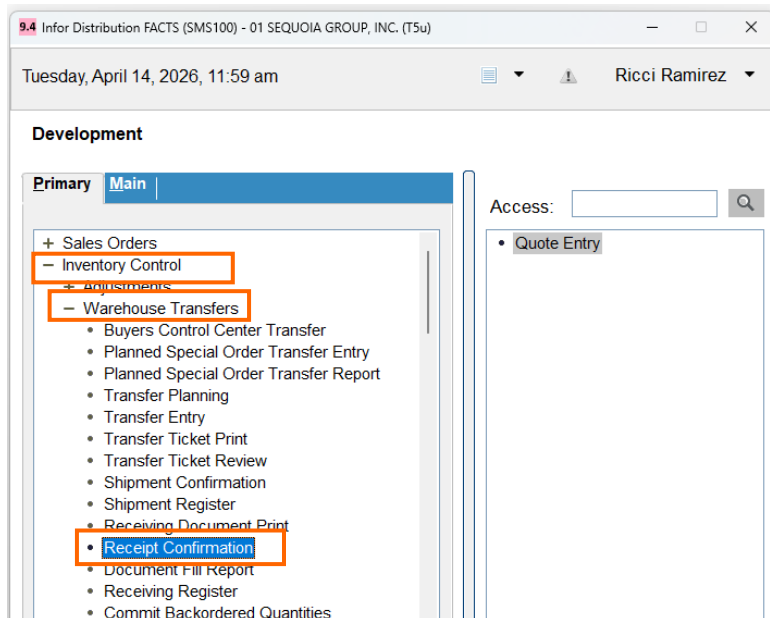


- The system will display a toggling screen. You can review the items from the source document. Toggle **items** on or off to select what to bring over, and edit the **quantities** if needed.

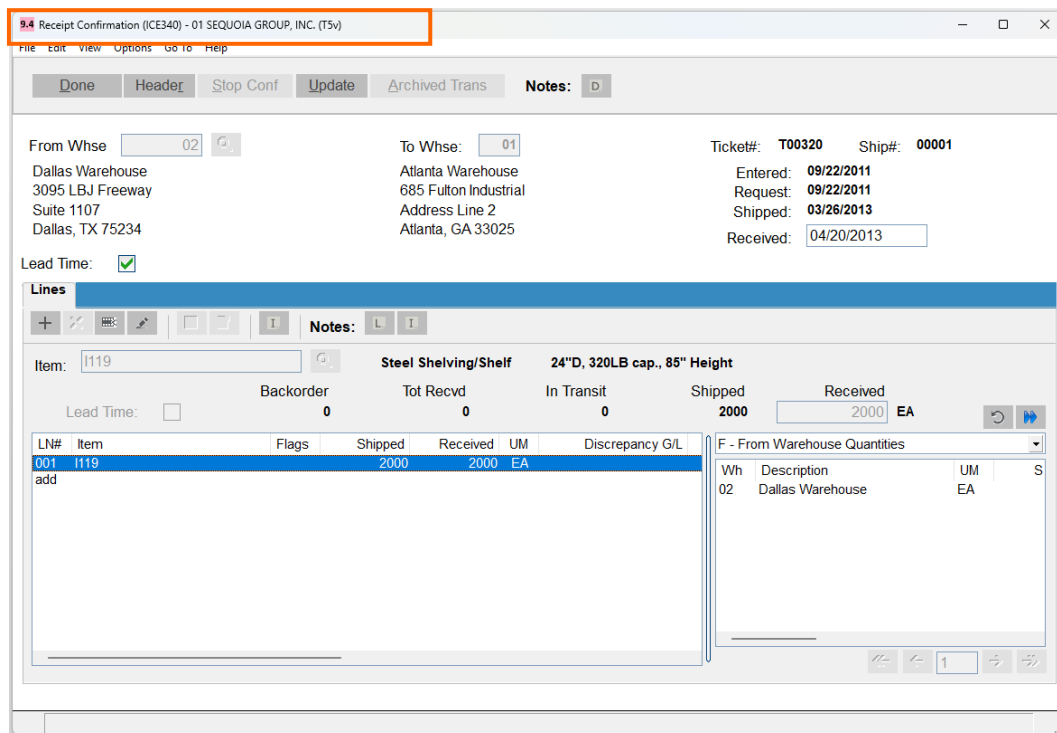
- When finishing entering the information, click **Done** to bring the selected lines into the current transfer ticket.
- On the main ticket screen, the system populates the **Number**, **Line Number**, and **Source** columns. This indicates the lines were imported and not entered manually.

- The same functionality applies in **Receipt Confirmation**.

Navigate to **Inventory Control-> Warehouse Transfers-> Receipt Confirmation**
(program ICE340)



- Select a ticket.



- Just like in **Shipment Confirmation**, you can use the Import Items option to bring in lines from short-term or long-term surplus, or to pull in companion items. This is useful

if an item arrives at the receiving warehouse but was not included on the original outbound ticket.

- Click **Options** and select **Import Items** option.

Receipt Confirmation (ICE340) - 01 SEQUOIA GROUP, INC. (T5v)

File Edit View Options Go To Help

Done Header Detail Import Items Conf Update Archived Trans Notes: D

From Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

To Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

Ticket#: T00320 Ship#: 00001
Entered: 09/22/2011
Request: 09/22/2011
Shipped: 03/26/2013
Received: 04/20/2013

Lead Time:

Lines

Item: 1119 Steel Shelving/Shelf 24"D, 320LB cap., 85" Height

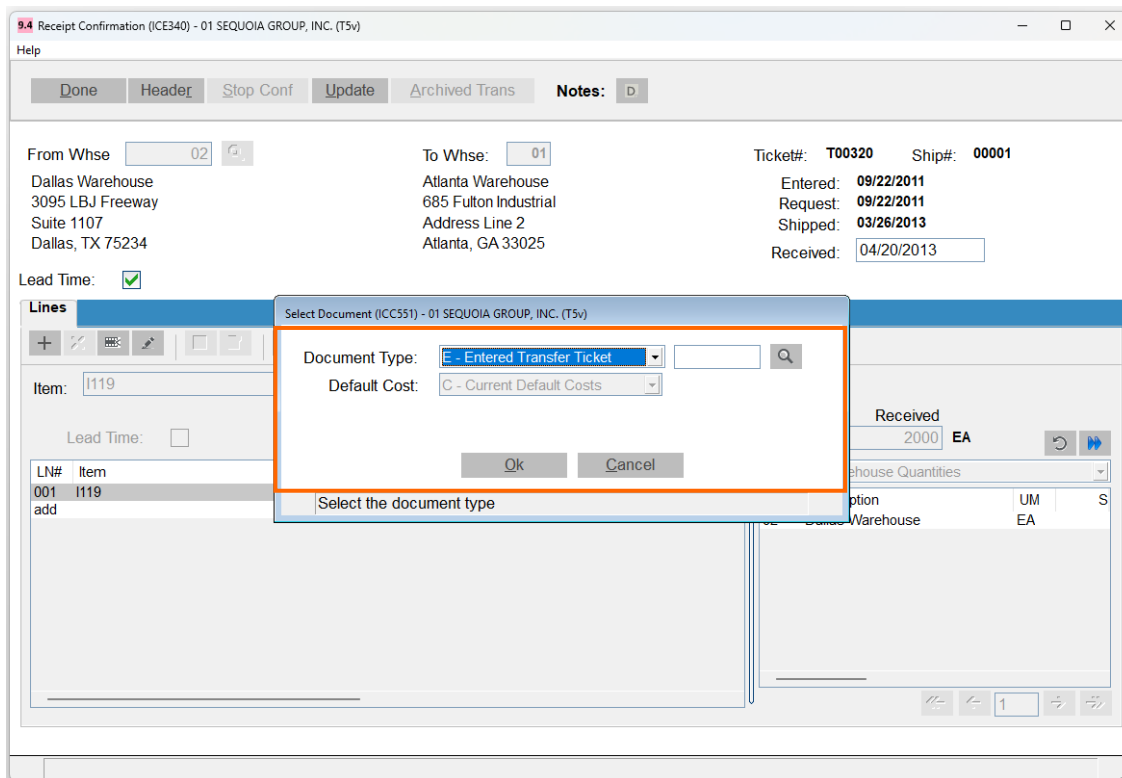
Backorder: 0 Tot Recvd: 0 In Transit: 0 Shipped: 2000 Received: 2000 EA

LN#	Item	Flags	Shipped	Received	UM	Discrepancy G/L
001	1119		2000	2000	EA	
add						

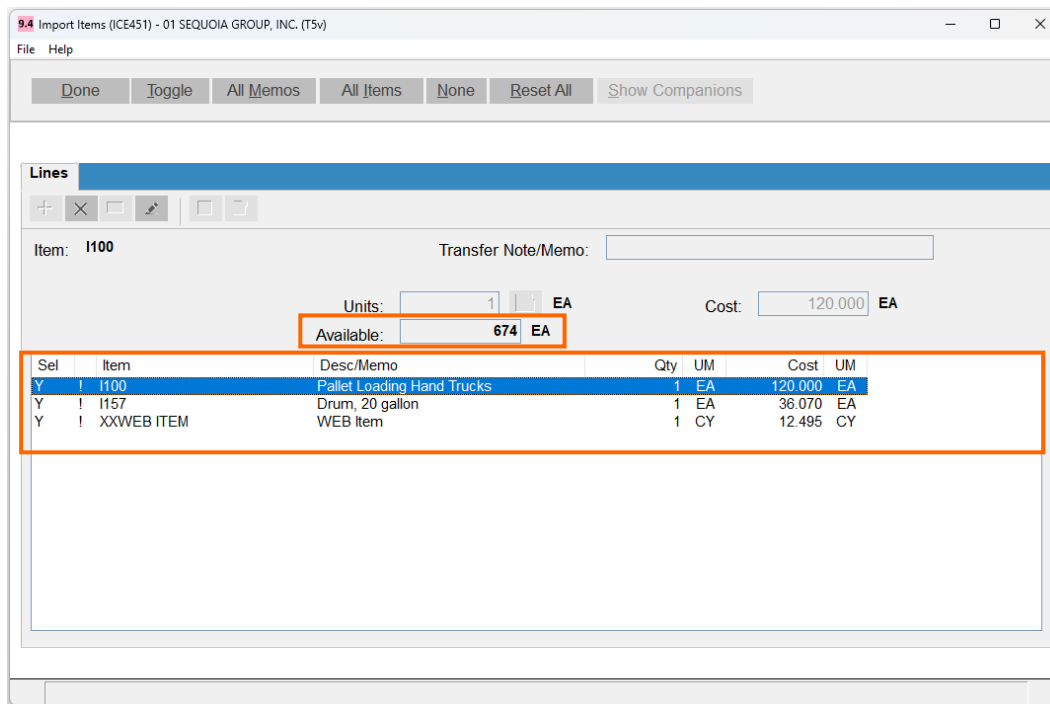
F - From Warehouse Quantities

Wh	Description	UM	S
02	Dallas Warehouse	EA	

- A window will appear where you can choose the **source document**. Select the desired document, then click **OK**.



- The system will display a toggling screen. You can review the items from the source document. Toggle **items** on or off to select what to bring over, and edit the **quantities** if needed.



- When finishing entering the information, click **Done** to bring the selected lines into the current transfer ticket.
- On the main ticket screen, the system populates the **Number, Line Number, and Source** columns. This indicates the lines were imported and not entered manually.

LN#	Item	Fl.	Shipped	Received	UM	Discrepancy	Order#	Ln#	Source	Description 1
001	1100	EA	2	2	EA	535-01-1	T00372	001	Transfer Import	Pallet Loading Hand Trucks
002	1100	EA	2	2	EA	535-01-1	T00372	002	Transfer Import	Pallet Loading Hand Trucks
003	XXWEB ITEM...	CY	2	2	CY	535-01-1	T00372	003	Transfer Import	WEB Item
004	1100	EA	0	1	EA	535-01-1	T00372	004	Transfer Import	Pallet Loading Hand Trucks
005	XXWEB ITEM	CY	0	1	CY	535-01-1	T00372	005	Transfer Import	WEB Item

- Receipt Confirmation and Shipment Confirmation follow the same rules and restrictions:
 - ✓ Standard Transfers are not available because these are confirmation programs, not transfer creation.
 - ✓ The document status controls access. Import Items is only available when the Add button is enabled. If the record is updated, the Add button is not available and Import Items is disabled.
 - ✓ Imported lines cannot be deleted. Once added, the Delete option is disabled, so verify the items before completing the import.

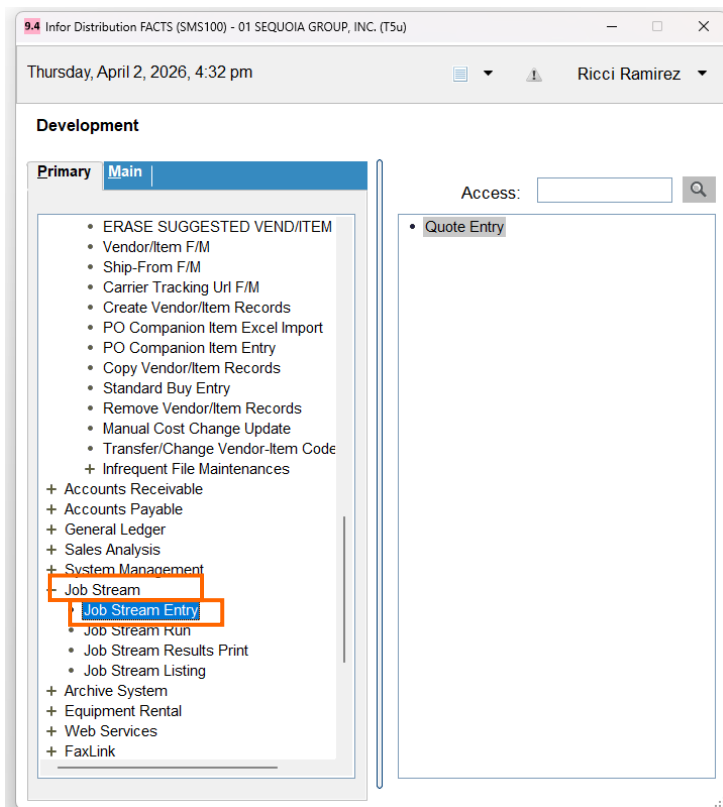
8. Job Stream scheduling as a background process

Job streams can be scheduled to run automatically in the background without manual intervention. Key characteristics include:

- ✓ Job streams run at scheduled times in the background.
- ✓ Once scheduled, the system handles the execution.
- ✓ Use the Background Scheduler Dashboard (SME910) to track runs, view last and next execution times, and adjust schedules.

Benefits:

- ✓ Reduces manual work.
 - ✓ Ensures tasks run on time.
 - ✓ Provides visibility into run history and results.
- To demonstrate this feature, navigate to **Job Stream** → **Job Stream Entry** (program JSE110).



- Open **Job Stream Entry** (program JSE 110)

9.4 Job Stream Entry (JSE110) - 01 SEQUOIA GROUP, INC. (T5y)

File Help

Done Show Ans Chg Ans Move Previous Next Custom Header

Job Stream: Search Trace:

Description:

Background Processing

Background: Months: Days:

Lines

Program: Template:

Error Continue: Run: Trace:

Printer Printer: Special Form: Paper Width: Paper Length:

Change Paper: Number of Parts: Number of Copies: Estimated # Pages: Optional Update: S - Skip update

LN#	Running	Program	Description	Template	C	R	Ptr	SF	Wid	Len	CH	PT	CPY	#PGS	L

- **Job Stream Entry** determines whether a job-stream can be run in the background or not.
- Click the '**Search**' button.

9.4 Job Stream Entry (JSE110) - 01 SEQUOIA GROUP, INC. (T5y)

File Help

Done Show Ans Chg Ans Move Previous Next Custom Header

Job Stream: Search Trace:

Description:

Background Processing

Background: Months: Days:

Lines

Program: Template:

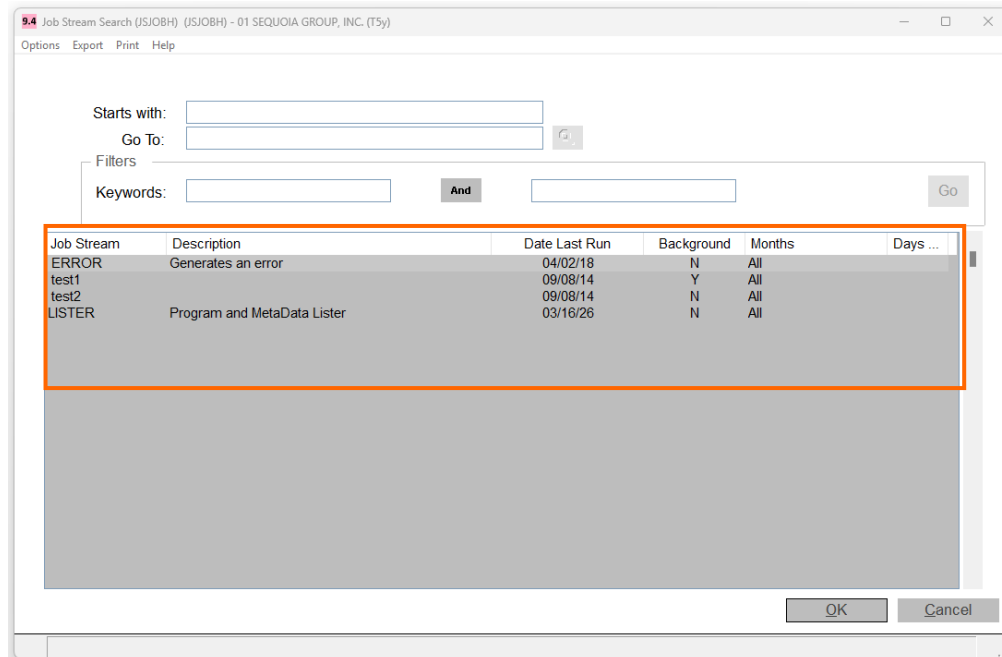
Error Continue: Run: Trace:

Printer Printer: Special Form: Paper Width: Paper Length:

Change Paper: Number of Parts: Number of Copies: Estimated # Pages: Optional Update: S - Skip update

LN#	Running	Program	Description	Template	C	R	Ptr	SF	Wid	Len	CH	PT	CPY	#PGS	L

- A search window appears, allowing you to view and manage all available job streams. For example, select a job stream where the **'Background'** field is set to **'Yes'** (indicated by a **'Y'**) and click **'Ok'**.



- To ensure background processing works correctly, the **Background**, **Months**, and **Days** fields in the Background Processing section must contain valid information.

- If you uncheck the **Background** box, the **Months** and **Days** settings remain unchanged, but the job stream will no longer be processed in the background.

Job Stream: test1 Trace:

Description:

Background Processing

Background: Months: JanFebMarAprMayJunJulAugSepOctNovDec All

Days:

Lines

Program: SMR710 Company Listing Template:

Printer: 0 Change Paper:

Continue: Run: Trace:

Special Form: Paper Width: 8.5 Paper Length: 11.0

Number of Parts: 1 Number of Copies: 1 Estimated # Pages:

Optional Update: S - Skip update

LN#	Running	Program	Description	Template	C	R	Prtr	SF	Wid	Len	CH	PT	CPY	#PGS	U
010		SMR710	Company Listing	james_tes...	Y	Y	0	N	8.5	11.0	N		1	1	S
015		SMR710	Company Listing	derek	Y	Y	0	N	8.5	11.0	N		1	1	S
020		SOR720	Order Status Report	Keven	Y	Y	0	N	8.5	11.0	N		1	1	S
add															

- If you select the **Background** checkbox, a guidance message will appear.


9.4 Job Stream Entry (JSE110) - 01 SEQUOIA GROUP, INC. (T5y)

Help

Done Show Ans Chg Ans Move Previous Next Custom Header

Job Stream: test1 Trace:

Description:

B:  All lines entered 'should' 1) output to file 2) do no updates.

Days:

Lines

Program: SMR710 Company Listing Template: 1-pick test PID

Error Continue: Run: Trace:

Printer Printer: 0 Change Paper:

Special Form: Number of Parts: 1

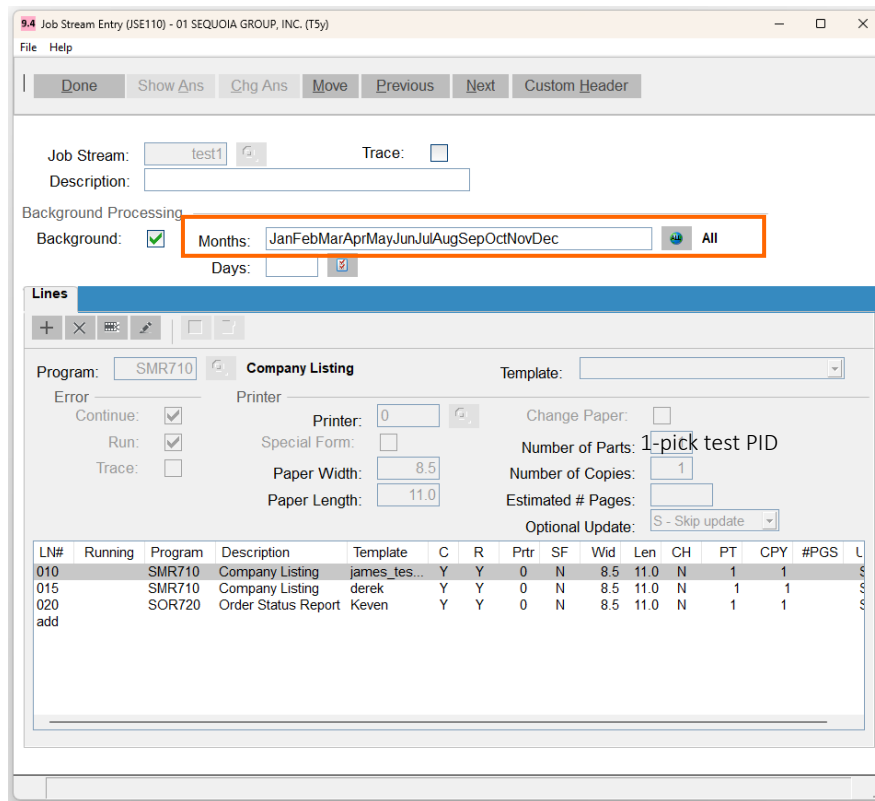
Paper Width: 8.5 Number of Copies: 1

Paper Length: 11.0 Estimated # Pages:

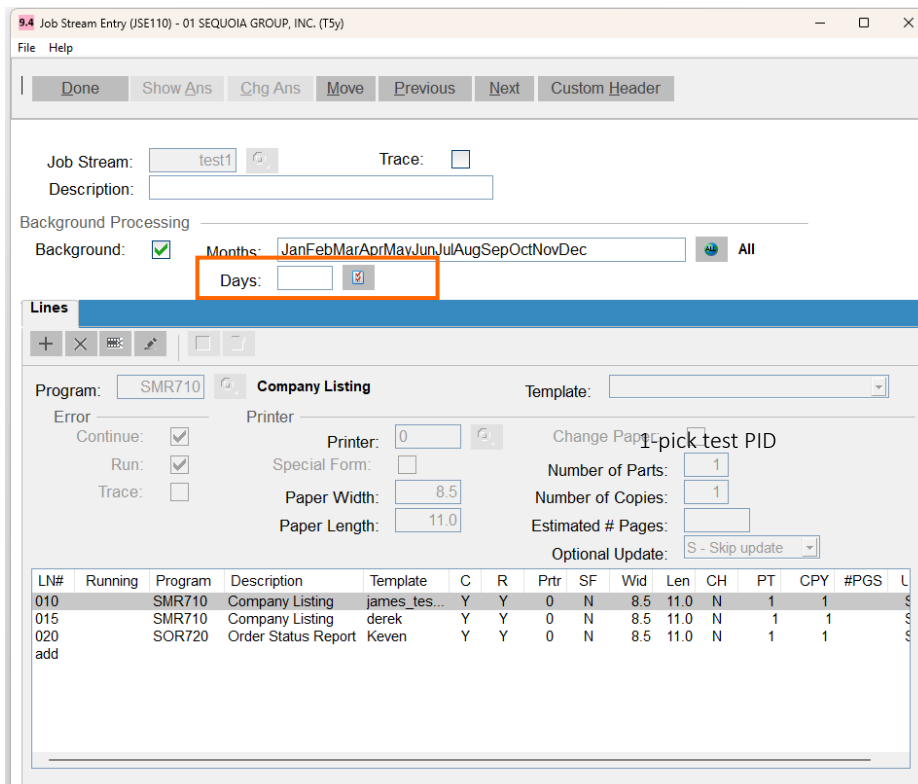
Optional Update: S - Skip update

LN#	Running	Program	Description	Template	C	R	Ptr	SF	Wid	Len	CH	PT	CPY	#PGS	U
010		SMR710	Company Listing	james_tes...	Y	Y	0	N	8.5	11.0	N	1	1		S
015		SMR710	Company Listing	derek	Y	Y	0	N	8.5	11.0	N	1	1		S
020		SOR720	Order Status Report	Keven	Y	Y	0	N	8.5	11.0	N	1	1		S
add															

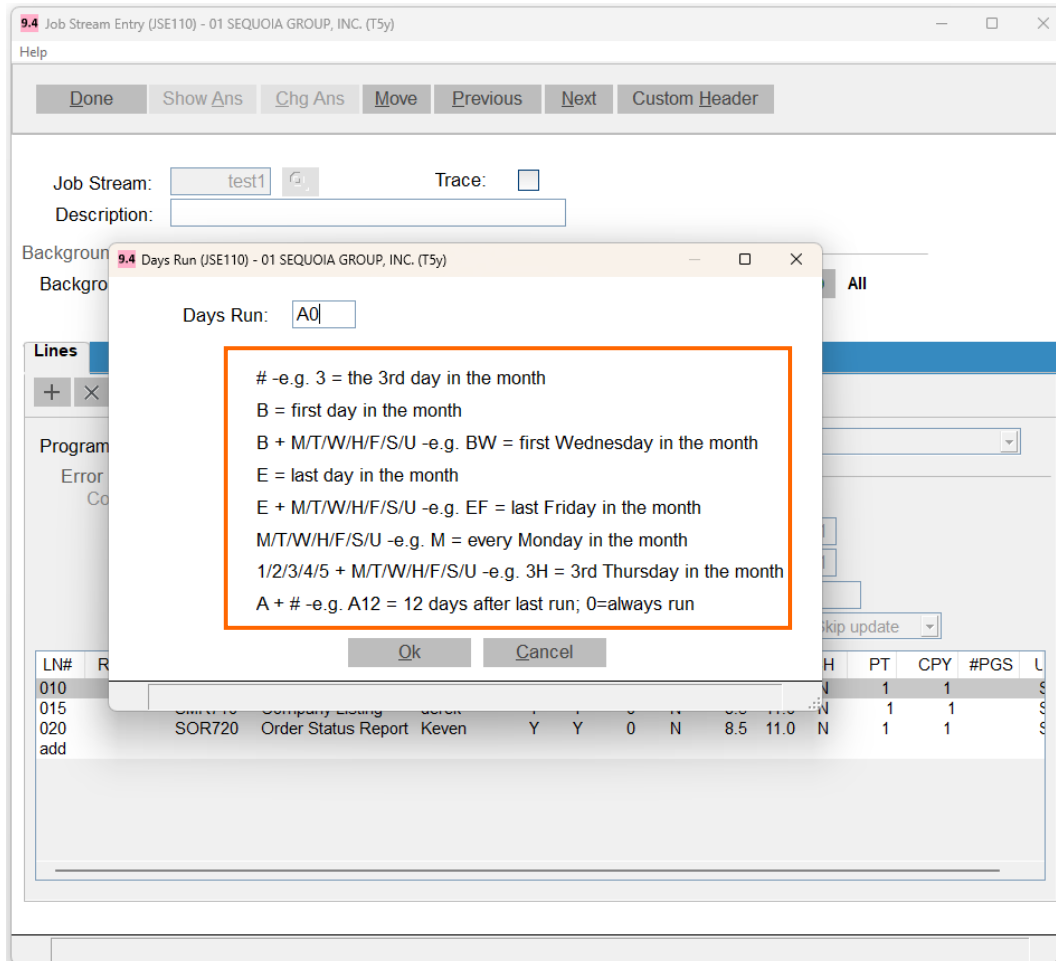
- The message provides guidance on setting up a job stream for execution, specifically:
 - ✓ **Output template:** It advises setting the output template to a file so that the job stream's output can be easily retrieved.
 - ✓ **Optional Update field:** It recommends setting the 'Optional Update' field to Skip when running a job stream in the background. This is to prevent potential issues with incomplete updates causing system instability if the background process fails or encounters an error.
- The **'Months'** field requires a three-character abbreviation (e.g., Jan, Feb, Mar) for the months during which the job stream is allowed to run in the background.



- The 'Days' field is a code that determines which day(s) in a month are valid for running this job stream.

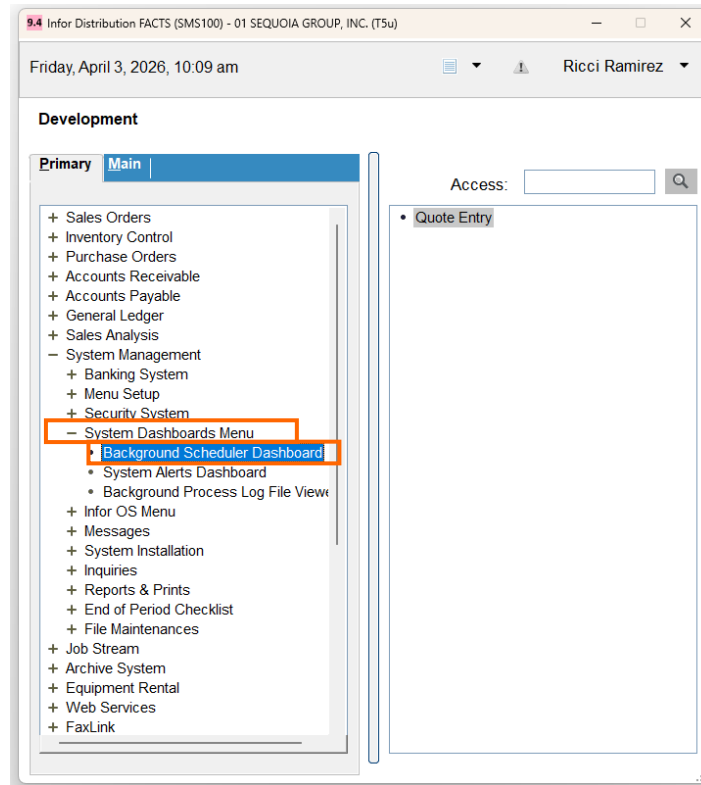


- If you click on the icon with the double red ticks, you can look up the available codes.

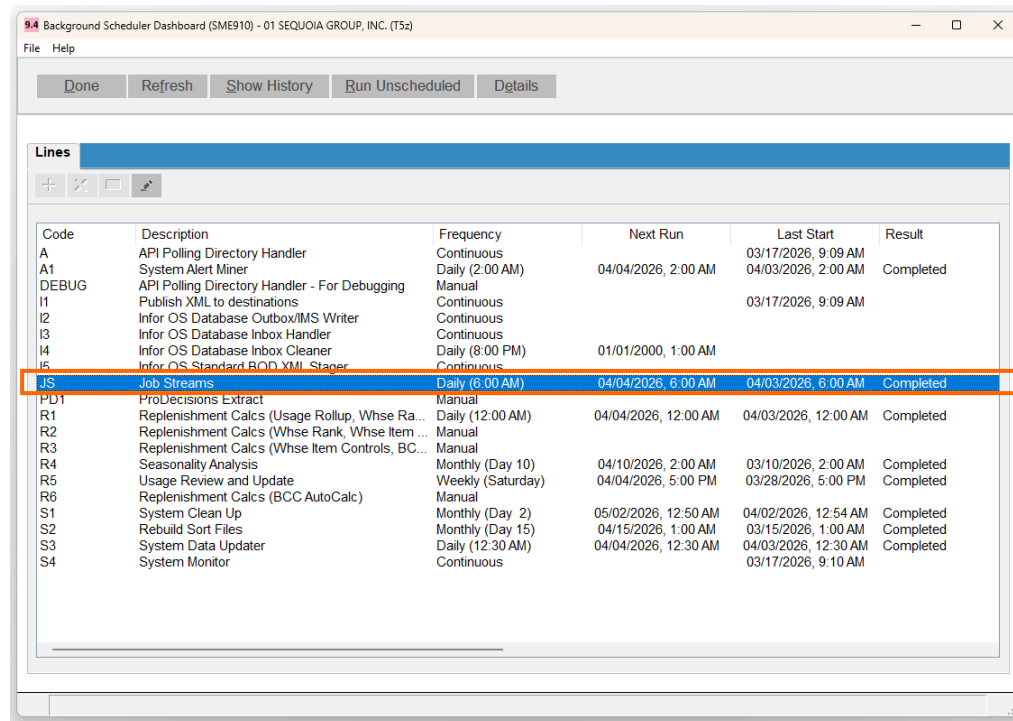


**The 'Background', 'Months', and 'Days' fields are evaluated by the background processor when running job stream (JS).*

- Access the Background Scheduler Dashboard by **navigating to System Management -> Background Scheduler Dashboard** (program SME910).



- Open the **Background Scheduler Dashboard** window



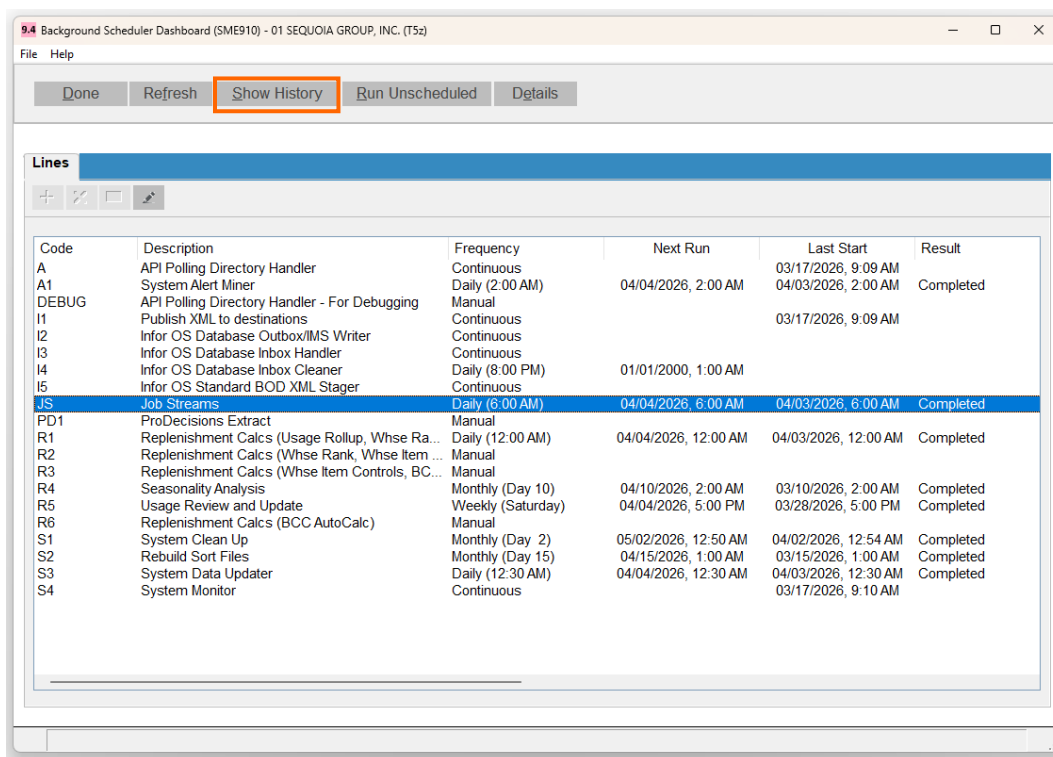
- The 'JS' code searches for a valid job stream in the Job Streams Entry window and launches it (if found) in its own process ID.

For example, if we have two job streams that are both scheduled to run today and set to 'Yes' to run in the background, each will have its own unique process ID. There is no guarantee which one will start first or complete before the other.

The unique IDs indicate that these processes can run asynchronously, meaning they may not finish in a specific order.

To avoid potential issues with dependencies between job streams, it's recommended that job streams with interdependent tasks are scheduled separately, either on different days or both should be within the same particular Job Stream identifier code

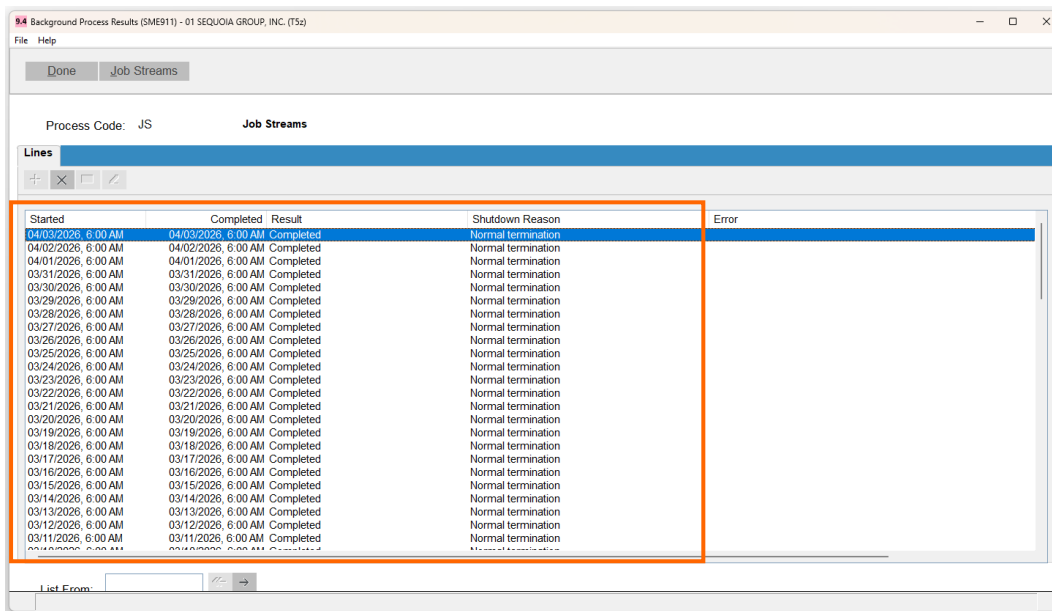
- The **'Show History'** button displays the job stream history for the current **'JS'** code.



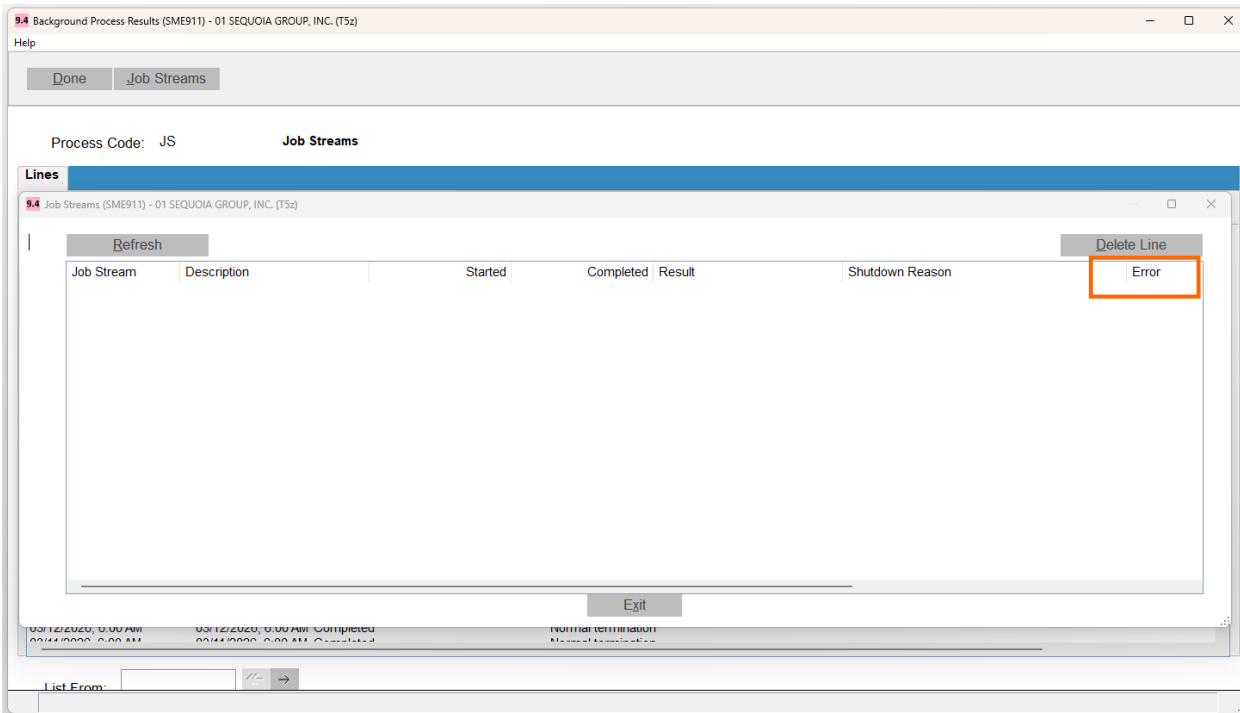
The screenshot shows a web application window titled "Background Scheduler Dashboard (SME910) - 01 SEQUOIA GROUP, INC. (T5z)". The interface includes a menu bar with "File" and "Help", and a toolbar with buttons for "Done", "Refresh", "Show History" (highlighted with a red box), "Run Unscheduled", and "Details". Below the toolbar is a section labeled "Lines" with a blue header and a table of job streams. The table has columns for Code, Description, Frequency, Next Run, Last Start, and Result. The "JS" row is highlighted in blue.

Code	Description	Frequency	Next Run	Last Start	Result
A	API Polling Directory Handler	Continuous		03/17/2026, 9:09 AM	
A1	System Alert Miner	Daily (2:00 AM)	04/04/2026, 2:00 AM	04/03/2026, 2:00 AM	Completed
DEBUG	API Polling Directory Handler - For Debugging	Manual			
I1	Publish XML to destinations	Continuous		03/17/2026, 9:09 AM	
I2	Infor OS Database Outbox/IMS Writer	Continuous			
I3	Infor OS Database Inbox Handler	Continuous			
I4	Infor OS Database Inbox Cleaner	Daily (8:00 PM)	01/01/2000, 1:00 AM		
I5	Infor OS Standard BOD XML Stager	Continuous			
JS	Job Streams	Daily (6:00 AM)	04/04/2026, 6:00 AM	04/03/2026, 6:00 AM	Completed
PD1	ProDecisions Extract	Manual			
R1	Replenishment Calcs (Usage Rollup, Whse Ra...	Daily (12:00 AM)	04/04/2026, 12:00 AM	04/03/2026, 12:00 AM	Completed
R2	Replenishment Calcs (Whse Rank, Whse Item ...	Manual			
R3	Replenishment Calcs (Whse Item Controls, BC...	Manual			
R4	Seasonality Analysis	Monthly (Day 10)	04/10/2026, 2:00 AM	03/10/2026, 2:00 AM	Completed
R5	Usage Review and Update	Weekly (Saturday)	04/04/2026, 5:00 PM	03/28/2026, 5:00 PM	Completed
R6	Replenishment Calcs (BCC AutoCalc)	Manual			
S1	System Clean Up	Monthly (Day 2)	05/02/2026, 12:50 AM	04/02/2026, 12:54 AM	Completed
S2	Rebuild Sort Files	Monthly (Day 15)	04/15/2026, 1:00 AM	03/15/2026, 1:00 AM	Completed
S3	System Data Updater	Daily (12:30 AM)	04/04/2026, 12:30 AM	04/03/2026, 12:30 AM	Completed
S4	System Monitor	Continuous		03/17/2026, 9:10 AM	

- If you click the **Show History** button, you can view a record of all previously run job streams.

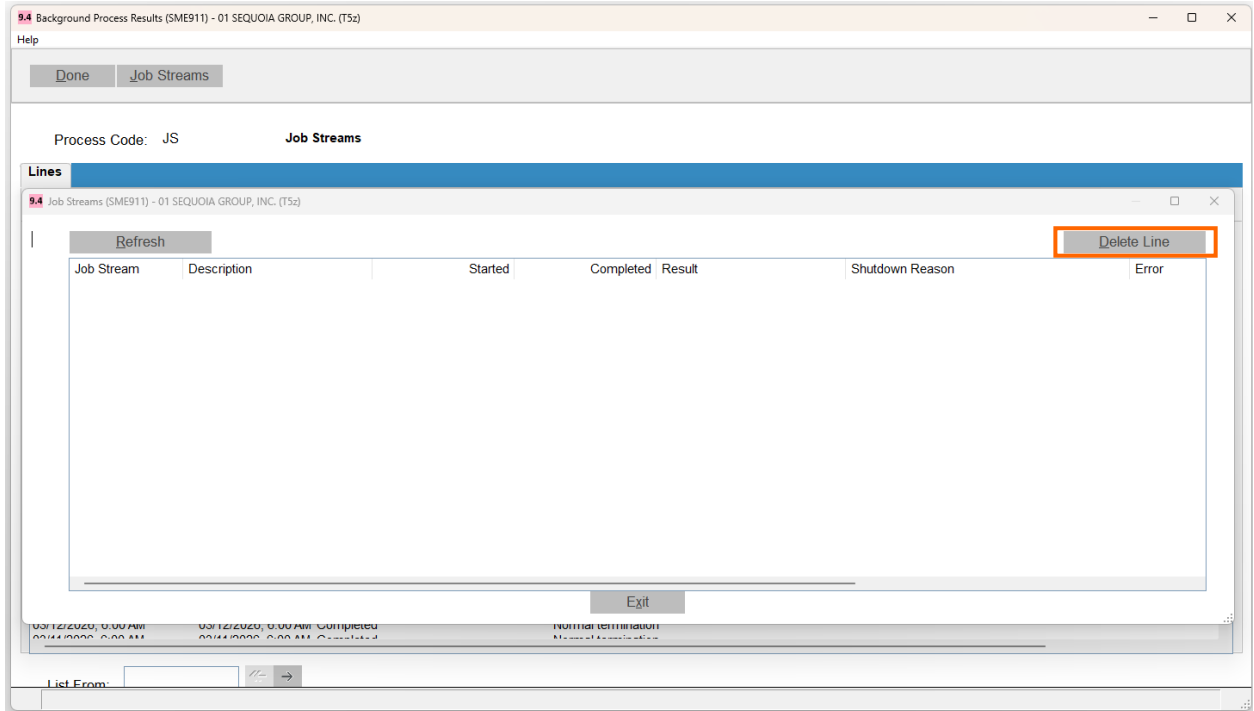


- When you click on the 'Job Streams' button, you can view details for each specific job stream that has been processed, including the outcome. If any errors occurred, they will be indicated in the 'Error' column.



- If errors occur in any of the job streams, they must be addressed and resolved before the JS code can run again. Otherwise, the entire process will fail to execute.

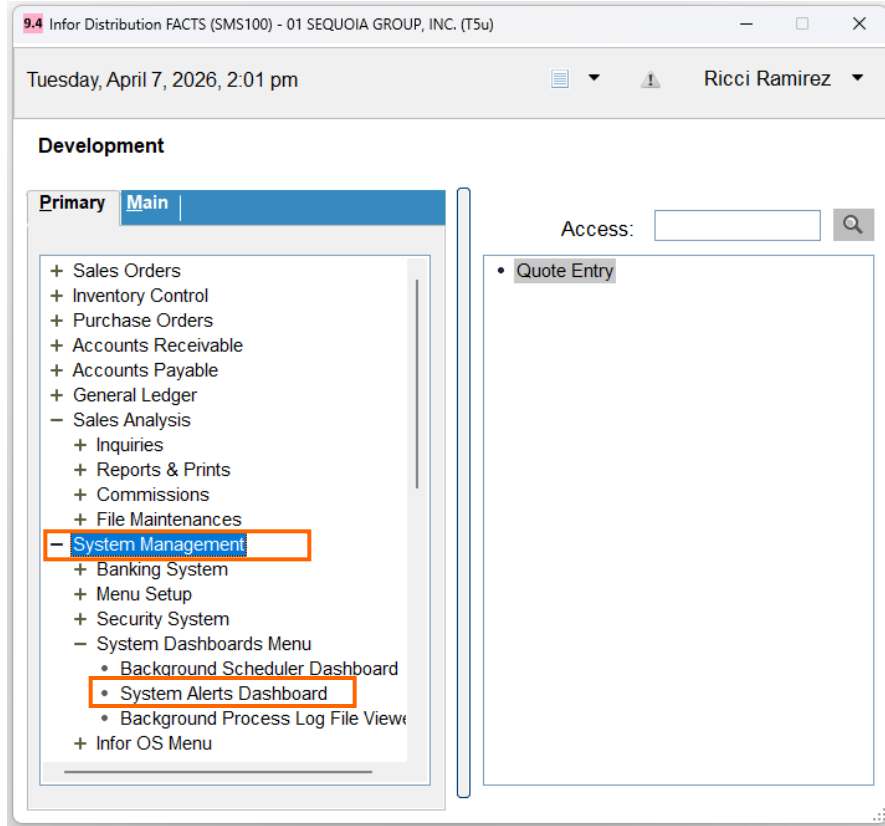
- You can use the '**Delete Line**' button to remove the error record from the history, allowing the affected job stream to be re-run by the background processor. Additionally, you must also ensure that any related result files are cleaned up to prevent further issues.



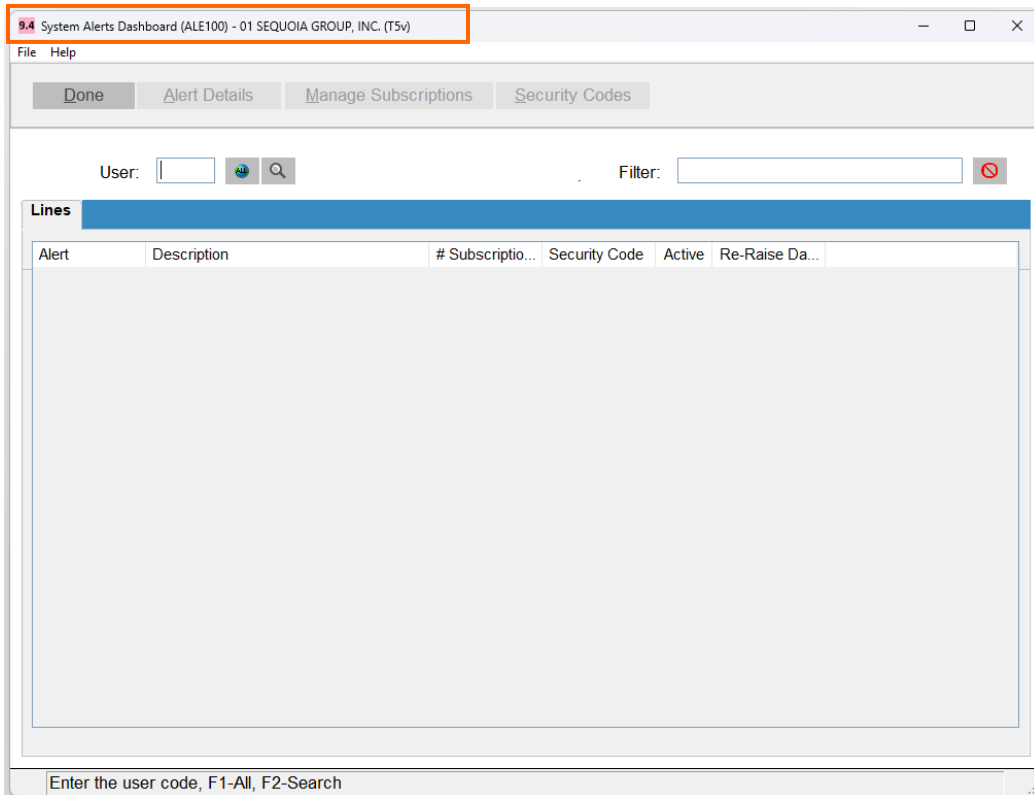
8.1 Job Stream alert (alerts for various events with running job streams)

A **Job Stream alert** is a system-generated notification that is raised each time a job stream is processed by the background process. The alert is delivered to every user who has subscribed to the **Job Stream alert** type and can be viewed, dismissed or manually deleted from the **Alert Control Center (ACC)**.

- Navigate to **System Management->System Dashboards Menu->System Alerts Dashboard** (program ALE100)



- Open System Alerts Dashboard



- In the **User** field, enter a user.

System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5v)

User: **RR** Ricci Ramirez

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	0		No	0
ALERT-FM	File Maintenance Process Detected	0		Yes	0
API-TIME	API Timeout	0		Yes	0
APIERROR	Notification of an API failing during proce...	0		Yes	0
AR-CRDLIM	Customer Over Credit Limit Alert	0		Yes	0
AR-PYMTDUE	Customer Payment Due or Past Due Al...	0		Yes	0
BK-I1 DXML	Delivery of XML in Background Procedu...	0		Yes	0
BK-I2 CERR	Connection error to Infor OS database	0		Yes	0
BK-I2 OUT	Delivery of XML to Infor OS failure	0		Yes	0
BK-IMS CER	IMS Connection error	0		Yes	0
CrdHold	Notification of SO Credit Hold/Release	0		Yes	0
CustHold	Customer Hold	0		Yes	0
DbtHoldPO	Notification of PO Debit Hold/Release	0		Yes	0
DirectFO	Direct Ship PO	0		Yes	0
DocDelFail	Doc Delivery Failure	0		Yes	0
ERR XMLGEN	Build of XML in background procedure f...	0		Yes	0
ERROR	An error occurred in FACTS	0		Yes	1
EmFail	Email Failure	0		Yes	0
FLDCHANGE	Field Change Detected	0		Yes	0
GL-IMPORT	GL Journal Entry Imported via API Access	0		Yes	1
IC-5HI	5-Hi Order Point Maximum Dollar Increa...	0		Yes	14
IC-ABLTPO	Abnormal Lead Time on a PO	0		Yes	7
IC-ABLTTR	Abnormal Lead Time on a Transfer	0		Yes	7
IC-ABUSAGE	Abnormal Usage	0		Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0		Yes	14

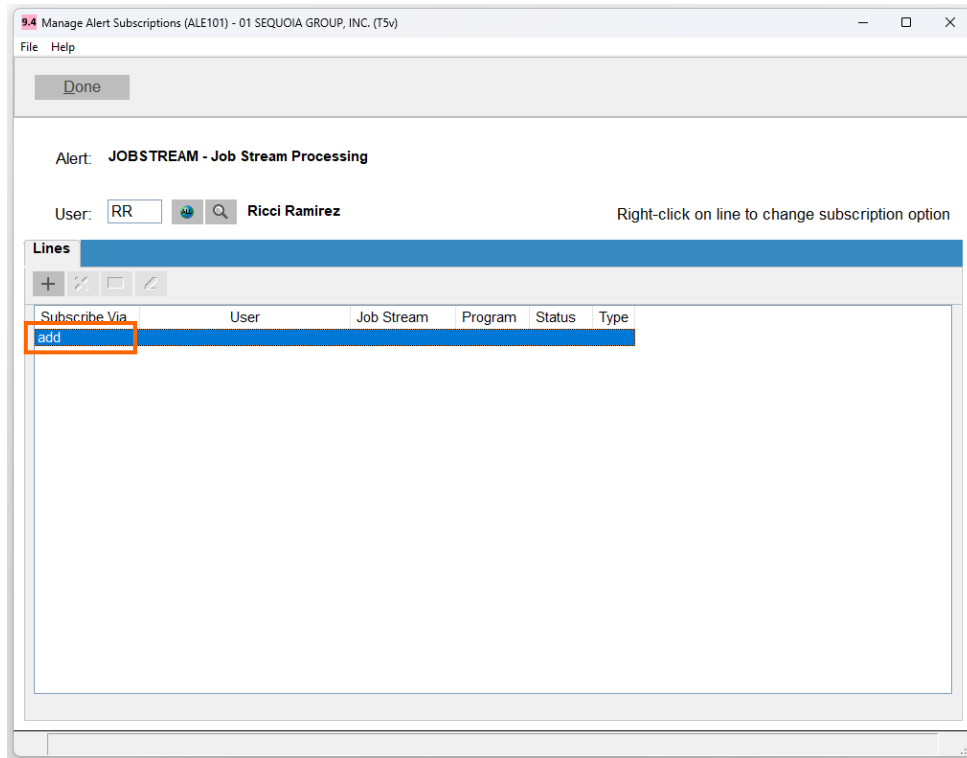
- Select the **JOBSTREAM** line.

System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5v)

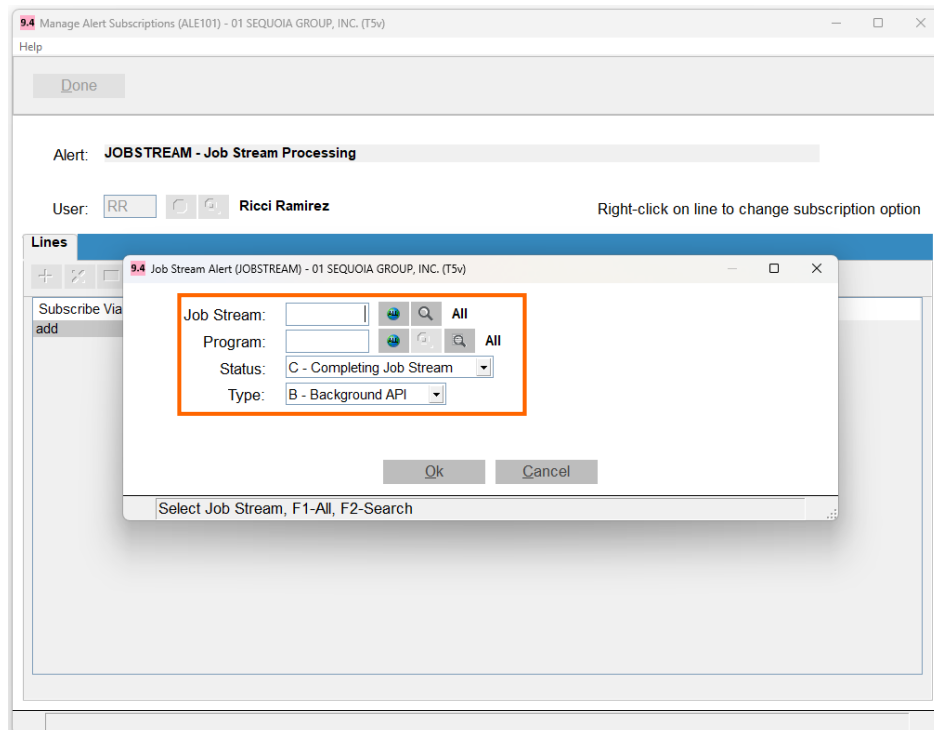
User: **RR** Ricci Ramirez

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
IC-STLSTR	Planned Special Order Transfer is Stale	0		Yes	1
IC-TREARLY	Transfer to Arrive Too Early	0		Yes	3
IC-TRLATE	Transfer to Arrive Too Late for Demand	0		Yes	3
IC-TRNDLIM	Seasonal Trending Limits Applied	0		Yes	30
IC-VENDCRO	Vendor Credit Overdue	0		Yes	7
IC-VENDRNR	Vendor Return Not Received	0		Yes	7
IOSRODIN	Infor OS CE BOD incoming via I3 back	0		Yes	0
JOBSTREAM	Job Stream Processing	0		Yes	0
LISRP-EXC	Notification of item's available quantity e...	0		Yes	0
MCBOMInAPI	Notification of MC BOM ticket arriving vi...	0		Yes	0
MCFMLInAPI	Notification of MC FML ticket arriving via...	0		Yes	0
OrderInAPI	Notification of Sales Order document ar...	0		Yes	0
PGMLAUNCH	Program Launch Detected	0		Yes	0
PMHold	PM Project billing on hold	0		Yes	7
PO-RCPTISS	PO Receipt Issue	0		Yes	0
PO-RCPTRTN	PO Receipt Return	0		Yes	0
PO-SPECORD	Special Order Receipt Alert	0		Yes	0
POCITEM	Notification of PO companion item's up...	0		Yes	0
PRHours	PTO hours will be exceeded	0		Yes	14
PlanReqMCB	Notification of BOM Planning Request	0		Yes	0
PlanReqMCF	Notification of Formula Planning Request	0		Yes	0
PlanReqPO	Notification of Purchase Planning Requ...	0		Yes	0
PlanReqSO	Notification of Order Planning Request	0		Yes	0
PlanReqTR	Notification of Transfer Planning Request	0		Yes	0
PreAuthExp	Pre-auth Credit Card Transaction is Ex...	0		Yes	1

- A window will appear showing any existing subscriptions.
- To add a subscription, click **Add**.



- A window will appear with four fields where you can add a subscription.

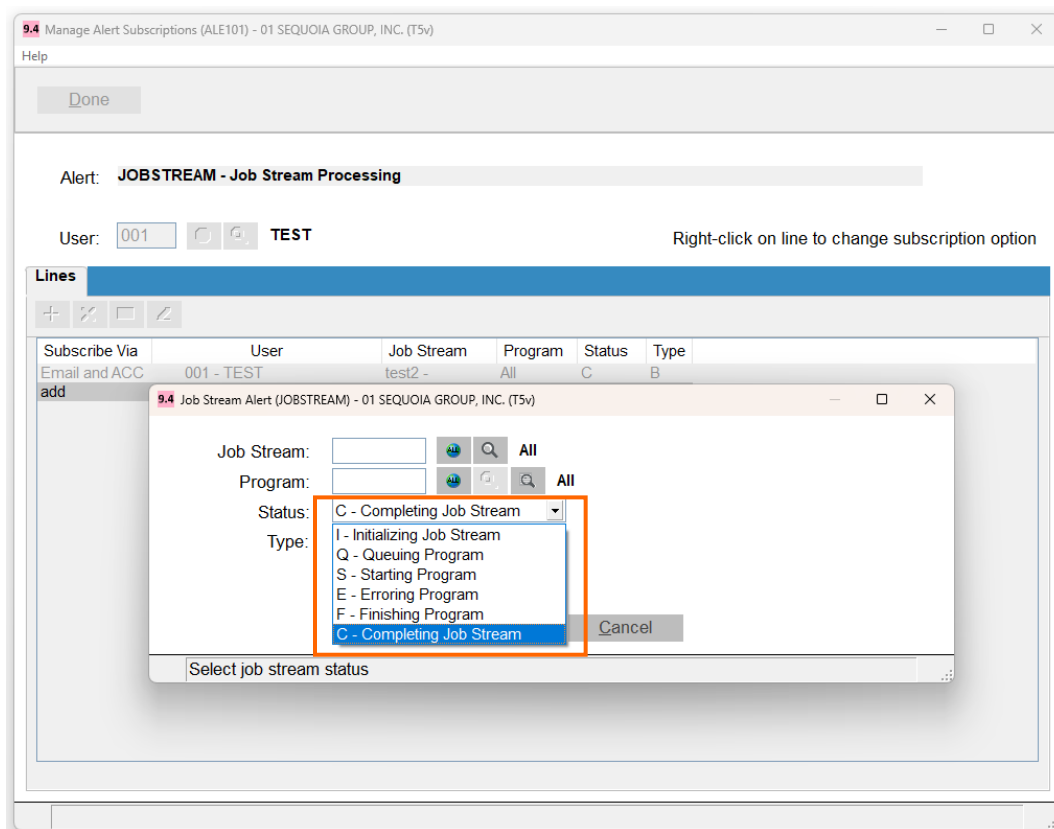


The **Job Stream** field allows you to subscribe to all job streams that have run or to select a specific job stream. For this example, select All.

In the **Program** field, you can view all valid programs. If you select a specific job stream in the Job Stream field, the Program field will update to show only the programs available for that job stream.

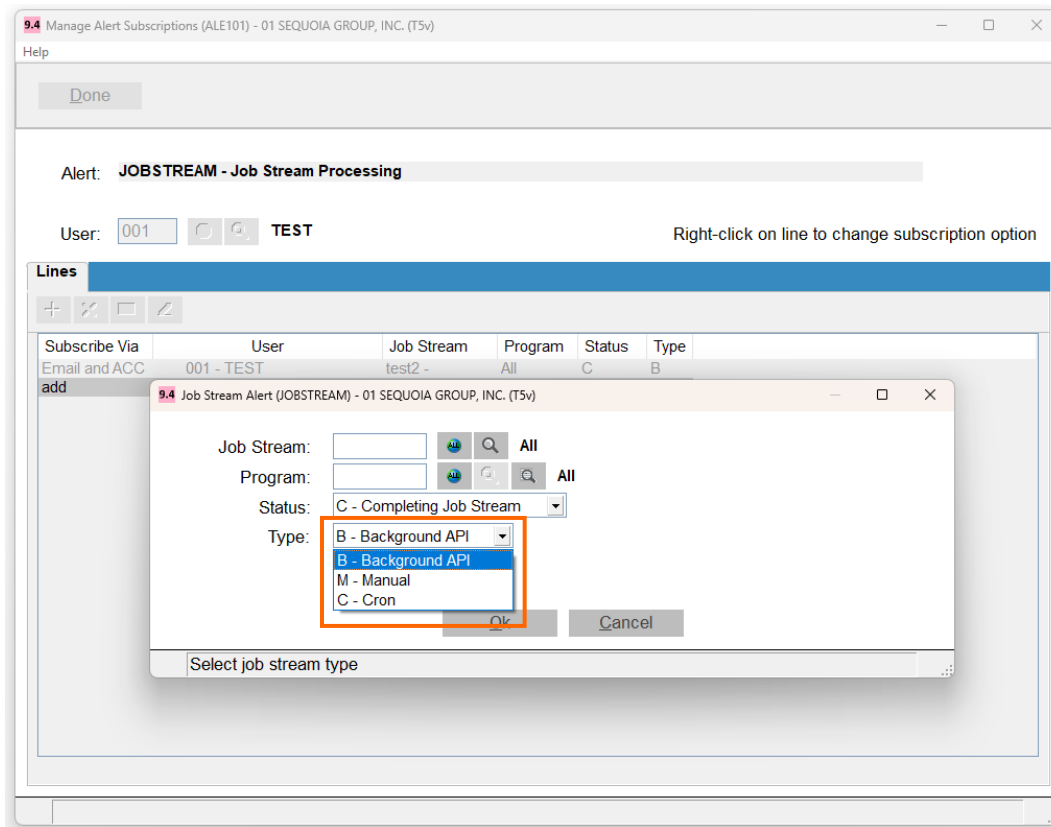
The **Status** field refers to the job stream status. There are six possible statuses.

- ✓ **I – Initializing Job Stream:** The job stream has been picked up and is starting.
- ✓ **Q – Queuing Program:** This status is used to start all selected programs.
- ✓ **S – Starting Program:** Indicates that the program has passed the queuing evaluation process. During this process, the system checks prior run results and may skip the program if it previously ended in error.
- ✓ **E – Erroring Program:** If an error is returned to the job stream, it can be caught and an alert can be sent to subscribed users.
- ✓ **F – Finishing Program:** Indicates that the program line is finishing.
- ✓ **C – Completing Job Stream:** Indicates that all programs in the job stream have been executed and the job stream is in the process of completing.



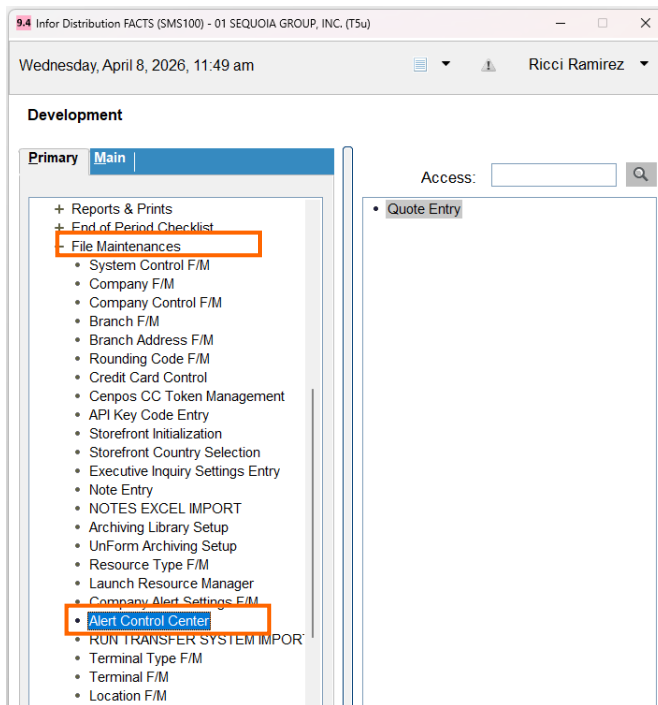
The **Type** field refers to how the program was executed. There are three options:

- ✓ **B – Background API:** The program was run in the background.
- ✓ **M – Manual:** The program was run manually from the Job Stream menu.
- ✓ **C – Cron:** The program was run by a CRON job, based on environment variable checks.



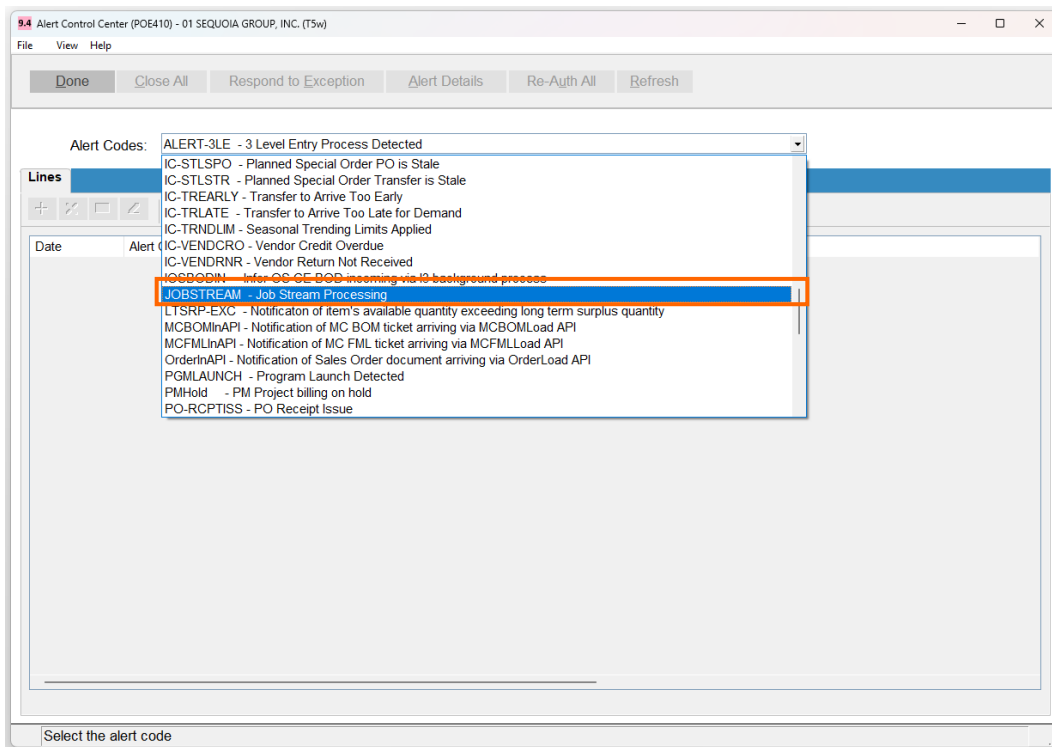
After running the **Job Stream (JS)** Background process ID, alerts are generated for those runs.

- Navigate to **System Management** → **File Maintenances** → **Alert Control Center** (program POE410)

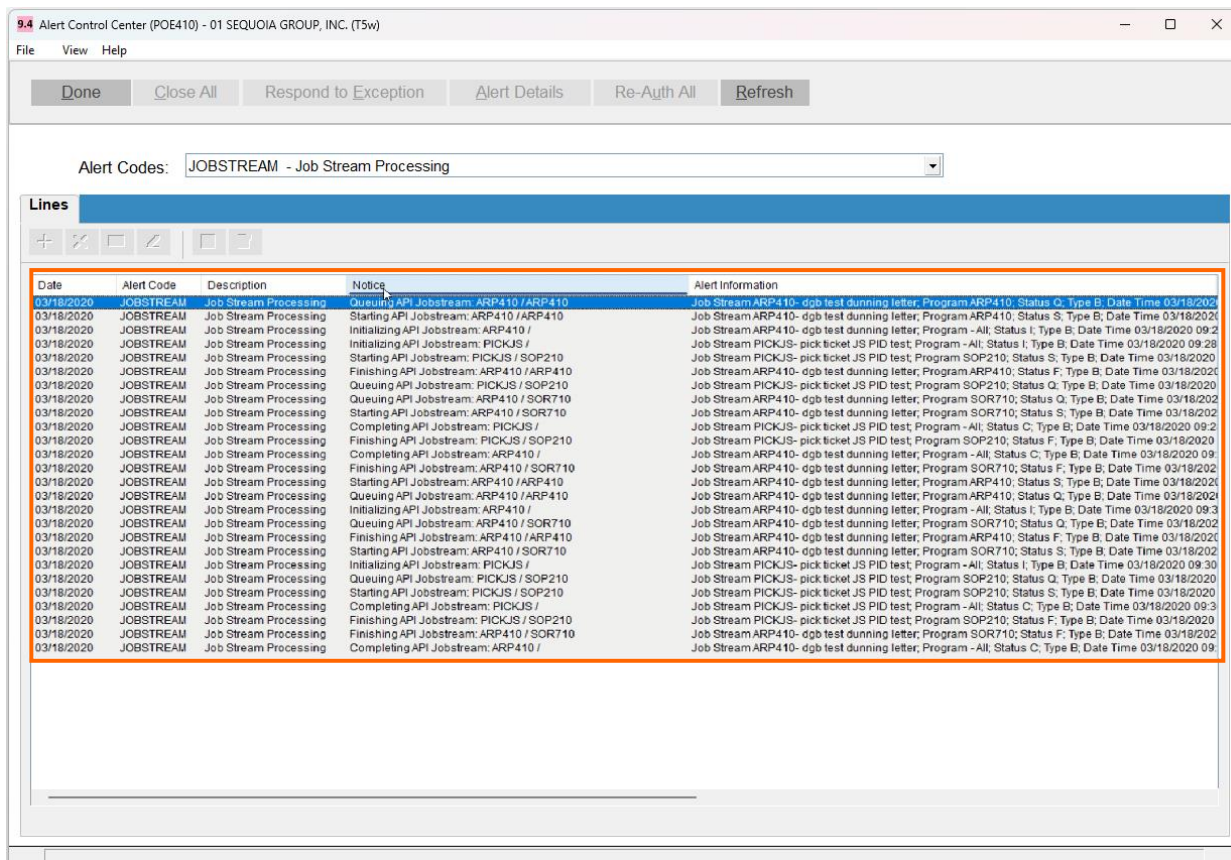


The **Alert Control Center** is the dedicated screen where Job-Stream alerts are displayed, reviewed, and managed.

- In the **Alert Codes** field, select **JOBSTREAM** to filter the alerts.



- A window showing all the job streams that have run is going to appear.



- In this window, review the information for each program in the job stream. If an error occurs, the alert will show which program was being processed at that moment.

9. Order Priority: Normal, Rush, Service Hold

Order Priority has been available in Sales Orders for a long time. With FACTS 9.4, this functionality was expanded to include Purchase Orders, Warehouse Transfers, Bill of Materials Production, and Formulation Production.

✓ **Rush Priority:**

When a document in any of these modules is set to **Rush**, it triggers a specific rush text to print at the top of the generated ticket (e.g., ‘Rush Purchase,’ ‘Rush Ticket,’ ‘Rush Build’). This text is no longer hardcoded and can be customized for each module within its respective static control settings (e.g., PO Static Control, Inventory Static Control).

Additionally, when generating Purchase Orders from special orders in the Buyer Control Center, the **Rush** flag can automatically carry over to the newly created Purchase Order.

✓ **Service Hold:**

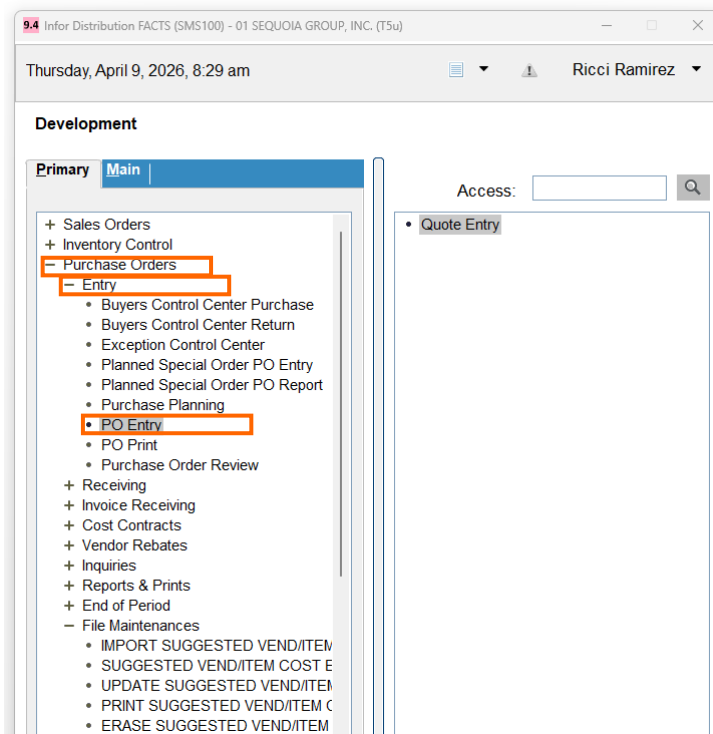
Placing a document on **Service Hold** acts as a full stop for processing. First, it prevents the ticket from printing entirely. Second, it blocks downstream actions. For example, a Purchase Order on Service Hold cannot be accessed in Receipt Entry, and transfer, BOM, or formulation tickets cannot be confirmed while on hold.

This ensures the document remains on hold until all necessary preliminary tasks have been completed.

- The following examples demonstrate this functionality.

9.1 Order Priority: Purchase Orders

- Navigate to **Purchase Orders → Entry → PO Entry** (program POE120).



- Create a new entry.

9.4 Purchase Order Document 001576 General Industrial MFG (POE120) - 01 SEQUOIA GROUP, INC. (T5x)

Vendor: V100 General Industrial MFG
 Ship From: SAME
 9610 Dunwoody, Pl.
 Suite 133-134
 Atlanta, GA 30338

Ship-to Whse: 01 Atlanta Warehouse
 Edit Address
 685 Fulton Industrial
 Address Line 2
 Atlanta, GA 33025

PO#: 001576
 Ordered: 04/09/2026
 Requested: TBD
 Promised: TBD
 Terms: 02 2% 10th Net 30

Buyer: 200 Sally Furne Lead Time: Contact: 10025 Mr. Kevin Larson Confirmed: Replenishment Doc:

LN#	Item	Flags	Description	Units	UM
001	Z3X3X3/16 PRIMED		3 X 3 X 3/16 PRIMED LINNEAL	5.00	FT

Ext.: 11.40

- In this example, after accessing Header, the Priority is set to Rush.

9.4 Header Detail for Purchase Order 001576 General Industrial MFG (POE120) - 01 SEQUOIA GROUP, INC. (T5x)

Standard

Vendor: V100 General Industrial MFG
 Ship From: SAME
 General Industrial MFG
 9610 Dunwoody, Pl.
 Suite 133-134
 Atlanta, GA 30338

Ship-to Whse: 01 (Warehouse Ship)
 Edit Address
 Atlanta Warehouse
 685 Fulton Industrial
 Address Line 2
 Address Line 2a
 Atlanta, GA 33025

Ordered: 04/09/2026 Requested: TBD Promised: TBD
 Confirmed: Replenishment Doc:

Codes

Freight: P - Prepaid
 Ship Via:
 FOB: Atlanta

Reference #:
 Memo:

Buyer: 200 Sally Furness
 Terms: 02 2% 10th Net 30
 Lead Time:

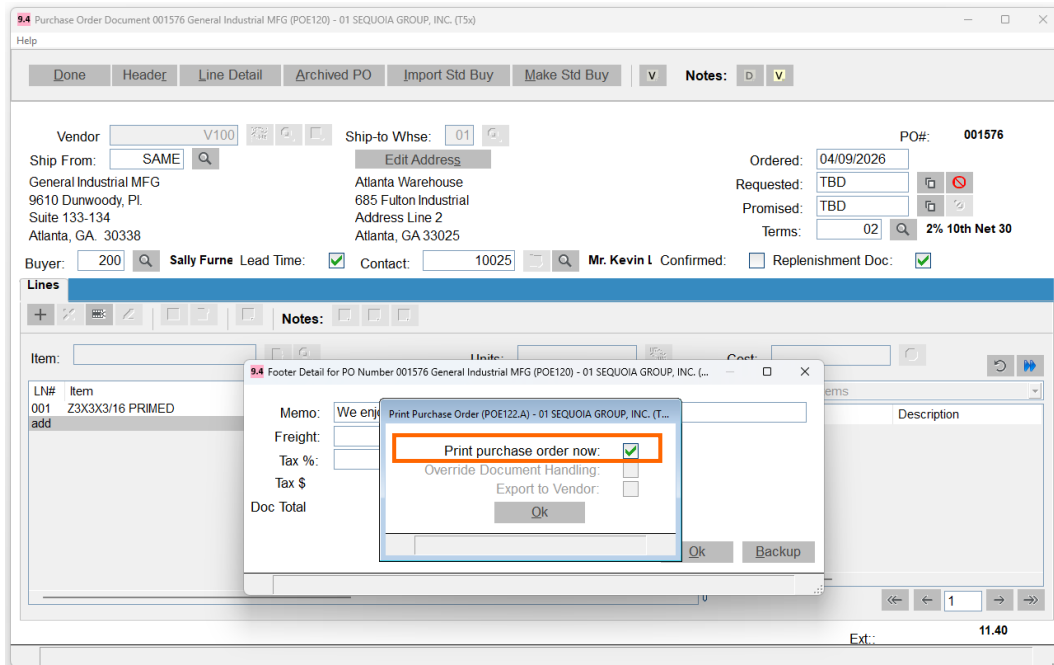
Priority: R - Rush
 N - Normal
 R - Rush
 H - Service Hold

Contact: Mr. Kevin Larson

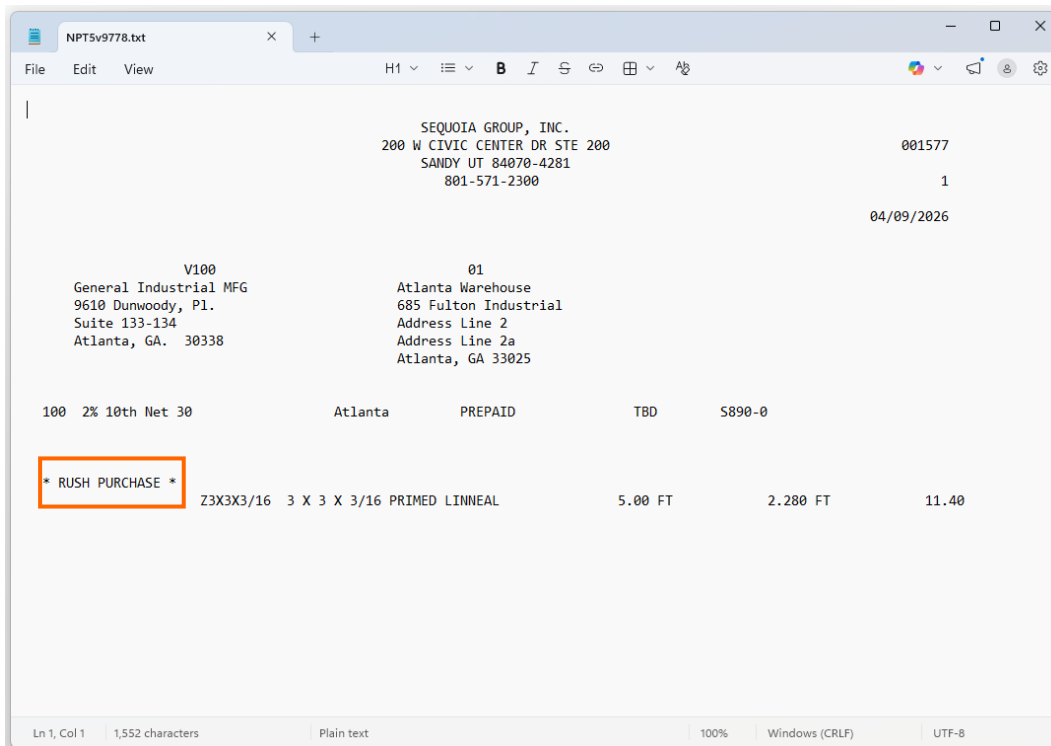
OK Cancel

Enter the priority

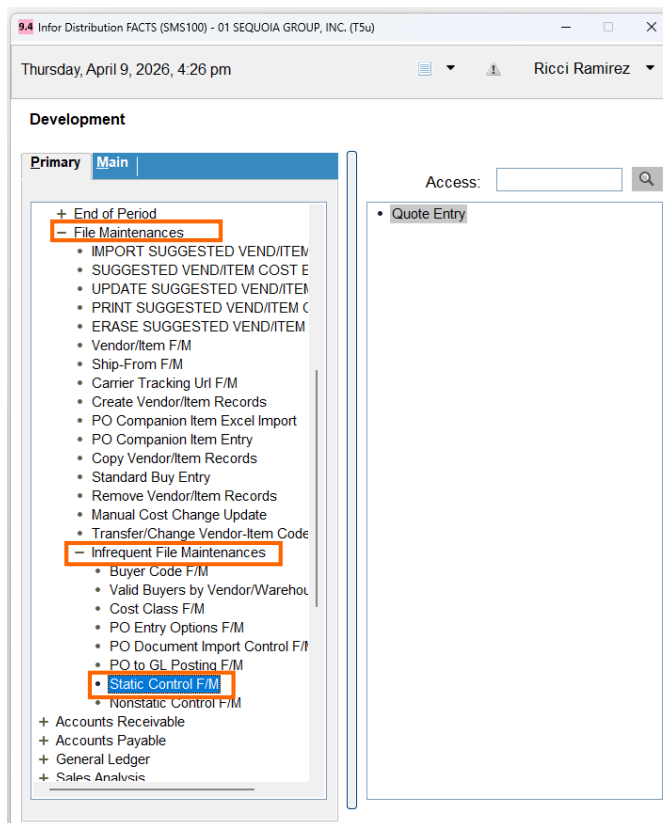
- Complete the document to proceed.



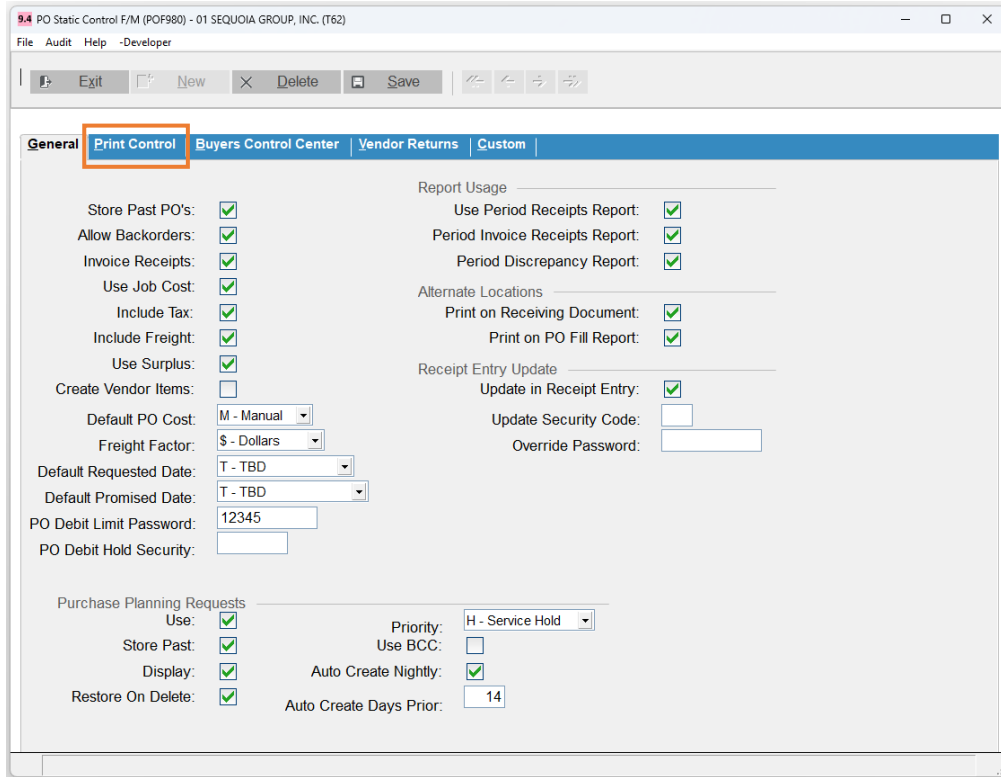
- When the purchase order is printed, the order priority is displayed.



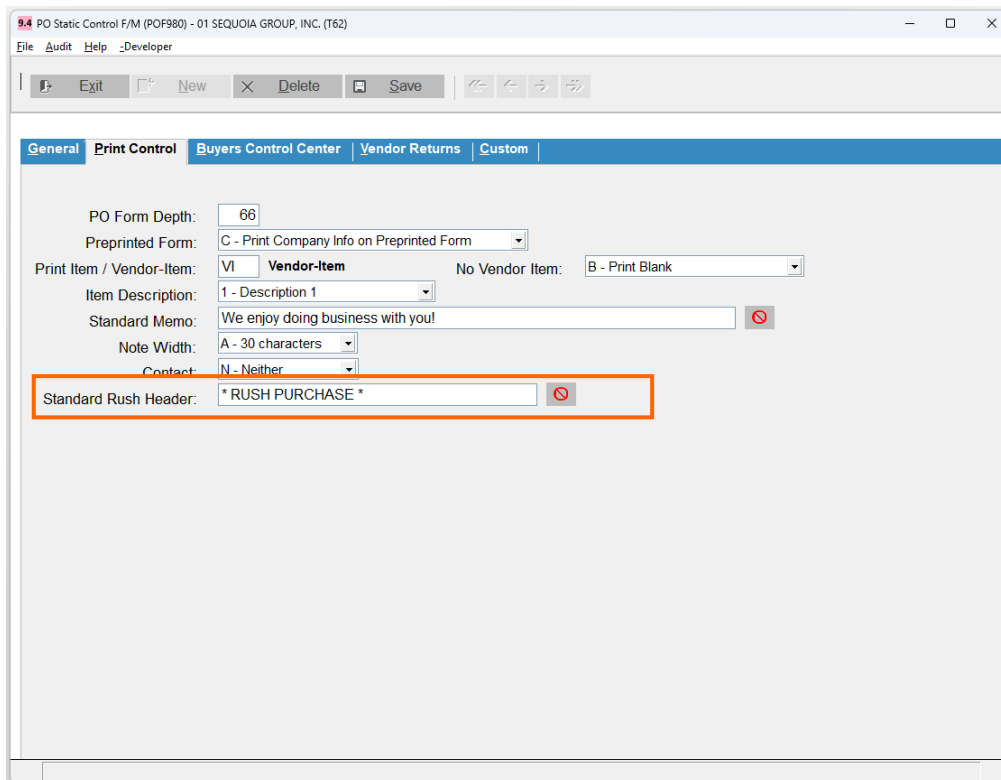
- To modify the **Standard Rush Header**, navigate to **Purchase Orders → File Maintenances → Infrequent File Maintenances → Static Control F/M** (program POF980).



- Click **Print Control** to access print settings.

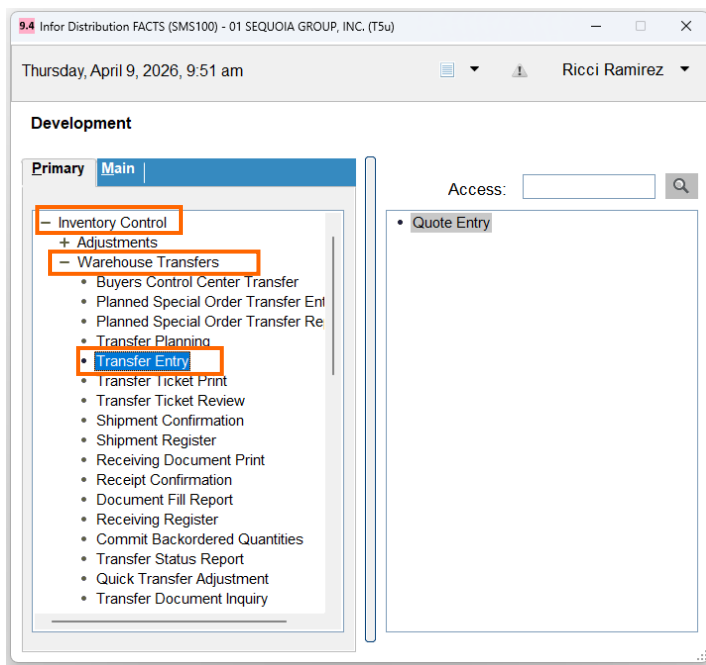


- A window will appear to modify the **Standard Rush Header**.

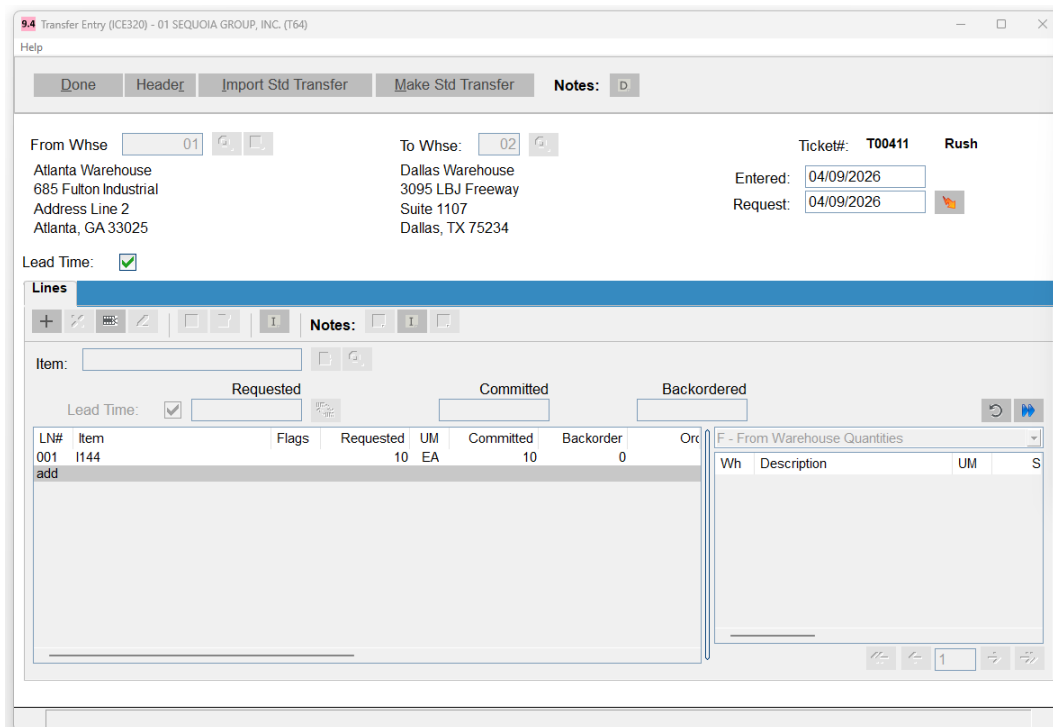


9.2 Order Priority: Warehouse Transfers

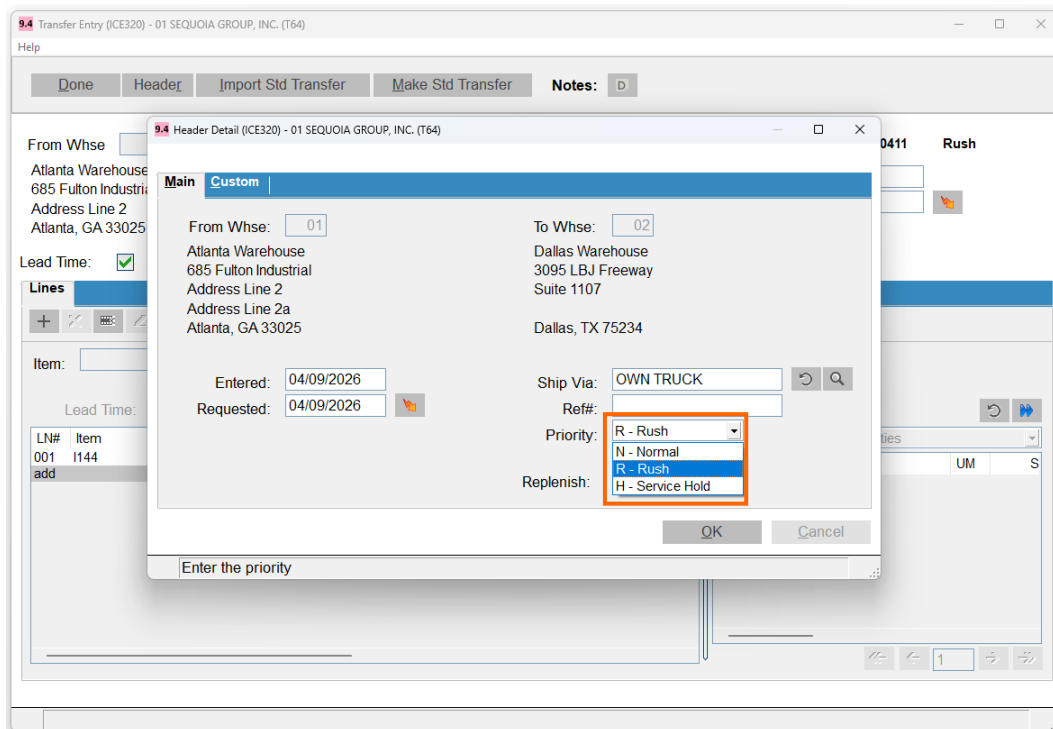
- Navigate to **Inventory Control** → **Warehouse Transfers** → **Transfer Entry** (program SMS100).



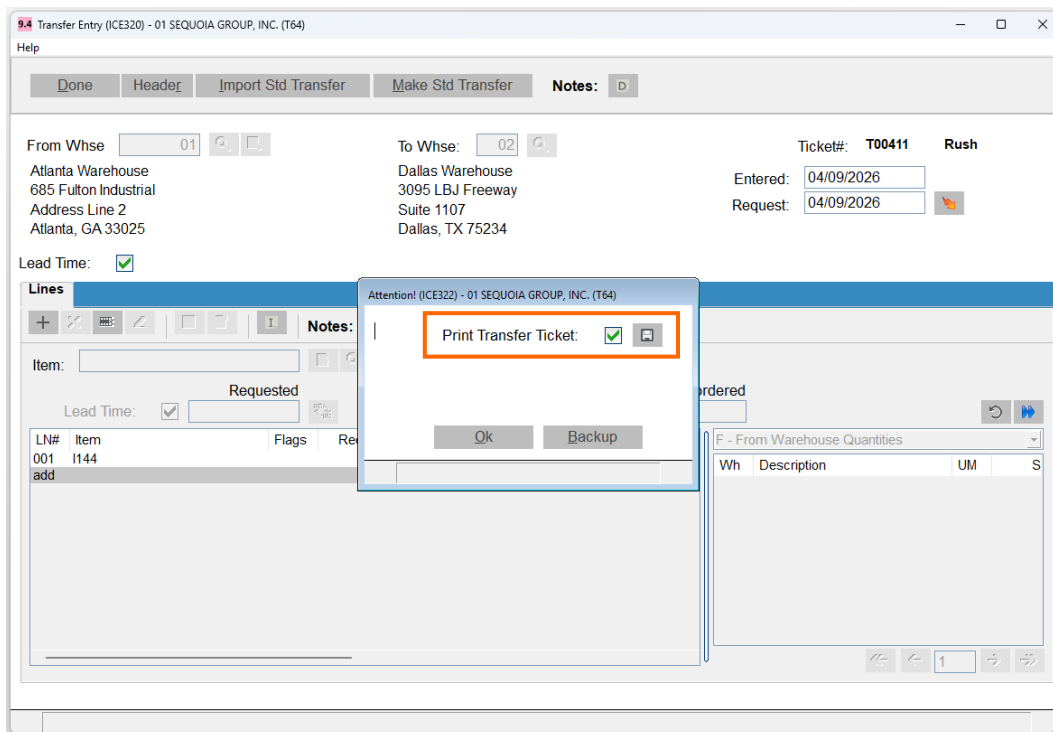
- Create a new entry.




- For this example, after clicking **Header**, set the **Priority**.



- Complete the document to proceed.




- When the ticket is printed, the order priority is displayed.

		KEVEN 200 W CIVIC CENTER DR STE 204 SANDY UT 84070-4207 802-571-2300 sales@sequoiagroup.com www.sequoiagroup.com			TRANSFER TICKET REPRINT		
		To Whse: 02 Utah Warehouse 1414 W 7800 S WEST JORDAN UT 84088		From Whse: 01 REFRIGERATION HARDWARE SUPPLY 632 FORESIGHT CIR GRAND JUNCTION CO 81505-1042		Number T00330 Date 04/20/2026 Page 1 Ship# 00001	
Reference #	Ordered	Requested	Ship Via				
	03/26/13	03/26/13	OWN TRUCK				
Item	Description	Committed	Ship	Back	UM	Weight	Loc
* RUSH TICKET 1151	Bicarbonate of Soda for formula	2			LB	6.0	A30
Total Weight:						6.0	

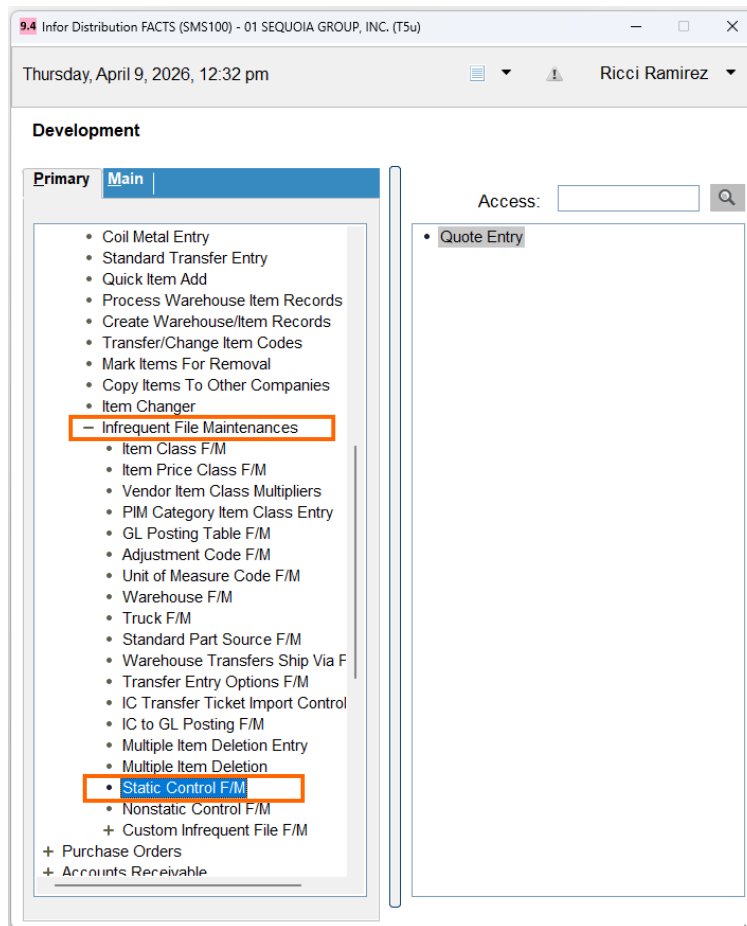
Do not write below this line Warehouse Copy ... Last Page



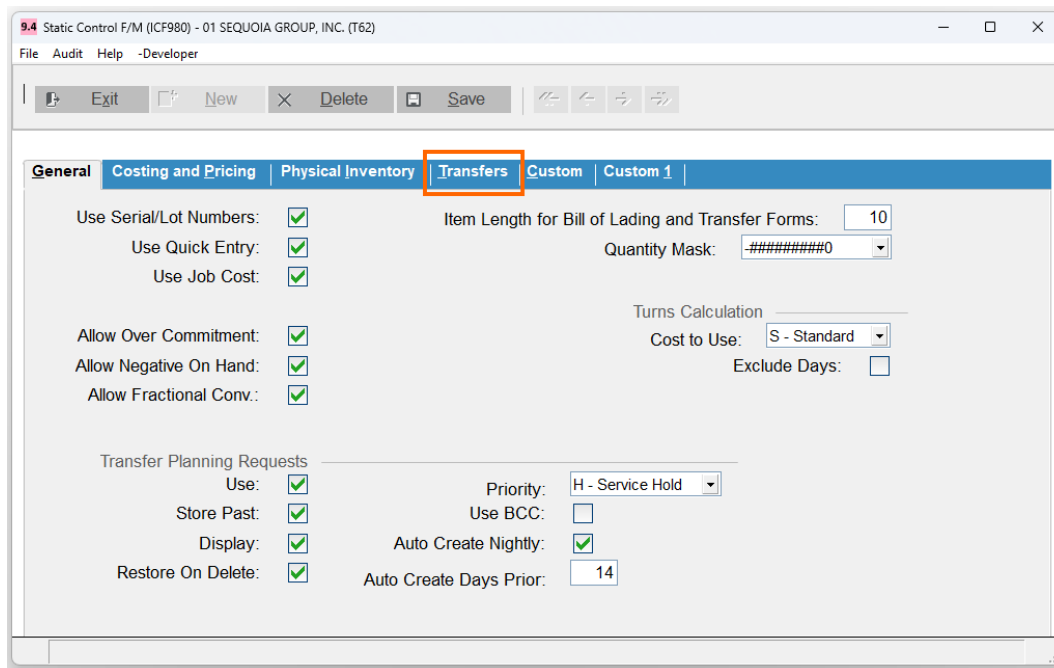
 <p>KEVEN 200 W CIVIC CENTER DR STE 204 SANDY UT 84070-4207 802-571-2300 sales@sequoiagroup.com www.sequoiagroup.com</p>		<p>TRANSFER TICKET REPRINT</p>								
		<table border="1" style="width:100%; border-collapse: collapse;"> <tr><td style="font-size: small;">Number</td><td>T00330</td></tr> <tr><td style="font-size: small;">Date</td><td>04/20/2026</td></tr> <tr><td style="font-size: small;">Page</td><td>1</td></tr> <tr><td style="font-size: small;">Ship#</td><td>00001</td></tr> </table>	Number	T00330	Date	04/20/2026	Page	1	Ship#	00001
Number	T00330									
Date	04/20/2026									
Page	1									
Ship#	00001									
To Whse: 02 Utah Warehouse 1414 W 7800 S WEST JORDAN UT 84088		From Whse: 01 REFRIGERATION HARDWARE SUPPLY 632 FORESIGHT CIR GRAND JUNCTION CO 81505-1042								
Reference #	Ordered	Requested	Ship Via							
	03/26/13	03/26/13	OWN TRUCK							
Item	Description		Committed	Ship	Back	UM	Weight	Loc		
* RUSH TICKET 1151	Bicarbonate of Soda for formula		2			LB	6.0	A30		
							Total Weight:	6.0		
Do not write below this line			Accounting Copy			... Last Page				



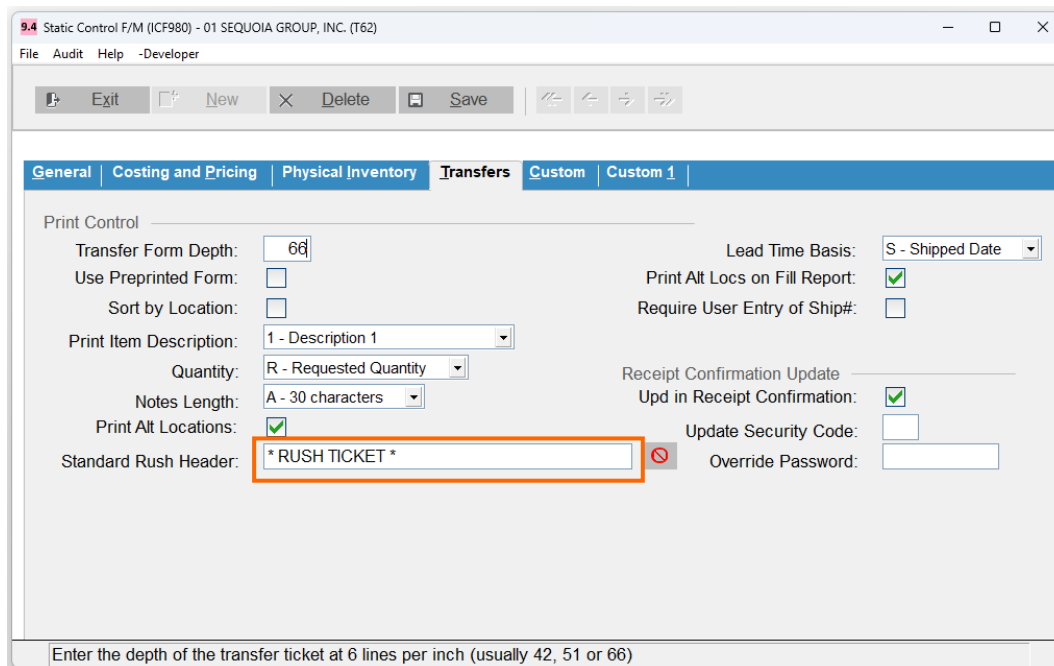
- To modify the **Standard Rush Header**, Navigate to **Inventory Control -> File Maintenances-> Infrequent File Maintenances-> Static F/M** (program ICF980)



- Click **Transfers** to access transfer settings.

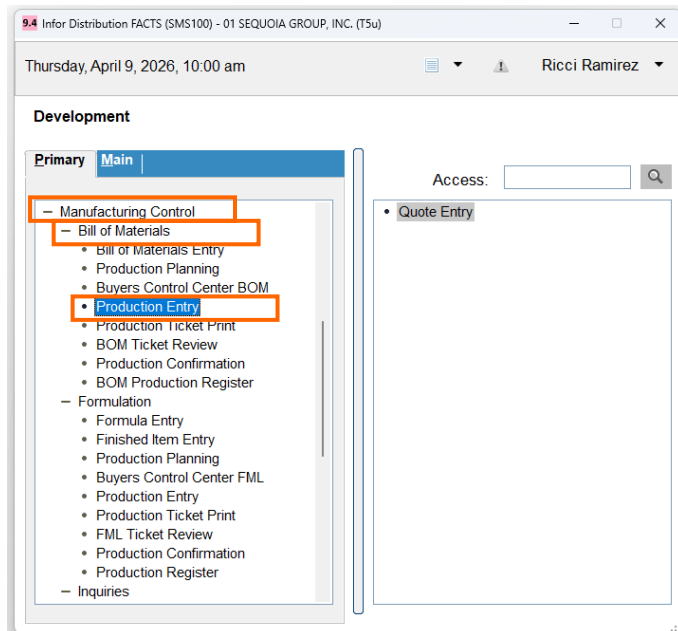


- A window will appear to modify the standard **Rush Header**.

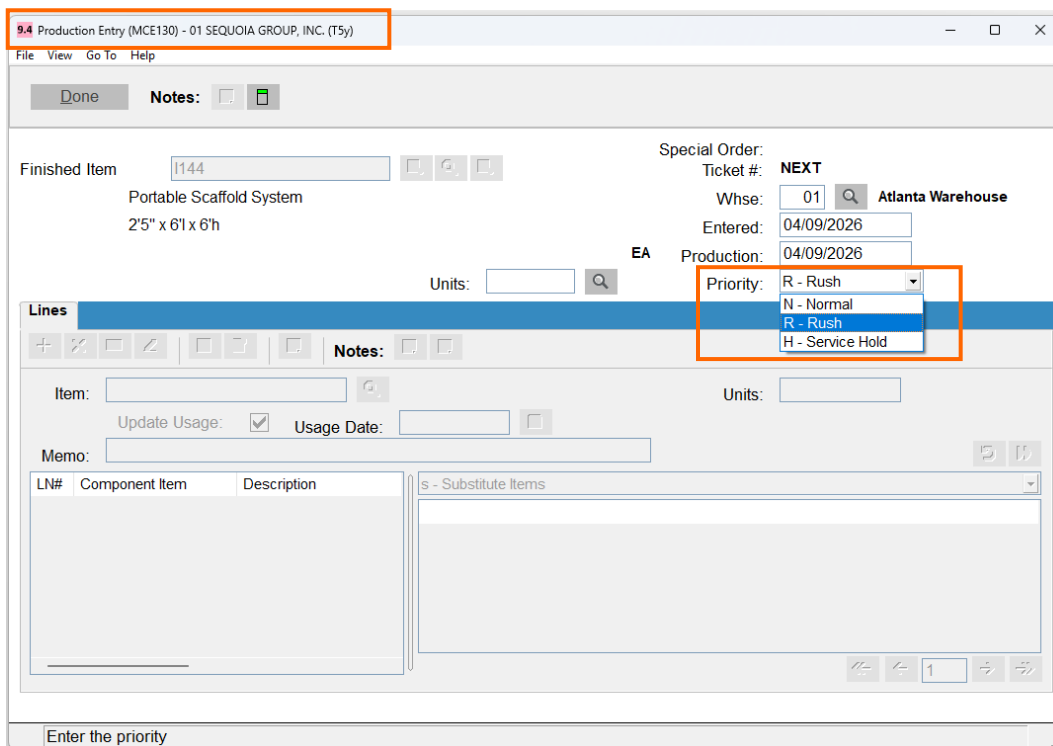


9.3 Order Priority: Bill of Materials Production

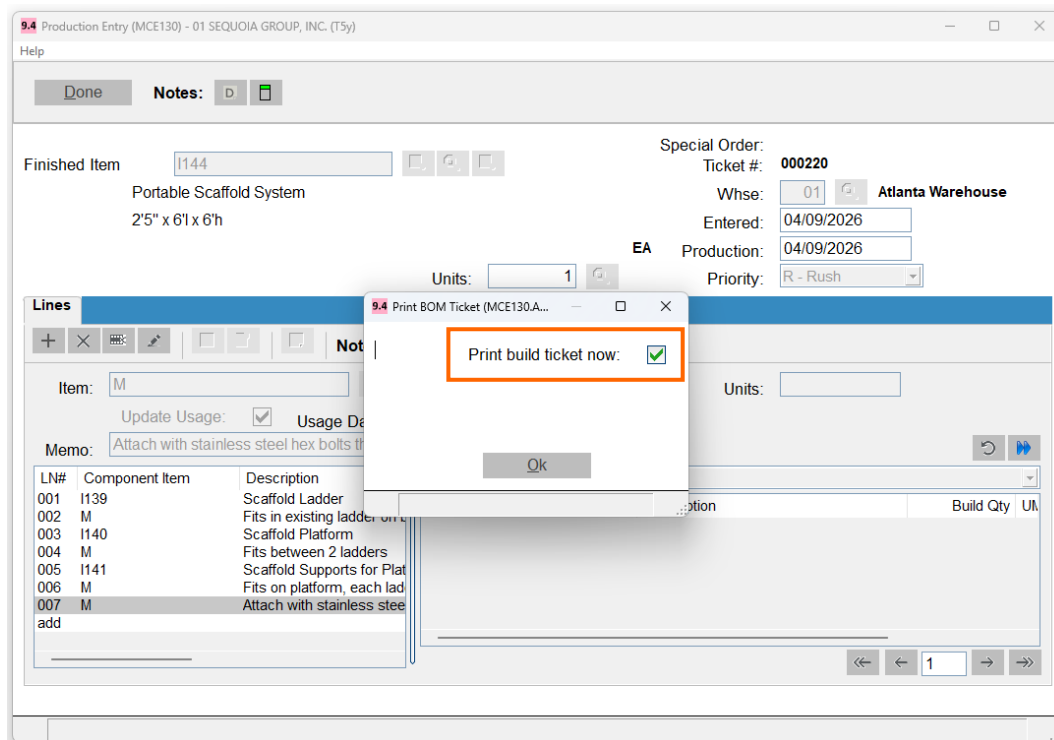
- Navigate to **Manufacturing Control** → **Bill of Materials** → **Production Entry** (program MCE130).



- When creating a new ticket, select the desired priority.



- Complete the ticket to proceed.



- When the ticket is printed, the order priority is displayed.

Reprint

PRODUCTION TICKET

KEVEN

Finished Item I144

Portable Scaffold System

Planned Production: Units 3 EA

Date 03/11/2020

Number	000218
Date	04/20/2026
Whse	01

Ln#	Component Item	Description	Units	UM	Memo
					* RUSH BUILD *
001	I139	Scaffold Ladder short stack Primary Loc: F72	6	EA	RED, 6FT HIGH
002		Fits in existing ladder on base unit			
003	I140	Scaffold Platform Primary Loc: G27	3	EA	ADJ ON 3"INCREMENTS
004		Fits between 2 ladders			
005	I141	Scaffold Supports for Platform Primary Loc: I36	6	EA	SAFETY RAIL OPTIONAL
006		Fits on platform, each ladder side			
007		Attach with stainless steel hex bolts throughout			

PRODUCTION TICKET

Date: _____ Initials: _____

Warehouse Copy

... Last Page

Reprint

PRODUCTION TICKET

KEVEN

Finished Item I144

Portable Scaffold System

Planned Production: Units

3 EA

Date 03/11/2020

Number	000218
Date	04/20/2026
Whse	01

Ln#	Component Item	Description	Units	UM	Memo
	* RUSH BUILD *				
001	I139	Scaffold Ladder short stack Primary Loc: F72	6	EA	RED, 6FT HIGH
002		Fits in existing ladder on base unit			
003	I140	Scaffold Platform Primary Loc: G27	3	EA	ADJ ON 3"INCREMENTS
004		Fits between 2 ladders			
005	I141	Scaffold Supports for Platform Primary Loc: I36	6	EA	SAFETY RAIL OPTIONAL
006		Fits on platform, each ladder side			
007		Attach with stainless steel hex bolts throughout			

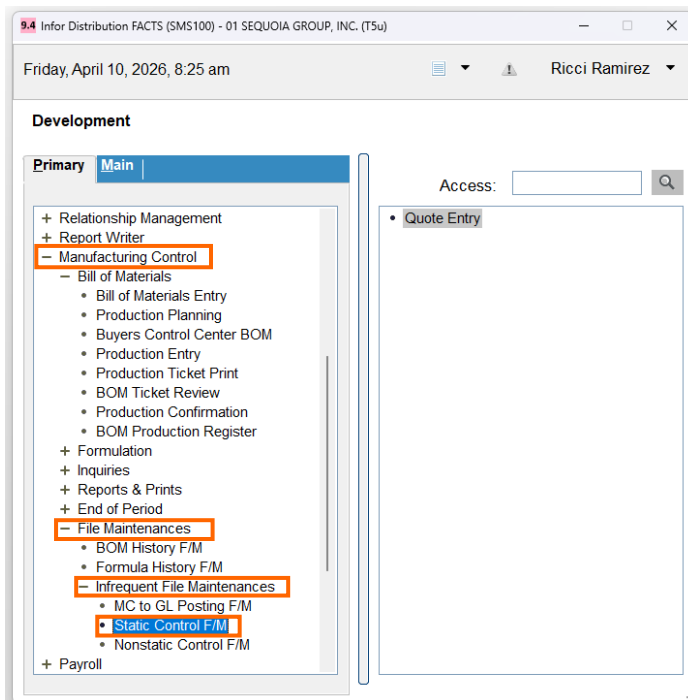
PRODUCTION TICKET

Date: _____ Initials: _____

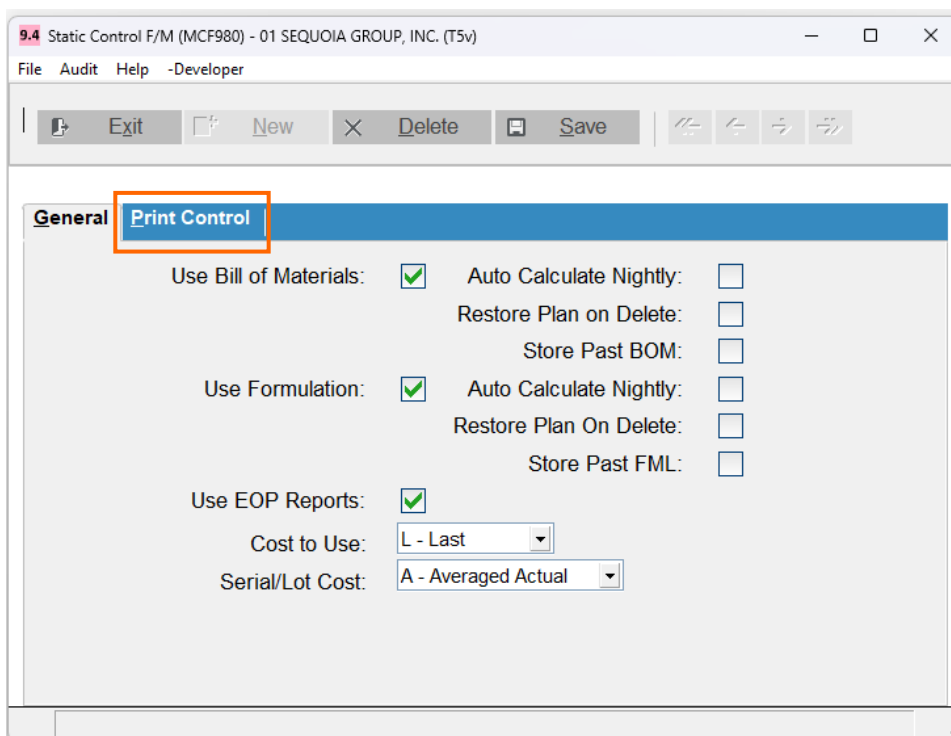
Accounting Copy

... Last Page

- To modify the **Standard Rush Header**, Navigate to **Manufacturing Control-> File Maintenances-> Infrequent File Maintenances-> Static F/M** (program MCF980)



- Click **Print Control**



- The **Static Control F/M** program will appear to modify the **Standard Rush Header** for **Bill of Materials** or **formulation**.

9.4 Static Control F/M (MCF980) - 01 SEQUOIA GROUP, INC. (T5v)

File Audit Help -Developer

Exit New Delete Save

General **Print Control**

Bill of Materials

Item Desc: 1 - Description 1

Notes Length: C - Not Printed

Print Location: N - No

Standard Rush Header: * RUSH BUILD *

Formula

Item Desc: 1 - Description 1

Notes Length: C - Not Printed

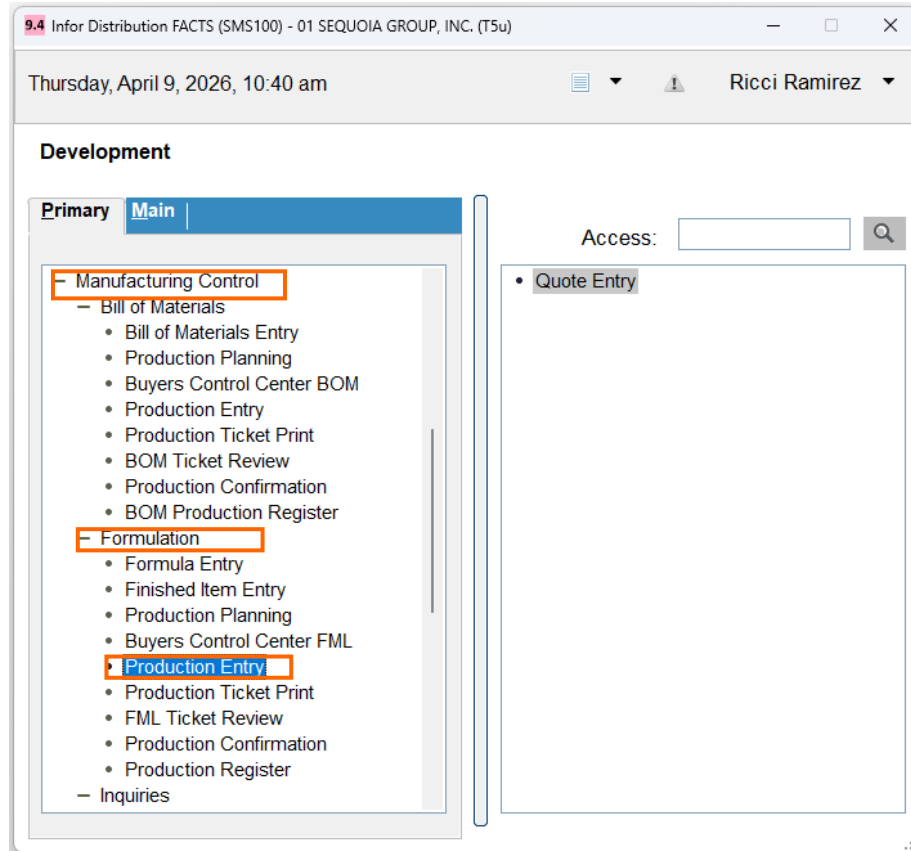
Print Location: N - No

Standard Rush Header: * RUSH BUILD *

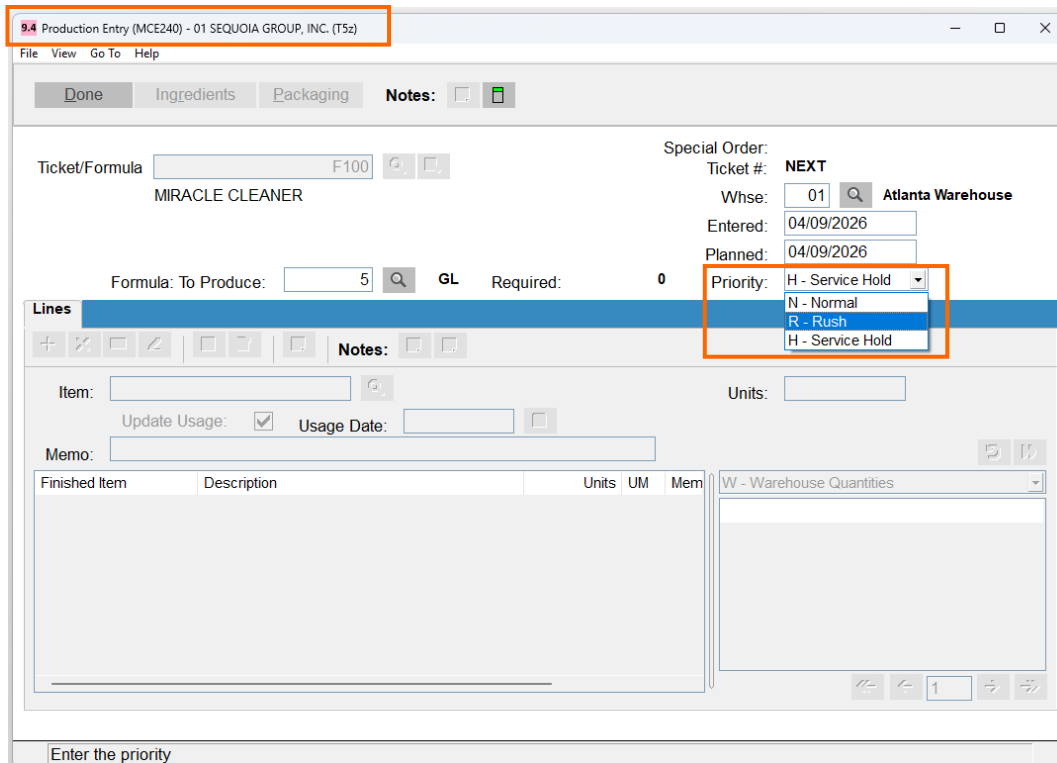
Enter standard rush text, F1-None

9.4 Order Priority: Formulation Production

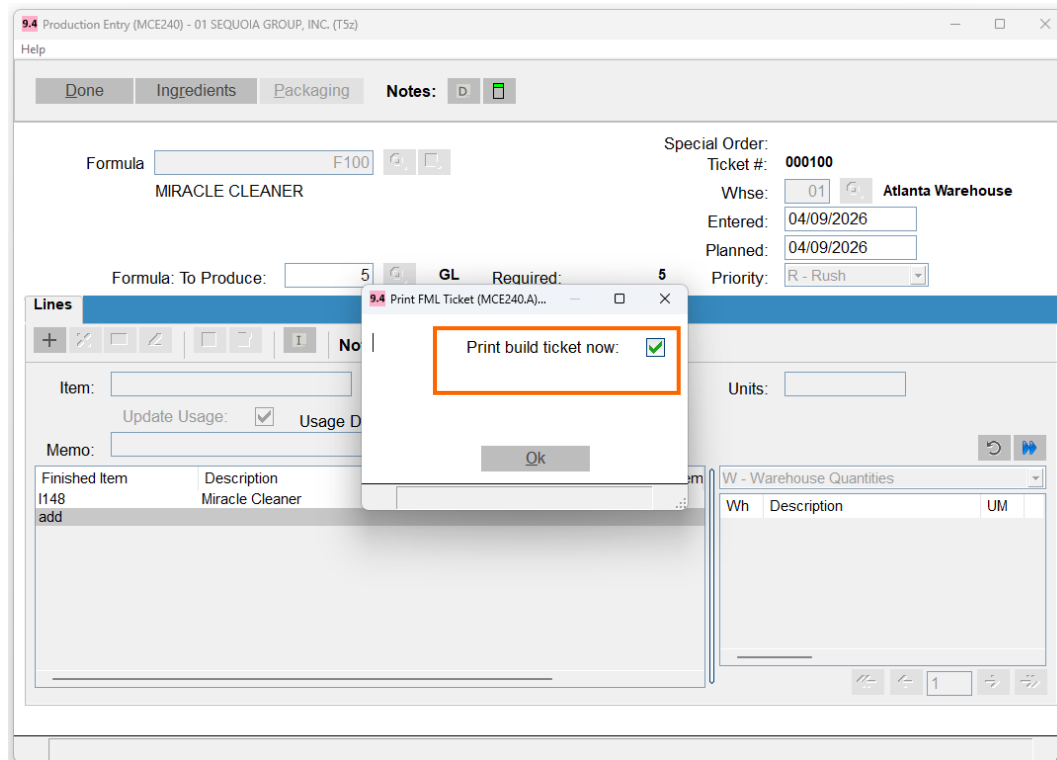
- Navigate to **Manufacturing Control-> Bill of Materials -> Formulation-> Production Entry** (program MCE240).



- For this example, we are generating a ticket for formula **F100** and set the priority to Rush.



- Complete the ticket to proceed.



- When the ticket is printed, the order priority is displayed.

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula **F100 MIRACLE CLEANER**

Planned Production: Quantity **25 GL** Date **09/16/2014**

Number	000100
Date	04/20/2026
Whse	01

Ln#	Ingredient	Description	Units	UM	Memo
	* RUSH BUILD *				
001	I150	Bleach - maximum concentration Primary Loc: C39 FIRST INGREDIENT	5	GL	DANGEROUS FUMES!
003	I151	Bicarbonate of Soda powder Primary Loc: A30 MIX WITH WATER FIRST, THEN ADD TO BLEACH	5	LB	3:1 W/WATER
005	I152	Ammonia Primary Loc: D80 ADD LAST; MIX SLOWLY. COVER DRUM IMMEDIATELY	0	GL	3:1 W/WATER
007		WHEN COMPLETE. CAUTION: WEAR MASK			
008	I100	Pallet Loading Hand Truck Primary Loc: SP345 Alt Loc: R35; OVRSTK; G25; NONSTK	5	CT	

FORMULATION PRODUCTION TICKET

Date: _____ Initials: _____

Warehouse Copy

Continued on next page ...

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula F100 MIRACLE CLEANER

Planned Production: Quantity 25 GL Date 09/16/2014

Number	000100
Date	04/20/2026
Whse	01

Ln#	Packaging Item	Description	Units	UM	Memo
	* RUSH BUILD *				
	Finished Item:	I148 Miracle Cleaner			
	Produce:	5.0 BX	Formula Required:	25 GL	
	Memo:	oc: C30			
	Primary L				
001	I156	Plastic Spray Bottle	0	EA	FILL'EM UP
002		Primary Loc: E56 DONT FORGET PROTECTIVE SEAL			
<p>Date: _____ Initials: _____</p>					

Warehouse Copy

... Last Page

FORMULATION PRODUCTION TICKET

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula F100 MIRACLE CLEANER

Planned Production: Quantity 25 GL Date 09/16/2014

Number	000100
Date	04/20/2026
Whse	01

Ln#	Ingredient	Description	Units	UM	Memo
001	I150	Bleach - maximum concentration Primary Loc: C39	5	GL	DANGEROUS FUMES!
002		FIRST INGREDIENT			
003	I151	Bicarbonate of Soda powder Primary Loc: A30	5	LB	3:1 W/WATER
004		MIX WITH WATER FIRST, THEN ADD TO BLEACH			
005	I152	Ammonia Primary Loc: D80	0	GL	3:1 W/WATER
006		ADD LAST; MIX SLOWLY. COVER DRUM IMMEDIATELY			
007		WHEN COMPLETE. CAUTION: WEAR MASK			
008	I100	Pallet Loading Hand Truck Primary Loc: SP345 Alt Loc: R35; OVRSTK; G25; NONSTK	5	CT	

Date: _____ Initials: _____

Accounting Copy

Continued on next page ...

FORMULATION PRODUCTION TICKET

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula F100 MIRACLE CLEANER

Planned Production: Quantity 25 GL Date 09/16/2014

Number	000100
Date	04/20/2026
Whse	01

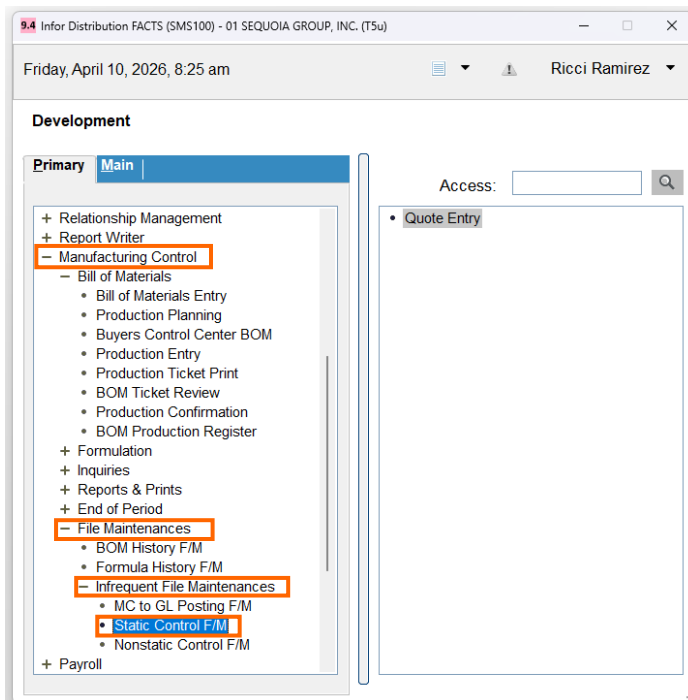
Ln#	Packaging Item	Description	Units	UM	Memo
	* RUSH BUILD *				
	Finished Item: I148 Produce: 5.0 BX Memo: Primary L	Miracle Cleaner 5.0 BX Formula Required: 25 GL oc: C30			
001	I156	Plastic Spray Bottle Primary Loc: E56	0	EA	FILL'EM UP
002		DONT FORGET PROTECTIVE SEAL			
Date: _____ Initials: _____					

FORMULATION PRODUCTION TICKET

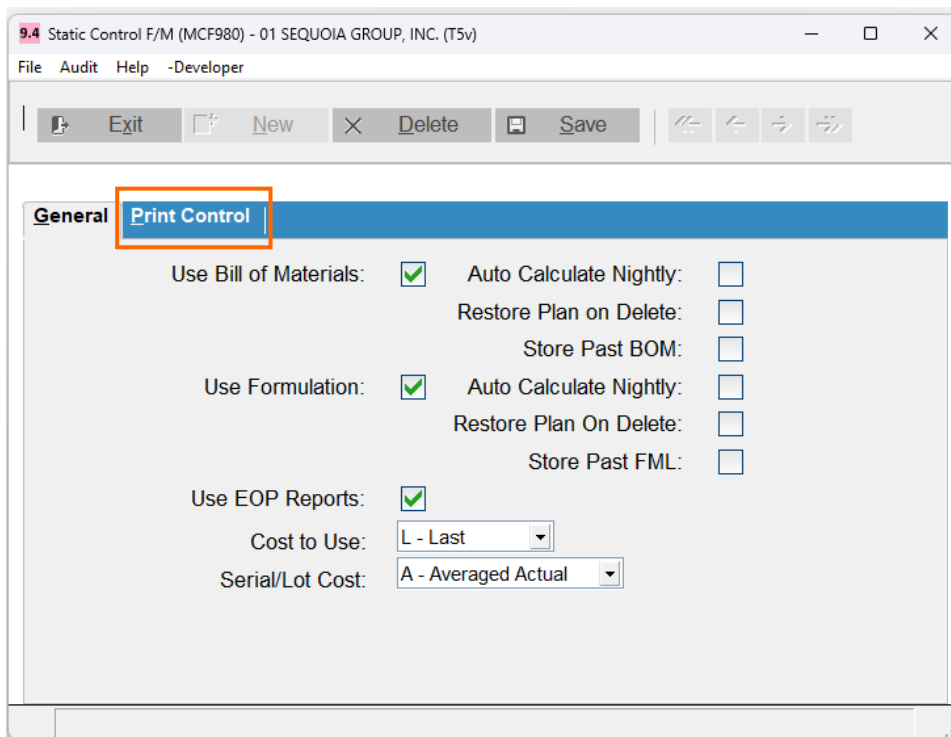
Accounting Copy

... Last Page

- To modify the **Standard Rush Header**, Navigate to **Manufacturing Control-> File Maintenances-> Infrequent File Maintenances-> Static F/M** (program MCF980)



- Click **Print Control**



- A window will appear to modify the Standard Rush Header for Bill of Materials or formulation.

New Review Programs for Managing Priorities

To manage these new priorities, dedicated **Review** programs were introduced: **Purchase Order Review**, **Transfer Ticket Review**, **Bill of Materials Ticket Review**, and **Formulation Ticket Review**.

These programs act as central dashboards where staff can manage document statuses. Using filters, users can view documents based on specific criteria, such as all documents currently on **Service Hold**.

From these review screens, users can quickly release documents from Service Hold (changing them back to Normal or Rush priority) or place normal documents on Service Hold.

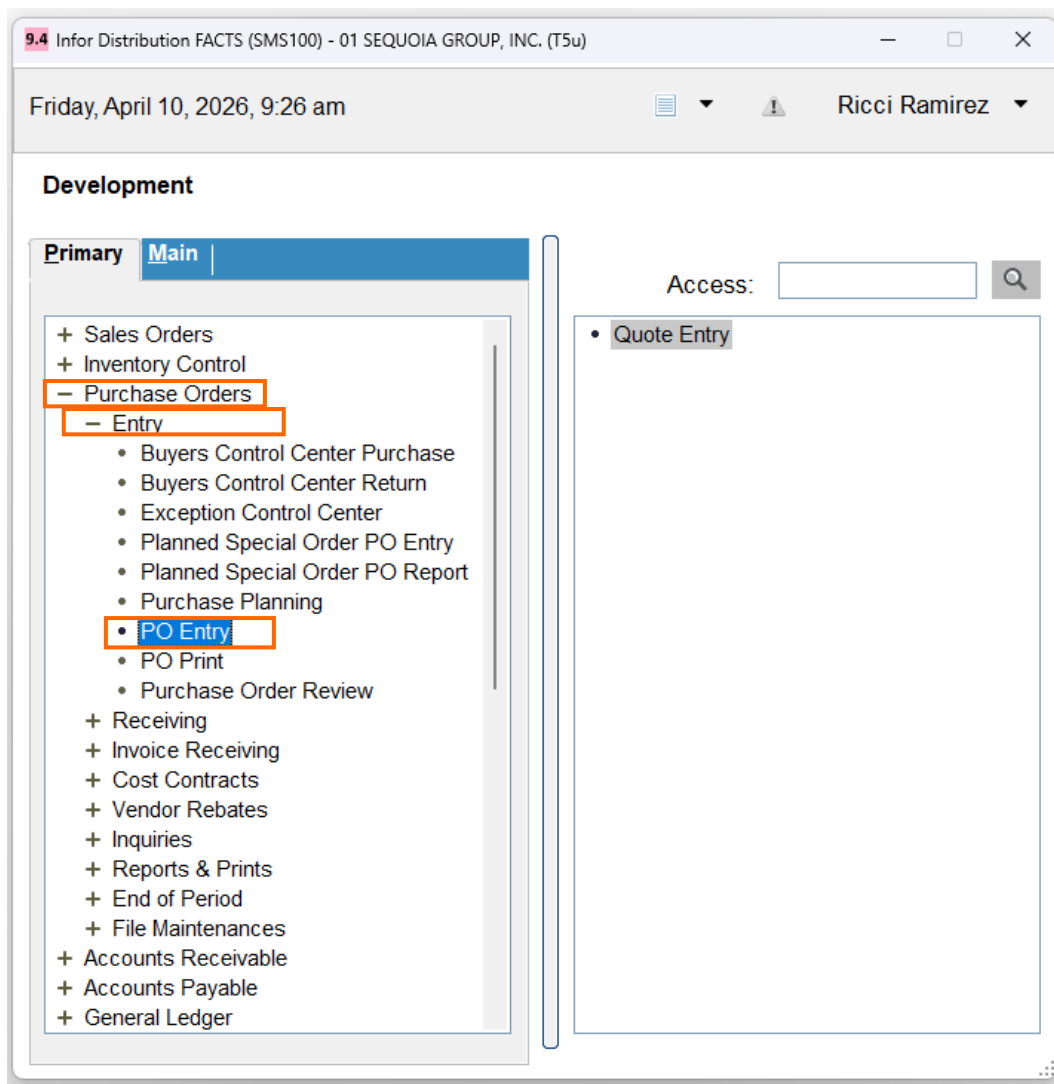
Bonus Feature – PO Review:

The **Purchase Order Review** program also includes a **Debit Hold** function. This feature is similar to the Sales Order credit hold functionality but applies to vendors. If a new Purchase Order causes a vendor to exceed a predefined open PO limit, the document is placed on Debit Hold.

Authorized users with the appropriate security permissions can use the PO Review program to release these debit holds.

9.5 Purchase Order Review

- To demonstrate this feature, we will create a **Purchase Order Entry** on Service Hold and then release it for printing. Navigate to **Purchase Orders-> Entry-> PO Entry** (program POE 120).



- Create a new **Purchase Order** entry. Enter the line items, then exit out of the line entry screen.

9.4 Purchase Order Document 001588 General Industrial MFG (POE120) - 01 SEQUOIA GROUP, INC. (T5v)

Done Header Line Detail Archived PO Import Std Buy Make Std Buy Notes: D V

Vendor: V100 Ship-to Whse: 01 PO#: 001588
 Ship From: SAME Edit Address
 General Industrial MFG Atlanta Warehouse
 9610 Dunwoody, Pl. 685 Fulton Industrial
 Suite 133-134 Address Line 2
 Atlanta, GA 30338 Atlanta, GA 33025
 Ordered: 04/10/2026
 Requested: 04/10/2026
 Promised: 04/10/2026
 Terms: 02 2% 10th Net 30
 Buyer: 100 Ronald Pat Lead Time: Contact: Confirmed: Replenishment Doc:

Lines

LN#	Item	Flags	Description	Units	UM
001	1100		Pallet Loading Hand Trucks	5.0	CT

Ext.: 6000.00

Click **Header** on the **Purchase Order**, set the **Priority** to **Service Hold**, then finish the document.

9.4 Header Detail for Purchase Order 001588 General Industrial MFG (POE120) - 01 SEQUOIA GROUP, INC. (T5v)

Standard

Vendor: V100 General Industrial MFG Ship-to Whse: 01 (Warehouse Ship)
 Ship From: SAME Edit Address
 General Industrial MFG Atlanta Warehouse
 9610 Dunwoody, Pl. 685 Fulton Industrial
 Suite 133-134 Address Line 2
 Atlanta, GA 30338 Atlanta, GA 33025
 Ordered: 04/10/2026 Requested: 04/10/2026 Promised: 04/10/2026
 Confirmed: Replenishment Doc:

Codes

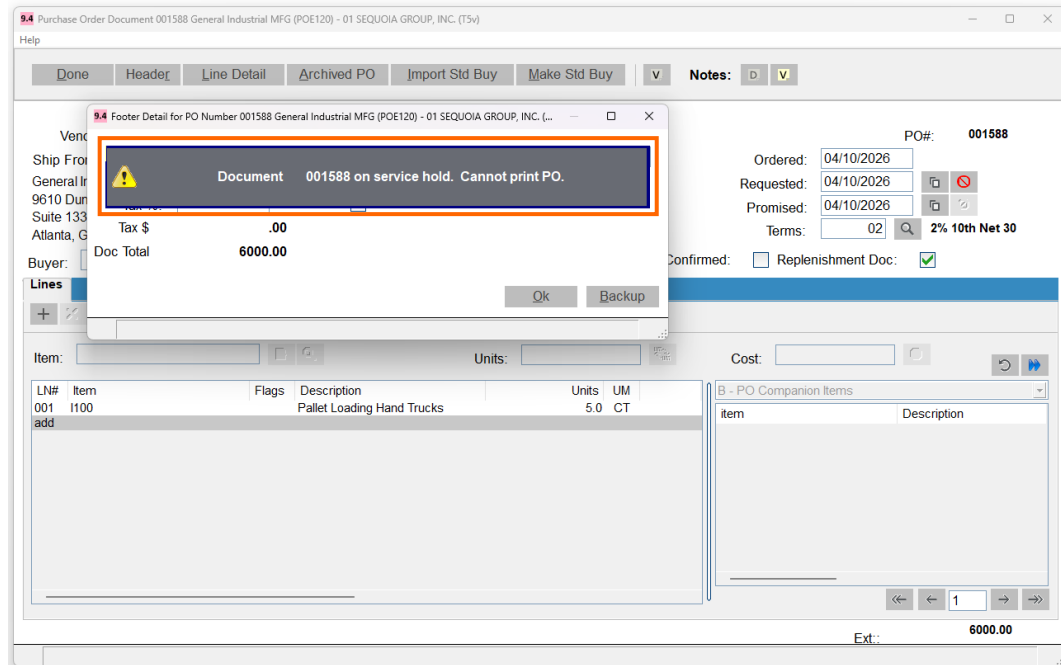
Freight: P - Prepaid Buyer: 100 Ronald Patton
 Ship Via: Terms: 02 2% 10th Net 30
 FOB: Atlanta Lead Time:

Reference #: Priority: R - Rush
 Memo: Contact: R - Normal
 In Transit: H - Service Hold

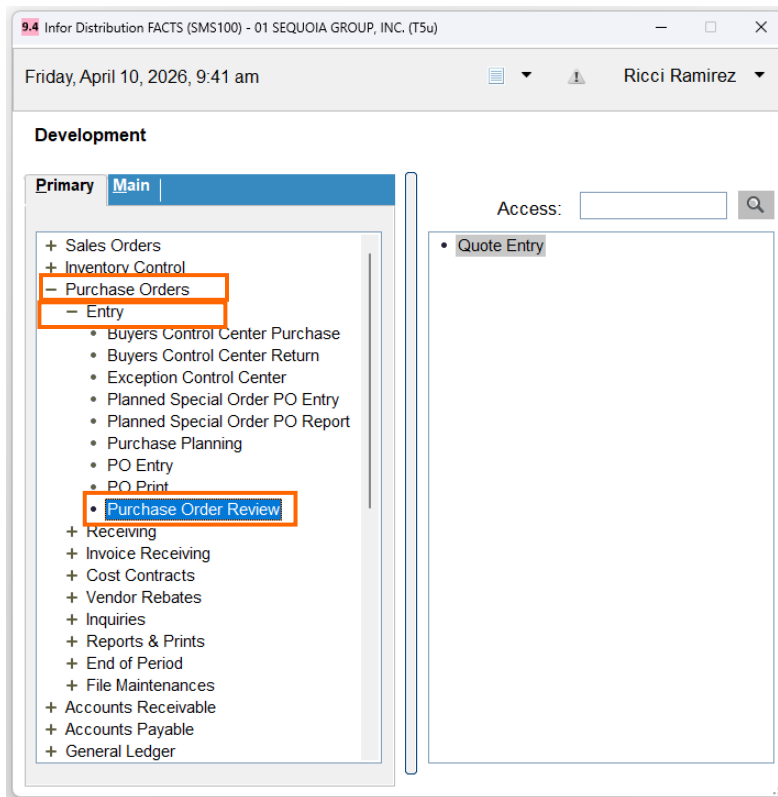
Enter the priority

Ext.: 6000.00

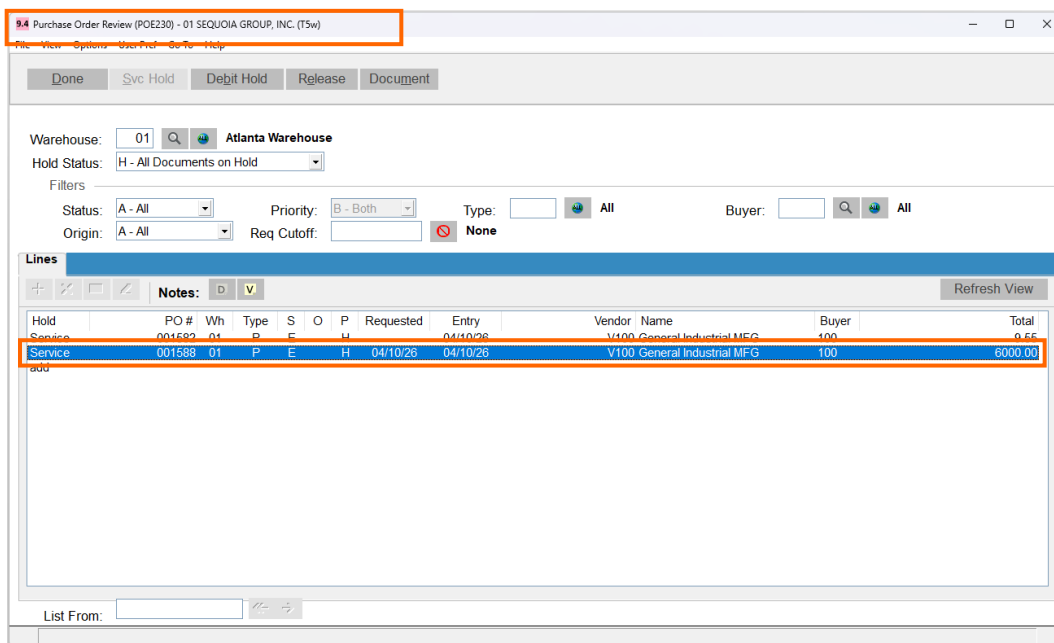
- Because the document is on **Service Hold**, you cannot print the **Purchase Order** ticket. It is also not available to pull into **Receipt Entry**.



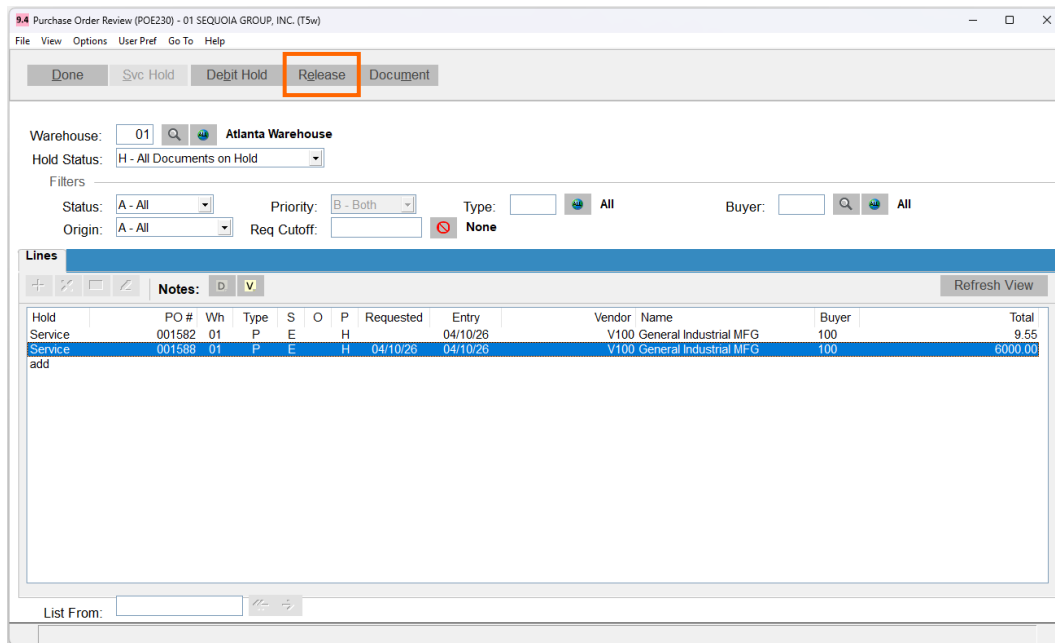
- After setting the Priority to Service Hold, finish the document.
- Use the **Purchase Order Review** program to release the **Service Hold**.
Navigate to **Purchase Orders** → **Entry** → **Purchase Order Review** (program POE230).



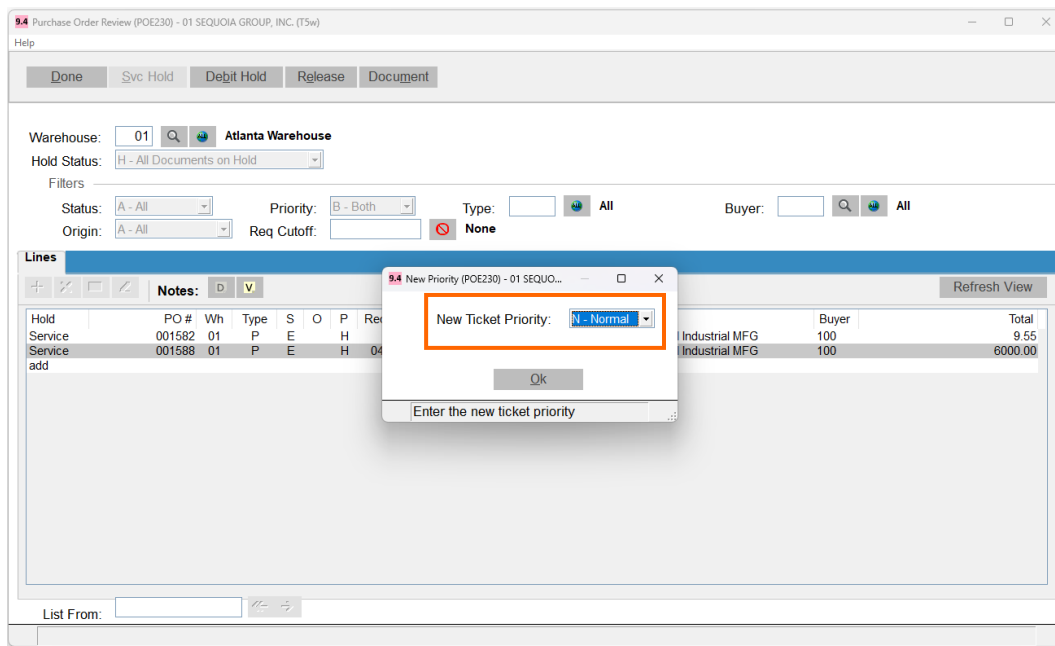
- Use the filters to refine the view. Select all documents on hold to quickly locate the **Purchase Order** you just created.



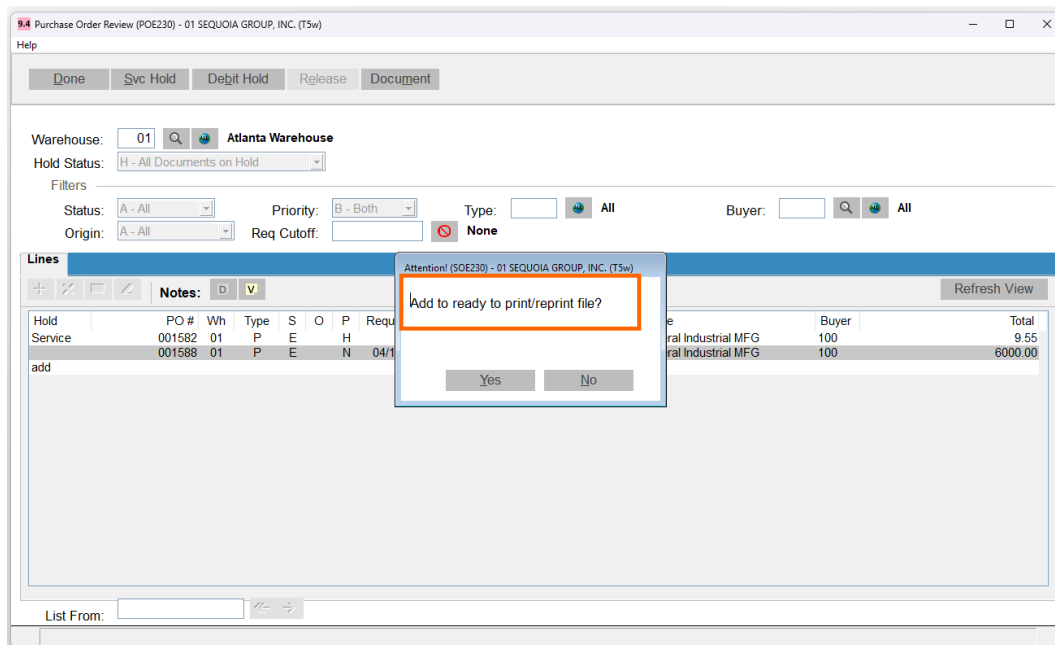
- Select the held document and click **Release** to remove the **Service Hold**.



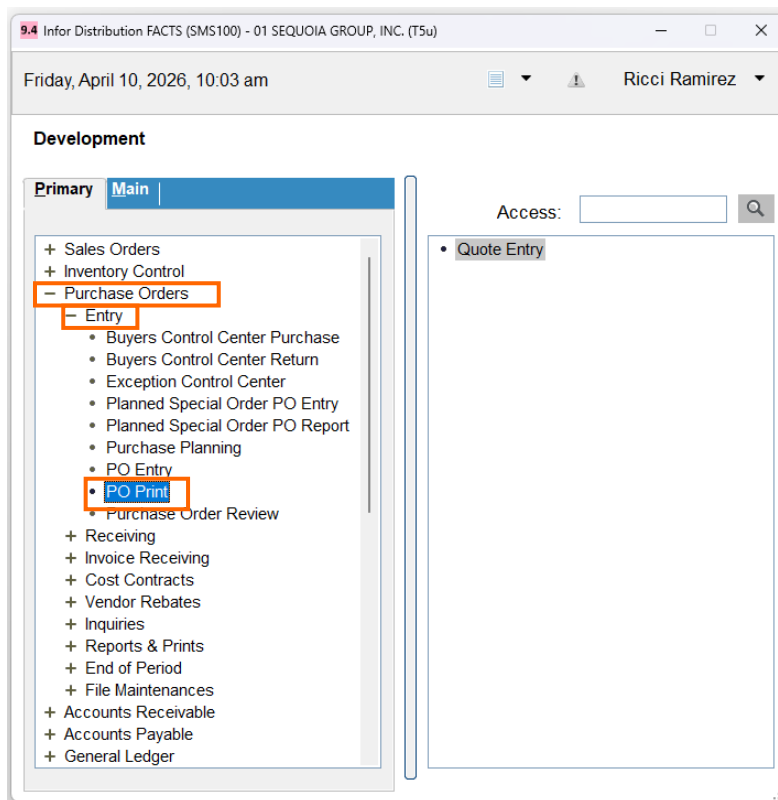
- A window will appear to set the new **Priority**: Normal or Rush. Select the desired **Priority**.



- Once the document is released and the **Priority** is updated, it is available to print and can be imported into **Receipt Entry**.



To print the document that has been released, navigate to **Purchase Orders-> Entry-> PO Print (programPOP110)**



- Look up the document by entering or searching for the document number you just released.

9.4 PO Print (POP110) - 01 SEQUOIA GROUP, INC. (T5x)

Template Print Options Help

Print/Reprint: P - Print Buyer: All

Warehouse: 01 Atlanta Warehouse

Cutoff Date: System Date 04/10/2026

Type: A - All PO's Origin: A - All

Doc Type: A - All

Priority: B - Both

Print All: Override Doc Handling

PO#: 001588

Template: None Printer: Print to Notepad

Ok Cancel

Enter document(s) to print, F1-Clear, F2-Search, F3-Delete Last Entry

- Because the document is no longer on hold, it stays in the grid and shows as 'able to print.' If the document is still on hold, the system removes it from the grid and rejects the print attempt. Proceed to print the document.

9.4 PO Print (POP110) - 01 SEQUOIA GROUP, INC. (T5x)

Help

Print/Reprint: P - Print Buyer: All

Warehouse: 01 Atlanta Warehouse

Cutoff Date: Processing... (SMR999) - 01 SEQUOIA GROUP, INC. (T5x)

Type: End Of Print.


Print All: Processing Records...: Finished.

PO#: PO#

Template: None Printer: Print to Notepad

Ok Cancel

- Once the document is printed, its status updates and it becomes available for downstream processes such as **Receipt Entry**.

		KEVEN 200 W CIVIC CENTER DR STE 204 SANDY UT 84070-4207 802-571-2300 diane@sequoiagroup.com www.sequoiagroup.com				PURCHASE ORDER REPRINT				
Vendor: V100 General Industrial MFG 9610 Dunwoody Place. Atlanta GA 30337		Ship-To: 01 West Jordan Warehouse 8070 S 1300 W WEST JORDAN UT 84088-9467		Number: 001415 Date: 12/06/2019 Page: 1						
Buyer	Terms	Ship Via	FOB	Freight	Expected	Customer	Reference			
100	2% 10th Net 30		WEST JORDAN UT	Prepaid	12/06/2019	S890-0				
Vendor-Item #	Item	Description	Units	uu	Cost	uu	Extension			
* RUSH PURCHASE *										
1101	Pallet Truck		1	EA	288.150	EA	288.15			
	5000lb capacity/ 8" wheels									
1100	Pallet Loading Handtruck		8	EA	50.000	EA	400.00			
	1000 lb capacity									
	STEEL ALLOY FRAME OF CONSTRUCTION. RUBBER NONSCUFF 6 INCH WHEELS. 1000 LB CAPACITY. 52" TALL. 17 POUNDS. 2 TIE DOWN STRAPS STANDARD.	RUGGED NONSKID,								
Contact 1: Roger Smith 404-393-9444 Contact 2: Gloria Faye (404)393-9457				Amount	Tax	Freight	Total			
				688.15	.00	.00	688.15			
We enjoy doing business with you! Do not write below this line				TAX EXEMPT # 3490922-12				Vendor Copy ... Last Page		

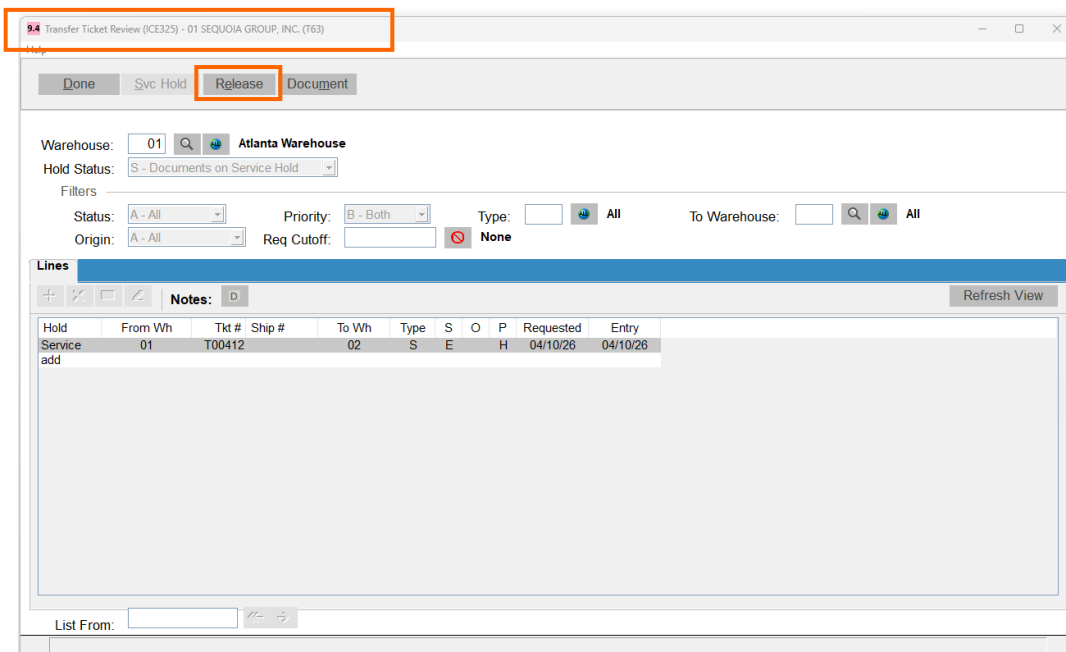


9.6 Transfer Ticket Review

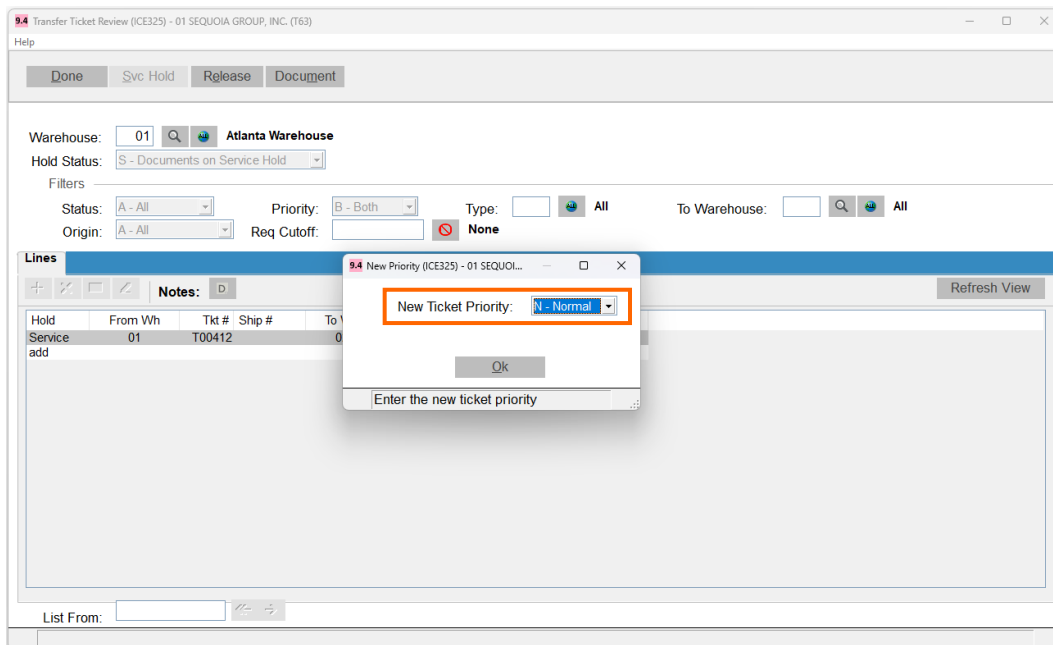
- To demonstrate this feature, we will create a **Transfer Entry** on Service Hold and then release it for printing.

- After setting the Priority to Service Hold, finish the document.
- Use the **Transfer Ticket Review** program to release the **Service Hold**. Navigate to **Inventory Control** → **Warehouse Transfers** → **Transfer Ticket Review** (program ICE325).

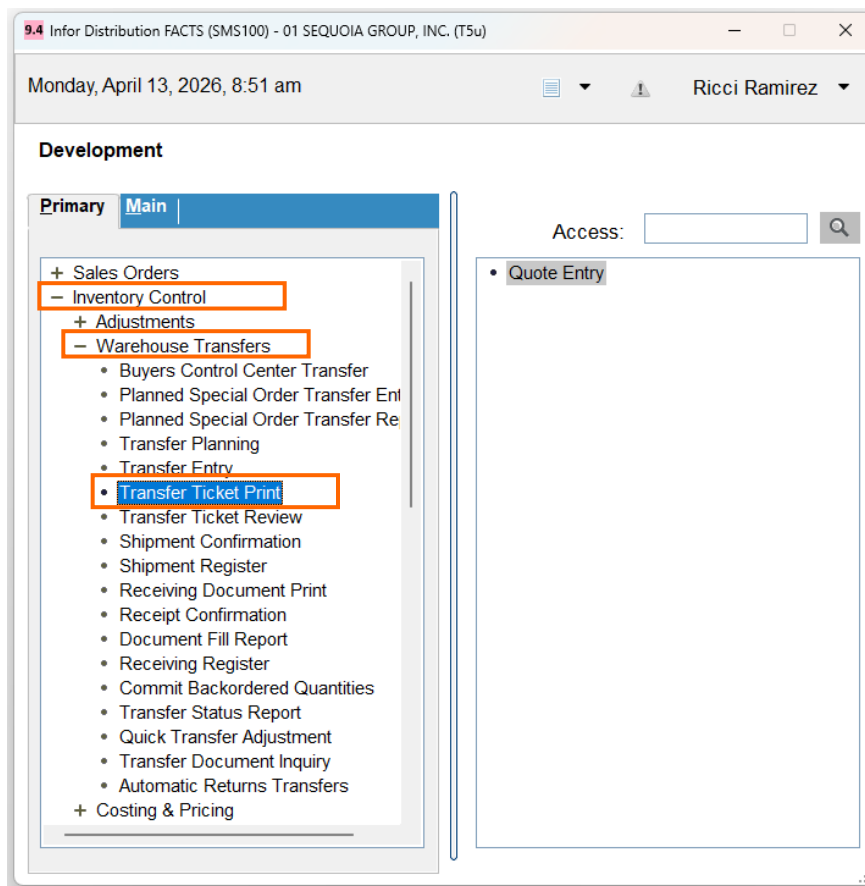
- Select the held document and click **Release** to remove the **Service Hold**.



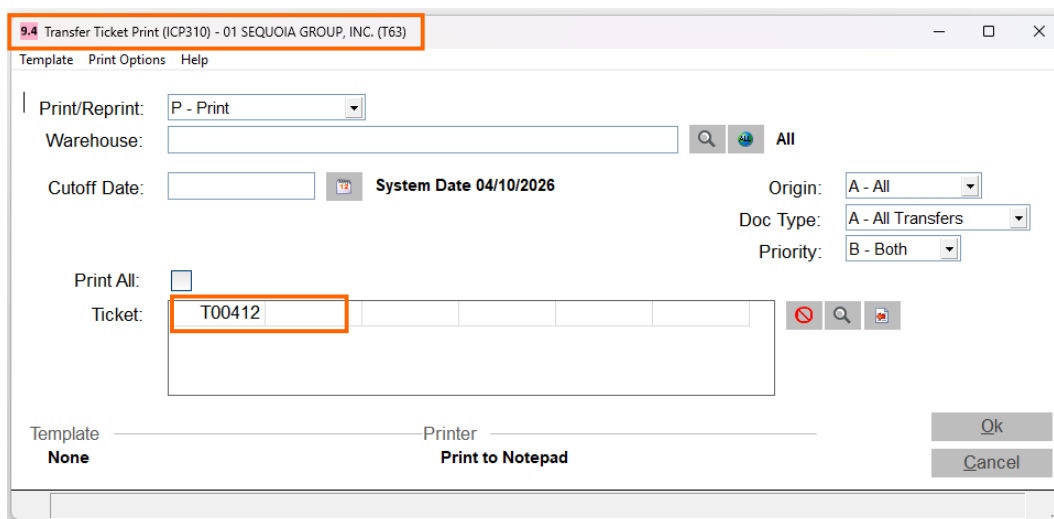
- A window will appear to set the new **Priority**: Normal or Rush. Select the desired Priority.



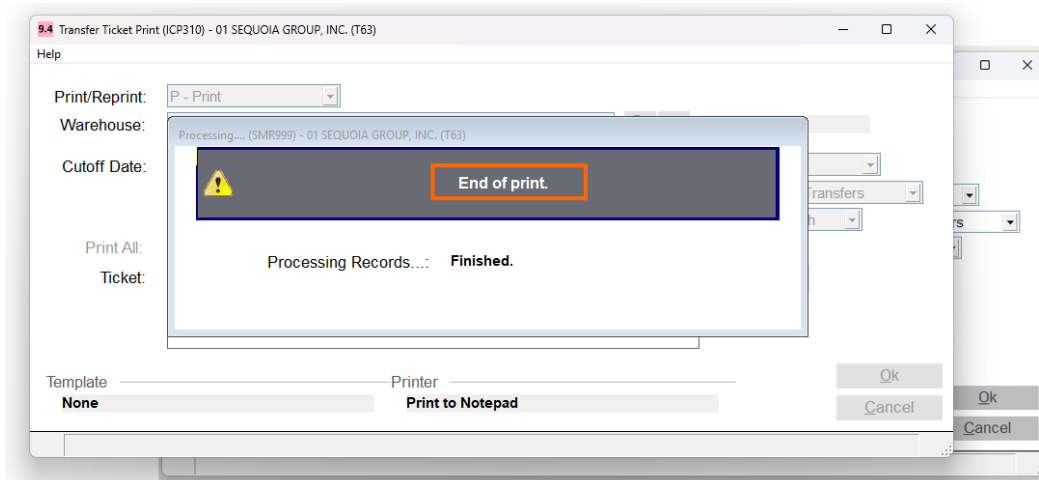
- Once the document is released and the **Priority** is updated, it is available to print.
- To print the document that has been released, navigate to **Inventory Control-> Warehouse Transfers-> Transfer Ticket Print (program ICP310)**.




- Look up the document by entering or searching for the document number you just released.



- Because the document is no longer on hold, it stays in the grid and shows as 'able to print.' If the document is still on hold, the system removes it from the grid and rejects the print attempt.



- Proceed to print the document.

		KEVEN 200 W CIVIC CENTER DR STE 204 SANDY UT 84070-4207 802-571-2300 sales@sequoiagroup.com www.sequoiagroup.com			TRANSFER TICKET REPRINT			
To Whse: 02 Utah Warehouse 1414 W 7800 S WEST JORDAN UT 84088		From Whse: 01 REFRIGERATION HARDWARE SUPPLY 632 FORESIGHT CIR GRAND JUNCTION CO 81505-1042			Number T00330	Date 04/20/2026	Page 1	Ship# 00001
Reference #	Ordered	Requested				Ship Via		
	03/26/13	03/26/13				OWN TRUCK		
Item	Description		Committed	Ship	Back	UM	Weight	Loc
* RUSH TICKET 1151	Bicarbonate of Soda for formula		2			LB	6.0	A30
							Total Weight:	6.0
Do not write below this line			Accounting Copy			... Last Page		



9.7 Bill of Materials Ticket Review

- To demonstrate this feature, we will create a **Production Entry on Service Hold** and then release it for printing.

9.4 Production Entry (MCE130) - 01 SEQUOIA GROUP, INC. (T63)

File View Go To Help

Done Notes: [D] [G]

Finished Item: I144
Portable Scaffold System
2'5" x 6'1 x 6'h

Special Order: 000223
Ticket #: 000223
Whse: 01 Atlanta Warehouse
Entered: 04/10/2026
Production: 04/10/2026
Priority: H - Service Hold (selected)
N - Normal
R - Rush
H - Service Hold

Units: 10 EA

Lines

Item: I139 Scaffold Ladder Units: 20 EA
Update Usage: [x] Usage Date: []
Memo: RED, 6FT HIGH

LN#	Component Item	Description
001	I139	Scaffold Ladder
002	M	Fits in existing ladder on t
003	I140	Scaffold Platform
004	M	Fits between 2 ladders
005	I141	Scaffold Supports for Plat
006	M	Fits on platform, each lad
007	M	Attach with stainless steel
add		

S - Substitute Items

Item Description Build Qty UM

Enter the priority

- After setting the Priority to Service Hold, finish the document.
- Use the **BOM Ticket Review** program to release the **Service Hold**. Navigate to **Manufacturing Control** → **Bill of Materials** → **BOM Ticket Review** (program MCE135).

9.4 Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Friday, April 10, 2026, 3:57 pm Ricci Ramirez

Development

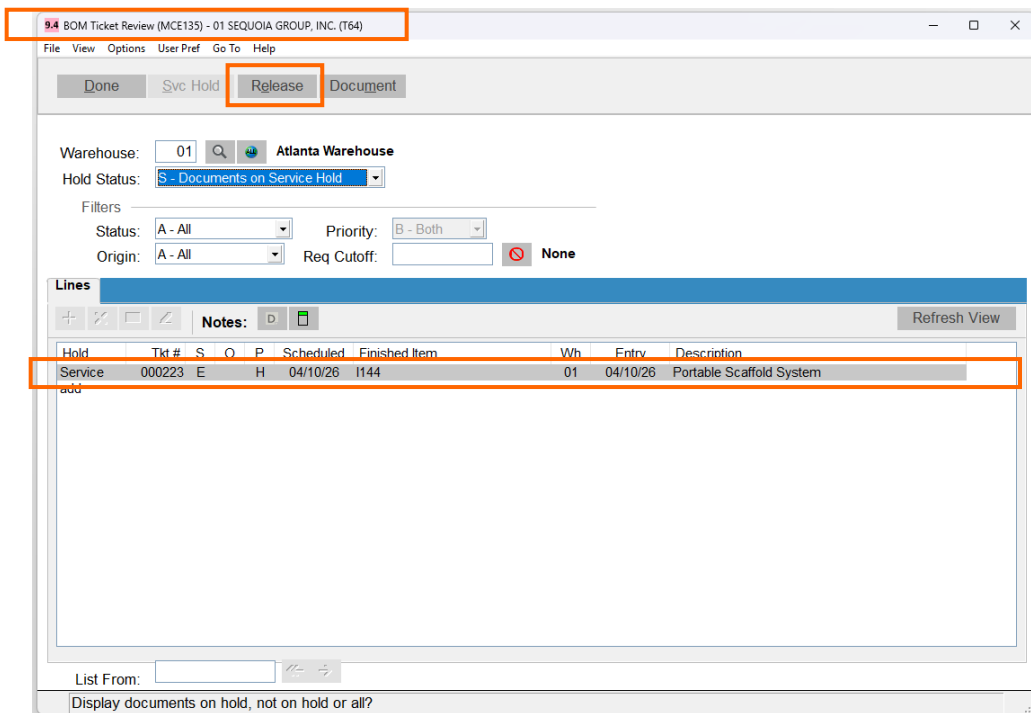
Primary Main

Access: [] [G]

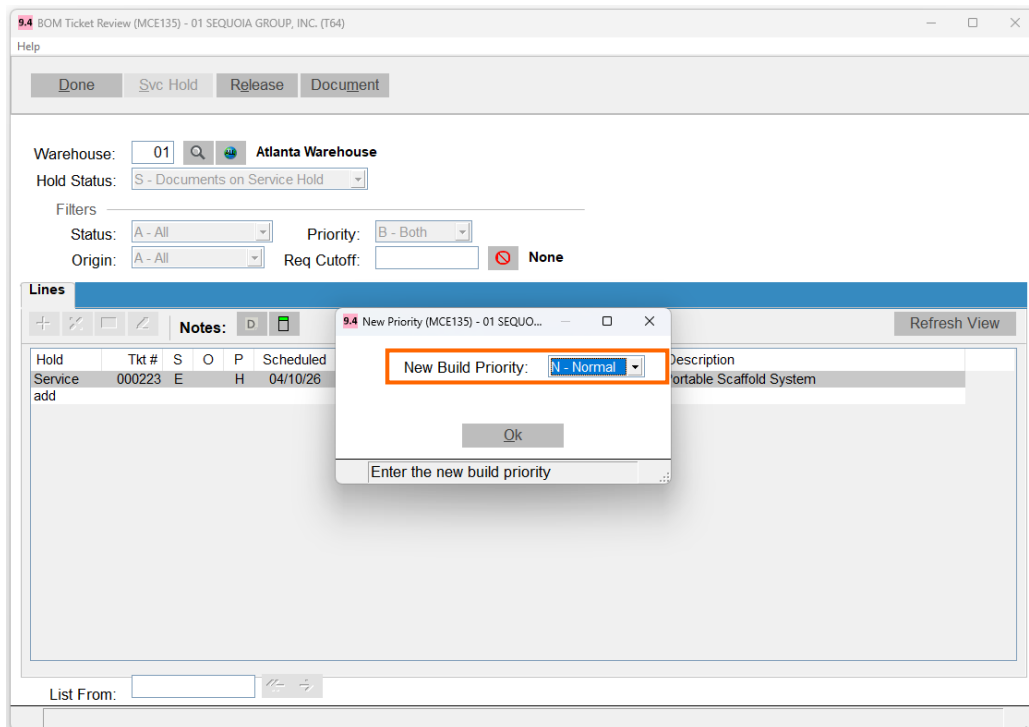
- + Relationship Management
- + Report Writer
- Manufacturing Control
 - Bill of Materials
 - Bill of Materials Entry
 - Production Planning
 - Buyers Control Center BOM
 - Production Entry
 - Production Ticket Print
 - BOM Ticket Review
 - Production Confirmation
 - BOM Production Register
 - + Formulation
 - + Inquiries
 - + Reports & Prints
 - + End of Period
 - File Maintenances
 - BOM History F/M

Quote Entry

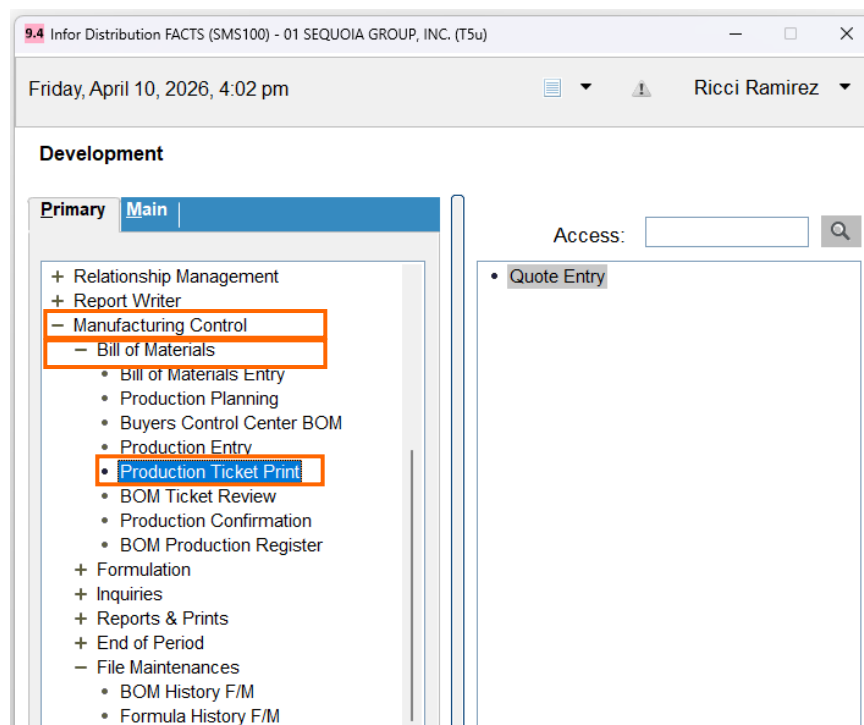
- Select the held document and click **Release** to remove the **Service Hold**.



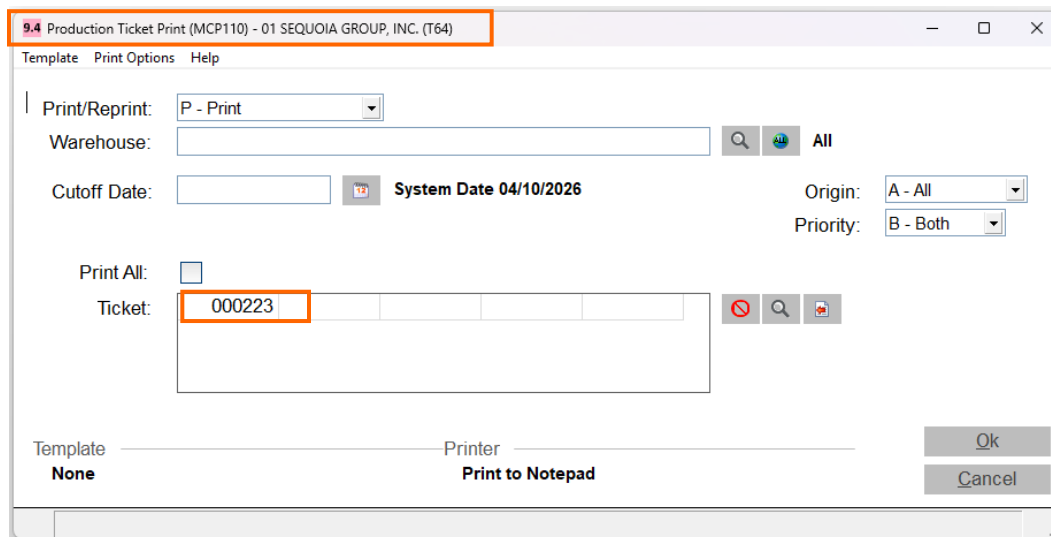
- A window will appear to set the new **Priority**: Normal or Rush. Select the desired Priority.



- To print the document that has been released, navigate to **Manufacturing Control-> Bill of Materials-> Production Ticket Print (program MCP110)**.



- Look up the document by entering or searching for the document number you just released.



- Proceed to print the document.

Reprint

PRODUCTION TICKET

KEVEN

Finished Item I144

Portable Scaffold System

Planned Production: Units

3 EA

Date 03/11/2020

<i>Number</i>	000218
<i>Date</i>	04/20/2026
<i>Whse</i>	01

Ln#	Component Item	Description	Units	UM	Memo
	* RUSH BUILD *				
001	I139	Scaffold Ladder short stack Primary Loc: F72	6	EA	RED, 6FT HIGH
002		Fits in existing ladder on base unit			
003	I140	Scaffold Platform Primary Loc: G27	3	EA	ADJ ON 3"INCREMENTS
004		Fits between 2 ladders			
005	I141	Scaffold Supports for Platform Primary Loc: I36	6	EA	SAFETY RAIL OPTIONAL
006		Fits on platform, each ladder side			
007		Attach with stainless steel hex bolts throughout			

PRODUCTION TICKET

Date: _____ **Initials:** _____

Warehouse Copy

... Last Page

Reprint

PRODUCTION TICKET

KEVEN

Finished Item I144

Portable Scaffold System

Planned Production: Units

3 EA

Date 03/11/2020

Number	000218
Date	04/20/2026
Whse	01

Ln#	Component Item	Description	Units	UM	Memo
	* RUSH BUILD *				
001	I139	Scaffold Ladder short stack Primary Loc: F72	6	EA	RED, 6FT HIGH
002		Fits in existing ladder on base unit			
003	I140	Scaffold Platform Primary Loc: G27	3	EA	ADJ ON 3"INCREMENTS
004		Fits between 2 ladders			
005	I141	Scaffold Supports for Platform Primary Loc: I36	6	EA	SAFETY RAIL OPTIONAL
006		Fits on platform, each ladder side			
007		Attach with stainless steel hex bolts throughout			

PRODUCTION TICKET

Date: _____ Initials: _____

Accounting Copy

... Last Page

9.8 Formulation Ticket Review

- To demonstrate this feature, we will create a **Production Entry** on Service Hold and then release it for printing.

9.4 Production Entry (MCE240) - 01 SEQUOIA GROUP, INC. (T66)

File View Go To Help

Done Ingredients Packaging Notes:

Ticket/Formula

DEGREASER

Special Order:
 Ticket #: NEXT
 Whse: Atlanta Warehouse
 Entered:
 Planned:
 Priority:

Formula: To Produce: GL Required: 0

Lines

Notes:

Item:

Update Usage: Usage Date:

Units:

Memo:

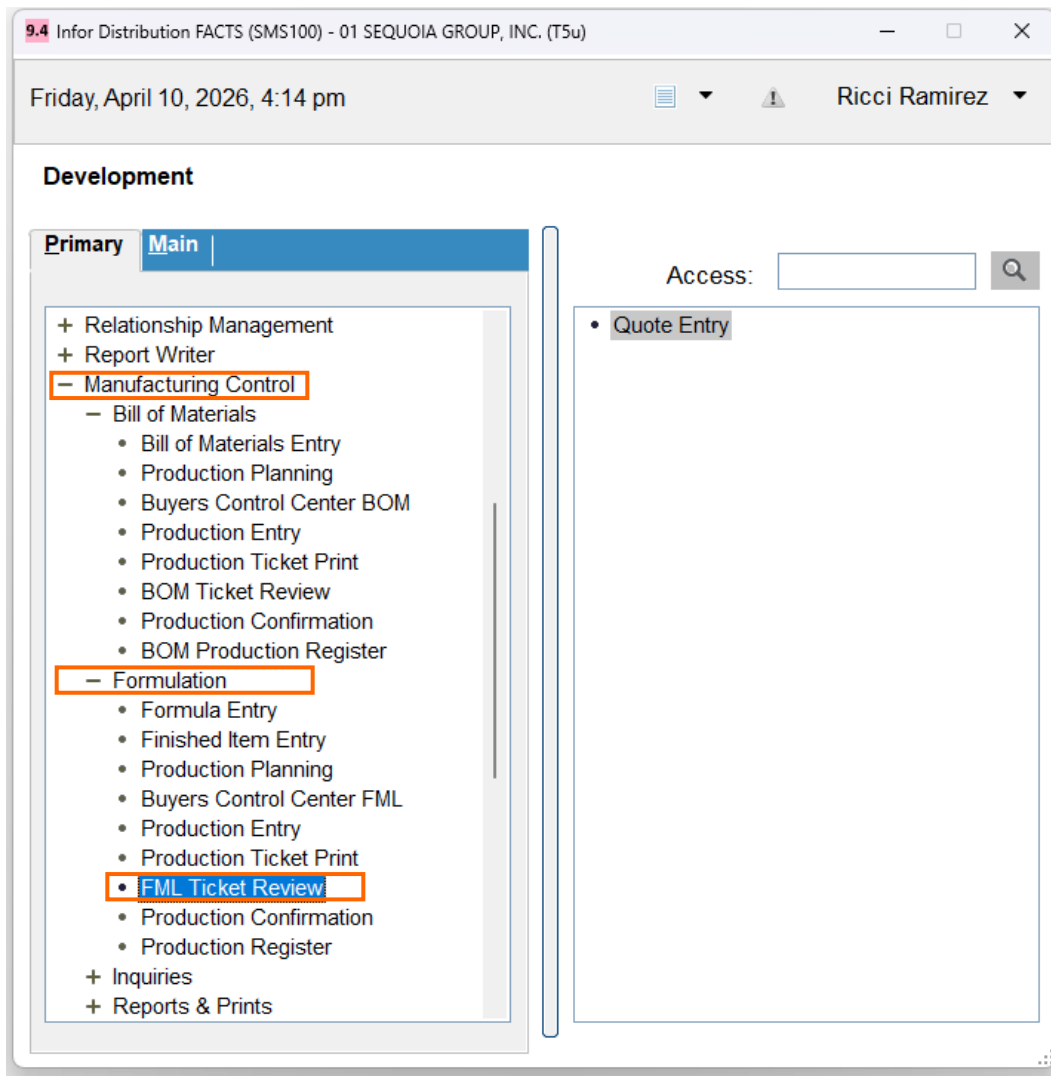
Finished Item	Description	Units	UM	Mem

W - Warehouse Quantities

Wh	Description	UM

Enter the priority

- After setting the **Priority** to **Service Hold**, finish the document.
- Use the **FML Ticket Review** program to release the **Service Hold**. Navigate to **Manufacturing Control** → **Formulation** → **FML Ticket Review** (program MCE135).



- Select the held document and click **Release** to remove the **Service Hold**.

9.4 FML Ticket Review (MCE245) - 01 SEQUOIA GROUP, INC. (T6n)

File View Options User Pref Go To Help

Done Svc Hold Release Document

Warehouse: All

Hold Status: S - Documents on Service Hold

Filters

Status: A - All Priority: B - Both

Origin: A - All Req Cutoff: None

Lines

Notes: D Refresh View

Hold	Tkt #	S	O	P	Scheduled	Formula	Wh	Entry	Description
Service	000097	E	H		04/28/11	F101	01	04/28/13	DEGREASER

List From:

- A window will appear to set the new **Priority**: Normal or Rush. Select the desired Priority.

9.4 FML Ticket Review (MCE245) - 01 SEQUOIA GROUP, INC. (T66)

Help

Done Svc Hold Release Document

Warehouse: All

Hold Status: S - Documents on Service Hold

Filters

Status: A - All Priority: B - Both

Origin: A - All Req Cutoff: None

Lines

Notes: D Refresh View

Hold	Tkt #	S	O	P	Scheduled
Service	000103	E	H		04/10/26

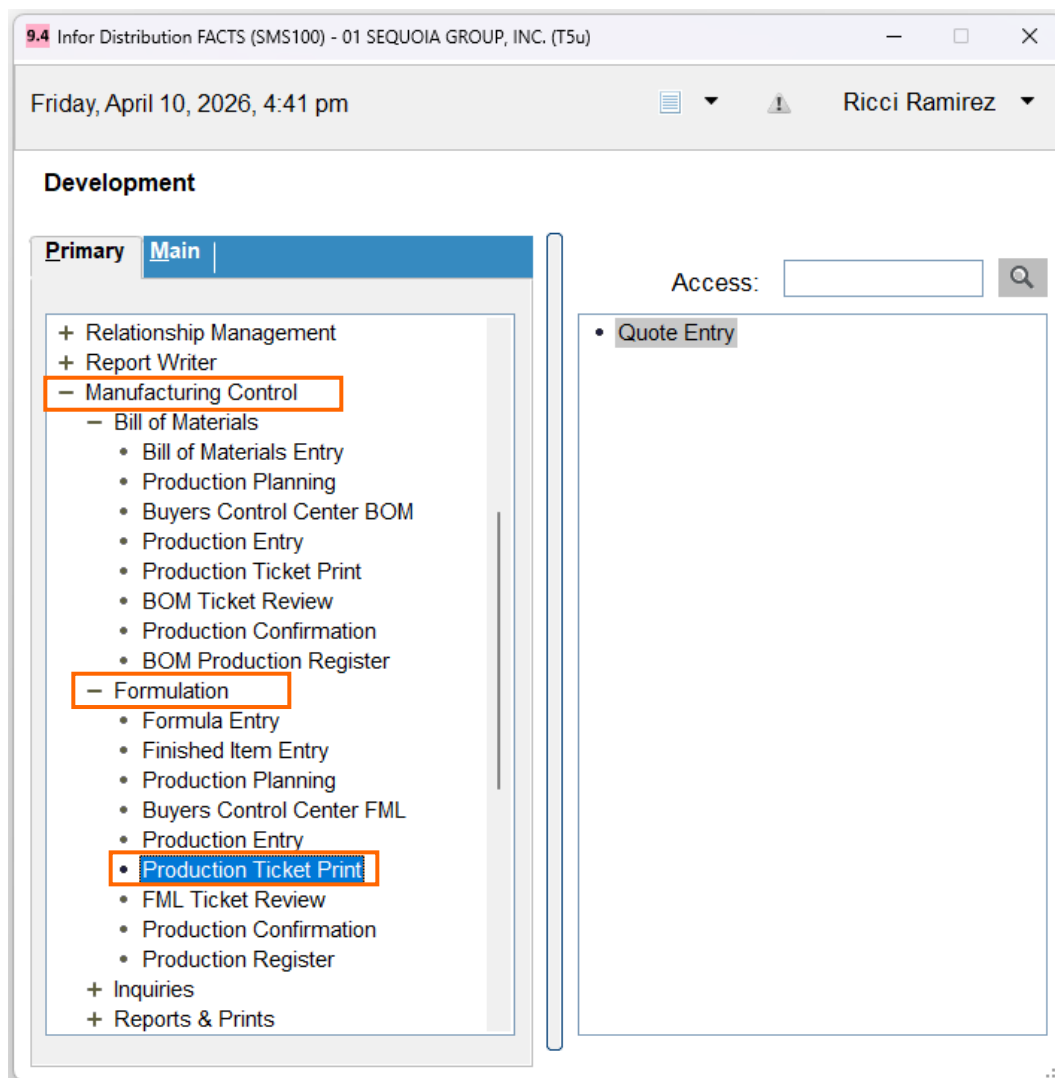
New Build Priority: N - Normal

Ok

Enter the new build priority

List From:

- To print the document that has been released, navigate to **Manufacturing Control-> Formulation -> Production Ticket Print** (program MCP210).



- Look up the document by entering or searching for the document number you just released.

9.4 Production Ticket Print (MCP210) - 01 SEQUOIA GROUP, INC. (T66)

Template Print Options Help

Print/Reprint: P - Print

Warehouse: 01 Atlanta Warehouse

Cutoff Date: System Date 04/10/2026 Origin: A - All

Priority: B - Both

Print All:

Ticket: 000103

Template: None Printer: Print to Notepad

Ok Cancel

- Proceed to print the document.

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula F100 MIRACLE CLEANER

Planned Production:

Quantity 25 GL

Date 09/16/2014

Number	000100
Date	04/20/2026
Whse	01

Ln#	Ingredient	Description	Units	UM	Memo
* RUSH BUILD *					
001	I150	Bleach - maximum concentration Primary Loc: C39	5	GL	DANGEROUS FUMES!
002		FIRST INGREDIENT			
003	I151	Bicarbonate of Soda powder Primary Loc: A30	5	LB	3:1 W/WATER
004		MIX WITH WATER FIRST, THEN ADD TO BLEACH			
005	I152	Ammonia Primary Loc: D80	0	GL	3:1 W/WATER
006		ADD LAST; MIX SLOWLY. COVER DRUM IMMEDIATELY			
007		WHEN COMPLETE. CAUTION: WEAR MASK			
008	I100	Pallet Loading Hand Truck Primary Loc: SP345 Alt Loc: R35; OVRSTK; G25; NONSTK	5	CT	

FORMULATION PRODUCTION TICKET

Date: _____ Initials: _____

Warehouse Copy

Continued on next page ...

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula **F100 MIRACLE CLEANER**

Planned Production: Quantity **25 GL** Date **09/16/2014**

Number	000100
Date	04/20/2026
Whse	01

Ln#	Packaging Item	Description	Units	UM	Memo
* RUSH BUILD *					
Finished Item:		I148 Miracle Cleaner			
Produce:		5.0 BX	Formula Required:	25 GL	
Memo:		oc: C30			
Primary L					
001	I156	Plastic Spray Bottle	0	EA	FILL'EM UP
002		Primary Loc: E56 DONT FORGET PROTECTIVE SEAL			
FORMULATION PRODUCTION TICKET					
Date: _____ Initials: _____					

Warehouse Copy

... Last Page

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula **F100 MIRACLE CLEANER**

Planned Production:

Quantity **25 GL**

Date **09/16/2014**

Number	000100
Date	04/20/2026
Whse	01

Ln#	Ingredient	Description	Units	UM	Memo
001	* RUSH BUILD * I150	Bleach - maximum concentration Primary Loc: C39	5	GL	DANGEROUS FUMES!
002		FIRST INGREDIENT			
003	I151	Bicarbonate of Soda powder Primary Loc: A30	5	LB	3:1 W/WATER
004		MIX WITH WATER FIRST, THEN ADD TO BLEACH			
005	I152	Ammonia Primary Loc: D80	0	GL	3:1 W/WATER
006		ADD LAST; MIX SLOWLY. COVER DRUM IMMEDIATELY			
007		WHEN COMPLETE. CAUTION: WEAR MASK			
008	I100	Pallet Loading Hand Truck Primary Loc: SP345 Alt Loc: R35; OVRSTK; G25; NONSTK	5	CT	

FORMULATION PRODUCTION TICKET

Date: _____ Initials: _____

Accounting Copy

Continued on next page ...

Reprint

FORMULATION PRODUCTION TICKET

KEVEN

Formula **F100 MIRACLE CLEANER**

Planned Production:

Quantity **25 GL**

Date **09/16/2014**

Number	000100
Date	04/20/2026
Whse	01

Ln#	Packaging Item	Description	Units	UM	Memo
* RUSH BUILD *					
Finished Item:		I148 Miracle Cleaner			
Produce:		5.0 BX	Formula Required:	25 GL	
Memo:		oc: C30			
Primary L					
001	I156	Plastic Spray Bottle	0	EA	FILL'EM UP
002		Primary Loc: E56 DONT FORGET PROTECTIVE SEAL			
<p>Date: _____ Initials: _____</p>					

FORMULATION PRODUCTION TICKET

Accounting Copy

... Last Page

9.9 New Alerts for Order Priority Changes

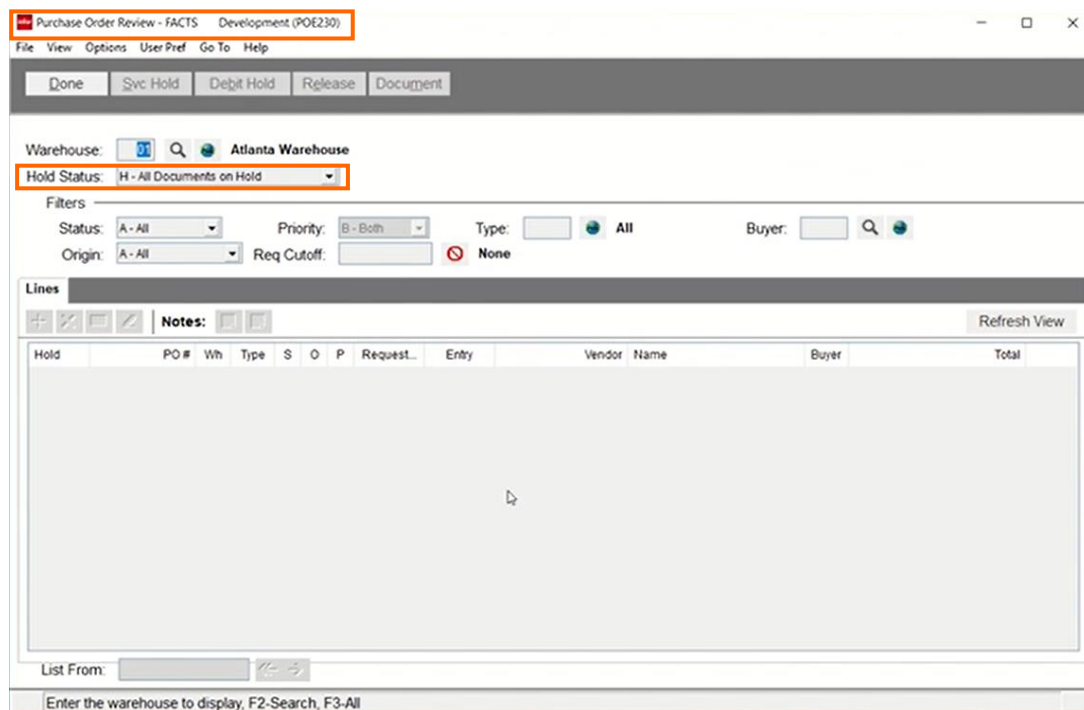
With the addition of holds across these modules, the system now includes notification alerts for priority changes.

Users can subscribe to these alerts to be notified when a document is placed on **Service Hold** or when a **Hold** is released.

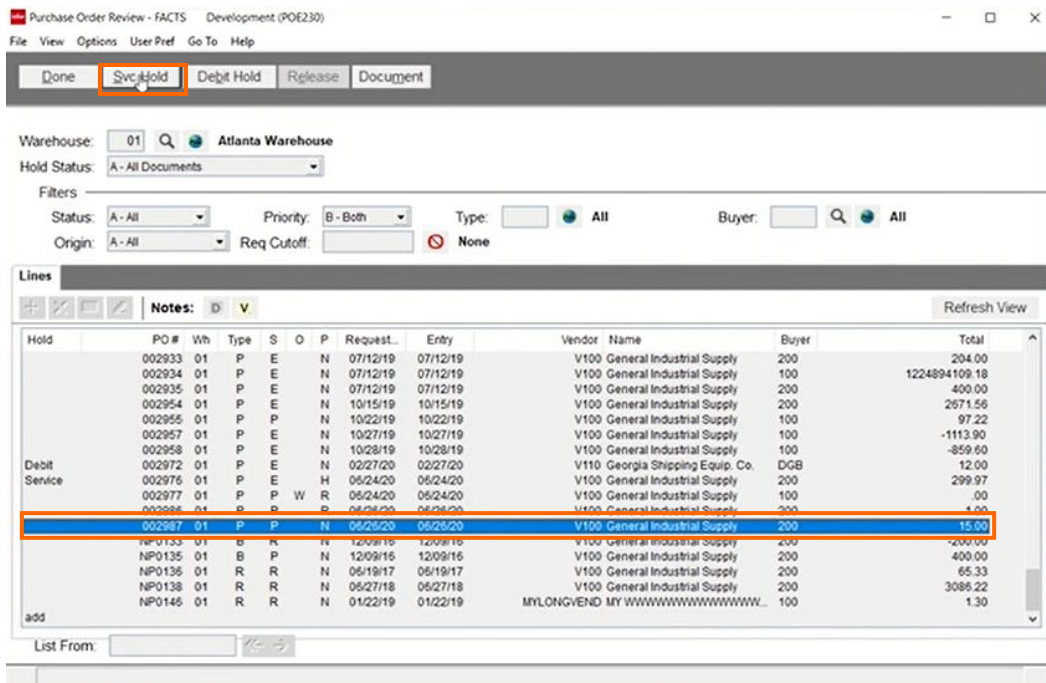
These alerts are interactive. When an alert appears, the user can click the **Respond To** option, which opens the corresponding Review program (e.g., clicking an alert for a formulation hold opens the **Formulation Ticket Review** program).

This allows the user to immediately view the document and take action to resolve the alert.

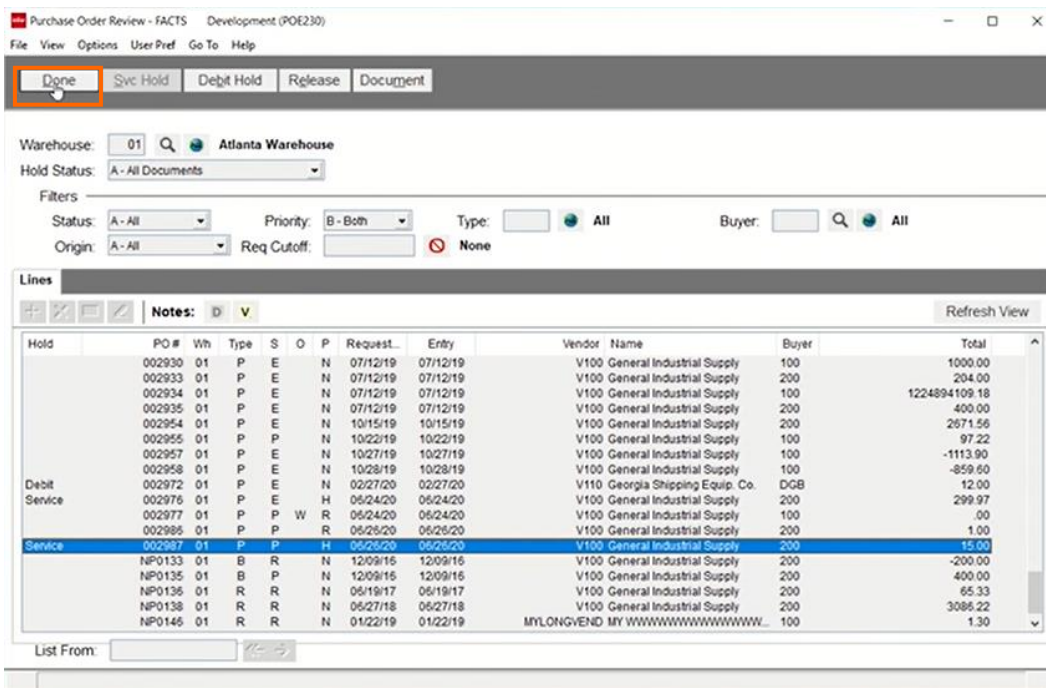
- To view this functionality, open **Purchase Order Review (POE230)** and select **All Documents on Hold** in the **Hold Status** field.



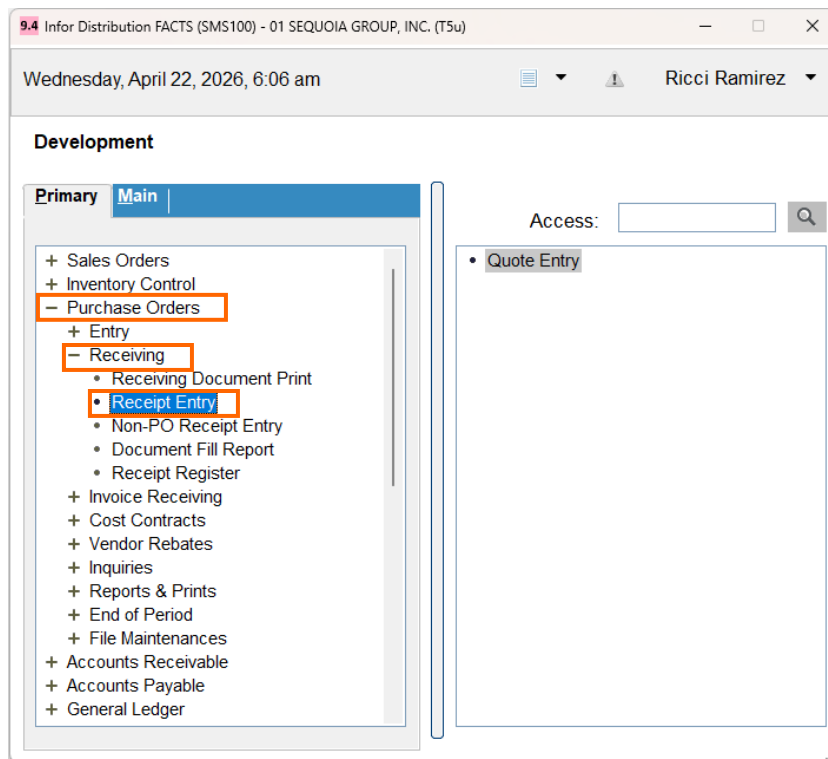
- For this example, select a specific document (**Purchase Order 2987**) and change its priority by placing it on a **Service Hold**.



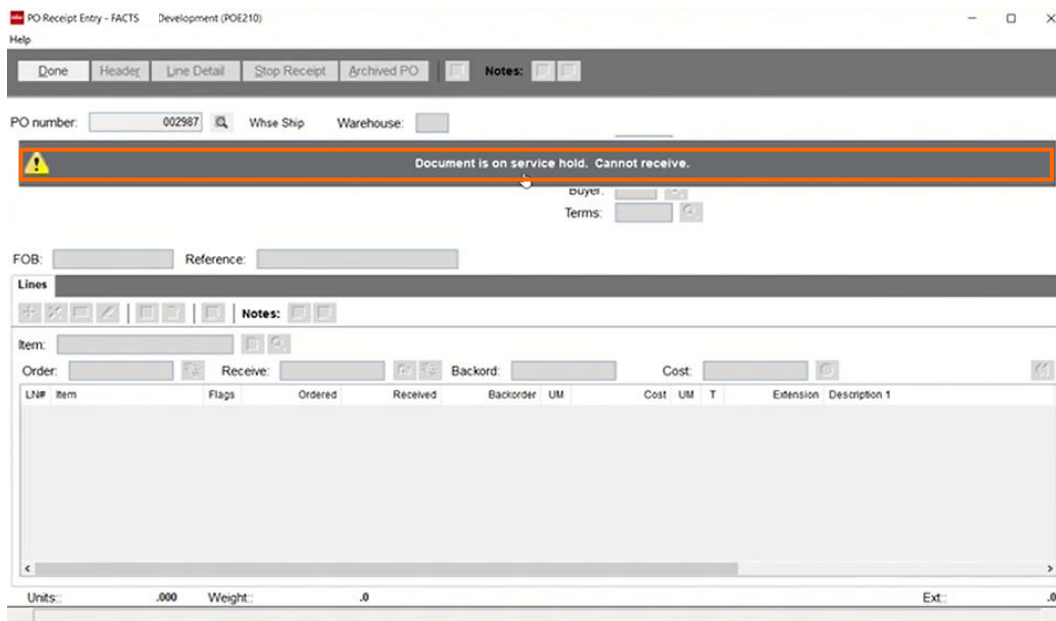
- Click **Done** to close the window.



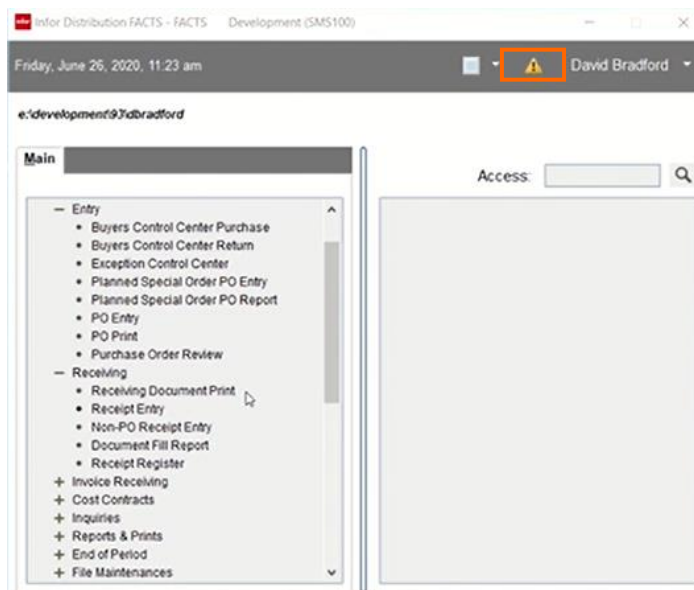
- Navigate to **Purchase Orders->Receiving->Receipt Entry** (program POE210).



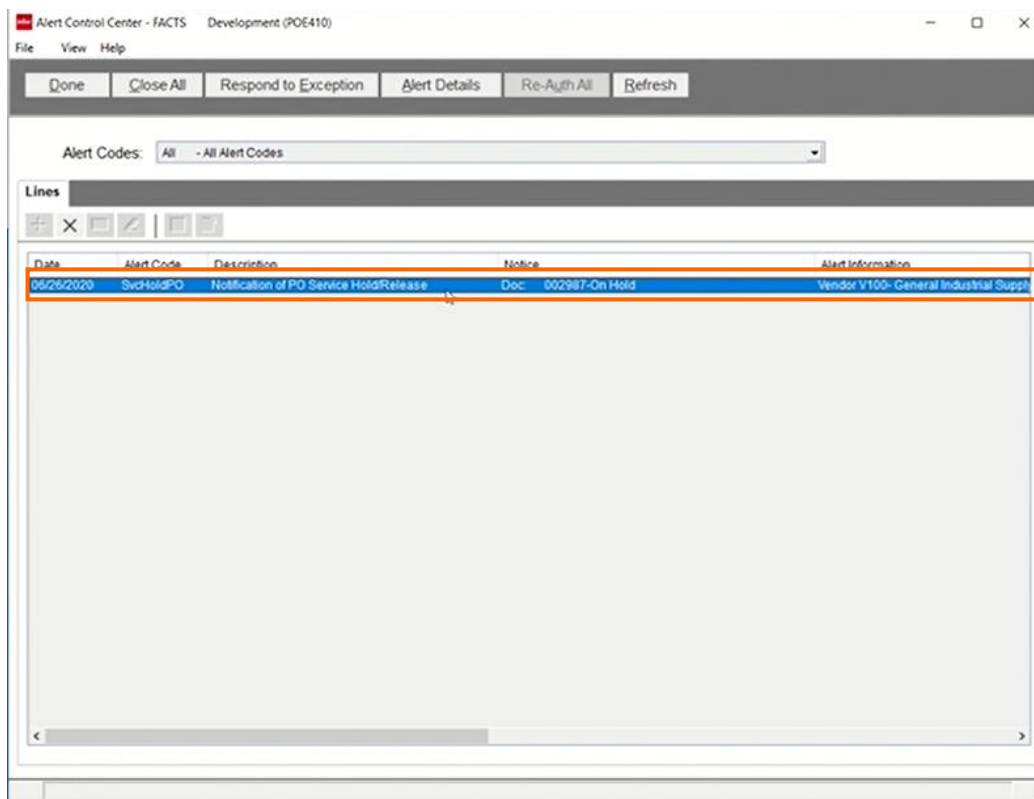
- Open **Receipt Entry** and enter **002987** in the **PO Number** field. The document cannot be pulled in because it is on **Service Hold**.



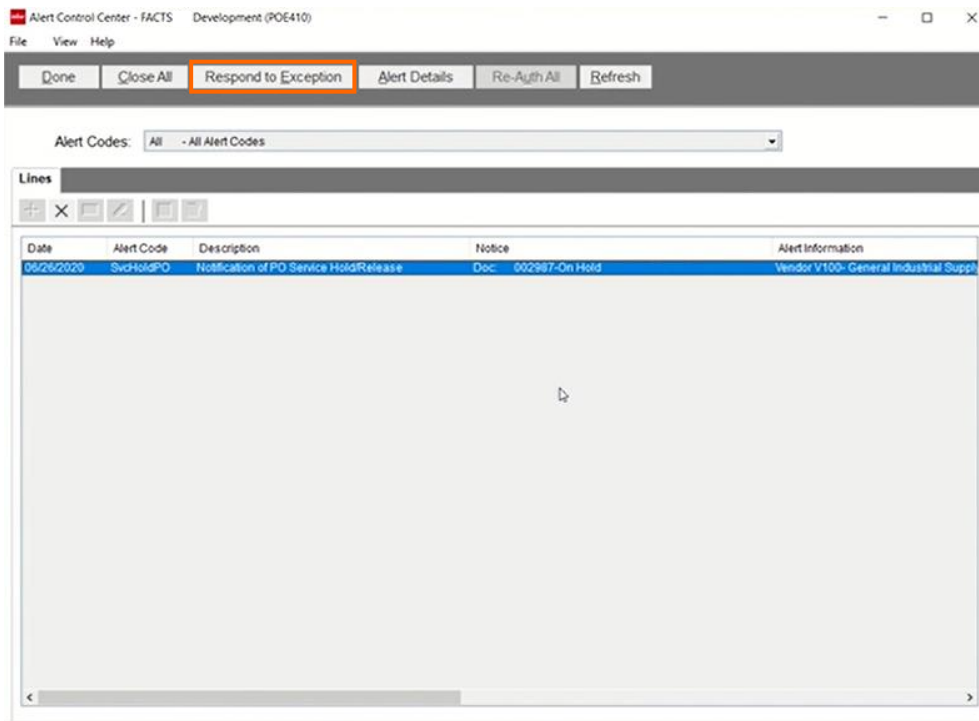
- The alert appears in the main menu (Alert Control Center) as an on-screen notification with a **yellow triangle**.



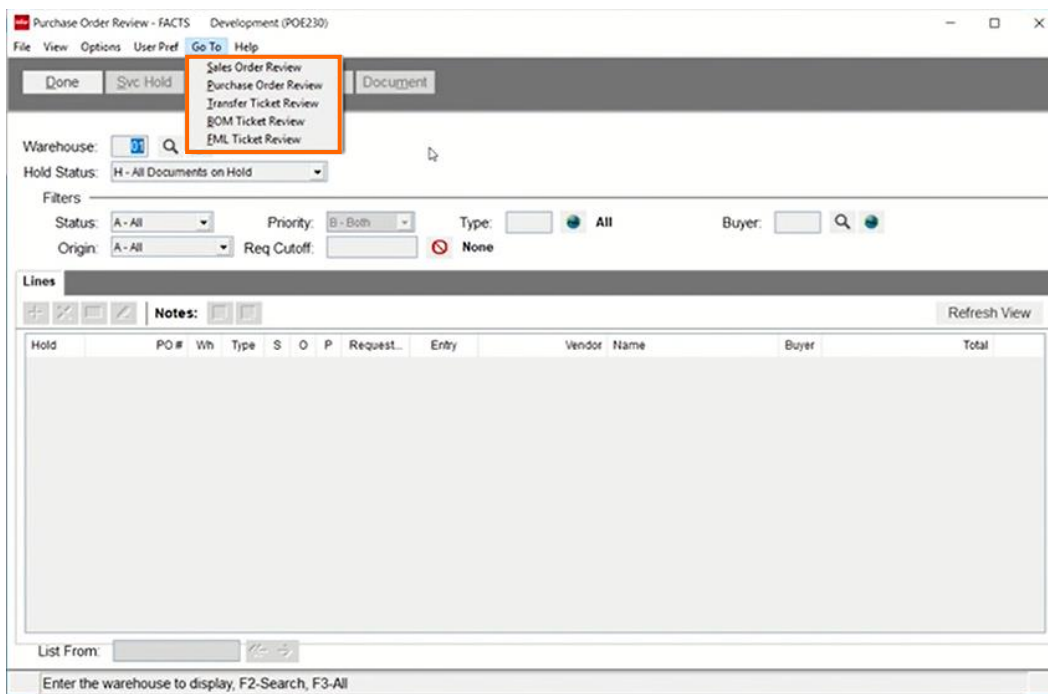
- **Alert Control** window appears with the notification.



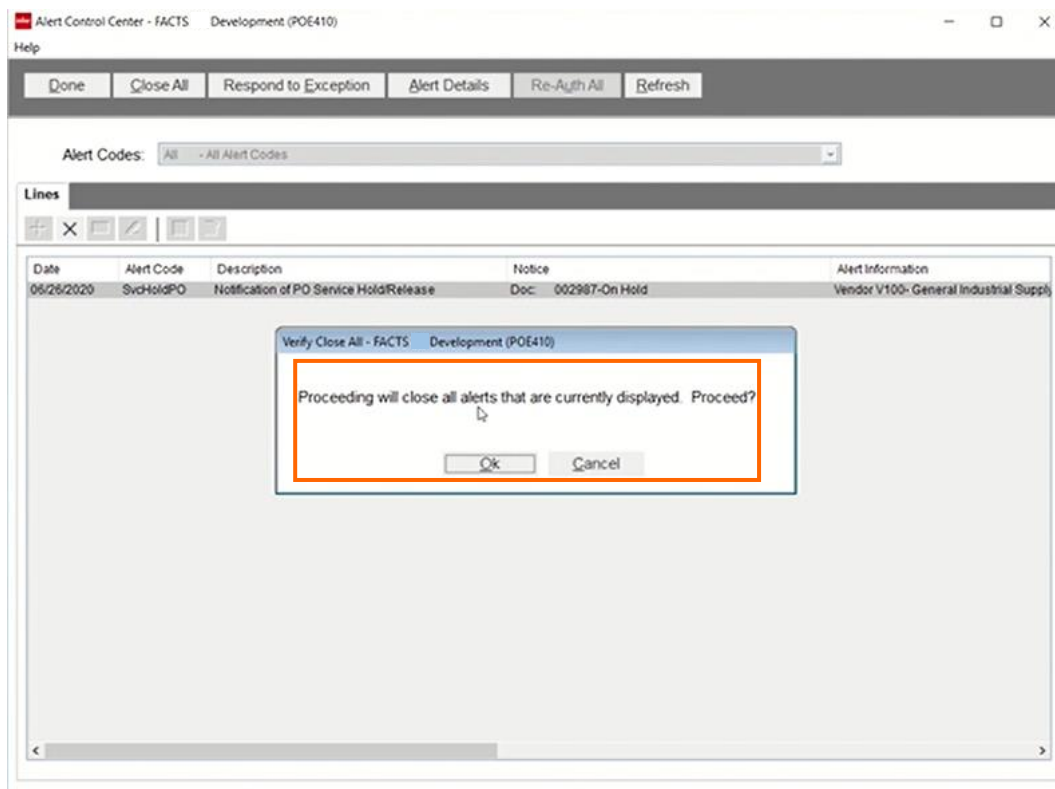
- Click **Respond to Exception** to proceed.



- Clicking **Respond to Exception** automatically opens the relevant review program for the document. In this example, it opens the **Purchase Order Review** screen. From this window, click **Go To** to access **Sales Order Review, Purchase Order Review, Transfer Ticket Review, BOM Ticket Review, and FML Ticket Review**.



- Click **Done** to return to the **Alert Control Center**, then click **Close All** to clear the alert (yellow triangle icon).



Click **OK**, then **Done**.

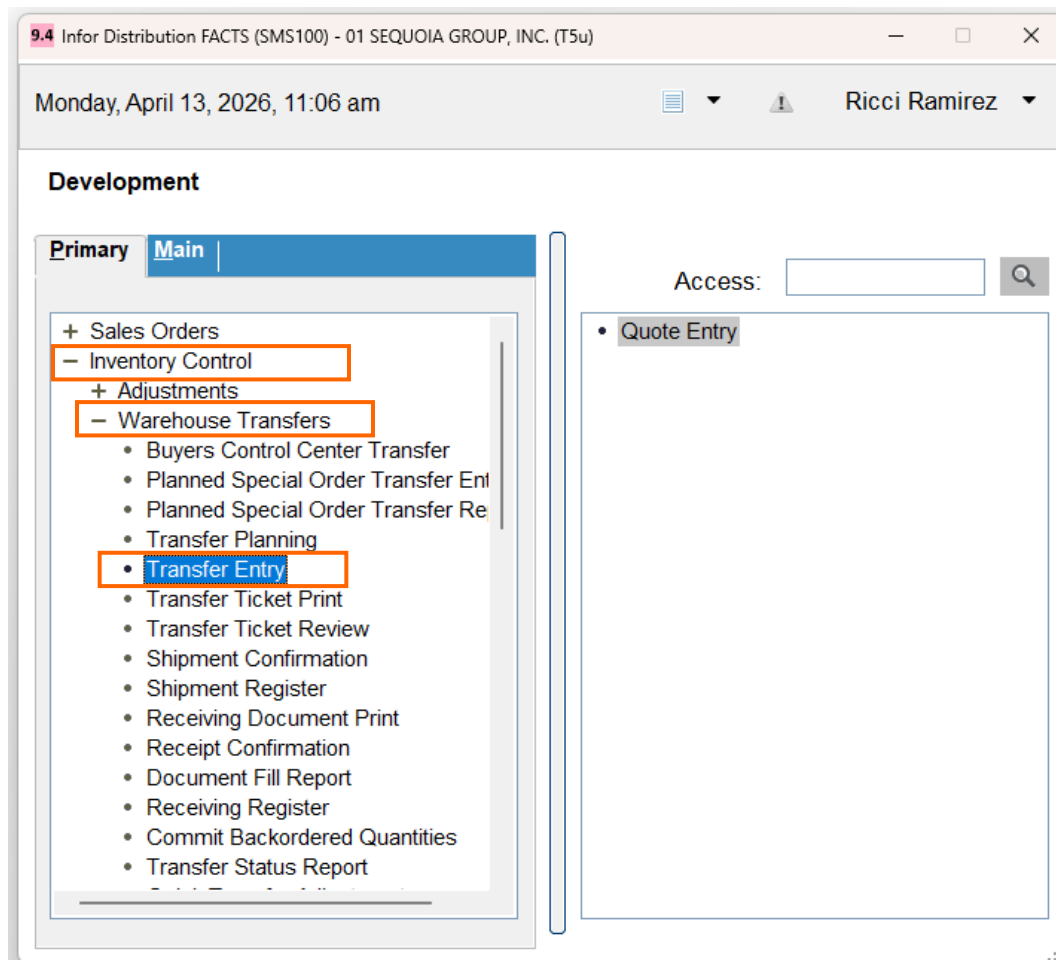
Because the system is fully standardized across all modules, the alert procedure works the same throughout the software. Whether you are working with a **Purchase Order, **Warehouse Transfer**, **Manufacturing Bill of Materials**, or **Formulation Ticket**, the notification system behaves consistently.*

*This means subscribing to document changes, receiving visual alerts, and using the **Respond To** option to open the appropriate review program all function the same across the system.*

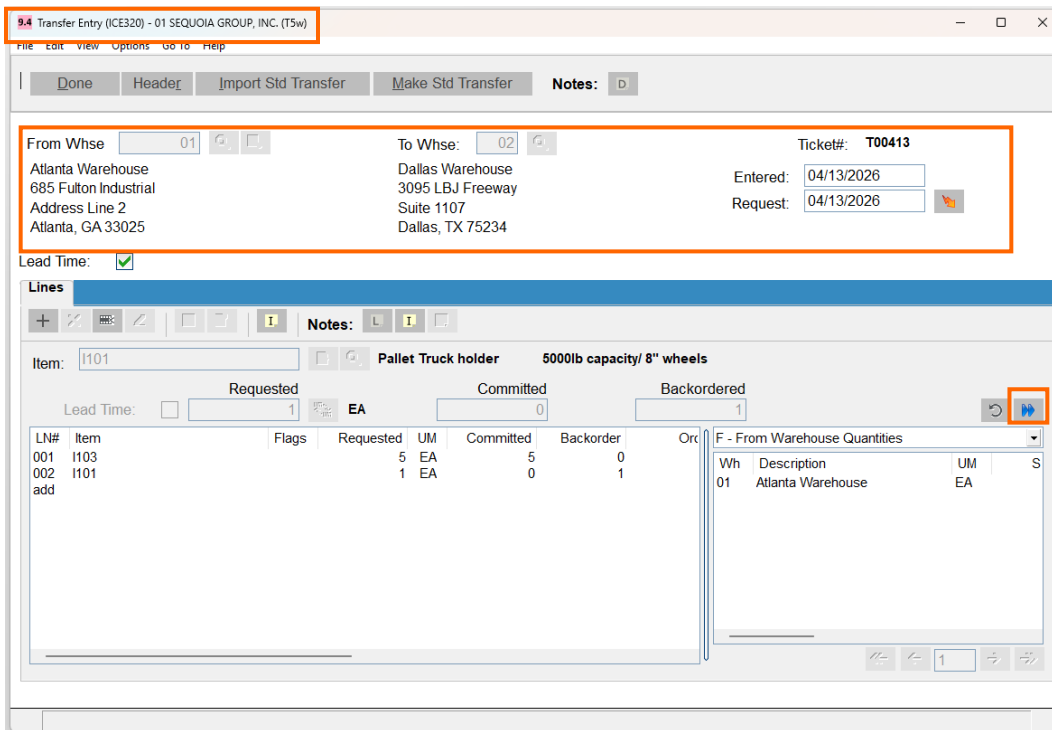
10. Sidebar added to Warehouse Transfer Entry programs

The IC module now includes sidebar functionality in Transfer Entry, Receipt Confirmation, and Shipment Confirmation. Use the sidebar drop-down options to view quantities by warehouse, along with resources, timelines, and notes. The new Incoming and Outgoing options group documents such as Purchase Orders, Sales Orders, Transfers, and manufacturing tickets.

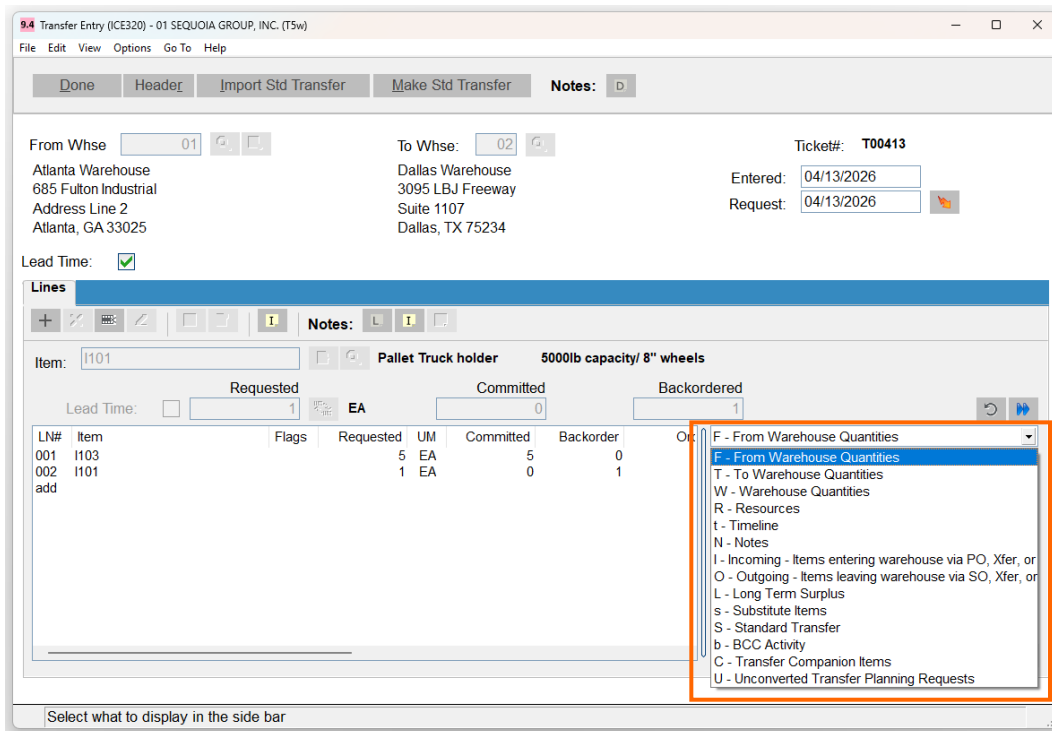
- Navigate to **Inventory Control-> Warehouse Transfers-> Transfer Entry** (program ICE320)



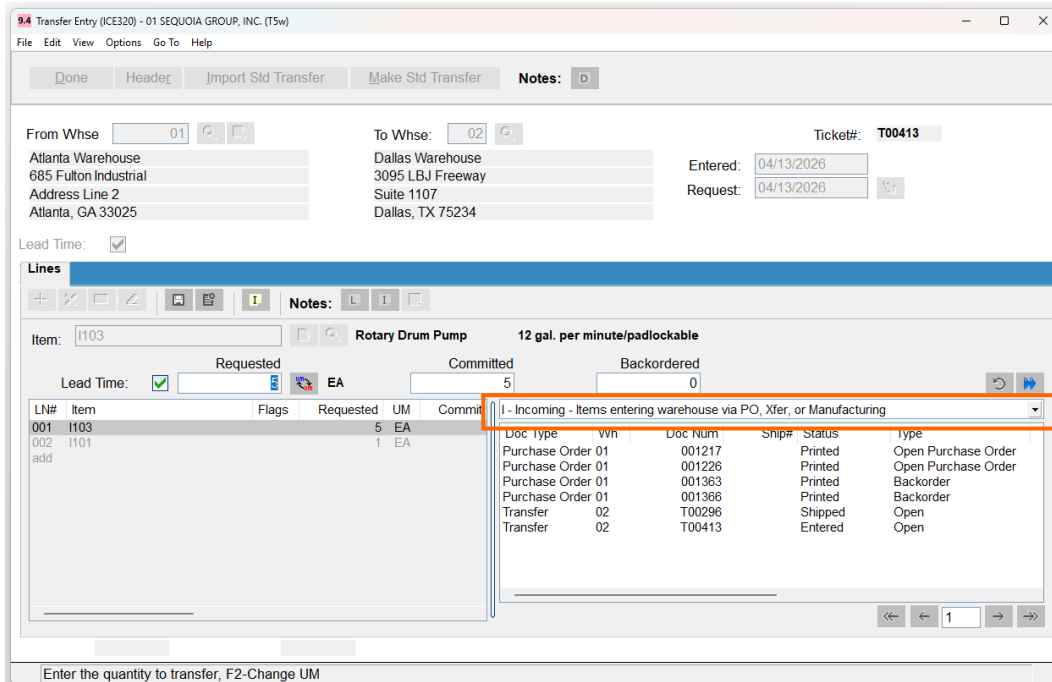
- Open **Transfer Entry**.
- Create a Transfer Entry document. For our example we are creating a document moving inventory from **warehouse 1 to warehouse 2**. We are entering the first item, **I101**, with a quantity of **1**, and then enter a second item, **I103**, with a quantity of **5**.



- Explore the sidebar options by selecting the first item, **1103**, to view the new drop-down options.

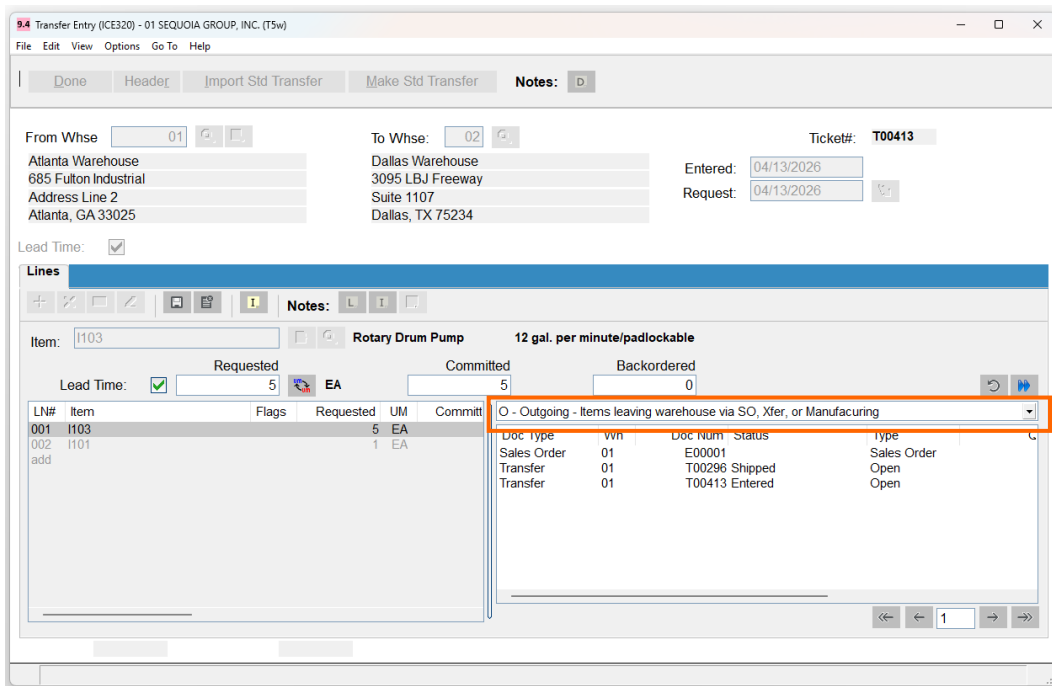


- **The Incoming** option displays all documents where an item is entering the 'from' or 'to' warehouse. This includes Purchase Orders, Transfers, and manufacturing.



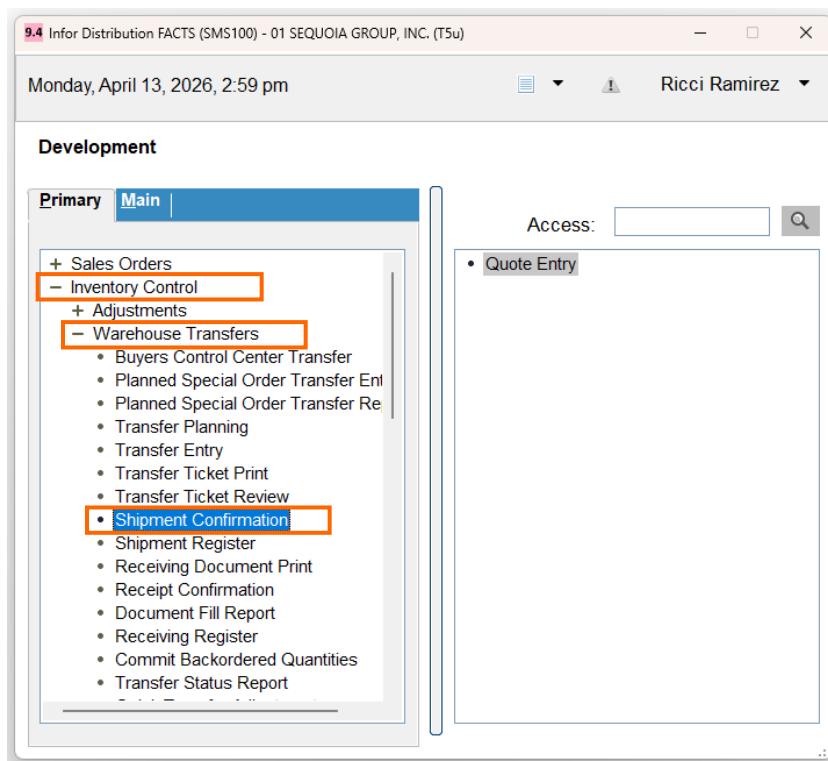
*Previously, this information was available in the View menu under 'On Order.'

- **The Outgoing** option displays all documents where an item is leaving the 'from' or 'to' warehouse. This includes Sales Orders, Transfers, and manufacturing. These options consolidate information that was previously spread across multiple View menu selections, making it easier to access.



*Previously, this information was available in the View menu under 'Committed.'

- Use the Filter in the sidebar to sort through large lists of documents. This is useful when there are many incoming or outgoing records. Set criteria such as document type (Sales Order) and warehouse (O2) to narrow the results and display only the relevant records.
- The sidebar in **Shipment Confirmation** is the same. To view it, navigate to **Inventory Control → Warehouse Transfers → Shipment Confirmation** (program ICE320).



- Open **Shipment Confirmation** to explore the options available in the sidebar.

9.4 Shipment Confirmation (ICE320) - 01 SEQUOIA GROUP, INC. (T5x)

File Edit View Options Go To Help

Done Header Stop Conf Notes: D

From Whse: 02 Dallas Warehouse
3095 LBJ Freeway
Suite 1107
Dallas, TX 75234

To Whse: 01 Atlanta Warehouse
685 Fulton Industrial
Address Line 2
Atlanta, GA 33025

Ticket#: T00319
Entered: 03/21/2013
Request: 03/21/2013
Shipped: 04/13/2026

Lead Time:

Lines

Item: I119 Steel Shelving/Shelf 24"D, 320LB cap., 85" Height

Requested: 3000 Shipped: 3000 Committed: 0 Backordered: 0

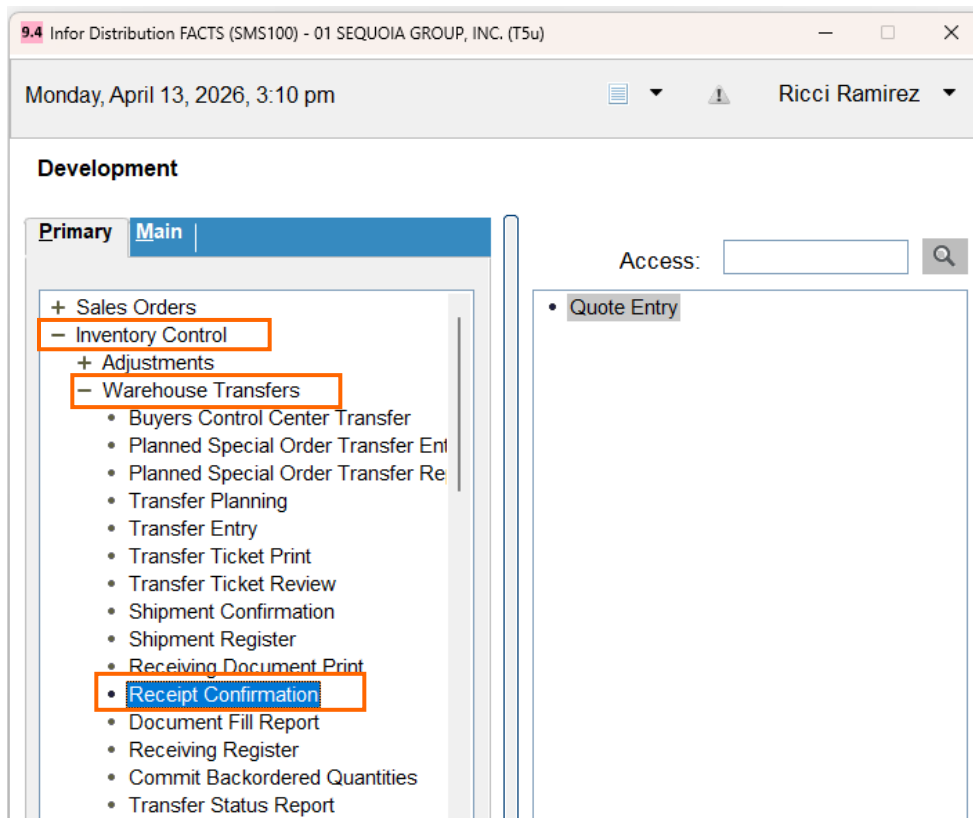
Lead Time: EA

LN#	Item	Flags	Requested	UM	Shipped	Committed	Backord
001	I119		3000	EA	3000	0	
add							

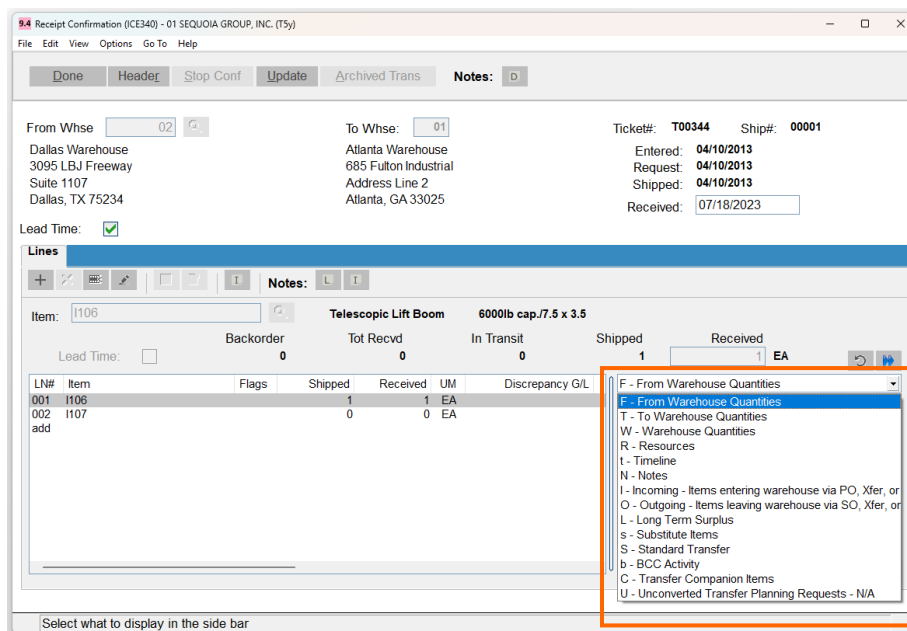
Select what to display in the side bar

- F - From Warehouse Quantities
- F - From Warehouse Quantities
- T - To Warehouse Quantities
- W - Warehouse Quantities
- R - Resources
- t - Timeline
- N - Notes
- I - Incoming - Items entering warehouse via PO, Xfer, or
- O - Outgoing - Items leaving warehouse via SO, Xfer, or
- L - Long Term Surplus
- s - Substitute Items
- S - Standard Transfer
- b - BCC Activity
- C - Transfer Companion Items
- U - Unconverted Transfer Planning Requests

- The sidebar in **Receipt Confirmation** is the same as in **Shipment Confirmation** and **Transfer Entry**.
- Navigate to **Inventory Control-> Warehouse Transfers-> Receipt Confirmation** (program ICE340)



- Open **Receipt Confirmation** to explore the options available in the sidebar.



11. Order Planning (for future orders)

The system handles future orders through its planning request functionality, which allows you to schedule orders ahead of time. In this system, each unique plan date is treated as a unique document.

Here is how order planning for future orders is managed:

- ✓ **Automatic Document Generation:** You can automate future orders using the 'auto create nightly' feature. This background process checks your pending plans every night to determine if an actual document (like a sales order or purchase order) needs to be created. You configure this by setting a 'days prior' rule, which tells the system how many days in advance it should create the actual document. For example, if you set it to 14 days, the system will automatically convert any valid planning requests scheduled for the next 14 days into live documents.
 - ✓ **Manual On-Demand Generation:** Instead of waiting for the automatic process, you can manually generate future orders at any time using the Requirements Report. Additionally, users can choose to manually import a future plan into an active document; if they do this, the future planning date is overridden to match the dates on the document they are actively working on.
 - ✓ **Date Grouping Rules:** If you have multiple planning requests for the exact same plan date, same customer, and same ship-to destination, the system will merge them together to create a single document. However, because plans are strictly tied to their date, the system will not allow you to combine items that have *different* scheduled plan dates onto the same document.
 - ✓ **Future Order Alerts:** As mentioned in our previous conversation, you can subscribe to system notifications to track these future plans. For example, you can configure an alert to notify you 5 days before a scheduled plan date arrives to give you a heads-up. You can also set 'overdue alerts' to trigger 5 days *after* a plan date if the order has passed without being converted.
- To see this functionality, navigate to **Sales Orders → File Maintenance → Infrequent File Maintenance → Static Control F/M** (program SOF980).

9.4 Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Wednesday, April 15, 2026, 9:05 am

Ricci Ramirez

Development

Primary Main

- + Freight System
 - Infrequent File Maintenances
 - Document Print Control F/M
 - Route F/M
 - Returns Code F/M
 - Package F/M
 - Shipping Control F/M
 - UPS Weight F/M
 - UPS Zone F/M
 - Order Source Code F/M
 - Lost Sales Reason Code F/M
 - Warehouse Code F/M
 - Deposit Earned Reason Code F/M
 - Cash Tray F/M
 - Cash Drawer F/M
 - Terms Code Order Setup
 - Order Activity Cost Code Entry
 - SO Entry Options F/M
 - SO Document Import Control F/M
 - SO to GL Posting F/M
 - Auto Quotes Import FM
 - Auto Quotes Vendor F/M
 - Currency Code F/M
 - Static Control F/M
 - Nonstatic Control F/M
 - Signature Capture Devices F/M

Access:

Quote Entry

- Open **Static Control F/M**.

Static Control F/M (SOF980) - 01 SEQUOIA GROUP, INC. (T5v)

File Audit Help -Developer

Exit New Delete Save

Use Features Settings Tax/Freight Printing Entries Blankets Orders Hazmat Custom Ship Verify CustomE

Job Cost: Y - Use Job Costing

Contract Pricing:

PD Sales Register:

Invoice History:

Past Sales:

Lost Sales: Record Lost Sales: Y - Yes

Default Reason Code for Lost Sales: NS

Line Discounts: \$ - Use Line Item Dollar Discounts

Invoice Discounts: % - Invoice Discount By Percent

Inside/2nd Sls: B - Use both salespeople

Remote Order Entry:

Cash Drawer Handling:

Routes:

Customer Creation:

Returns Tracking:

Multiple Warehouses:

Order Booking: 99

Require Effective Date:

Require Expiration Date:

Require Requested Date:

Default Requested Date: A - ASAP

Display Quotes:

Acknowledgement Print:

Order Planning Requests

Use: Order Priority: H - Service Hold

Store Past: Order Init Warehouse: Use Plan

Display: Auto Create Nightly:

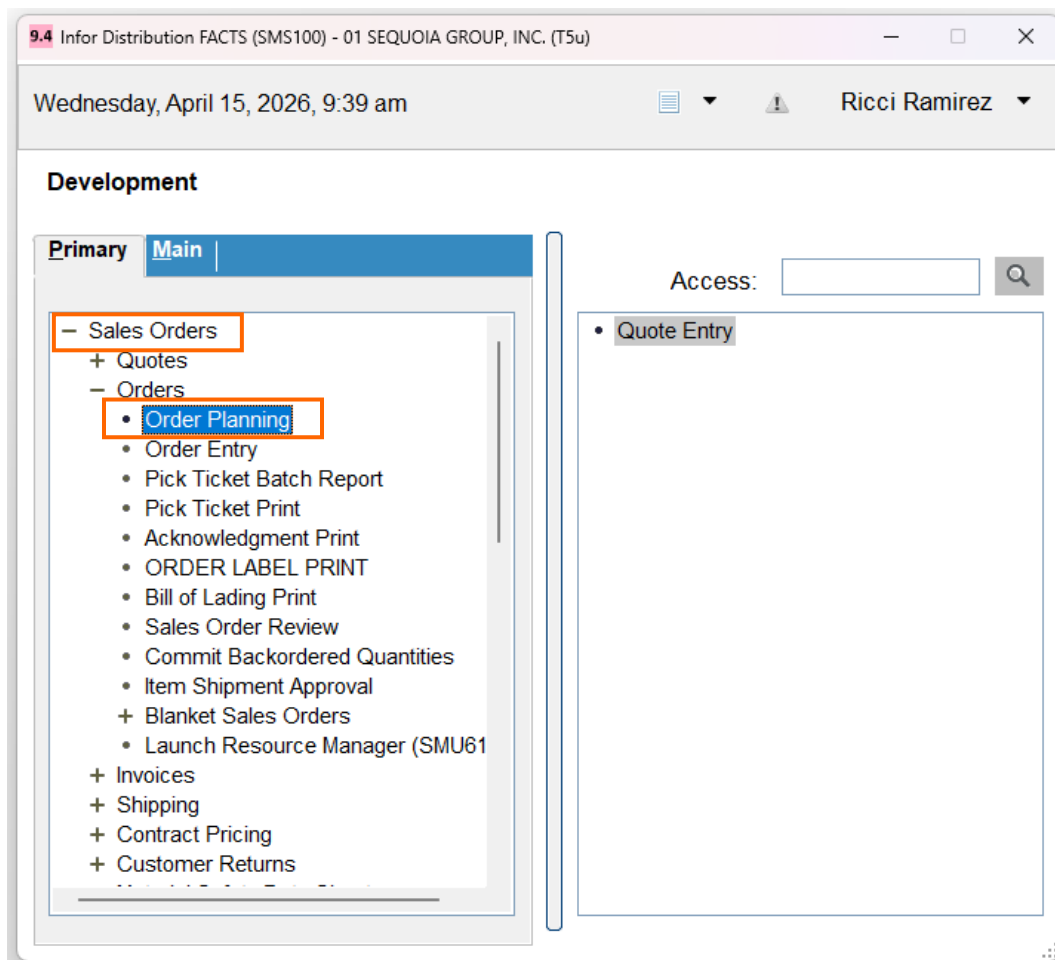
Restore On Delete: Auto Create Days Prior: 14

Use job cost?

Through this window (Order Planning Requests section), enable and configure planning rules.

- ✓ **Use:** Enable or disable the Order Planning feature. Existing values are preserved when disabled.
 - ✓ **Store Past:** Store completed plans and notes after processing through system registers.
 - ✓ **Display:** Notify users during order entry and allow importing of existing plans.
 - ✓ **Restore on Delete:** Restore deleted planning lines to Normal status or mark them as D (delete).
 - ✓ **Order Priority:** Set the priority for automatically generated documents.
 - ✓ **Order Init Warehouse:** Set the initiating warehouse or use the plan's ship-to warehouse.
 - ✓ **Autocreate Nightly:** Enable nightly processing to generate documents automatically.
 - ✓ **Autocreate Days Prior:** Set the number of days before the plan date to create documents.
- Once configuration is complete, press Exit.

- **Navigate to Sales Orders->Orders->Order Planning (program SOE220)**



- **Open Order Planning, then enter the required information.**

Order Planning Request Entry (SOE220) - 01 SEQUOIA GROUP, INC. (T5v)

File View Options Go To Help

Done Notes: I C

Sort: DC - Date - by Customer Beginning: First

Lines

Date: 04/15/2026 Customer: C100 Southeastern Industrial Ship-To: SAME
 Wh: 01 Atlanta Warehouse Item: I100 Pallet Loading Hand Trucks Quantity: 5 EA Status: N - Normal / Active

Date	Customer	Ship To	Wh	Item	Description	Qty	UM	E=Entered, N=N...	Order#
04/15/26	C100	SAME	01	I100	Pallet Loading Hand Trucks	5	EA	N	01...

Filter by: Date: Customer: Ship-To: Wh: Item: Status:

*It is important to understand that the system treats each unique plan date as a unique document.

- To include specific line notes, click **Notes: L**.

Order Planning Request Entry (SOE220) - 01 SEQUOIA GROUP, INC. (T5v)

File View Options Go To Help

Done Notes: I C

Sort: DC - Date - by Customer Beginning: First

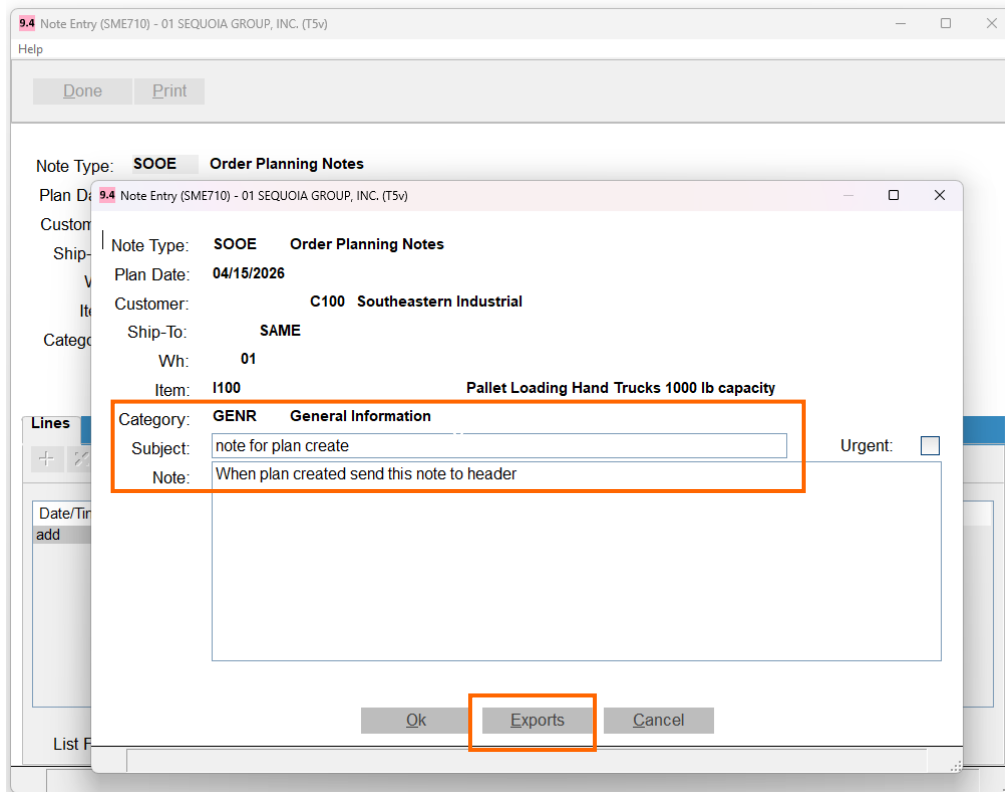
Lines

Date: 04/15/2026 Customer: C100 Southeastern Industrial Ship-To: SAME
 Wh: 01 Atlanta Warehouse Item: I100 Pallet Loading Hand Trucks Quantity: 5 EA Status: N - Normal / Active

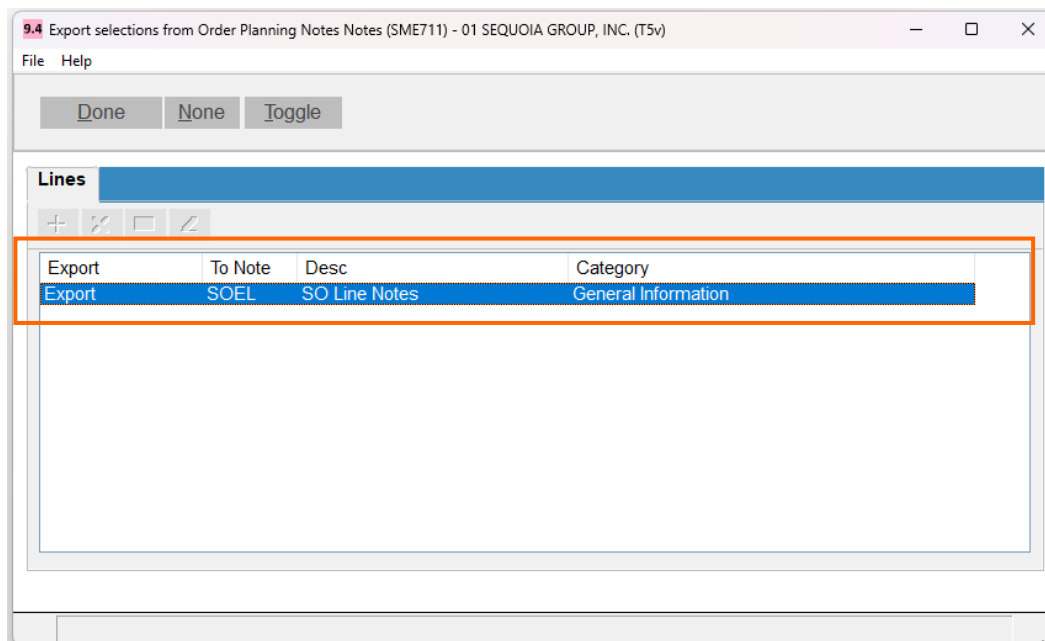
Date	Customer	Ship To	Wh	Item	Description	Qty	UM	E=Entered, N=N...	Order#
04/15/26	C100	SAME	01	I100	Pallet Loading Hand Trucks	5	EA	N	01...

Filter by: Date: Customer: Ship-To: Wh: Item: Status:

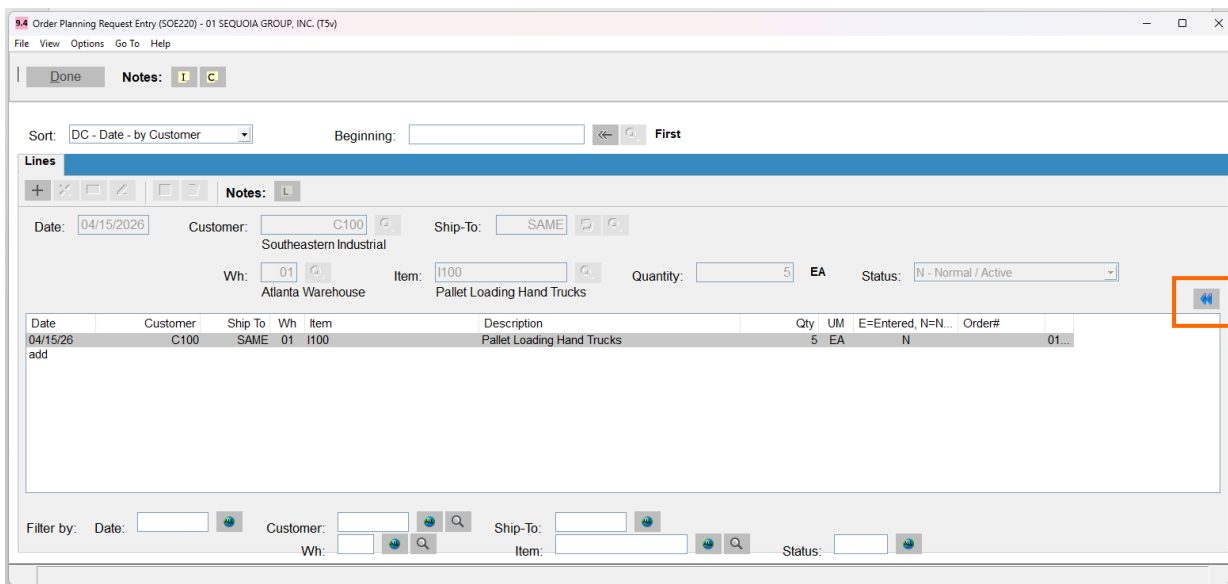
- Enter the note.



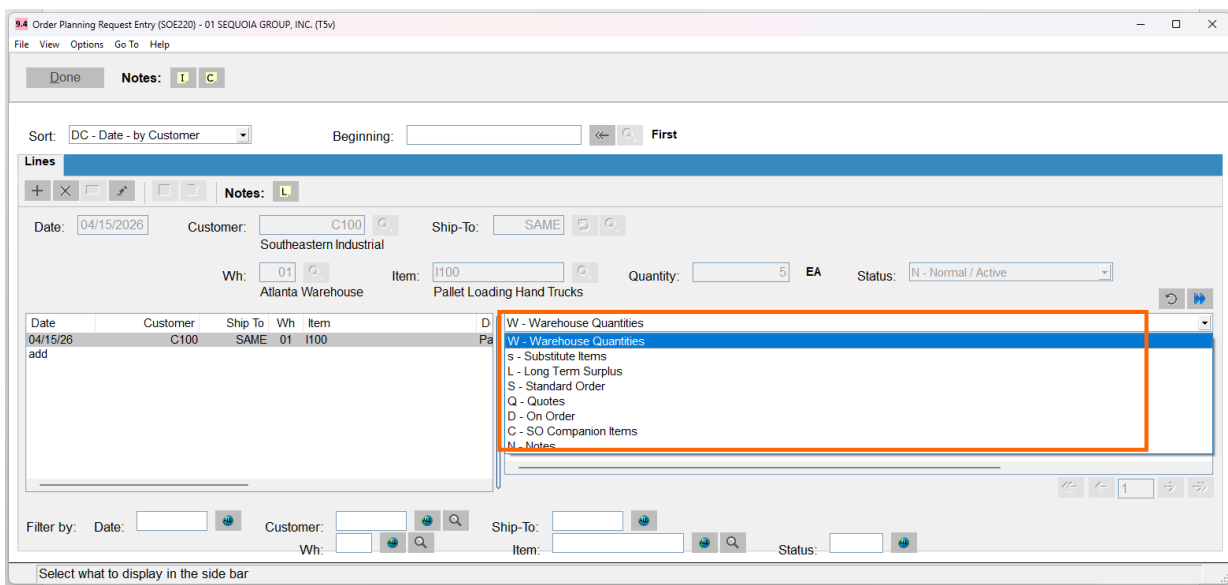
- Click **Export**. Here you can define if the note will export to the final document. In this case, the note is set to export.



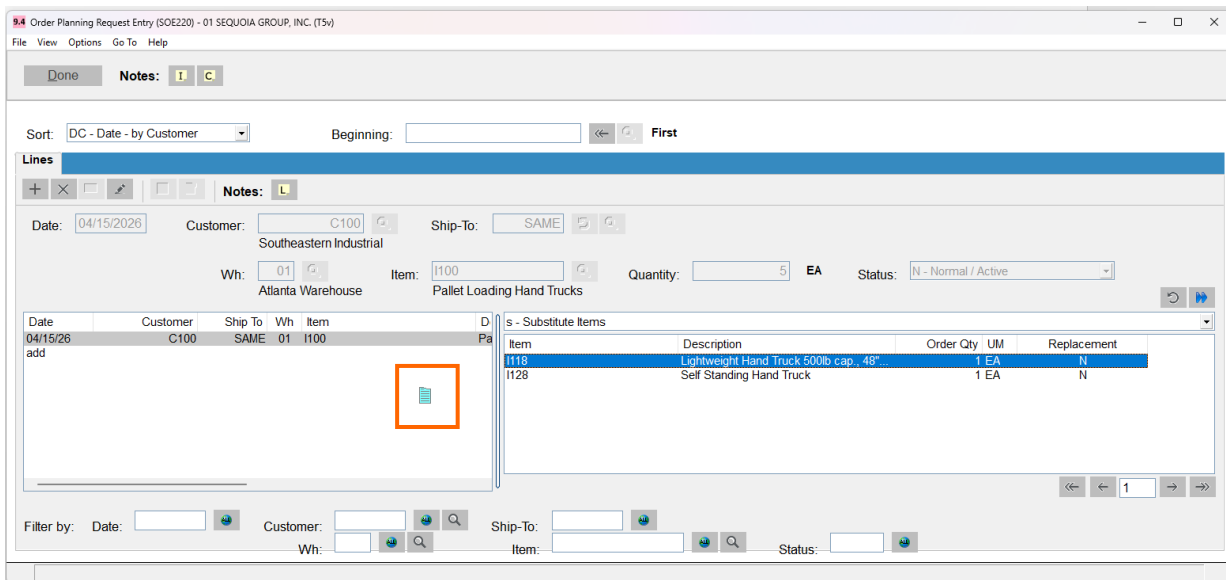
- Return to the **Order Planning Request Entry** window. The **sidebar** is available.



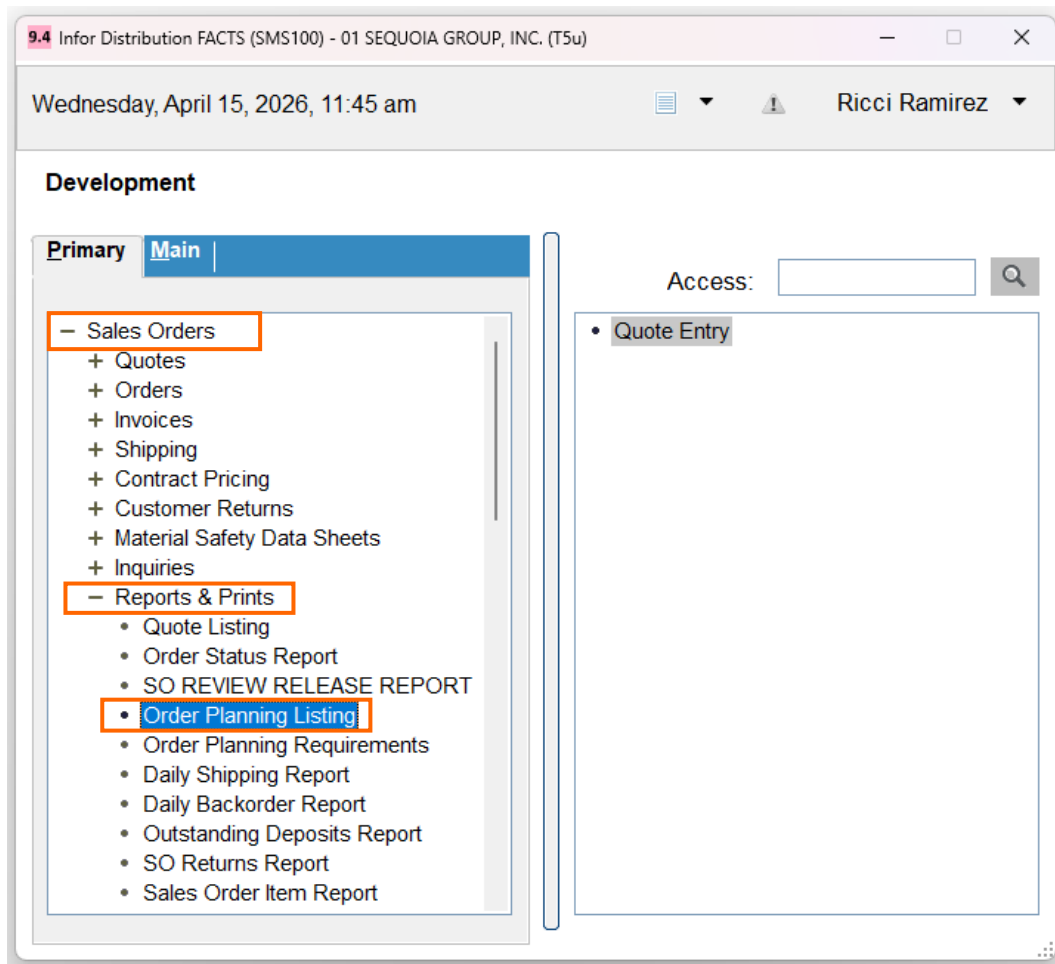
- Click the **double blue arrow** to view the information. Review warehouse quantities, substitute items, long-term surplus, standard order quotes, active orders, companion items, and existing notes.



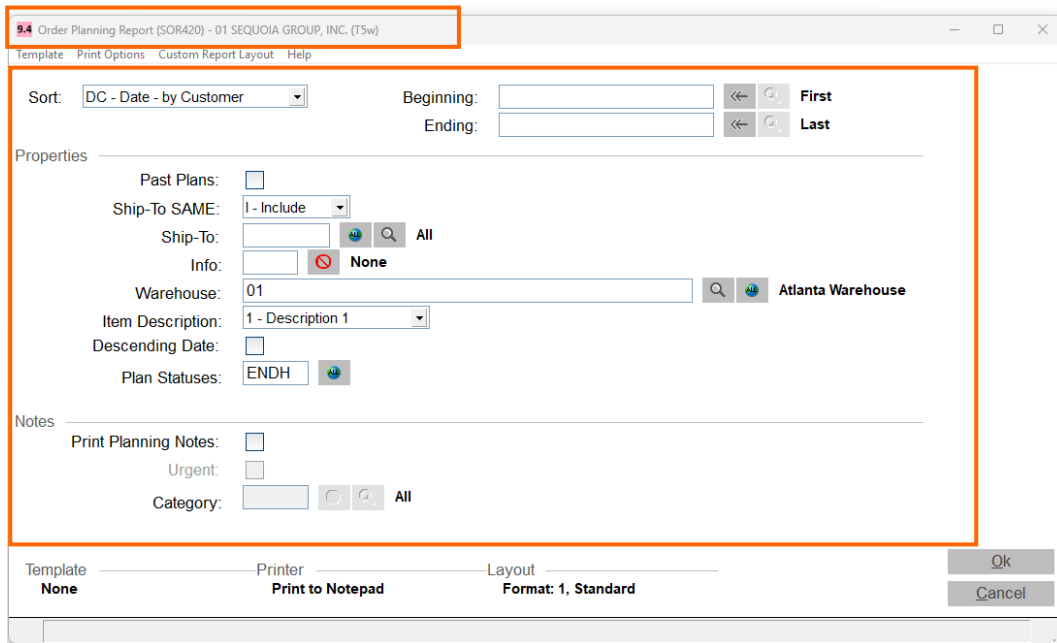
- You can also **drag and drop** items from the sidebar into the active plan.



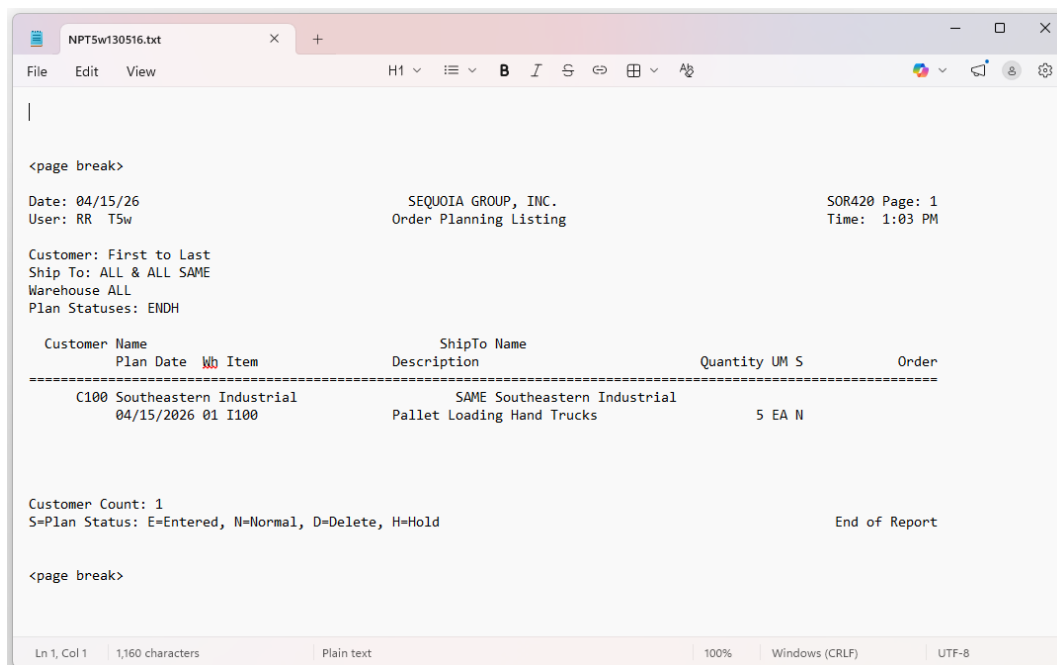
- Once you have entered your planning requests, use the Order Planning Listing report to review them.
- Navigate to **Sales Orders → Reports and Prints → Order Planning Listing** (program SOR420).



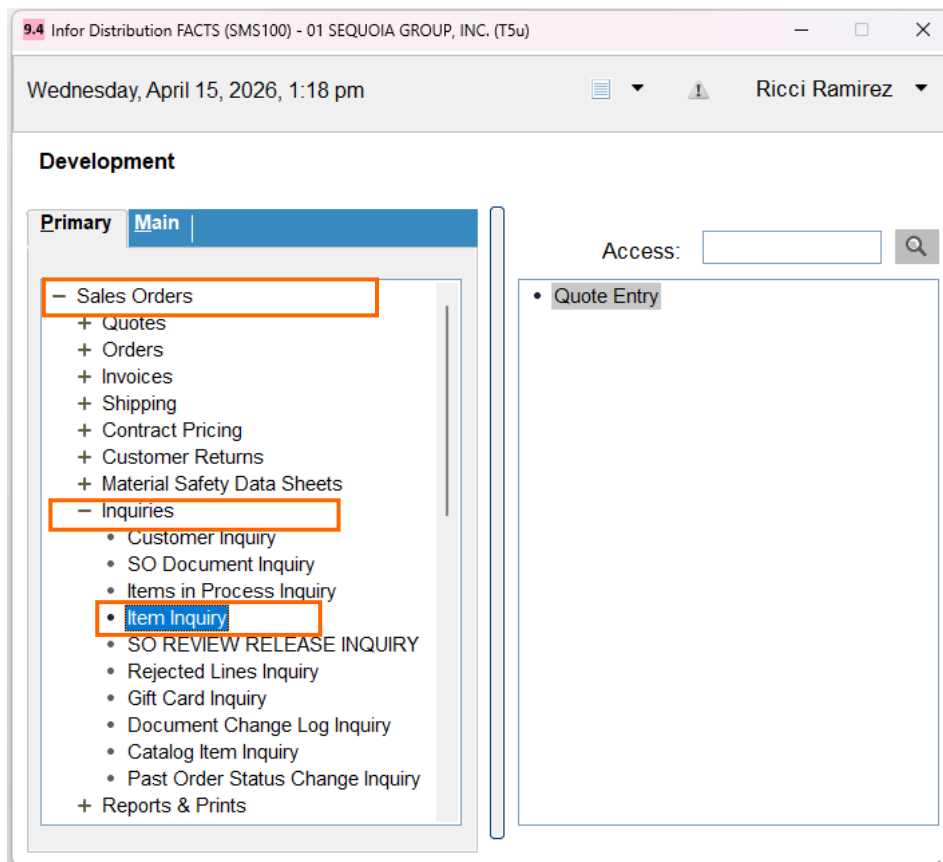
- In this window, you can filter planning requests by date, sort by customer and ship-to, track current status, and choose to display line notes.



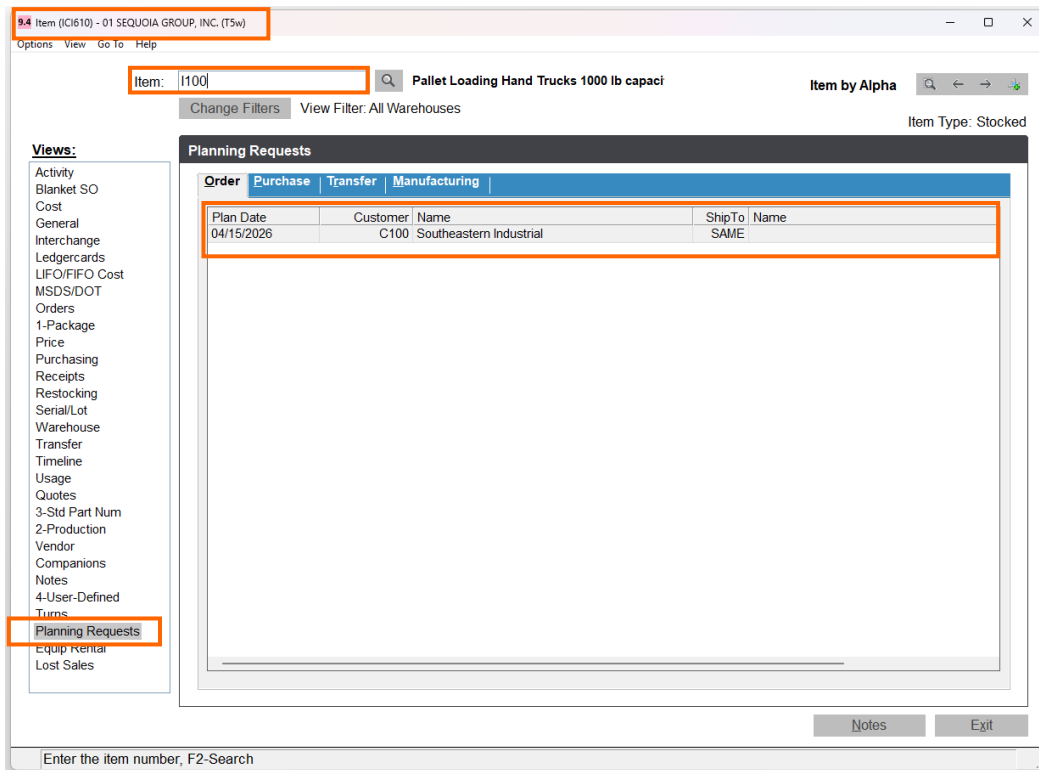
- Select your preferences and press OK to generate the report.



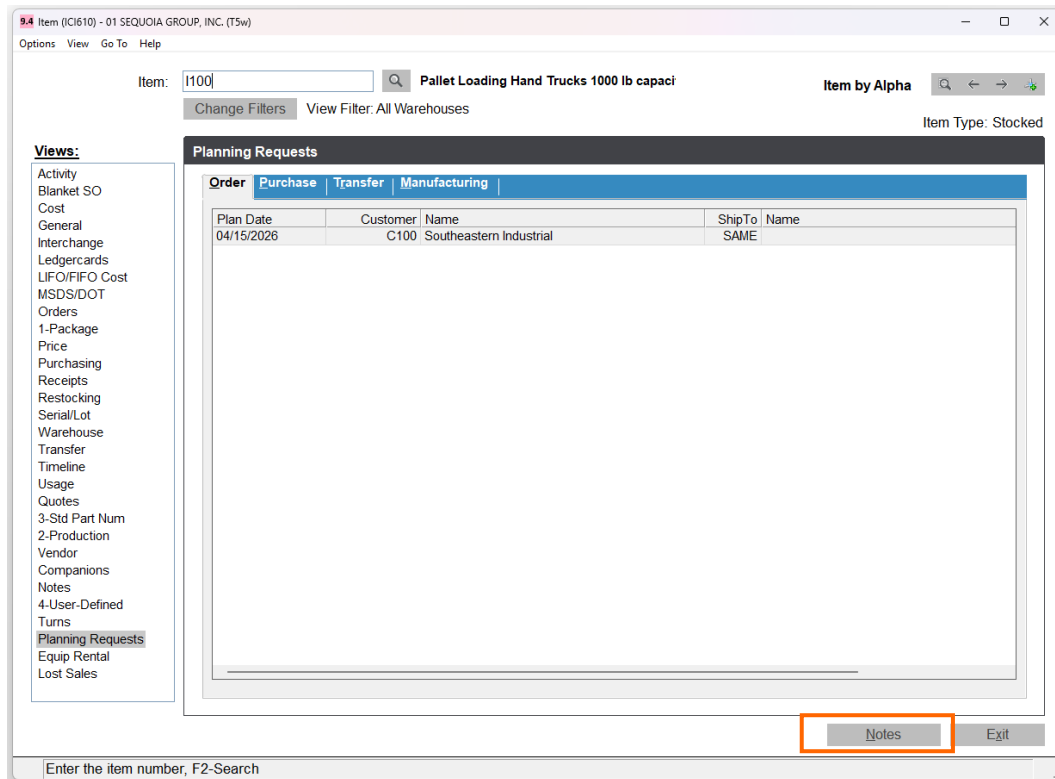
- Another way to view planning requests is through Item Inquiry. **Navigate to Sales Orders → Inquiries → Item Inquiry** (program ICI610) to open the inquiry window.



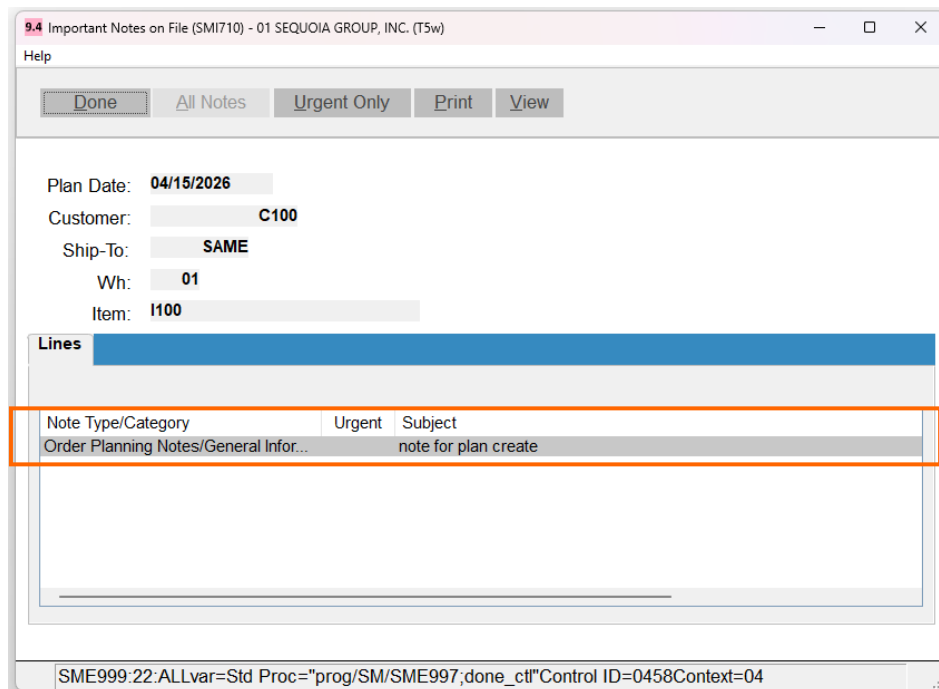
- Open **Item Inquiry** and select **Planning Requests** option. Enter Item: **I100**.



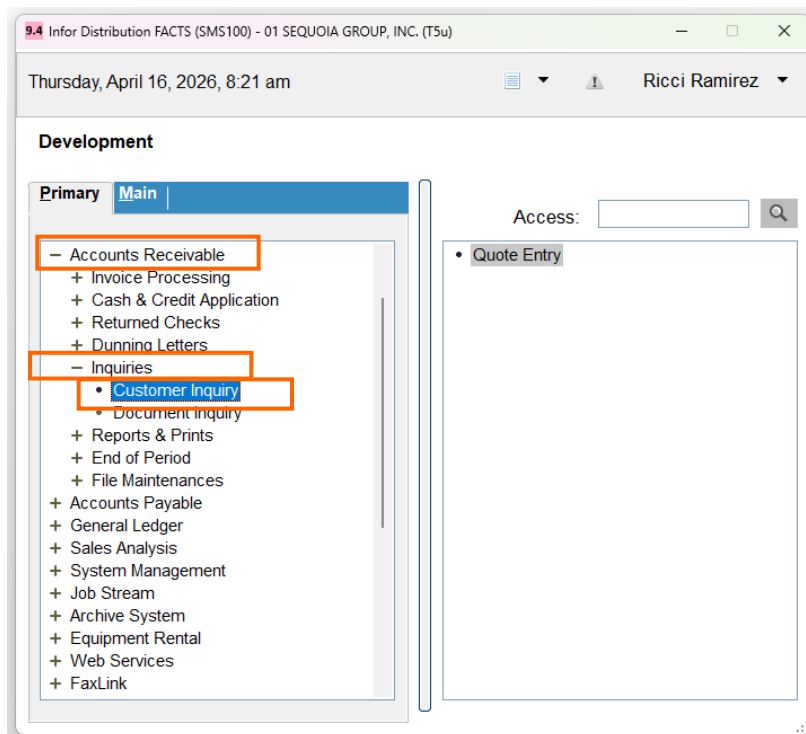
- To review notes, click **Notes**.



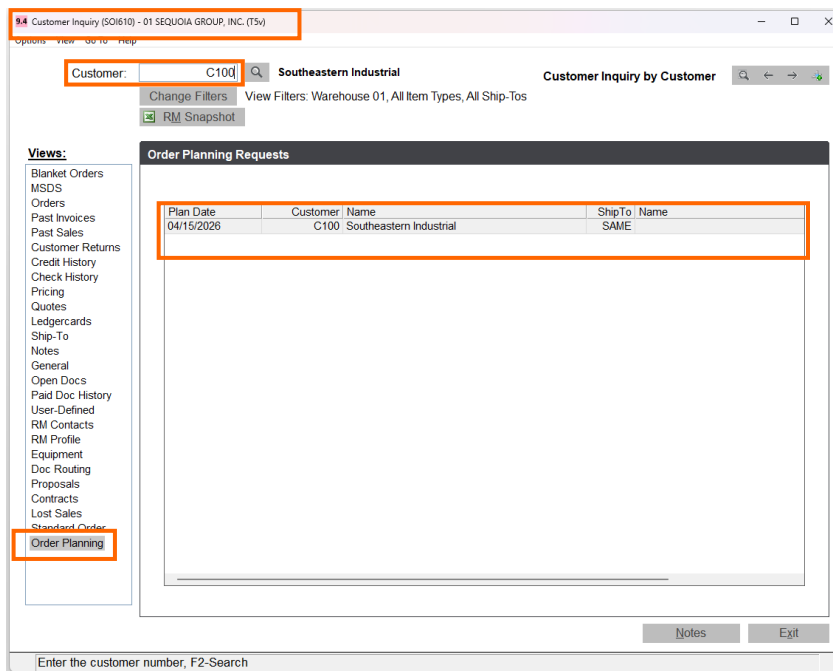
- The system will show the notes if they exist.



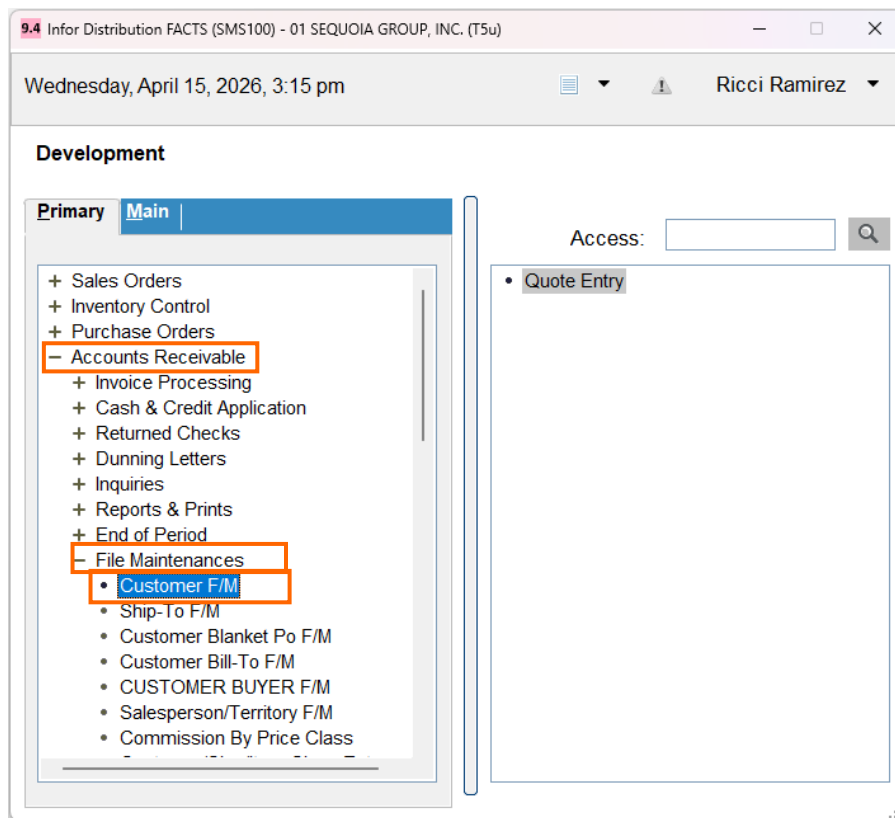
- To review planning requests, you can also use **Customer Inquiry**. Navigate to **Sales Orders** → **Inquiries** → **Customer Inquiry** (program SOI610).



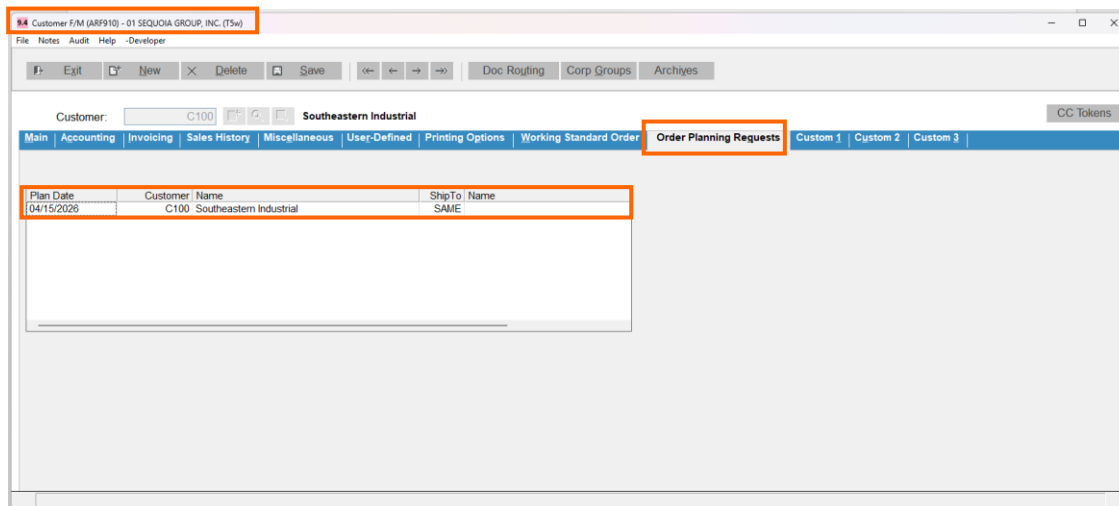
- Open **Customer Inquiry**, then select the **Order Planning** option. This allows you to review planning requests based on a specific customer. Enter customer: **C100**.



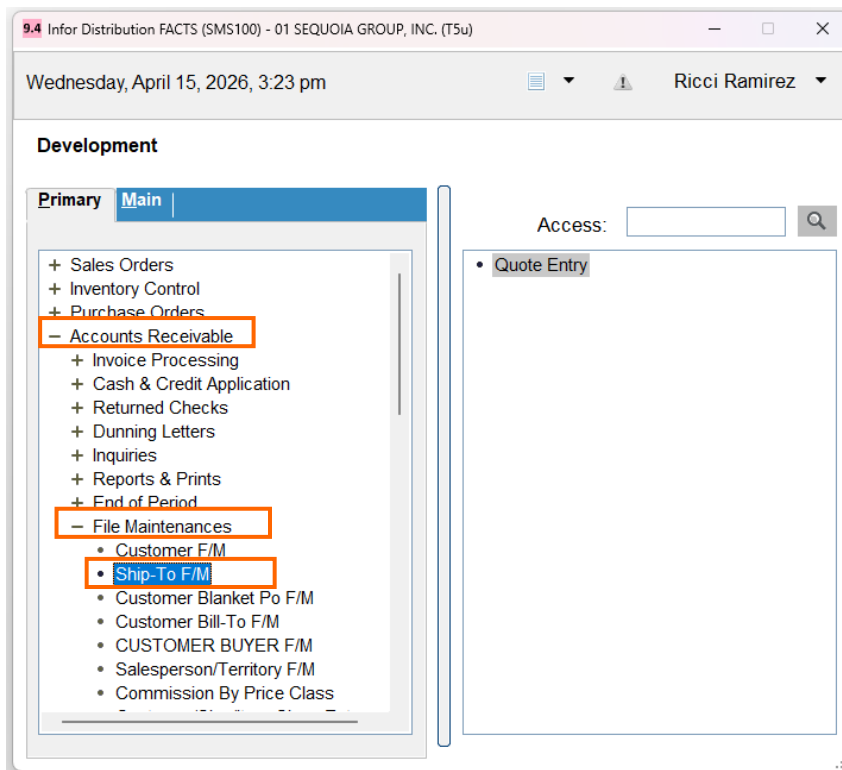
- Another option to review planning requests is Customer F/M.
- Navigate to **Accounts receivable->File Maintenances->Customer F/M** (program ARF910).



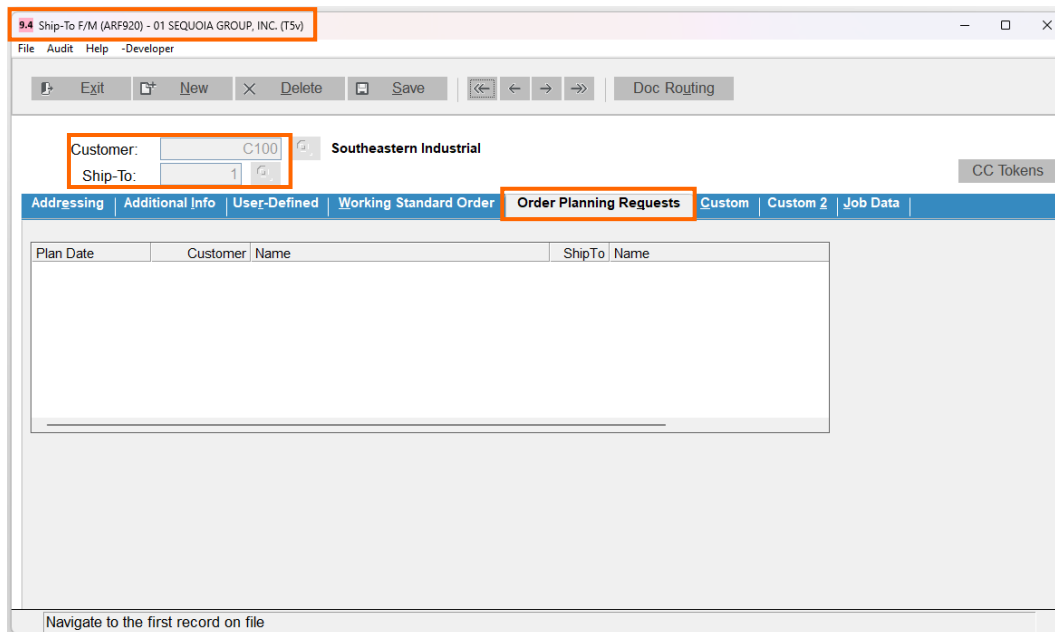
- Open **Customer F/M** and select the **Order Planning Requests** option. This allows you to view all plans associated with a specific customer.



- An additional method to review planning requests is **Ship-To F/M**.
- Navigate to **Accounts Receivable->File Maintenances->Ship-to F/M** (program AEF920).

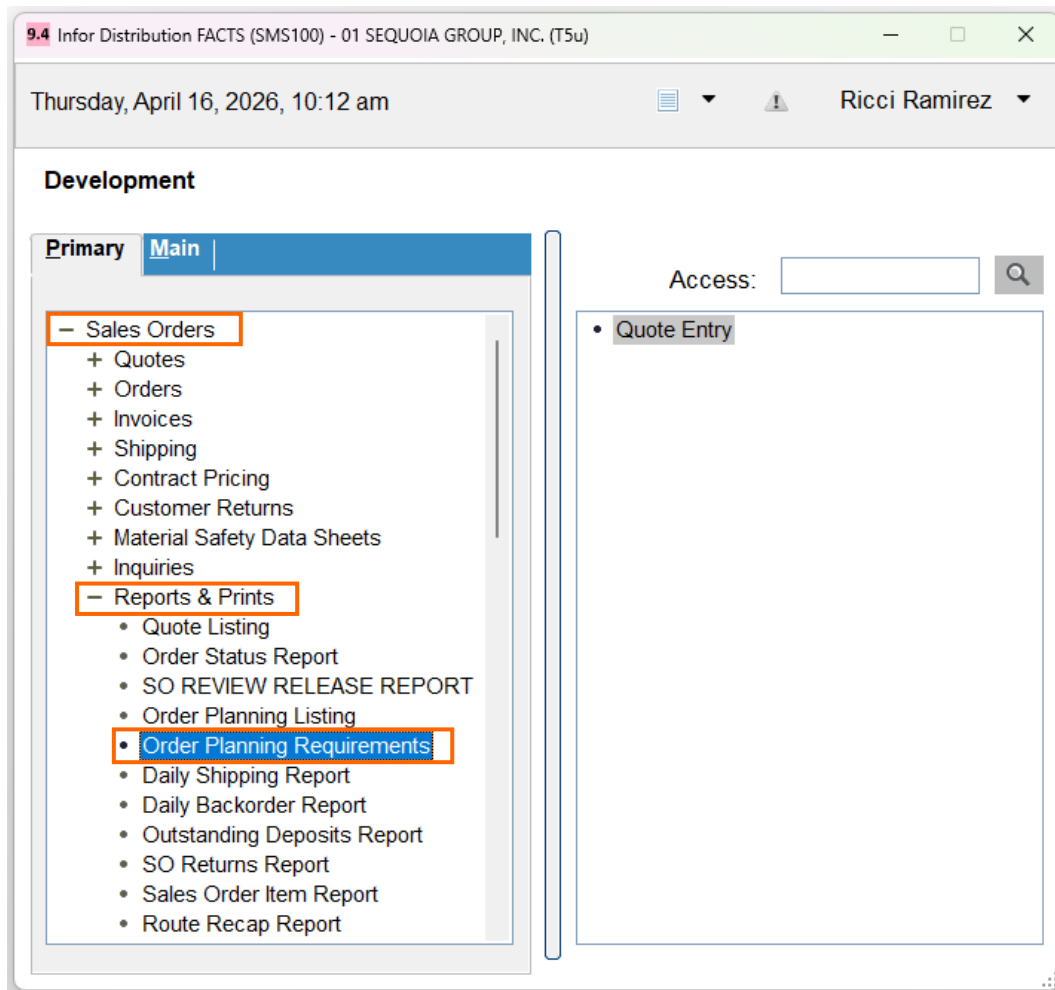


- Open **Ship-To F/M**, then select the **Order Planning Requests** option. This allows you to review plans filtered by customer and specific ship-to.

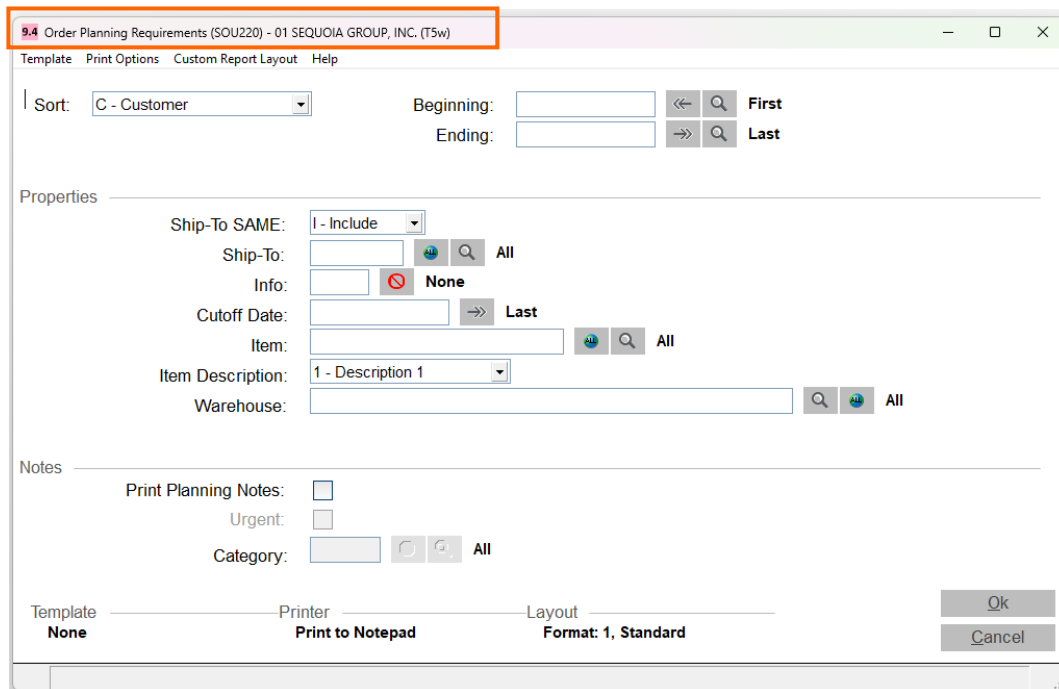


An important tool in Order Planning Requests is the **Order Planning Requirements**. It acts as an on-demand conversion tool, allowing you to filter and generate live documents when needed, and provides a way to remove and archive canceled plans.

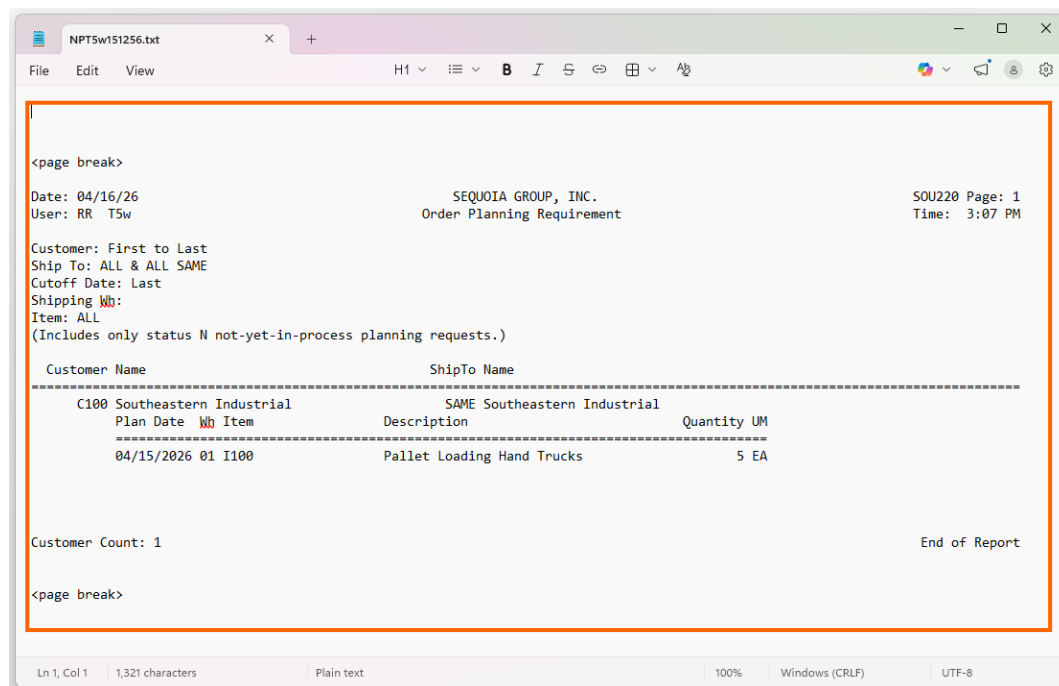
- Navigate to **Sales Orders-> Reports & Prints->Order Planning Requirements** (program SOU220)



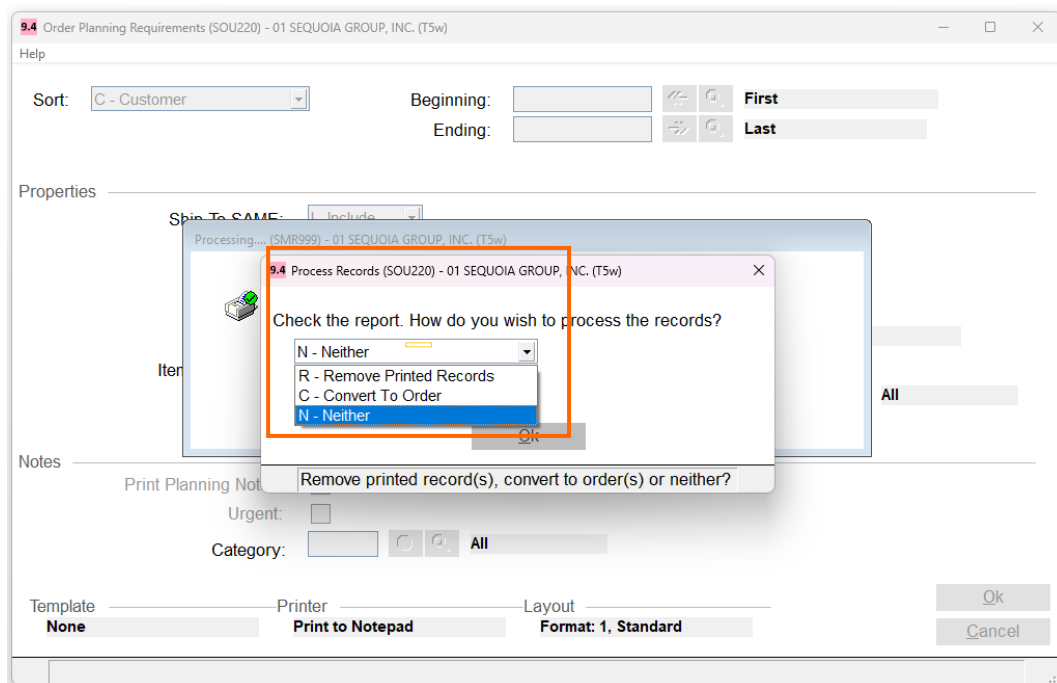
- Open the **Order Planning Requirements** window to manage planning requests. Select customers by entering a single customer, multiple customers, or a range. Select specific warehouses or include all warehouses.
- In this example, all warehouses are selected and confirmed by pressing **OK**.



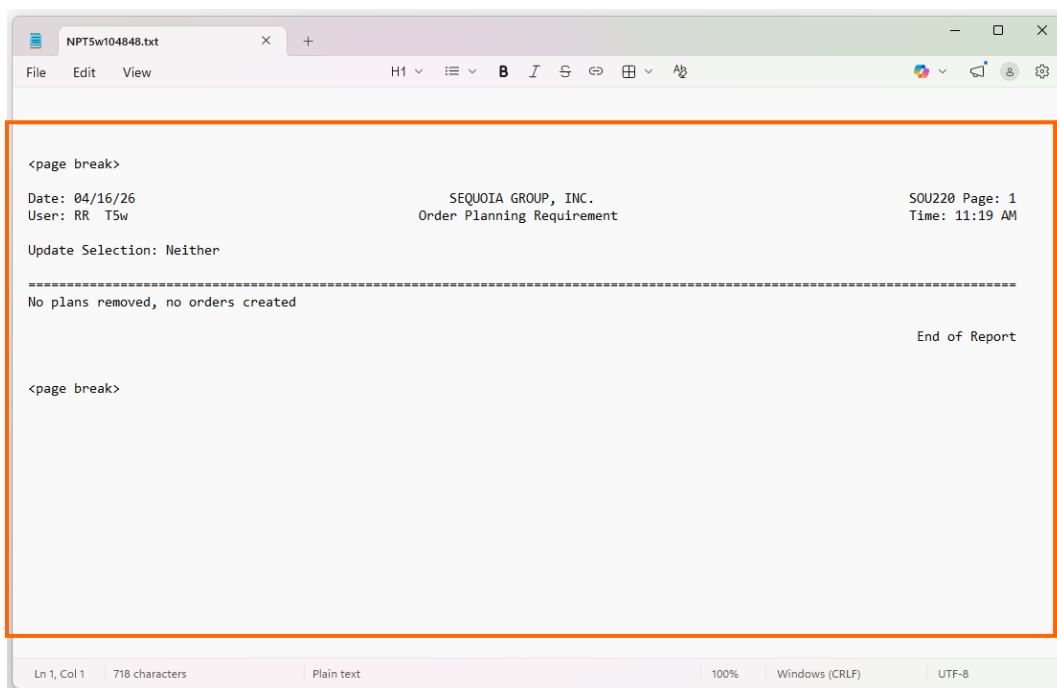
- For this example, the selection is set to **all warehouses**, and the action is confirmed with **OK**. The system then displays the report window.



- On this screen, select **Convert** to generate live documents (such as Sales Orders), or select **Remove** to cancel plans and archive them into the past records file.



- In this example, the option is set to **Neither**, and this value appears in the report.



- Return to the **Order Planning Requirements** window. For this example, we are using Customer **C100**, Ship-To **SAME O-Only**, and Warehouse **01** (Atlanta Warehouse).

- Press OK to generate the report.

```

<page break>
Date: 04/16/26                               SEQUOIA GROUP, INC.                               SOU220 Page: 1
User: RR T5w                                Order Planning Requirement                           Time: 10:29 AM

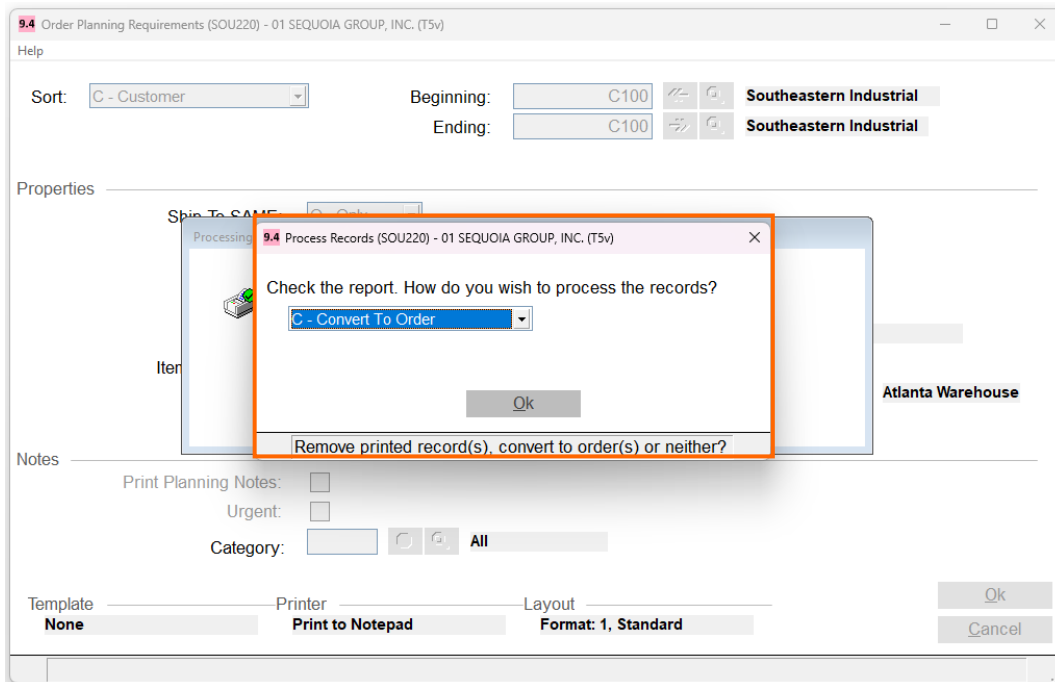
Customer: First to Last
Ship To: ALL & ALL SAME
Cutoff Date: Last
Shipping Wb: ALL
Item: ALL
(Includes only status N not-yet-in-process planning requests.)

Customer Name                                ShipTo Name
-----
C100 Southeastern Industrial                 SAME Southeastern Industrial
Plan Date Wb Item                           Description                               Quantity UM
-----
04/15/2026 01 I100                          Pallet Loading Hand Trucks                5 EA

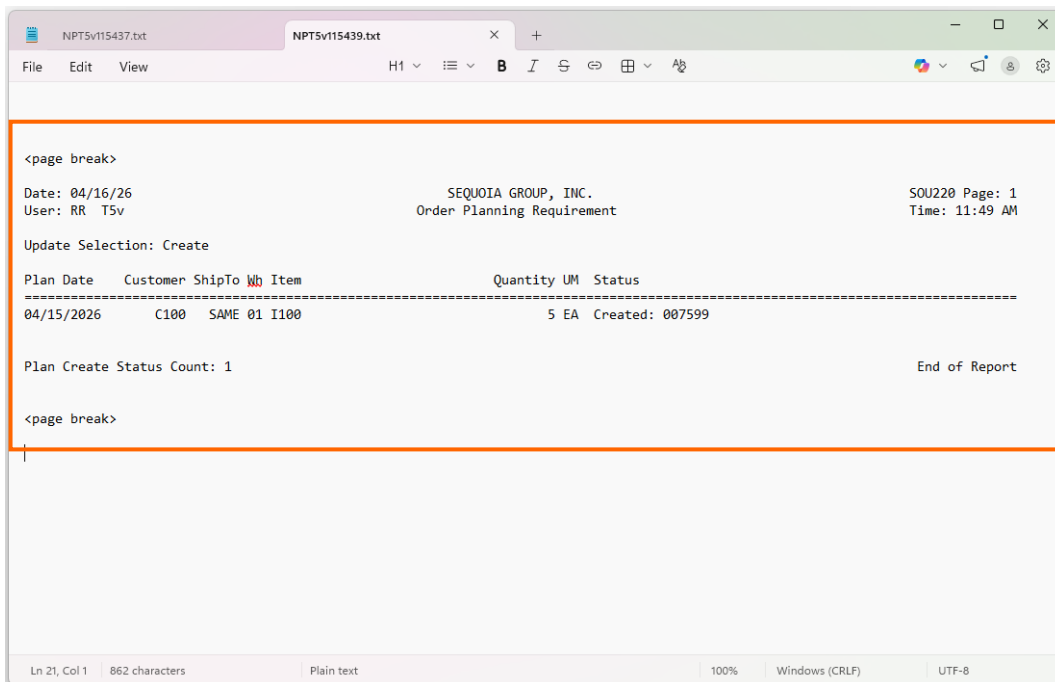
Customer Count: 1                               End of Report

<page break>
    
```

- For this example, select **Convert to Order** to process the records.



- The report shows that the process completed successfully. If there were any errors, the status will indicate them.



Planning Request Alerts

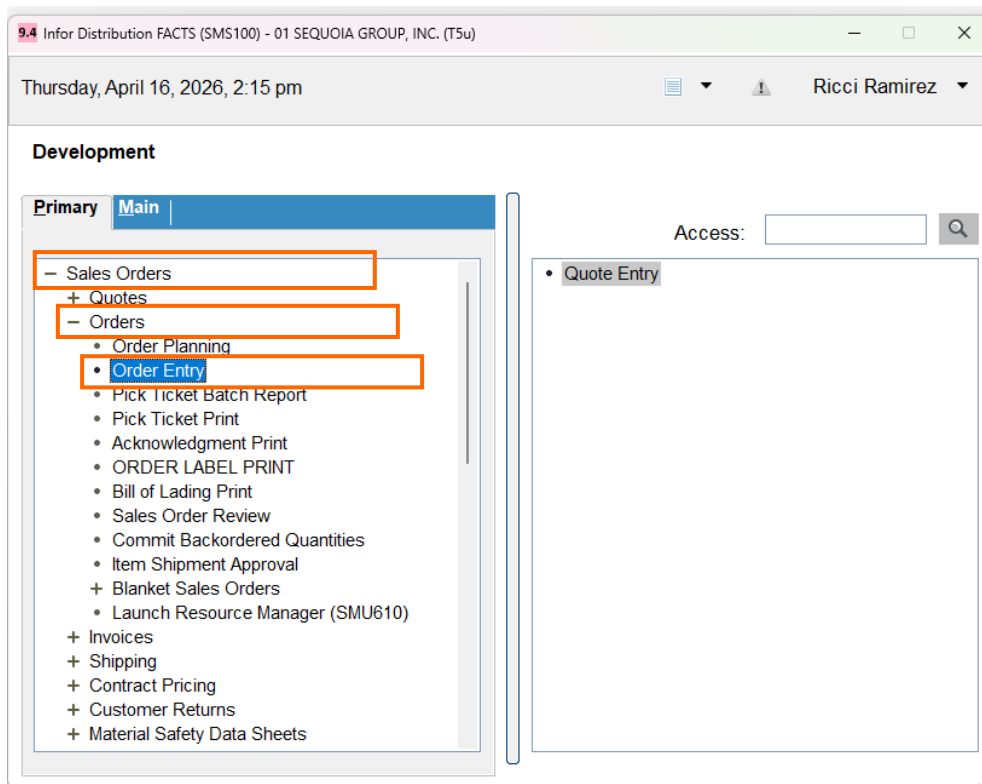
The system provides alerts for planning requests through System Management Alerts. These alerts act as reminders to ensure plans are reviewed and processed.

- ✓ **Advance notice.** Alerts can be set to notify a number of days before the plan date. For example, '-5 days' sends a notification for plans scheduled five days in advance.
- ✓ **Overdue notice.** Alerts can be set to notify a number of days after the plan date if the plan is still in Normal status and has not been converted. For example, '5 days' notifies you of plans that are overdue by five days.
- ✓ **Alert visibility.** When triggered, an alert indicator appears on the main screen. Opening the alert displays the customer, ship-to, warehouse, item, and plan date.
- ✓ **Informational only.** These alerts do not include a 'Respond To' action. The user must review the alert and take action manually, such as using the Requirements Report to process the plan.

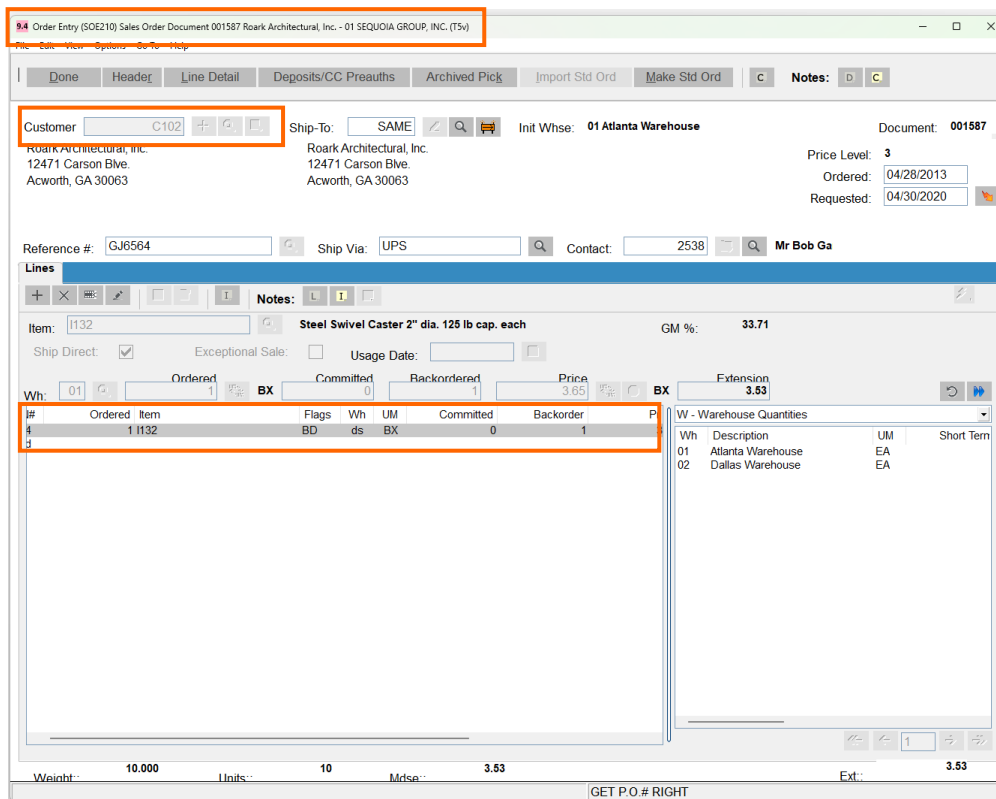
Manually Importing Planning Requests During Order Entry

When a pending future plan needs to be converted into a live document, it can be imported directly during the order entry process.

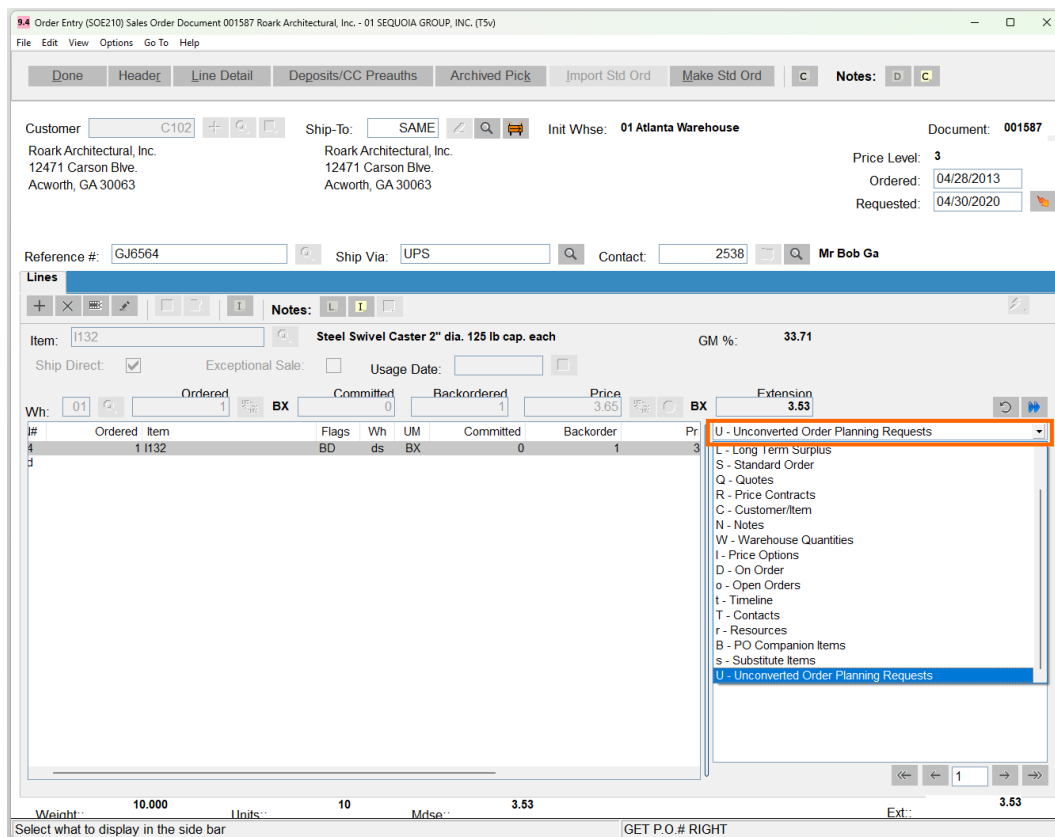
- Navigate to **Sales Orders-> Orders-> Order Entry** (program SOE210)



- Search for a document.



- On the side bar select **Unconverted Order Planning Requests**.



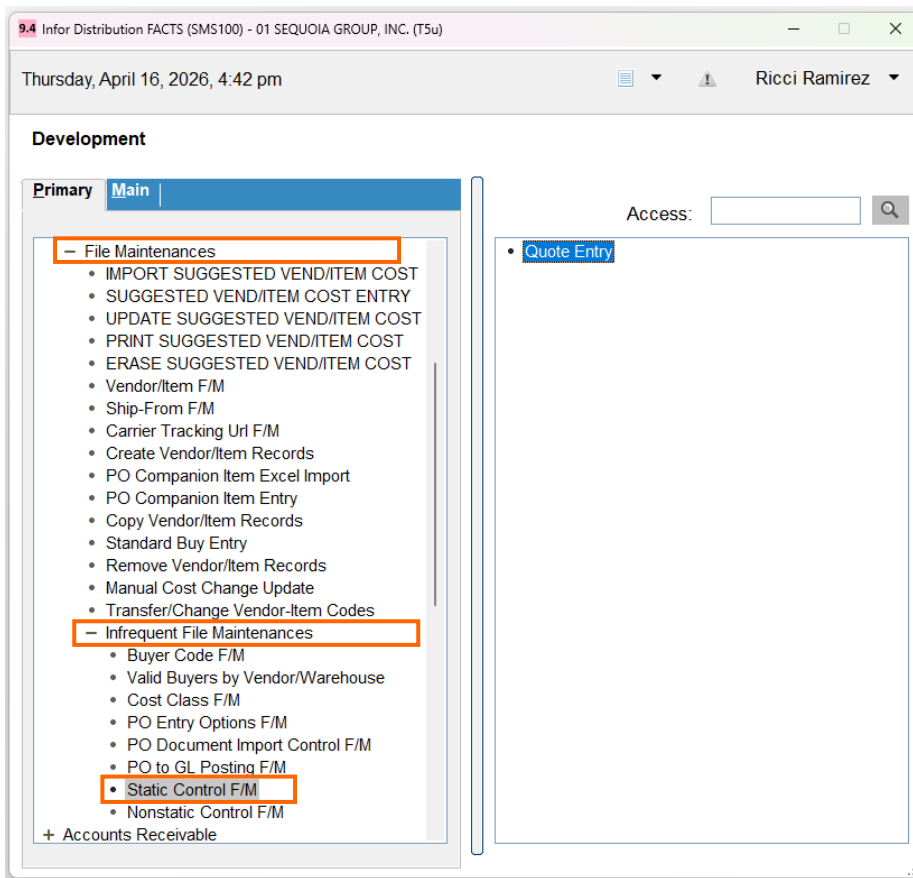
- **Unconverted order planning request's** view in the sidebar allows a user to see normal-status plans and drag and drop them directly into the active order.

*If you decide to change the **Ship-To** destination on an active document after you have already imported a planning request, the system will recognize that the original plan's parameters no longer apply.

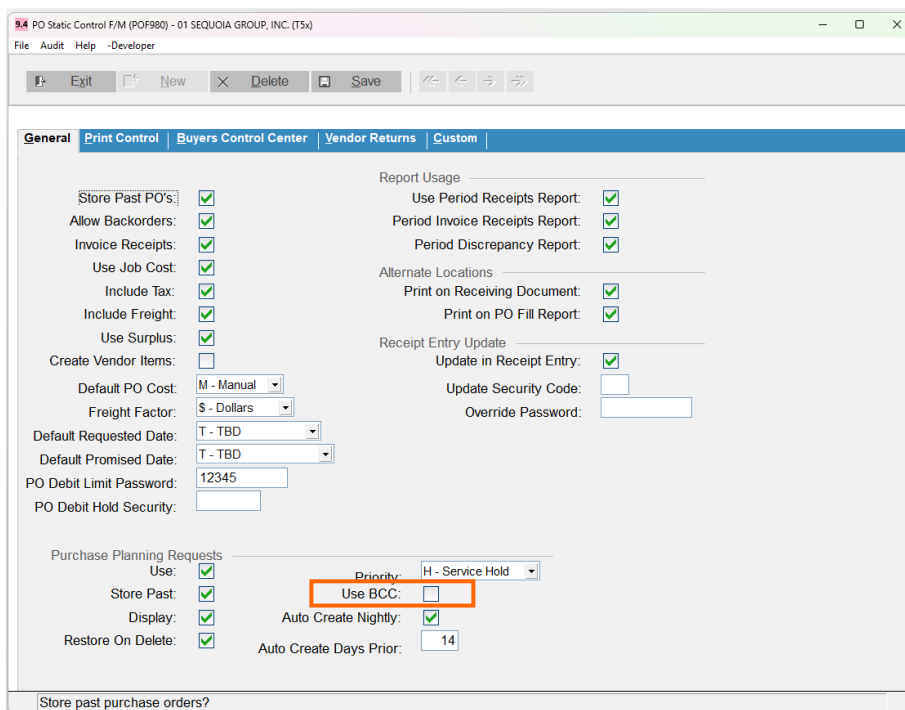
12. Purchase Order Planning (for future Pos)

This operates similarly to **Sales Order** planning, where future documents are staged in a **Normal** status. It includes rules specific to the **Buyer's Control Center (BCC)**.

Navigate to **Purchase Orders** → **File Maintenance** → **Infrequent File Maintenance** → **Static Control F/M** (program POF980).



- Open **Static Control F/M**. You will see the option to 'Use the BCC' available.



When you check **Use the BCC in PO** or **IC Static Control**, plan processing changes:

- ✓ **Control shifts to the buyers.** The Convert option in the **Requirements Report** is disabled, and plans are managed from the **BCC**.
- ✓ **A new status is introduced.** The B status indicates the plan is in the Buyer's Control Center and managed by a buyer.

9.4 PO Static Control F/M (POF980) - 01 SEQUOIA GROUP, INC. (T5x)

File Audit Help -Developer

Exit New Delete Save

General Print Control Buyers Control Center Vendor Returns Custom

Store Past PO's:

Allow Backorders:

Invoice Receipts:

Use Job Cost:

Include Tax:

Include Freight:

Use Surplus:

Create Vendor Items:

Default PO Cost: M - Manual

Freight Factor: \$ - Dollars

Default Requested Date: T - TBD

Default Promised Date: T - TBD

PO Debit Limit Password: 12345

PO Debit Hold Security:

Report Usage

Use Period Receipts Report:

Period Invoice Receipts Report:

Period Discrepancy Report:

Alternate Locations

Print on Receiving Document:

Print on PO Fill Report:

Receipt Entry Update

Update in Receipt Entry:

Update Security Code:

Override Password:

Purchase Planning Requests

Use:

Store Past:

Display:

Restore On Delete:

Priority: H - Service Hold

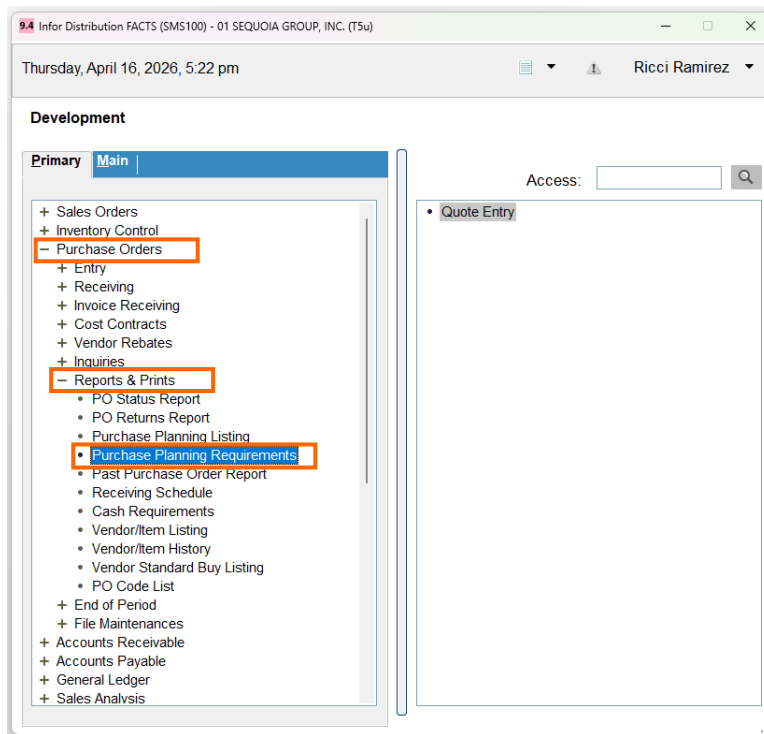
Use BCC:

Auto Create Nightly:

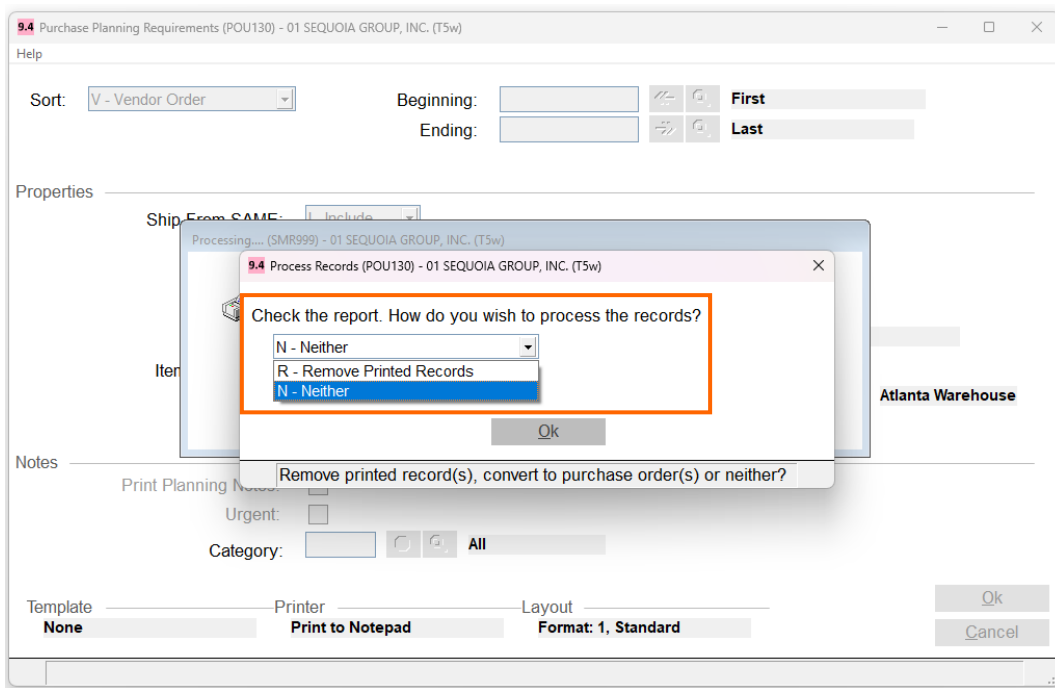
Auto Create Days Prior: 14

Create purchase plans via BCC calcs

- To verify that the Convert option is disabled in the **Requirements Report**, navigate to **Purchase Orders → Reports and Prints → Purchase Planning Requirements** (program POU130). Open the program to review the options.



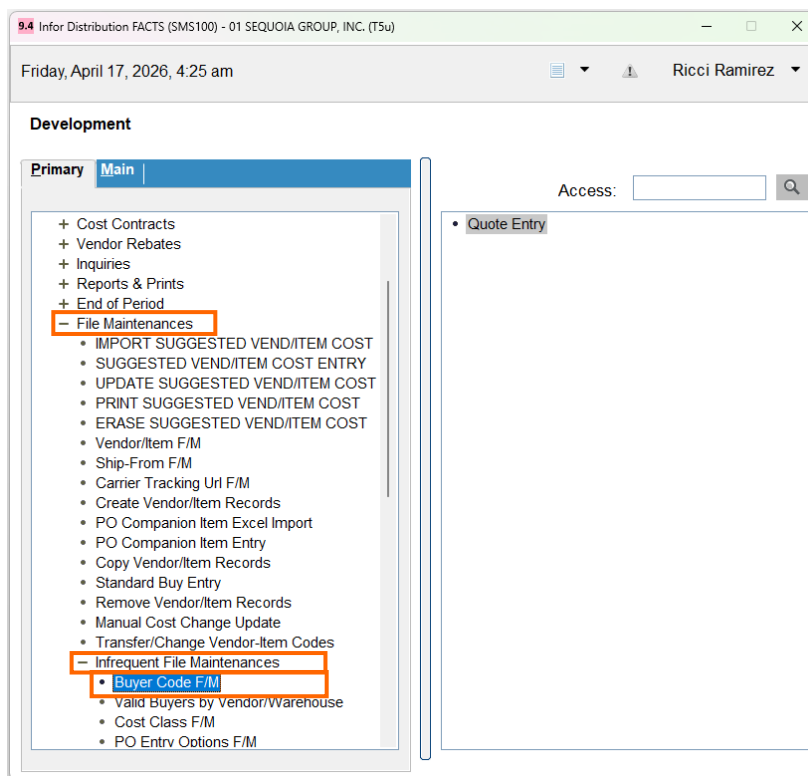
- Only two options are available to process the records: **Remove Printed Records** and **Neither**.



*This strict shift in control to the BCC is a specific difference from how **Sales Order** planning operates, where the manual conversion option remains fully available in the **Planning Requirements** report.

It is important to understand that the **Buyer's Control Center** (BCC) relies on individual buyer configuration to populate planning records.

- Navigate to **Purchase Orders → File Maintenance → Infrequent File Maintenance → Buyer Code F/M** (program POF920) to review this setup.



- Open Buyer **Code F/M**. Enter or search for a buyer code to review the **Auto Calculate Nightly** section.
- If a buyer is not configured for auto calculation, the system will skip them during the nightly process. Their planning records remain in **Normal** status and will not appear in the **BCC**.

9.4 Buyer Code F/M (POF920) - 01 SEQUOIA GROUP, INC. (T5v)

File Audit Help -Developer

Exit New Delete Save

Buyer Code: KRH

Name: Keven Harsh

User Code: []

Email Address: kevenh@sequoiagroup.com

Subscribe: X - Exception Control Center

Auto Calculate Nightly —

Procurements:

Transfers:

Enter the buyer name

- If a buyer is configured for auto-calculation, the system will pull their plans into the **BCC** during the nightly process.

9.4 Buyer Code F/M (POF920) - 01 SEQUOIA GROUP, INC. (T5v)

File Audit Help -Developer

Exit New Delete Save

Buyer Code: KRH

Name: Keven Harsh

User Code: []

Email Address: kevenh@sequoiagroup.com

Subscribe: X - Exception Control Center

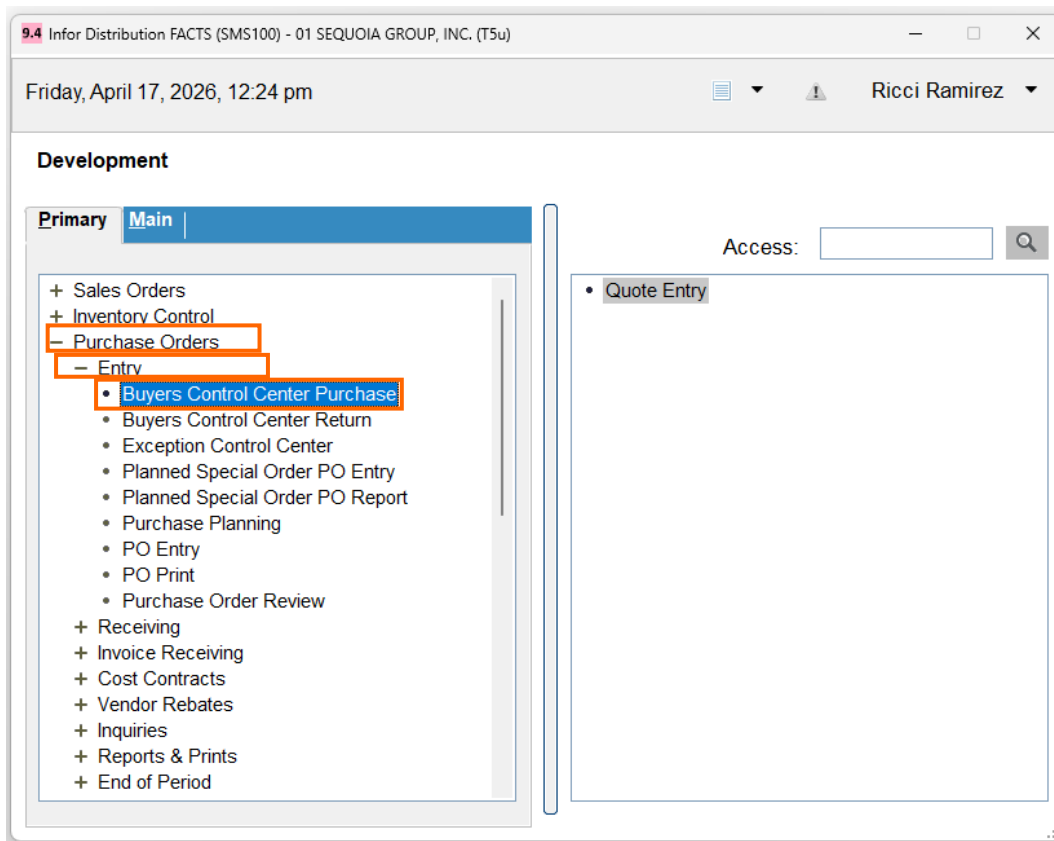
Auto Calculate Nightly —

Procurements:

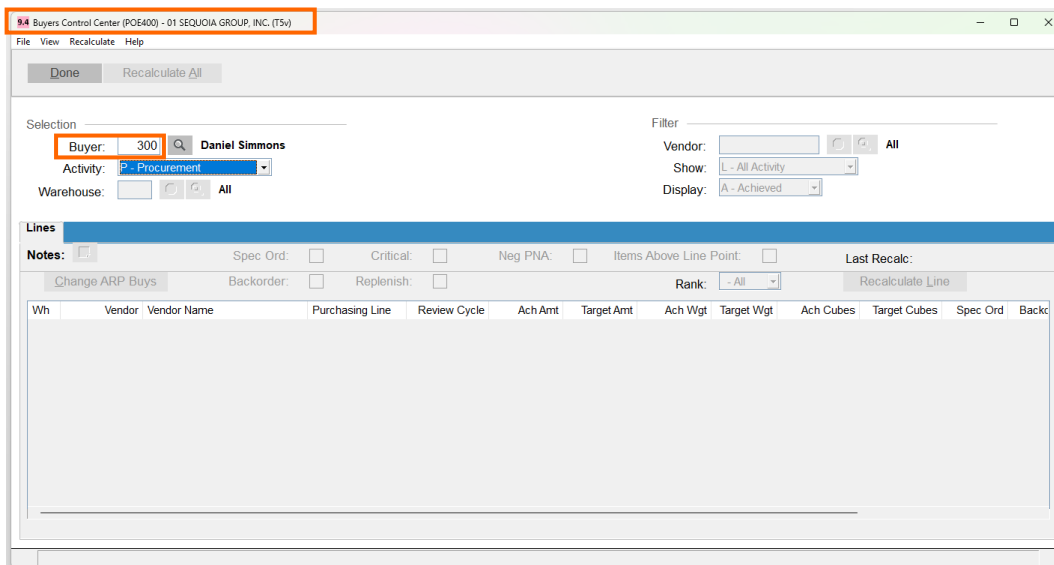
Transfers:

Calculate this BCC activity automatically, each night

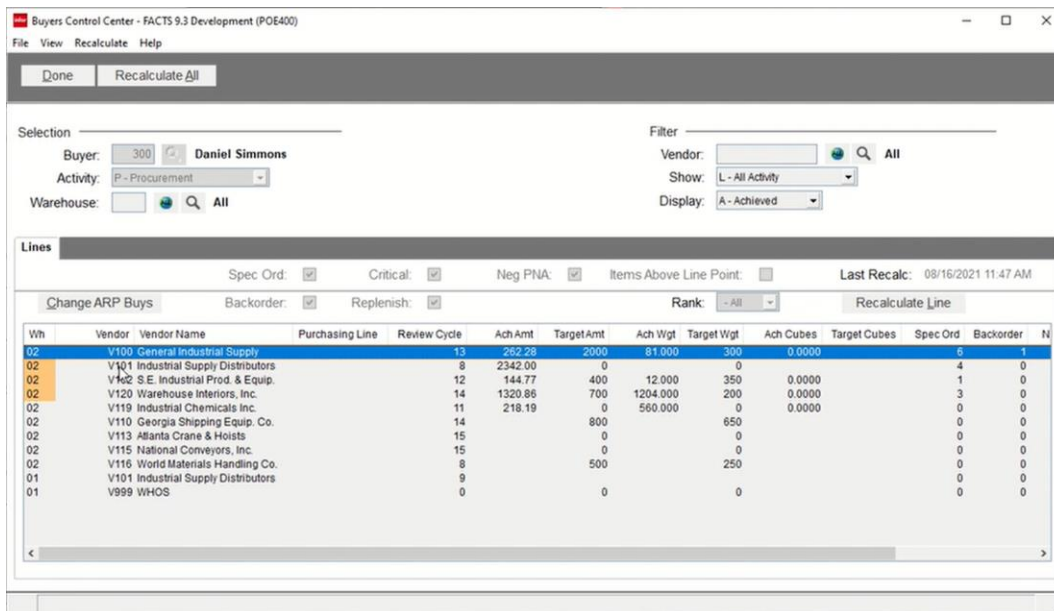
- To bypass this, manually pull the plans into the system. Navigate to **Purchase Orders → Entry → Buyer's Control Center Purchase** (program POE400).



- Open **Buyers Control Center Purchase**.

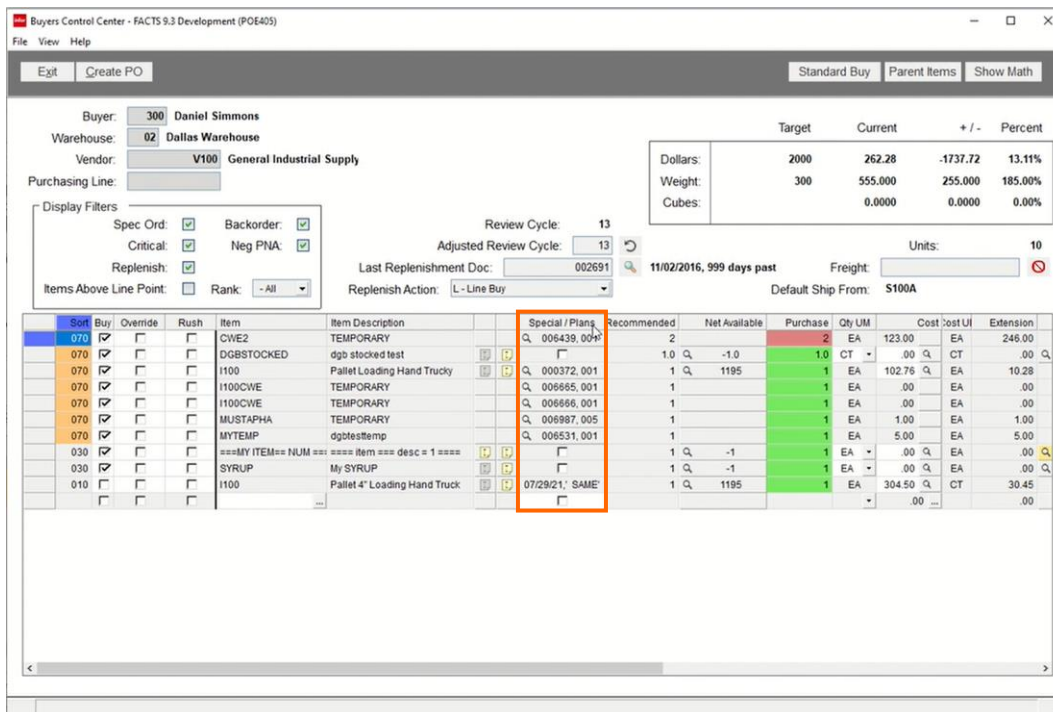


- Select the specific buyer and click **Recalculate Line**.

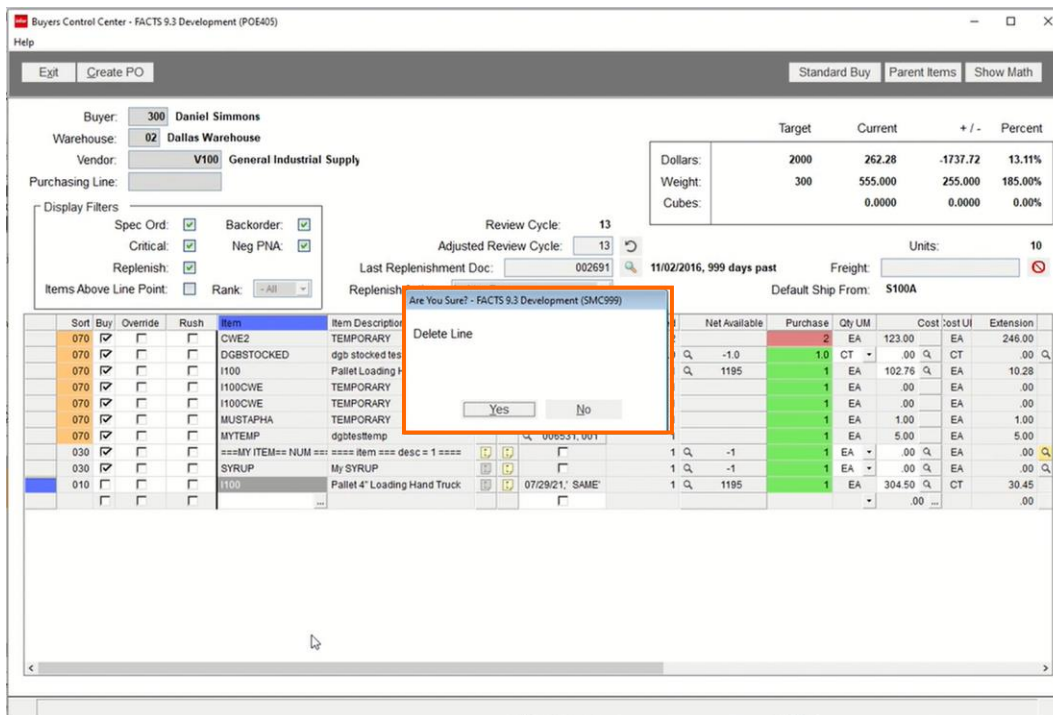


*Depending on the scenario, use the File Remove Line option before clicking Recalculate Line to ensure it executes properly.

- Once you trigger the recalculation, the system pulls the pending planning record into the Buyer’s Control Center. Double click the specific line to view the plan under the **Special/Plans** column.



- If a line is pulled in during recalculation and is not needed, highlight the line and press Delete to remove it from the BCC.



- The line will no longer appear in the list.

Buyers Control Center - FACTS 9.3 Development (POE405)

Buyer: 300 Daniel Simmons
 Warehouse: 02 Dallas Warehouse
 Vendor: V100 General Industrial Supply

	Target	Current	+/-	Percent
Dollars:	2000	262.28	-1737.72	13.11%
Weight:	300	555.000	255.000	185.00%
Cubes:		0.0000	0.0000	0.00%

Review Cycle: 13
 Adjusted Review Cycle: 13
 Last Replenishment Doc: 002691
 Replenish Action: L-Line Buy
 11/02/2016, 999 days past
 Units: 10
 Default Ship From: S100A

Sort	Buy	Override	Rush	Item	Item Description	Special / Plans	Recommended	Net Available	Purchase	Qty UM	Cost	Cost UI	Extension
070				CWE2	TEMPORARY	Q, 006439, 001	2		2	EA	123.00	EA	246.00
070				DGBSTOCKED	dgb stocked test		1.0	-1.0	1.0	CT	.00	CT	.00
070				H100	Pallet Loading Hand Truck	Q, 000372, 001	1	1195	1	EA	102.76	EA	10.28
070				H100CWE	TEMPORARY	Q, 006665, 001	1		1	EA	.00	EA	.00
070				H100CWE	TEMPORARY	Q, 006665, 001	1		1	EA	.00	EA	.00
070				MUSTAPHA	TEMPORARY	Q, 006987, 005	1		1	EA	1.00	EA	1.00
070				MYTEMP	dgbtemp	Q, 006531, 001	1		1	EA	5.00	EA	5.00
030				SYRUP	My SYRUP		1	-1	1	EA	.00	EA	.00
030				SYRUP	My SYRUP		1	-1	1	EA	.00	EA	.00

- Press Exit.
- Navigate to **Purchase Orders-> Entry-> Purchase Planning** (program POE130).

9.4 Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Friday, April 17, 2026, 1:19 pm
 Ricci Ramirez

Development

Primary Main

Access: []

- + Sales Orders
- + Inventory Control
- Purchase Orders
 - Entry
 - Buyers Control Center Purchase
 - Buyers Control Center Return
 - Exception Control Center
 - Planned Special Order PO Entry
 - Planned Special Order PO Report
 - Purchase Planning
 - PO Entry
 - PO Print
 - Purchase Order Review
- + Receiving
- + Invoice Receiving
- + Cost Contracts
- + Vendor Rebates
- + Inquiries
- + Reports & Prints
- + End of Period

- Open **Purchase Planning Request Entry**. Notice the status of the line has changed to **B**. This
- confirms the line is in the **Buyer's Control Center** and is being managed to create a **Purchase**
- **Order**.

Purchase Planning Request Entry - FACTS Development (POE130)

Sort: VS - Vendor - by Ship From Beginning: << Q First

Lines

Date: 07/29/2021 Vendor: V100 Ship From: SAME

General Industrial Supply

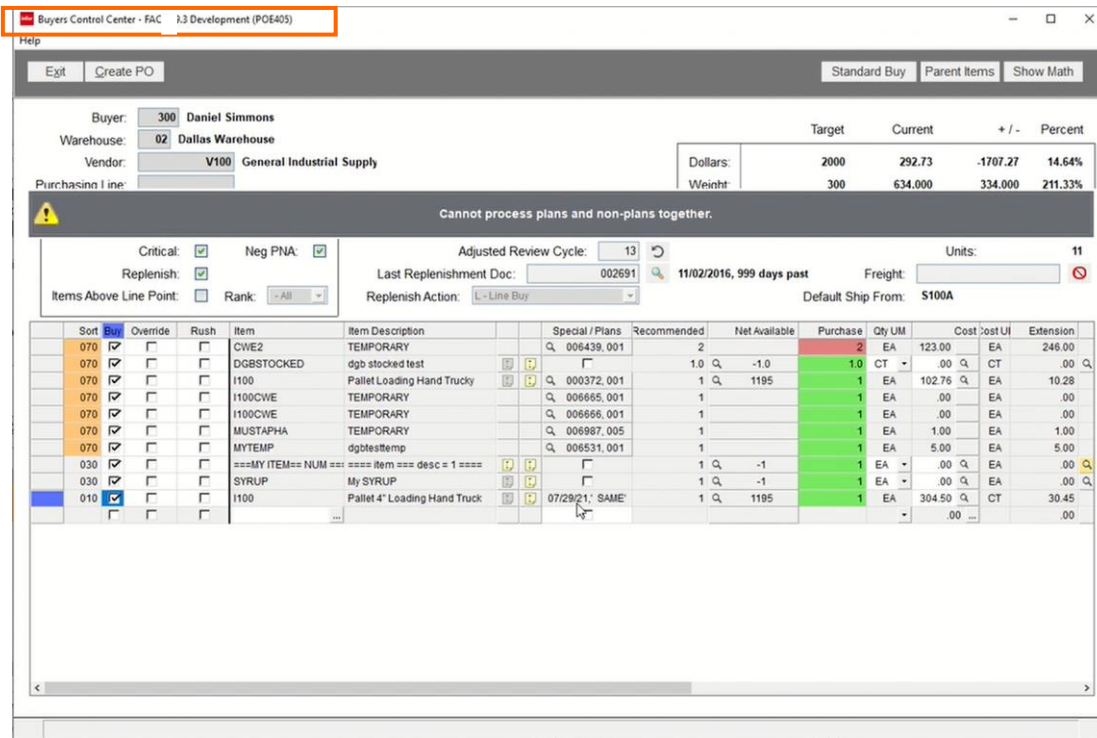
Wh: 02 Item: 1100 Quantity: 1 EA Status: B - BCC entered

Dallas Warehouse Pallet 4" Loading Hand Truck

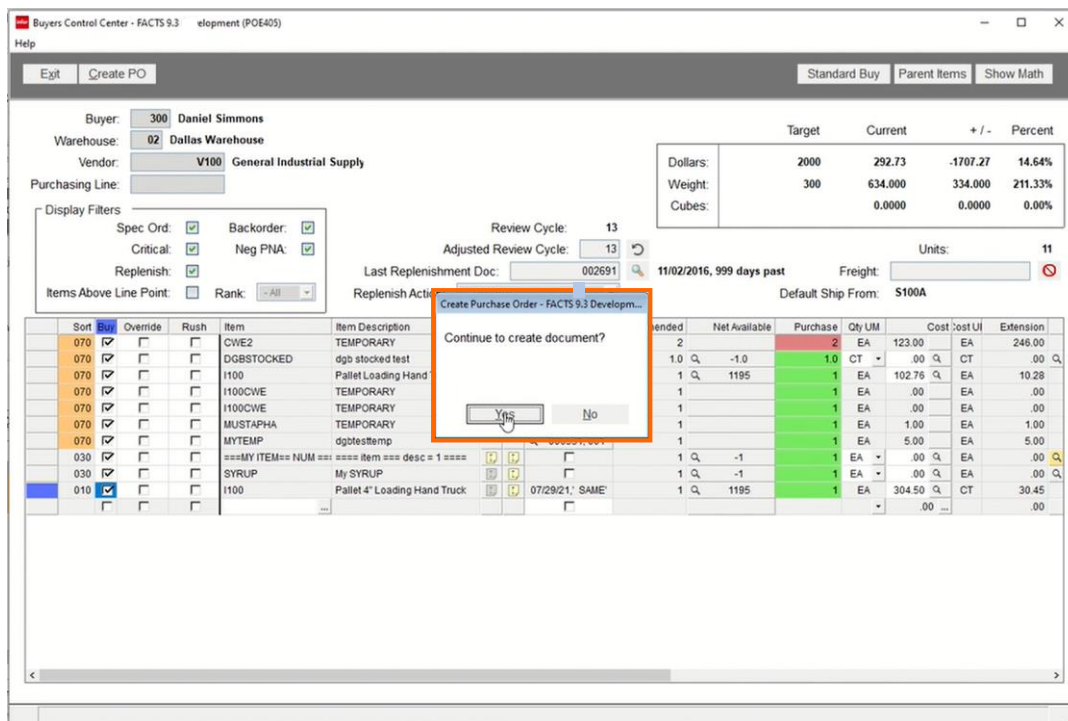
Date	Vendor	Ship From	Wh	Item	Description	Qty	UM	E-Entered	N=	PO #
02/28/21	V100	S100	01	1100	Pallet 4" Loading Hand Truck	1	EA	N		
06/28/21	V100	S100	01	1100	Pallet 4" Loading Hand Truck	1	EA	N		
07/01/21	V100	S100	01	RIBBON	RIBBON desc 1	2,000	M	H		
07/03/21	V100	S100	01	1144	Portable Scaffold System	1	EA	N		
07/29/21	V100	SAME	02	1100	Pallet 4" Loading Hand Truck	1	EA	B		
06/27/21	V101	S100A	01	1144	Portable Scaffold System	2	EA	N		110130
07/07/21	V101	S101	01	1119	Steel Shelving/Shelf	.09	DZ	N		
07/07/21	V101	S101	01	1140	Scaffold Platform	1	EA	N		
02/28/21	V110	SAME	01	1110	Stool Storage Cabinet XXX	1	EA	E		003008

Filter by: Date: Vendor: Ship-To: Wh: Item: Status:

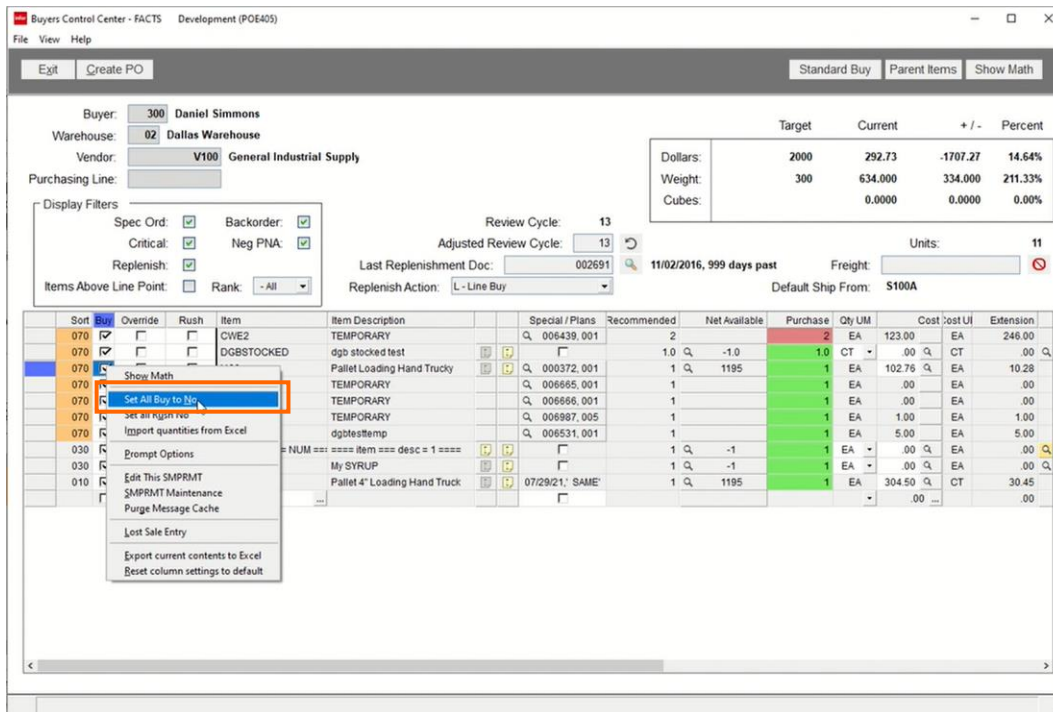
- Return to Buyer's Control Center (program POE405).



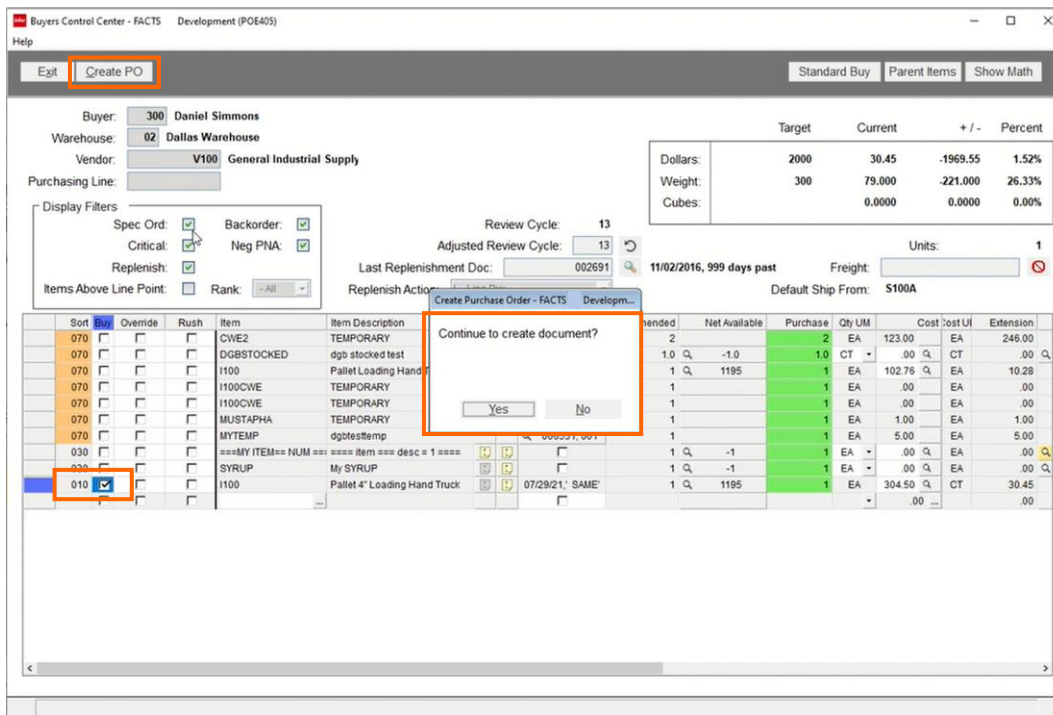
- The system **blocks mismatches**. If you attempt to combine the planning line with items that have a different vendor, ship-from location, or request date, an error message is displayed and the PO is not created.



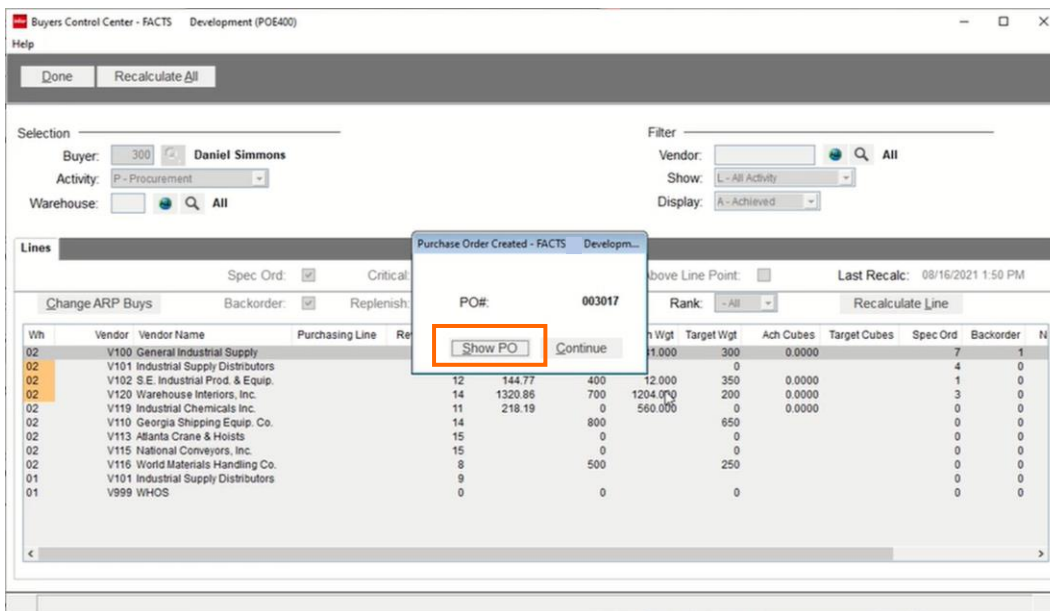
- To generate the PO, set the other standard **Buy** lines to **No**. This isolates the planning line so only that line is processed.



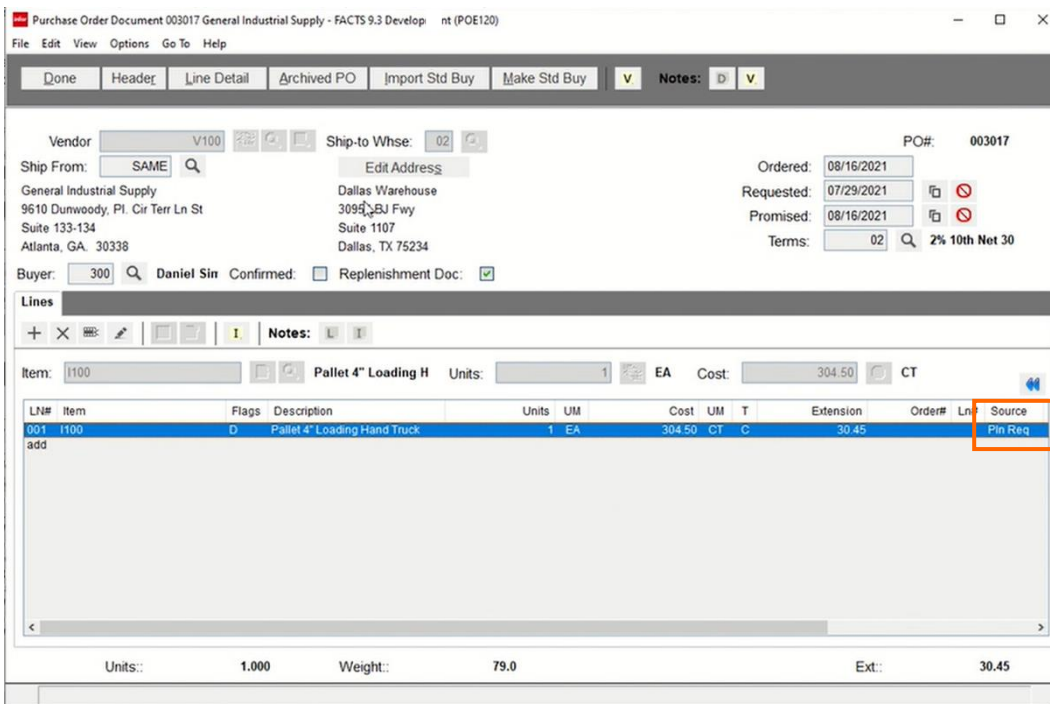
- Select the line and press **Create PO** to create the document.



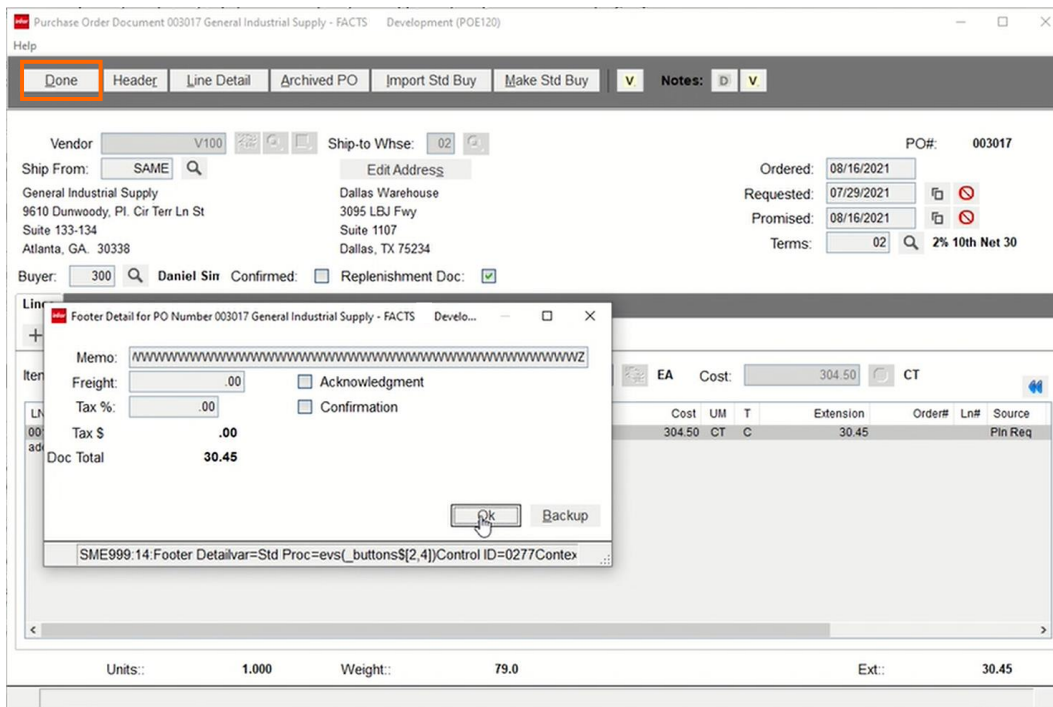
- Click **Show PO** to open and view the Purchase Order.



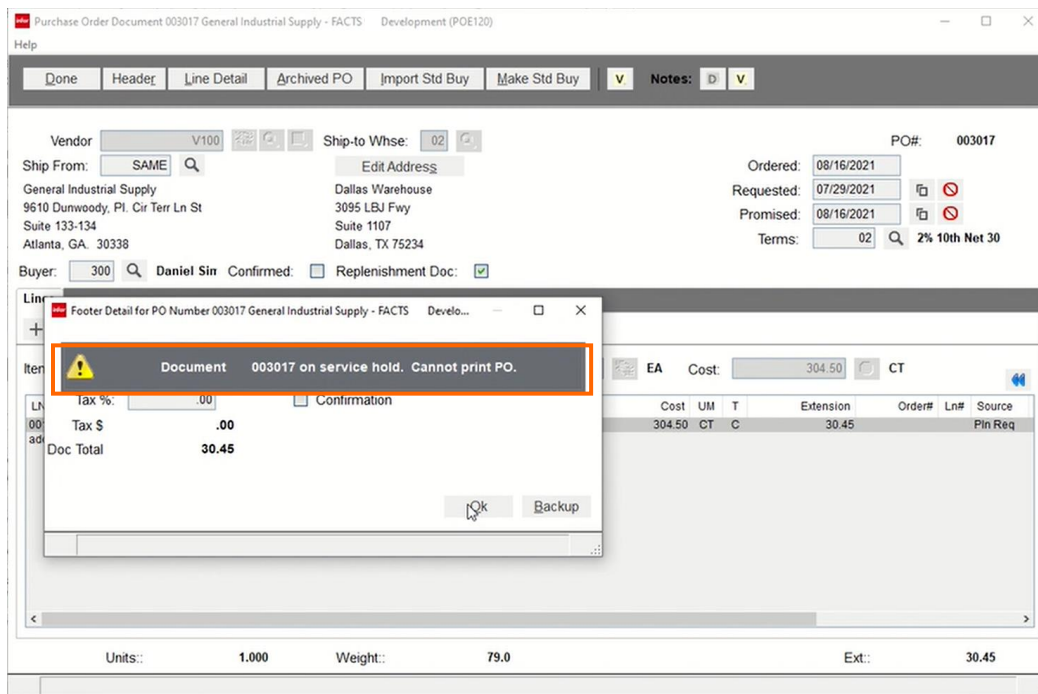
- Review the **Source** field. It shows **Pln Req** (planning request).



- Click **Done** to complete the process.



- The new PO uses the default priority from the PO Static Control. In this example, the order is
- placed on **Service Hold**.



- To manage this, go to the **Purchase Order Review** program. In this window, select the order and press **Release** to remove the hold.

Purchase Order Review - FACTS Development (POE230)

File View Options User Pref Go To Help

Done Svc Hold Debit Hold **Release** Document

Warehouse: 01 Atlanta Warehouse

Hold Status: H - All Documents on Hold

Filters

Status: A - All Priority: B - Both Type: All Buyer: All

Origin: A - All Req Cutoff: None

Lines

Hold	PO #	Wh	Type	S	O	P	Requested	Entry	Vendor	Name	Buyer	Total
Service	002890	01	B	P	H		01/26/19	01/25/19	V100	General Industrial Supply	100	425.24
Service	002876	01	P	E	H		06/24/20	06/24/20	V100	General Industrial Supply	200	289.97
Dbt/Svc add	003008	01	P	E	W	H	07/20/21	07/20/21	V110	Georgia Shipping Equip. Co.	CWE	159.82

List From: < >

- Return to **PO Entry** (program POE120). If the order is not needed, review the document and delete it.

Purchase Order Document 003017 General Industrial Supply - FACTS Development (POE120)

File Edit View Options Go To Help

New Document Number... Line Detail Archived PO Import Std Buy Make Std Buy V Notes: D V

Open Existing Document... **Delete Document**

Vendor: V100 Ship-to Whse: 02

Ship From: SAME Edit Address

General Industrial Supply Dallas Warehouse
9610 Dunwoody, Pl. Cir Terr Ln St 3095 LBJ Fwy
Suite 133-134 Suite 1107
Atlanta, GA. 30338 Dallas, TX 75234

Ordered: 08/16/2021 PO#: 003017
Requested: 07/29/2021
Promised: 08/16/2021
Terms: 02 2% 10th Net 30

Buyer: 300 Daniel Sin Confirmed: Replenishment Doc:

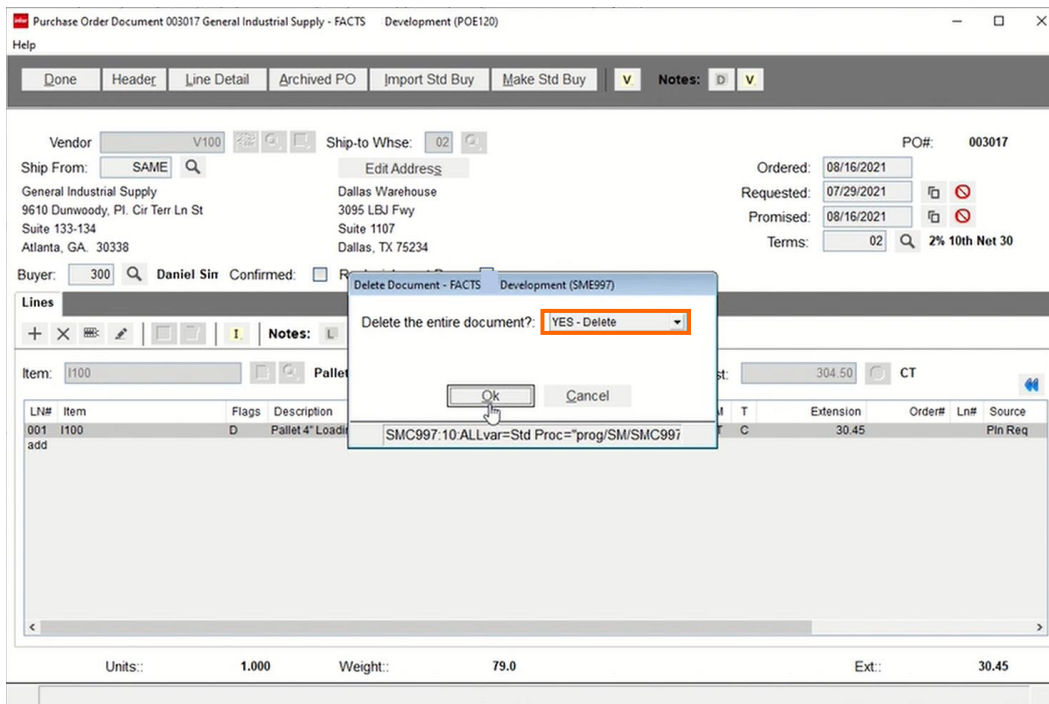
Lines

Item: I100 Pallet 4" Loading H Units: 1 EA Cost: 304.50 CT

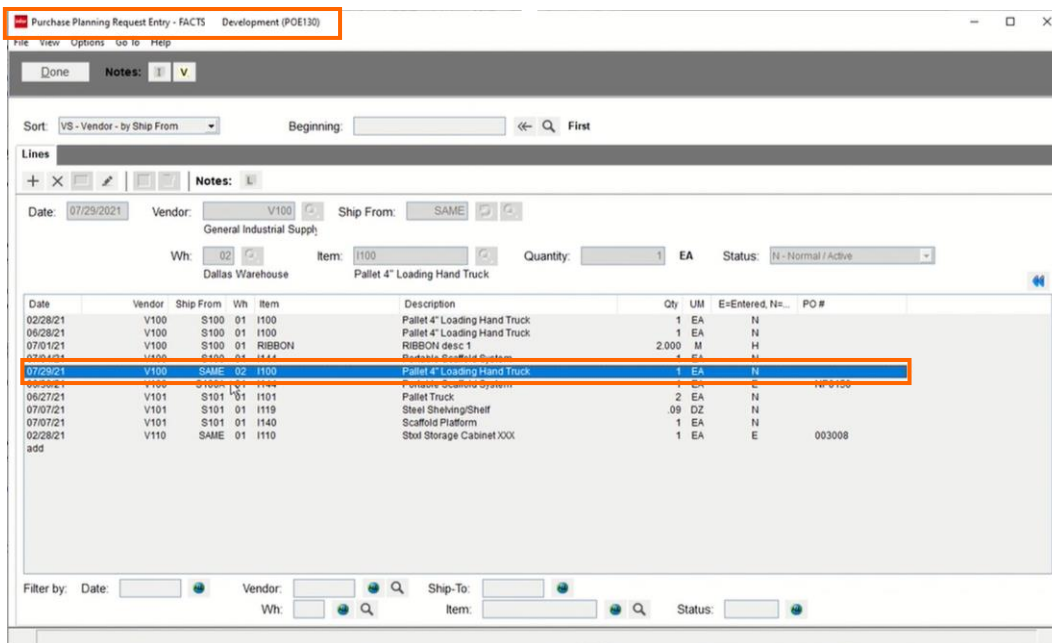
LN#	Item	Flags	Description	Units	UM	Cost	UM	T	Extension	Order#	Ln#	Source
001	I100	D	Pallet 4" Loading Hand Truck	1	EA	304.50	CT	C	30.45			Pin Req

Units: 1.000 Weight: 79.0 Ext: 30.45

- Select **YES-Delete** to confirm and complete the deletion.



- Return to **Purchase Planning Entry**. The document is back to Normal status and ready to be processed again. This safely reverts the planning request to **Normal** status.



13. Transfer Planning (for future transfers)

Transfer Planning operates in almost exactly the same manner as **Purchase Order (PO)** planning, including the unique rules involving the **Buyer's Control Center (BCC)**.

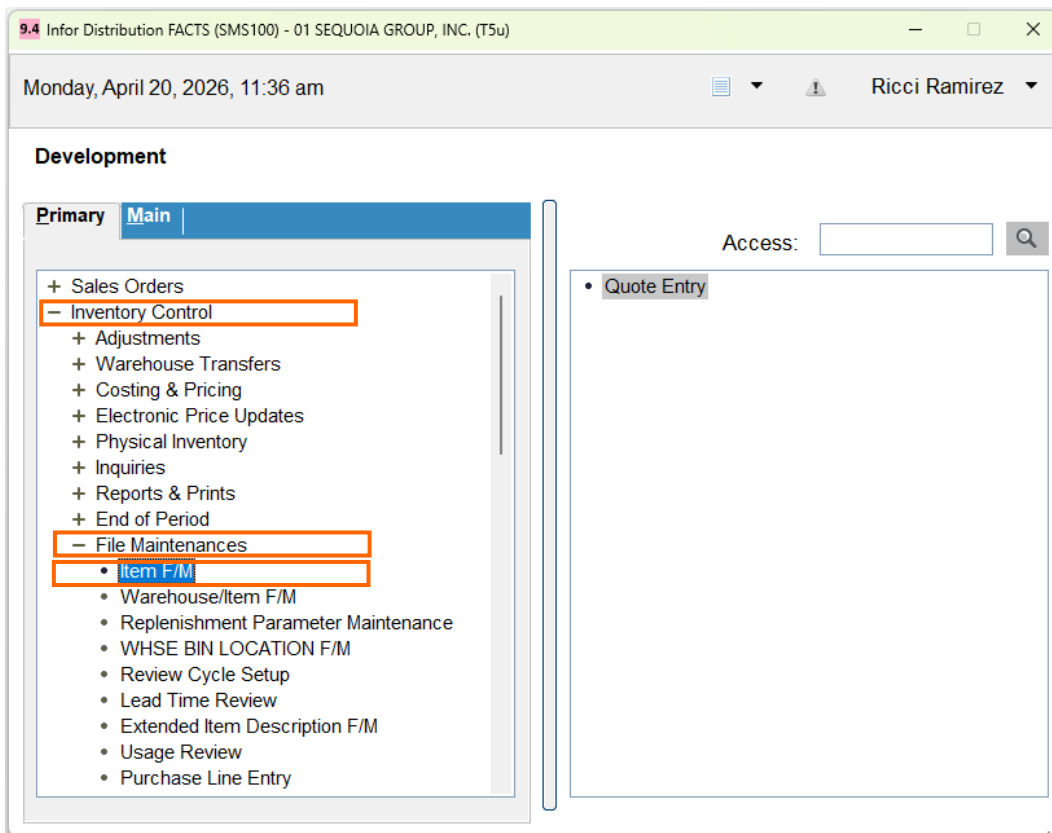
- To access the program, navigate to **Inventory Control->Warehouse Transfers->Transfer Planning** (program ICE230).

The transfer planning setup is structurally identical, but adapted for internal movement. Instead of customer/ship-to (Sales Orders) or vendor/ship-from (Purchase Orders), the system uses warehouse and ship-via designations.

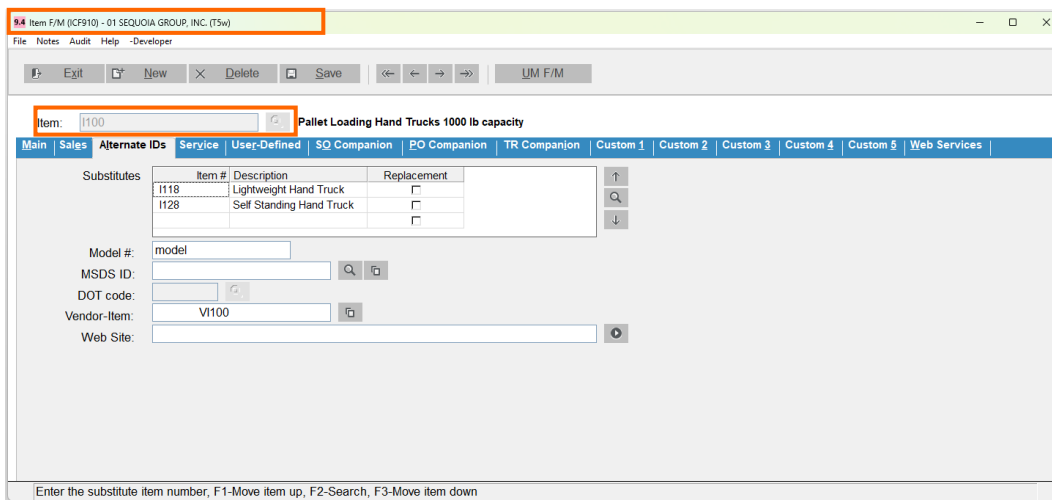
14. Ability to flag a substitute item as a replacement item

This feature allows users to flag a substitute item as a replacement. This helps identify the preferred or actual replacement for a specific item. Instead of displaying substitutes in item number order, the system reflects the intended replacement hierarchy, making it easier to understand.

- Navigate to **Inventory Control->File Maintenances->Item F/M(ICF910)**



- Open **Item F/M**, then go to **Alternate IDs** for substitute items. Search for item **I100**.



- Use the **Replacement** column to flag substitute items as preferred replacements by checking the corresponding box.
- Once selected, the **Replacement** designation is displayed throughout the system, such as in order entry sidebars, item inquiries, and reports, allowing users to quickly identify which item to select or drag into their document.

- For this example, item **I118 Lightweight Hand Truck** is set up as the replacement for **I100**.

Item #	Description	Replacement
I118	Lightweight Hand Truck	<input checked="" type="checkbox"/>
I128	Self Standing Hand Truck	<input type="checkbox"/>
V TEAM		<input type="checkbox"/>

Model #: model

MSDS ID: BENZENE

DOT code:

Vendor-Item: V100

Web Site:

- Press **Save** and then **Exit**.
- You can also view this in the **Substitute Item Report**. Navigate to **Inventory Control->Reports and Prints->Substitute Item Listing** (program ICR755).

Monday, April 20, 2026, 1:46 pm

Access:

Development

Primary Main

- + Sales Orders
- Inventory Control
- + Adjustments
- + Warehouse Transfers
- + Costing & Pricing
- + Electronic Price Updates
- + Physical Inventory
- + Inquiries
- Reports & Prints
 - Stock Status Report
 - Surplus Stock Report
 - Transfer Planning Listing
 - Transfer Planning Requirements
 - Item Sales Report
 - Inventory Turns Report
 - TEMPORARY ITEM REPORT
 - Warehouse/Item Listing
 - Item Ledgercards
 - Item Listing
 - Companion Item Listing
 - **Substitute Item Listing**
 - Item Interchange Listing

Quote Entry

- Open **Substitute Item Listing**, then press **OK** to generate the report using the defaulted settings.

9.4 Substitute Item Report (ICR755) - 01 SEQUOIA GROUP, INC. (T5w)

Template Print Options Custom Report Layout Help

Order: Beginning: **First**

Ending: **Last**

Properties

Item Type: **All**

Vendor: **All**

Item Description:

Template Printer Layout

Print in item, alpha, vendor or item class order?

- Review the document and look for the newly added **Replacement** column.

NPT5w139146.txt

File Edit View H1 **B** *I*

<page break>

Date: 04/20/26 SEQUOIA GROUP, INC. ICR755 Page: 1
 User: RR T5w Substitute Item Listing Time: 1:55 PM

Item from First to Last
 Vendor ALL

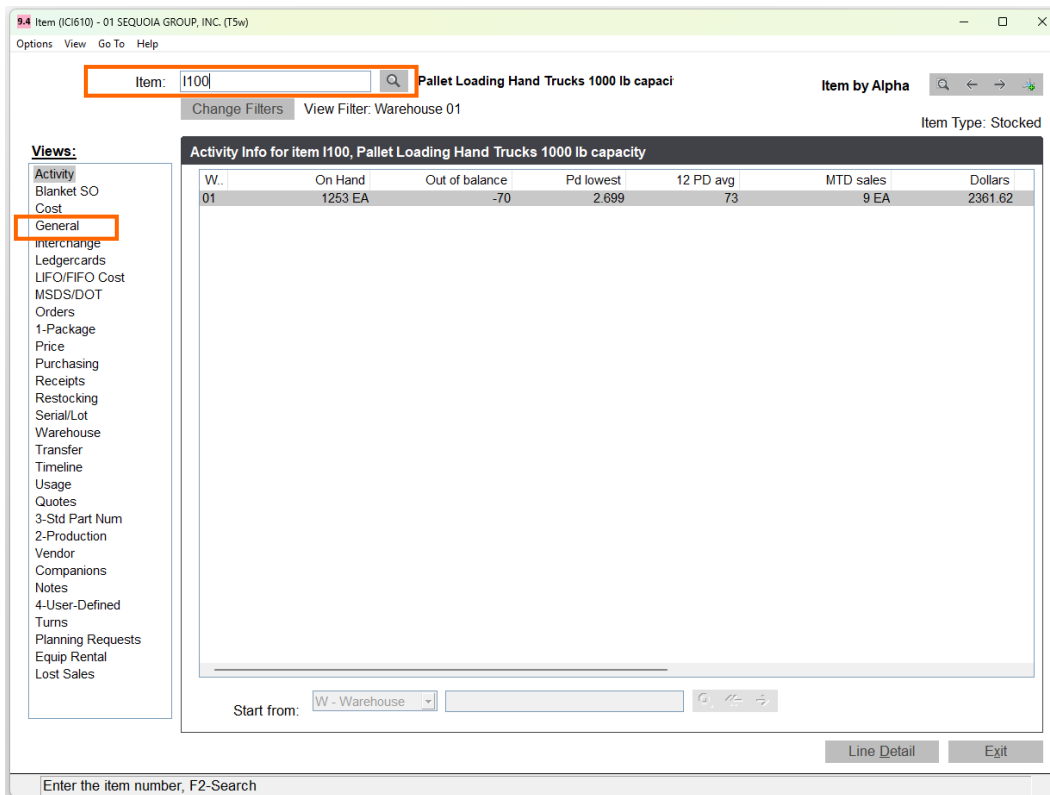
Item	Description	Substitute	Description	Replacement
I100	Pallet Loading Hand Trucks	I118 I128 NEW TEAM	Lightweight Hand Truck Self Standing Hand Truck	N Y N
I108	Steel Top Work Bench	I109	Foremen Shop Cabinet Desk	N
I109	Foremen Shop Cabinet Desk	I108	Steel Top Work Bench	N
I113	Rolling Stock Picking Ladder	I136	Reinforced Strapping Tape	N
I114	Digital UPS/Parcel Post Scale	I121	Heavy Duty Shipping Scale	N
I118	Lightweight Hand Truck	I100 I128	Pallet Loading Hand Trucks Self Standing Hand Truck	N N
I121	Heavy Duty Shipping Scale	I114	Digital UPS/Parcel Post Scale	N

- Review the Replacement column to identify the selected replacement items. This provides system-wide visibility into which items are flagged as replacements.

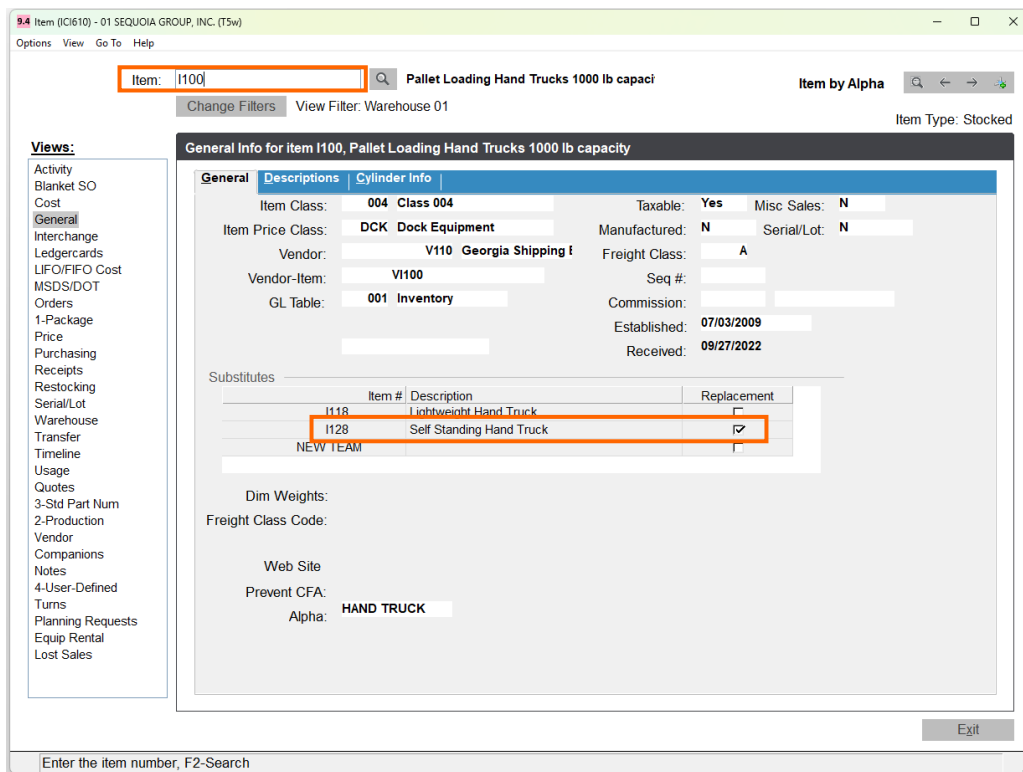
Item	Description	Substitute	Description	Replacement
I100	Pallet Loading Hand Trucks	I118	Lightweight Hand Truck	N
		I128	Self Standing Hand Truck	Y
		NEW TEAM		N
I108	Steel Top Work Bench	I109	Foremen Shop Cabinet Desk	N
I109	Foremen Shop Cabinet Desk	I108	Steel Top Work Bench	N
I113	Rolling Stock Picking Ladder	I136	Reinforced Strapping Tape	N
I114	Digital UPS/Parcel Post Scale	I121	Heavy Duty Shipping Scale	N
I118	Lightweight Hand Truck	I100	Pallet Loading Hand Trucks	N
		I128	Self Standing Hand Truck	N
I121	Heavy Duty Shipping Scale	I114	Digital UPS/Parcel Post Scale	N

- In the same way, we can check the substitutes information at **Item Inquiry**. Navigate to **Inventory Control->Inquiries->Item Inquiry** (program I100).

- For this example, we are pulling up item **I100**, then click **General View**.



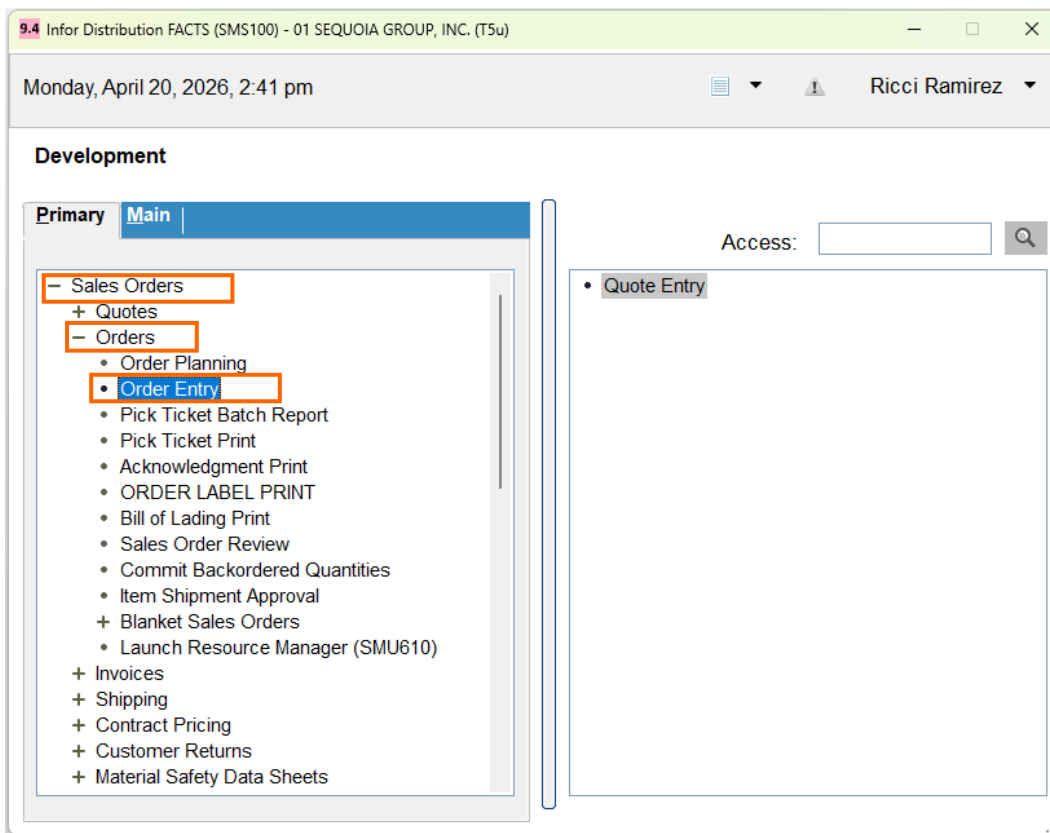
- Notice the replacement value is also visible here.



- Click **Exit** to close the window.

With this new feature, sidebars clearly display which items are the suggested replacements. The substitute dropdown has been updated across all modules, meaning the new replacement designation is visible in orders, purchases, and transfers, anywhere a substitute sidebar exists.

- Navigate to **Sales Orders-> Orders-> Order Entry** (program SOE210).



- Open **Order Entry**. For this example, we are pulling up customer **C100**, then click the **double blue arrow** to open the sidebar.

94 Order Entry (SOE210) Sales Order Document 002179 Southeastern Industrial - 01 SEQUOIA GROUP, INC. (T5y)

File Edit View Options Go To Help

Done Header Line Detail Deposits/CC Preauths Archived Pick Import Std Ord Make Std Ord Notes: D C

Customer: C100 Ship-To: S100 Init Whse: 01 Atlanta Warehouse Document: 002179

Southeastern Industrial Southeastern Industrial Supply
 12490 South Peachtree Street 1145-A Fulton Industrial Park
 Atlanta GA 30348 Atlanta, GA 30223

Price Level: 0
 Ordered: 04/20/2026
 Requested: ASAP
 Turbo Token:

Reference #: 2 Ship Via: UPS Contact:

Lines

Item: 1100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 47.37

Ship Direct: Exceptional Sale: Usage Date:

Wh: 01 Ordered 5 EA Committed 5 Backordered 0 Price 228.00 EA Extension 1140.00

LN#	Ordered	Item	Flags	Wh	UM	Committed	Backorder	Price	T	UM	GM%	Source
001	8	NEW TEAM	BD%	ds	EA	4	4	.00		EA	.00	
002	3	1152	D	ds	GL	3	0	64.65	S	GL	96.91	
003	5	1100	D	ds	EA	5	0	228.00	C	EA	47.37	
add												

Weight: 410.000 Units: 16 Mrse: 1333.95 Ext.: 1333.95

VERY GOOD CUSTOMER

- In the sidebar, select **Substitute Items** from the drop-down to view the **Replacement** column.

Order Entry (SOE210) Sales Order Document 002179 Southeastern Industrial - 01 SEQUOIA GROUP, INC. (T5y)

File Edit View Options Go To Help

Done Header Line Detail Deposits/CC Preauths Archived Pick Import Std Ord Make Std Ord Notes: D C

Customer: C100 Ship-To: S100 Init Whse: 01 Atlanta Warehouse Document: 002179

Southeastern Industrial 12490 South Peachtree Street Atlanta GA 30348
Southeastern Industrial Supply 1145.A Fulton Industrial Park Atlanta, GA 30223

Price Level: 0
Ordered: 04/20/2026
Requested: ASAP
Turbo Token:

Reference #: 2 Ship Via: UPS Contact:

Lines

Item: I100 Pallet Loading Hand Trucks 1000 lb capacity GM %: 47.37

Ship Direct: Exceptional Sale: Usage Date:

Wh: 01 Ordered: 5 EA Committed: 5 Backordered: 0 Price: 228.00 Extension: 1140.00

LN#	Ordered	Item	Flags	Wh	UM	Committed	B
001	8	NEW TEAM	BD%	ds	EA	4	
002	3	I152	D	ds	GL	3	
003	5	I100	D	ds	EA	5	
add							

s - Substitute Items

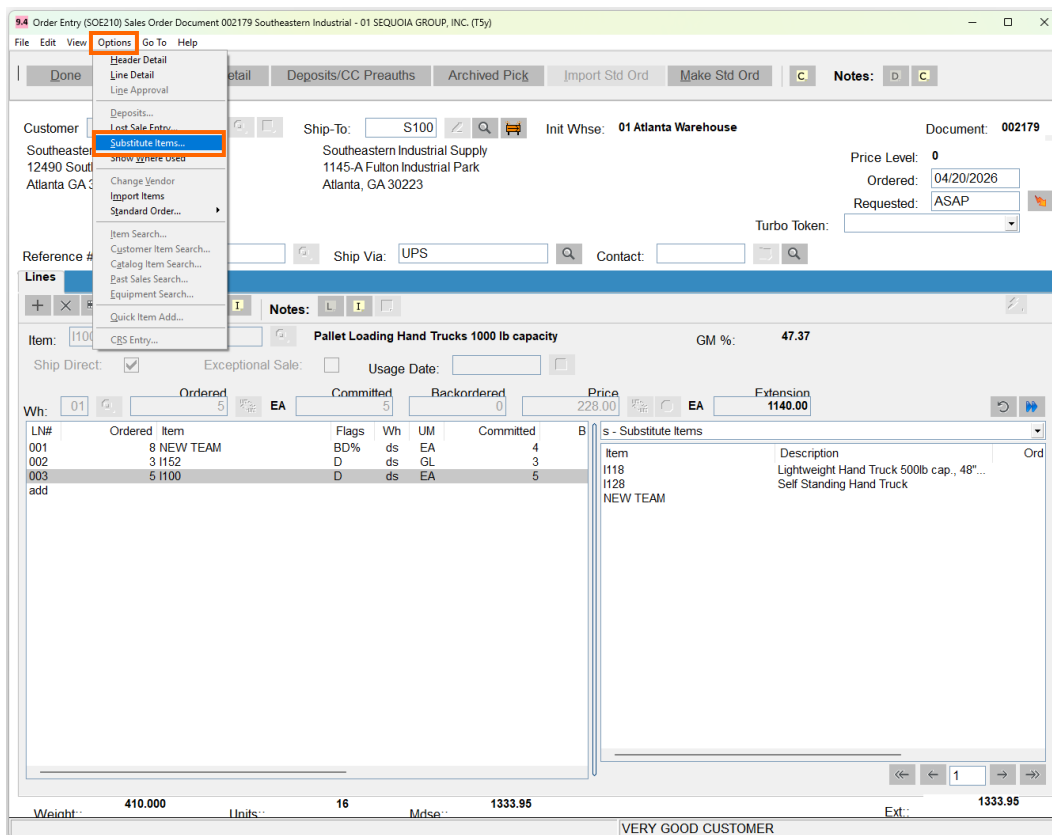
Item	Description	Order Qty	UM	Replacement
I118	... Lightweight Hand Truck 500lb c...	1	EA	N
I128	... Self Standing Hand Truck	1	EA	Y
NEW TE...		1	EA	N

Weight: 410.000 Units: 16 Mds: 1333.95 Ext: 1333.95

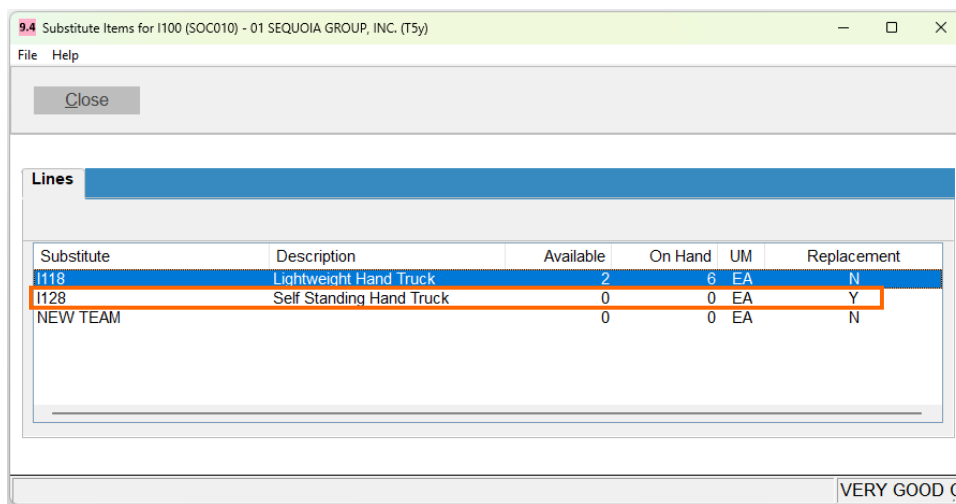
VERY GOOD CUSTOMER

When you open the **Substitute Items sidebar, the **Replacement** column is clearly visible. This allows you to quickly identify the preferred replacement item and **drag** it directly into your document.*

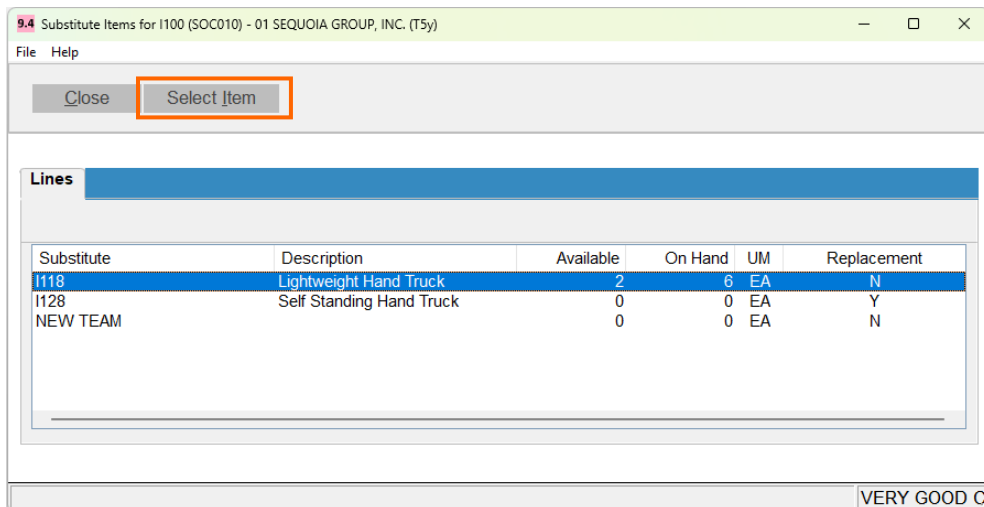
- Another way to access the replacement item functionality while working in a document (such as a sales order or quote) is by going to the **Options** menu and selecting **Substitute Items**.



- A window displaying the replacement items will appear.



- Click **Close**.
- If you are adding an item and go to the **Options** menu to select **Substitute Items**, you can directly pick the designated replacement item to use instead.



- Once you select a replacement item from this menu, the system automatically pulls it into your document and processes it through standard validation, just as if the item number had been entered manually.
- Click **Close**.

While the standard system strictly uses the replacement flag for visibility, you could leverage the new replacement flag to build custom validations and advanced data rollups tailored to your specific business needs.

Here are a few ways partners might implement this:

- ✓ **Custom Validations During Order Entry:** *You could leverage the new replacement flag to trigger a hard stop or custom prompt if a user enters an outdated item. For example, the system could be coded to stop the user, ask for a password, or immediately prompt them with a message indicating that they should be using the newer replacement item instead.*
- ✓ **Advanced Inventory Rollups:** *You could leverage the new replacement flag to create custom fields within screens like Warehouse Item File Maintenance. If you have a chain of items that sequentially replace one another (e.g., Item 104 replaces 103, and Item 100 replaces 104), custom coding could calculate and display a 'rollup' of the total combined quantities on hand or the cumulative monetary values across that entire chain of replacements.*
- To customize the text used for the replacement feature, navigate to **Message F/M** (program SMF996).
- Open **Message F/M**, then click the **Search** button.

9.4 Message F/M (SMF996) - 01 SEQUOIA GROUP, INC. (T5z)

File Audit Help Developer

Exit New Delete Save

Message Code: → 🔍

Message Text:

Spanish Text:

Review Translation:

Enter the message code, F1-Next, F2-Search

- In the **Keywords** field, enter '**sub_replacement**'

9.4 Message Code Search (SMMSG5) - 01 SEQUOIA GROUP, INC. (T5x)

Options Export Print Help

Starts with:

Go To: 🔍

Filters

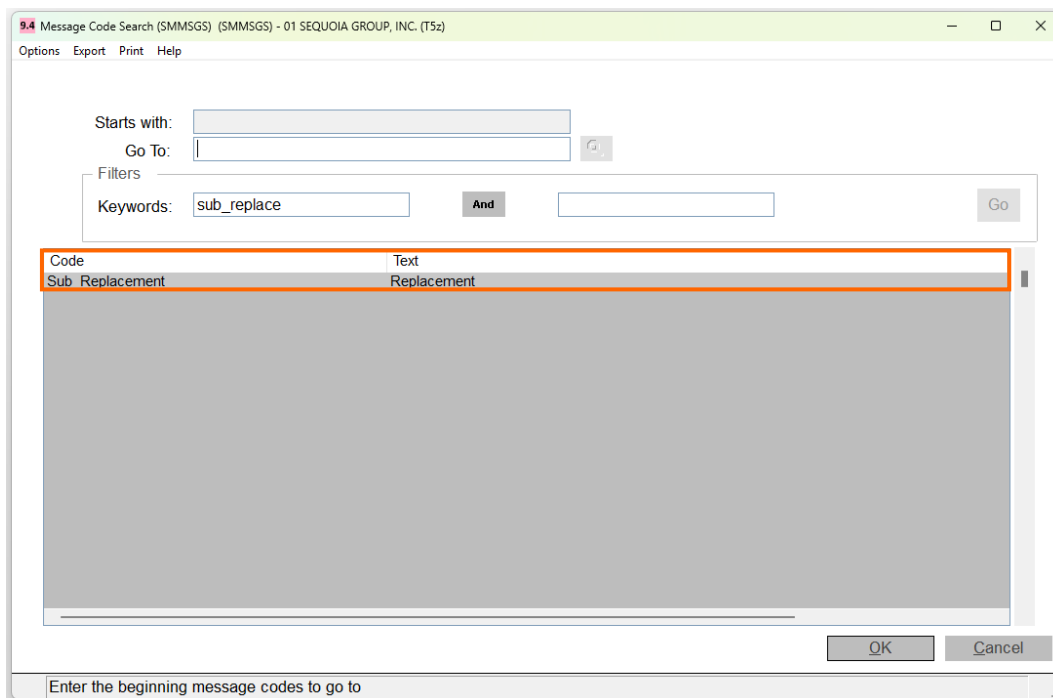
Keywords: And Go

Code	Text
Document Detail	Document Detail
Restocking	Restocking
days	days
than	than
the %1	the %1
!BSONUM	Failed to create document number
!BUY_UM	Buying UM '%1' for item '%2' not on file
!COST_UM	Costing UM '%1' for item '%2' not on file
!PRICE_UM	Pricing UM '%1' for item '%2' not on file
!SELL_UM	Selling UM '%1' for item '%2' not on file
!TEMP_SHIP	Temporary Ship-To's not allowed
!WHSE	Init. Warehouse has not been entered
# Columns on Receipt	# Columns on Receipt
# Days	# Days
# Days Auto Increment	# Days Auto Increment
# Disputed	# Disputed
# Eligible	# Eligible
# Header Records to Skip	# Header Records to Skip

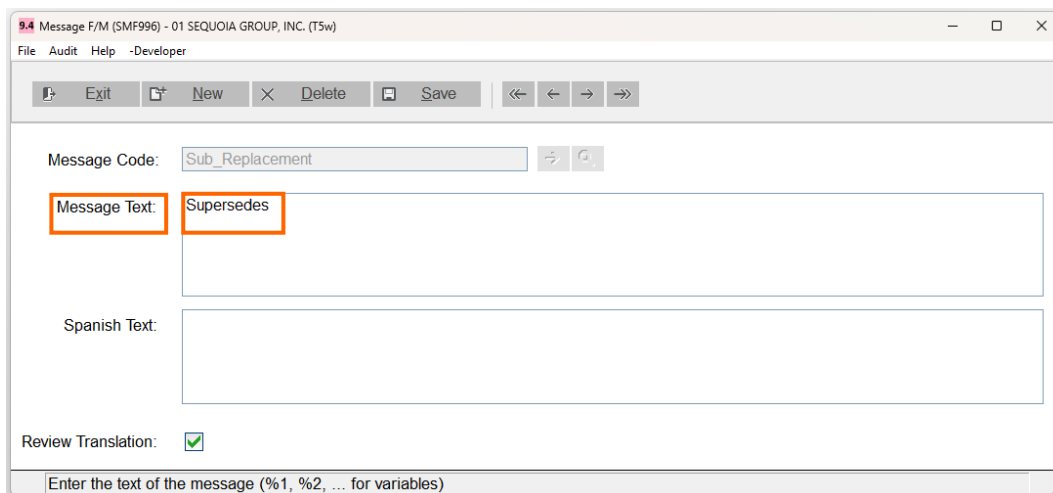
OK Cancel

Enter the beginning message codes to go to

- Click **OK**.
- A window is going to appear where you can select the **Sub_Replacement** and click **OK**.
- When the window appears, select **Sub_Replacement**, then click **OK** to proceed.



- A window will appear where you can customize the text. For this example, the **Message Text** field is set to **'Supersedes'**, and the action is confirmed with **Save and Exit**.



- Return to Item **F/M** (program ICF910). Click **Alternate IDs**, then search for item **I100**. Notice the column name is now **'Supersedes.'**

9.4 Item F/M (ICF910) - 01 SEQUOIA GROUP, INC. (T5w)

File Notes Audit Help --Developer

Item: I100 Pallet Loading Hand Trucks 1000 lb capacity

Main Sales **Alternate IDs** Service User-Defined SO Companion PO Companion TR Companion Custom 1 Custom 2 Custom 3 Custom 4 Custom 5 Web Services

Substitutes	Item #	Description	Supersedes
	I118	Lightweight Hand Truck	<input type="checkbox"/>
	I128	Self Standing Hand Truck	<input checked="" type="checkbox"/>
	NEW TEAM		<input type="checkbox"/>

Model #: model

MSDS ID: BENZENE Benzene

DOT code:

Vendor-Item: V100

Web Site:

Enter the substitute item number, F1-Move item up, F2-Search, F3-Move item down

- Press **Exit**.
- Return to **Substitute Item Report** (program ICR755), then press **OK** to continue.

9.4 Substitute Item Report (ICR755) - 01 SEQUOIA GROUP, INC. (T5w)

Template Print Options Custom Report Layout Help

Order: - Item Beginning: Ending: First Last

Properties

Item Type: SNU All

Vendor: All

Item Description: 1 - Description 1

Template: None Printer: Print to Notepad Layout: Format: 1, Standard Ok Cancel

Print in item, alpha, vendor or item class order?

- As shown in the report, the column text now displays **'Supersedes.'**

NPT5w99138.txt

File Edit View H1 B I S ↻ ⌂

<page break>

Date: 04/21/26 User: RR T5w SEQUOIA GROUP, INC. Substitute Item Listing ICR755 Page: 1 Time: 9:55 AM

Item from First to Last Vendor ALL

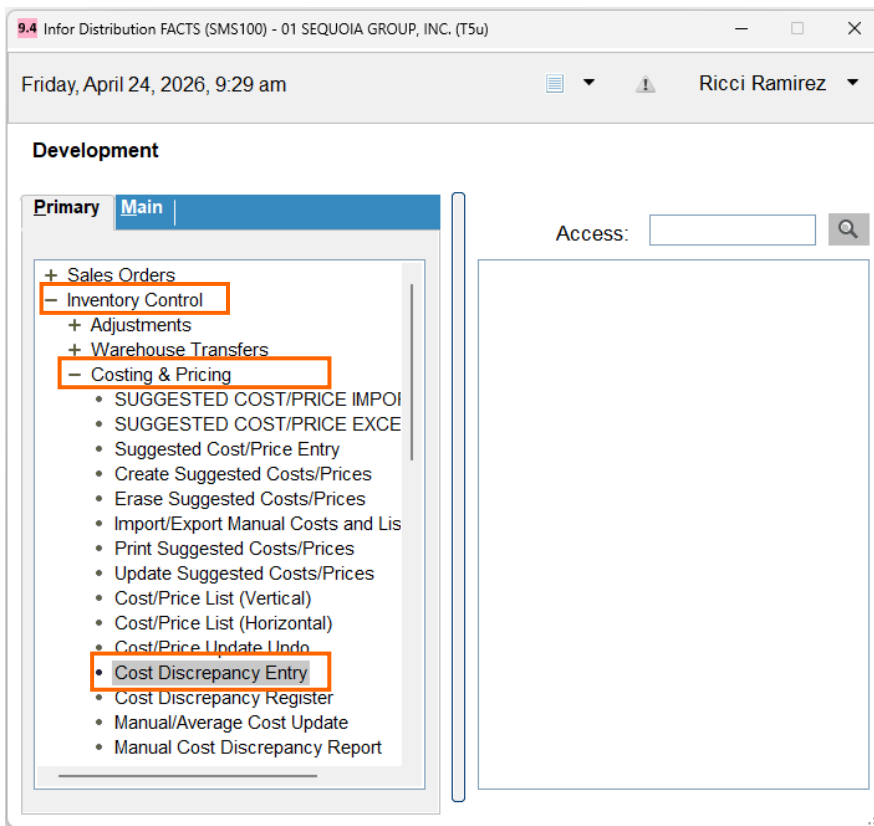
Item	Description	Substitute	Description	Supersedes
I100	Pallet Loading Hand Trucks	I118 I128 NEW TEAM	Lightweight Hand Truck Self Standing Hand Truck	N Y N
I108	Steel Top Work Bench	I109	Foremen Shop Cabinet Desk	N
I109	Foremen Shop Cabinet Desk	I108	Steel Top Work Bench	N
I113	Rolling Stock Picking Ladder	I136	Reinforced Strapping Tape	N
I114	Digital UPS/Parcel Post Scale	I121	Heavy Duty Shipping Scale	N
I118	Lightweight Hand Truck	I100 I128	Pallet Loading Hand Trucks Self Standing Hand Truck	N N
I121	Heavy Duty Shipping Scale	I114	Digital UPS/Parcel Post Scale	N
I122	Electric Hoist/2000 lb cap.	I123	20 gal Waste Container	N
I128	Self Standing Hand Truck	I100 I118	Pallet Loading Hand Trucks Lightweight Hand Truck	N N
I133	Steel Swivel Caster 2 1/2" dia	I132	Steel Swivel Caster 2" dia.	N

Ln 31, Col 44 3,292 characters Plain text 100% Windows (CRLF) UTF-8

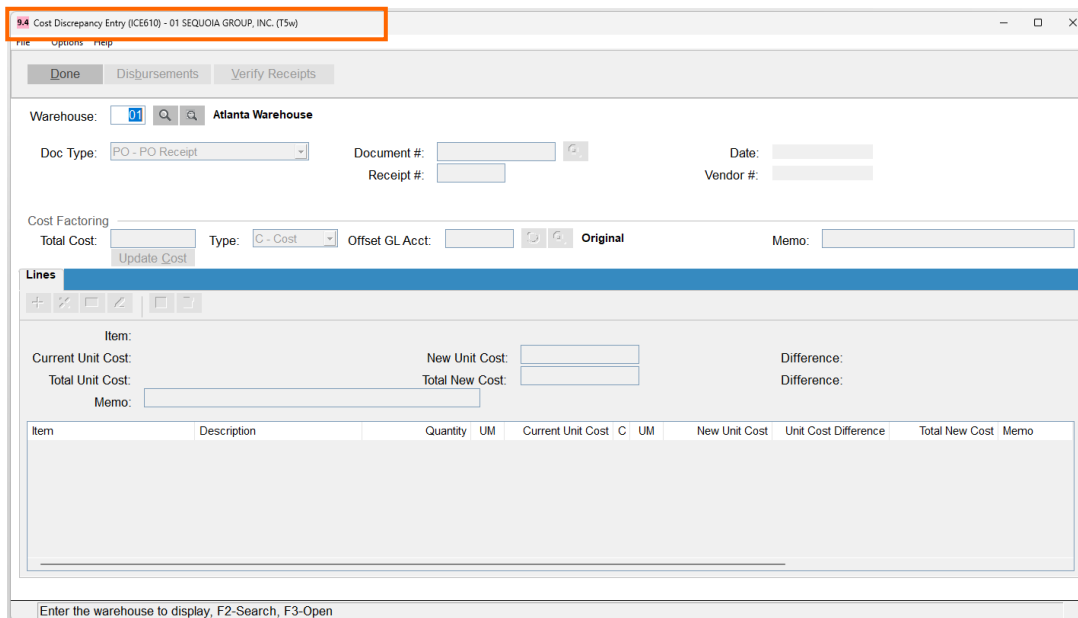
15. Enhancements to Cost Discrepancy Entry

15.1 Update Cost button

- ✓ The **Update Cost** button recalculates and applies cost changes based on entries in the **Cost Discrepancy Entry** system.
 - ✓ When clicked, it calculates the updated unit cost and displays it, while also showing a new column on the right (after the memo column) that indicates **how much will be added to the unit cost** for each line item. If the total cost cannot be evenly distributed, the system prompts you to either **ignore** the uneven distribution and save it as-is, or **fix** it by entering a new cost value.
 - ✓ This ensures costs reflect the latest changes, such as adjustments to receipts or disbursements, and keeps your cost records accurate and up-to-date with clear visibility into how costs are factored across line items.
- Navigate to **Inventory Control->Costing & Pricing->Cost Discrepancy Entry** (program ICE610).



- Open Cost Discrepancy Entry.



- Pull up a document. For our example, we are pulling up Document #: 001366, Receipt #: 00002.

Cost Discrepancy Entry (IC6610) - 01 SEQUOIA GROUP, INC. (T5v)

Warehouse: 01 Atlanta Warehouse

Doc Type: PO - PO Receipt

Document #: 001366
Receipt #: 00002

Date: 11/03/2022
Vendor #: V100

Cost Factoring
Total Cost: 3500.00 Type: C - Cost Offset GL Acct: Original

Update Cost

Lines

Item: I101 Pallet Truck holder 5000lb

Current Unit Cost: 288.150 EA New Unit Cost: 288.150 EA Difference: .000
Total Unit Cost: 5763.00 Total New Cost: 5763.00 Difference: .00

Item	Description	Quantity	UM	Current Unit Cost	C	UM	New Unit Cost	Unit Cost Difference	Total New Cost	Memo
I101	Pallet Truck holder 5000lb capacit...	20	EA	288.150	EA	EA	288.150	.000	5763.00	
I102	Adjustable Height Steel Stool 17"-...	50	EA	42.280	EA	EA	42.280	.000	2114.00	

- For this example, **4900.00** is entered in the **Total Cost** field. **Update Cost** is then selected. When the window appears, **Fix** or **Ignore** can be selected for the cost factor, which cannot be evenly distributed in this scenario.

Cost Discrepancy Entry (IC6610) - 01 SEQUOIA GROUP, INC. (T5v)

Warehouse: 01 Atlanta Warehouse

Doc Type: PO - PO Receipt

Document #: 001366
Receipt #: 00002

Date: 11/03/2022
Vendor #: V100

Cost Factoring
Total Cost: 4900.00 Type: C - Cost

Update Cost

Lines

Item: I101 Pallet Truck holder 5000lb

Current Unit Cost: 288.150 EA
Total Unit Cost: 5763.00

Memo:

Cost Factor Error (IC6610) - 01 SEQUOIA GROUP, INC. (T5v)

Cost Factor of 4900.00 cannot be evenly distributed.
Uneven distribution outcome value is: -0.01
Select 'Fix' to try another cost factor (perhaps: 4900.01).
Select 'Ignore' to allow the uneven distribution outcome value to be ignored.

Ignore Fix

Item	Description	Quantity	UM	Current Unit Cost	C	UM	New Unit Cost	Unit Cost Difference	Total New Cost	Memo
I101	Pallet Truck holder 5000lb capacit...	20	EA	288.150	EA	EA	288.150	.000	5763.00	
I102	Adjustable Height Steel Stool 17"-...	50	EA	42.280	EA	EA	42.280	.000	2114.00	

- Click **Ignore** to keep the calculated values as they are. The **Factored Unit Cost** column will retain the uneven distribution, and the system will not adjust the unit cost to evenly distribute the total cost across line items. These values will be used for further processing and reporting.

- If you click **Fix** when the cost factor cannot be evenly distributed, the system will prompt you to enter a new cost value to replace the uneven distribution.
- In this example, **Ignore** is selected. The **Factored Unit Cost** column displays the original uneven distribution values, with no adjustments applied.

Cost Discrepancy Entry (ICE610) - 01 SEQUOIA GROUP, INC. (TSv)

Warehouse: 01 Atlanta Warehouse

Doc Type: PO - PO Receipt Document #: 001366 Date: 11/03/2022

Receipt #: 00002 Vendor #: V100

Cost Factoring: Total Cost: 4900.00 Type: C - Cost Offset GL Acct: Original Memo:

Update Cost

Lines

Item: 1101 Pallet Truck holder 5000lb

Current Unit Cost: 288.150 EA New Unit Cost: 288.150 EA Difference: .000

Total Unit Cost: 5763.00 Total New Cost: 5763.00 Difference: .00

Memo:

Quantity	UM	Current Unit Cost	C	UM	New Unit Cost	Unit Cost Difference	Total New Cost	Memo	Factored Unit Cost
20	EA	288.150	EA	288.150	.000	5763.00			179.248
50	EA	42.280	EA	42.280	.000	2114.00			26.301

* Use the **Factored Unit Cost** column to review how the total cost is distributed across line items. This column shows the additional cost applied to each item's unit cost, helping you understand the impact of the update.

- You can change the column order by placing the **Factored Unit Cost** column immediately after **Description**. This positioning ensures the cost information is visible alongside key item details during review or correction.

Cost Discrepancy Entry (IC610) - 01 SEQUOIA GROUP, INC. (T5v)

Warehouse: 01 Atlanta Warehouse

Doc Type: PO - PO Receipt Document #: 001366 Date: 11/03/2022

Receipt #: 00002 Vendor #: V100

Cost Factoring: Total Cost: 4900.00 Type: C - Cost Offset GL Acct: Original Memo:

Lines

Item: I101 Pallet Truck holder 5000lb

Current Unit Cost: 288.150 EA New Unit Cost: 288.150 EA Difference: .000

Total Unit Cost: 5763.00 Total New Cost: 5763.00 Difference: .00

Item	Description	Factored Unit Cost	Quantity	UM	Current Unit Cost	C	UM	New Unit Cost	Unit Cost Difference	Total
I101	Pallet Truck holder 5000lb capa...	179.248	20	EA	288.150		EA	288.150	.000	
I102	Adjustable Height Steel Stool 1...	26.301	50	EA	42.280		EA	42.280	.000	

- Click **Done**.
- Enter a **Warehouse** and click the **Search** button to continue.

Cost Discrepancy Entry (IC610) - 01 SEQUOIA GROUP, INC. (T5v)

Warehouse: 01 Atlanta Warehouse

Doc Type: PO - PO Receipt Document #: Date:

Receipt #: Vendor #:

Cost Factoring: Total Cost: Type: C - Cost Offset GL Acct: Original Memo:

Lines

Item: Current Unit Cost: New Unit Cost: Difference:

Total Unit Cost: Total New Cost: Difference:

Memo:

Item	Description	Quantity	UM	Current Unit Cost	C	UM	New Unit Cost	Unit Cost Difference	Total New Cost	Memo
------	-------------	----------	----	-------------------	---	----	---------------	----------------------	----------------	------

Enter the warehouse to display, F2-Search, F3-Open

- Review the window displaying cost factoring details for lines 1 through 10. The **Factored Unit Cost** column is visible and populated, showing how cost adjustments are applied to each line.

9.4 Load Existing Search (ICCSDS) (ICCSDS) - 01 SEQUOIA GROUP, INC. (T5v)

Options Export Print Help

Starts with:

Go To:

Filters

Keywords: **And**

W...	Type	Document	Receipt	Invoice	Line	Item
01	PO	001072	00001		001	1100
01	PO	001361	00001		002	1100
01	PO	001363	00002		001	1100
01	PO	001363	00002		003	1102
01	PO	001363	00002		004	1103
01	PO	001366	00002		002	1101
01	PO	001366	00002		003	1102
01	TR	T00294	00001		001	1106
01	TR	T00294	00001		002	1123
01	TR	T00294	00001		003	1129

Enter the beginning document to go to

15.2 New column Cost Overridden

The **Cost Overridden** column flags line items where the user has manually changed the receipt cost instead of using the system-calculated or default value.

- For our example, we are going to pull up the information for **Document #: 001208** and **Receipt #: 00002**.

The **Cost Overridden** column displays an asterisk (*) next to costs that were overridden by the user during the receiving process, making it easy to identify manually adjusted values. Because these costs were overridden by a user, it might be desirable to keep the overridden cost and not allow the cost factoring to change that line.

16. Enhancements to Cost Discrepancy Register

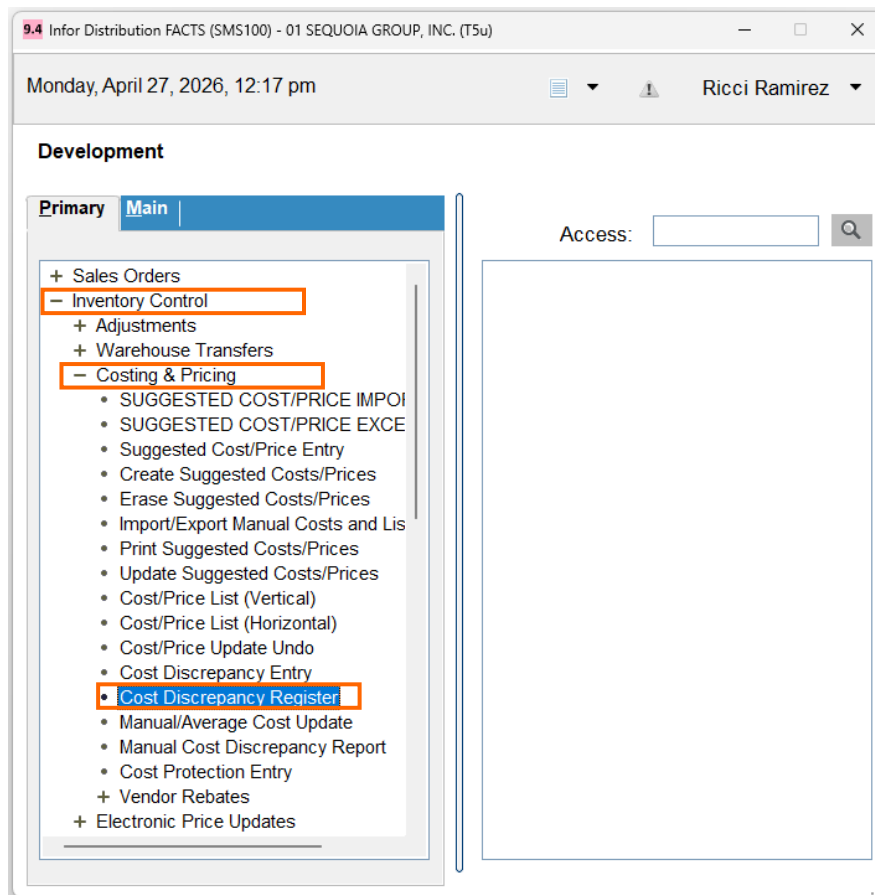
16.1 Overridden Costs

If the cost on a sales order was overridden by the user, the cost discrepancy register will not update the cost on that sales order invoice.

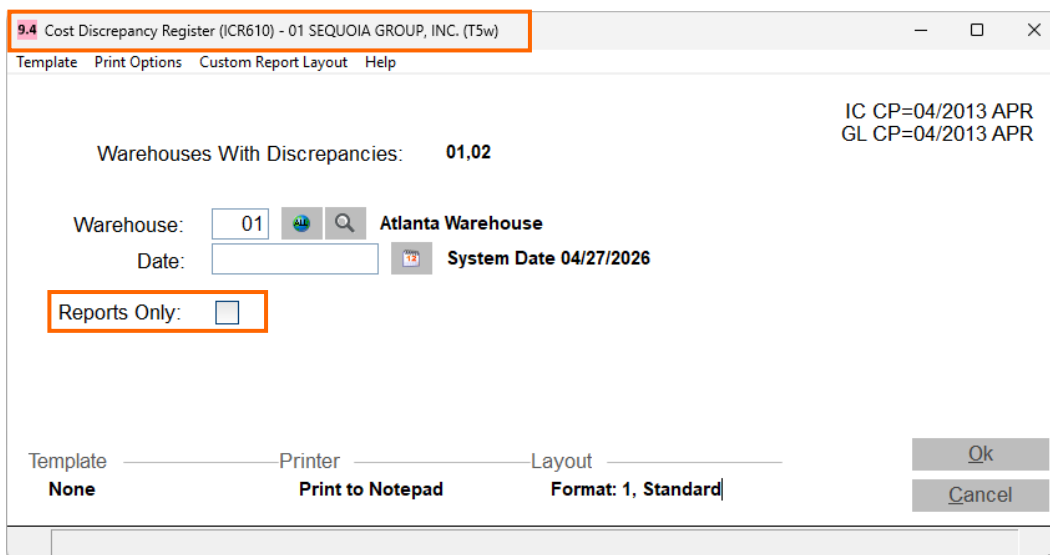
16.2 New Update check box

If the box is not checked, nothing will be updated. It will report everything as if it were updating so you can review what will be changed when you do decide to update.

- Navigate to **Inventory Control->Costing and Pricing->Cost Discrepancy Register** (program ICR610).



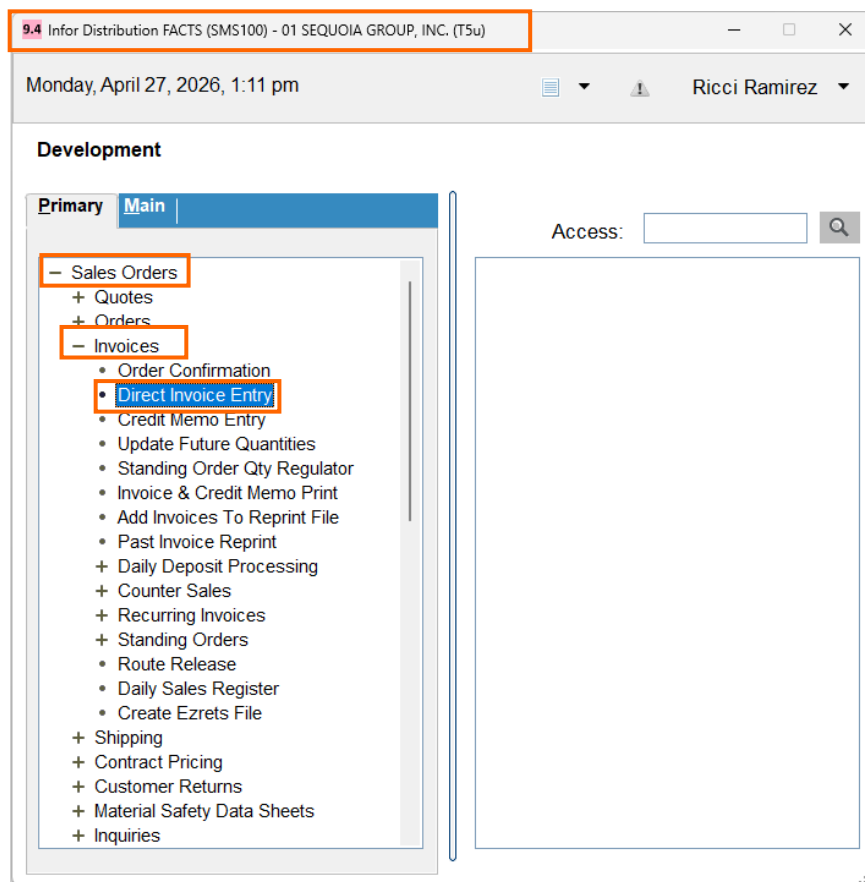
- Open **Cost Discrepancy Register** and locate the new **Update** checkbox. By default, this option is unchecked.



When the **Update checkbox is unchecked, the register runs in review mode. This allows you to view the current cost discrepancy details for the selected warehouse without*

making any changes. No updates are applied to general ledger records, receipts, distributions, or related documents.

- Before running the register, review the updated warehouse selection process. The All-Warehouses option is no longer available. Instead, the system displays only the warehouses that require processing. Select and process each warehouse individually.
- This change prevents race conditions, where running all warehouses at once could create an endless loop and prevent the register from completing. Processing one warehouse at a time ensures a successful update.
- Navigate to **Sales Orders->Invoices->Direct Invoice Entry** (program SOE320)



- Open **Direct Invoice Entry**.

9.4 Invoice (SOE320) Next Invoice - 01 SEQUOIA GROUP, INC. (T5y)

File Edit View Options Go To Help

Done Header Line Detail Archived Pick Archived Inv Close Notes

Doc/Cust Ship-To: Init Whse: 01 Atlanta Warehouse

Price Level: Invoice: 04/27/2026 Shipped: 04/27/2026 Turbo Token:

Lines

Item: GM %:

Ship Direct: Exceptional Sale: Usage Date:

Ordered Shipped Committed Backordered Price Extension

LN#	Item	Flags	Wh	Ordered	UM	Ship
	s - Substitute Items					

Weight: .000 Units: 0 Mdse: .00 Ext: .00

Enter document or cust number, F1-Add, F2-Cust Search, F3-Document Search

- Open a sales document tied to the purchase order you are currently updating. In this example, we are using **Customer C100** with **Ship-To S100**. Leaving the document open causes the system to treat it as **locked** or **in use**.

9.4 Invoice (SOE320) Invoice Document 001586 Southeastern Industrial - 01 SEQUOIA GROUP, INC. (T5x)

File Edit View Options Go To Help

Done Header Line Detail Archived Pick Archived Inv Close C Notes: D C

Customer: C100 Ship-To: S100 Init Whse: 01 Atlanta Warehouse Document: 001586

Southeastern Industrial 12490 South Peachtree Street Atlanta GA 30348
 Southeastern Industrial Supply 1145-A Fulton Industrial Park Atlanta, GA 30223

Price Level: 0
 Invoice: 11/10/2017
 Shipped: 11/10/2017
 Turbo Token:

Lines

Item: I104 Rubber Tire Mats 14" X22": 4.6LBS GM %: 26.10

Ship Direct: Exceptional Sale: Usage Date:

Ordered: 5 Shipped: 0 Committed: 0 Backordered: 5 Price: 5.25 Extension: .00

LN#	Item	Flags	Wh	Ordered	UM	Ship
005	I104	B	01	5	EA	
006	I110	B	01	1	EA	
007	I100		01	1	EA	
add						

Weight: 79.000 Units: 1 Mdse: 228.00 Ext: 228.00

VERY GOOD CUSTOMER

- Return to the **Cost Discrepancy Register** and, for this example, we are using **04/30/2013** in the **Date** field. Leave the **Update** checkbox unchecked and run the register in report-only mode.

9.4 Cost Discrepancy Register (ICR610) - 01 SEQUOIA GROUP, INC. (T5w)

Template Print Options Custom Report Layout Help

Warehouses With Discrepancies: 01,02

IC CP=04/2013 APR
 GL CP=04/2013 APR

Warehouse: 01 Atlanta Warehouse
 Date: 04/30/2013 Current GL Period

Reports Only:

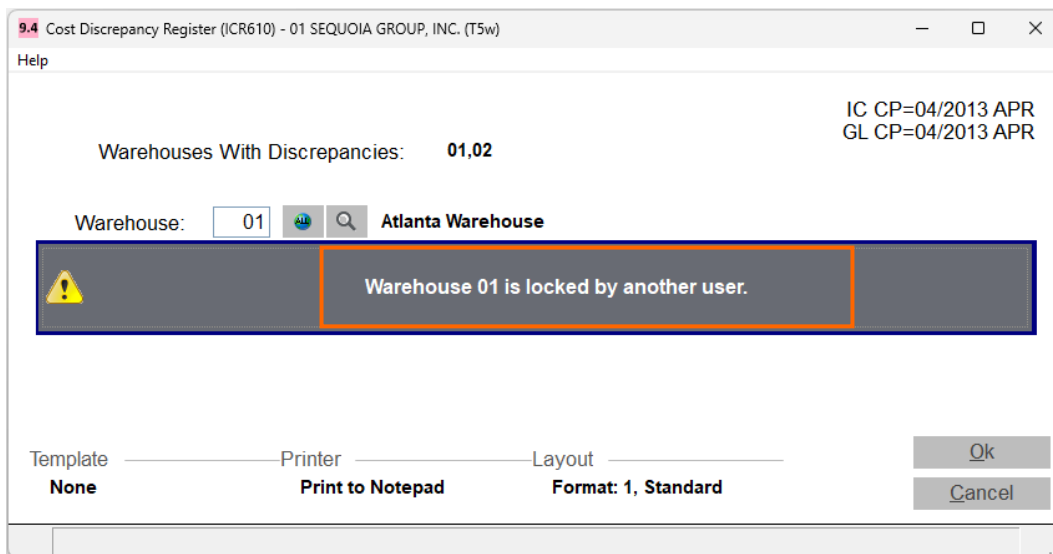
Template: None Printer: Print to Notepad Layout: Format: 1, Standard

Ok Cancel

Select to update

- Press **OK**.

- Leave the **Update** checkbox unchecked to run the register in preview mode. In this example, the system detects the locked document opened in **Direct Invoice Entry** and displays a message indicating it is locked. The report is not generated.



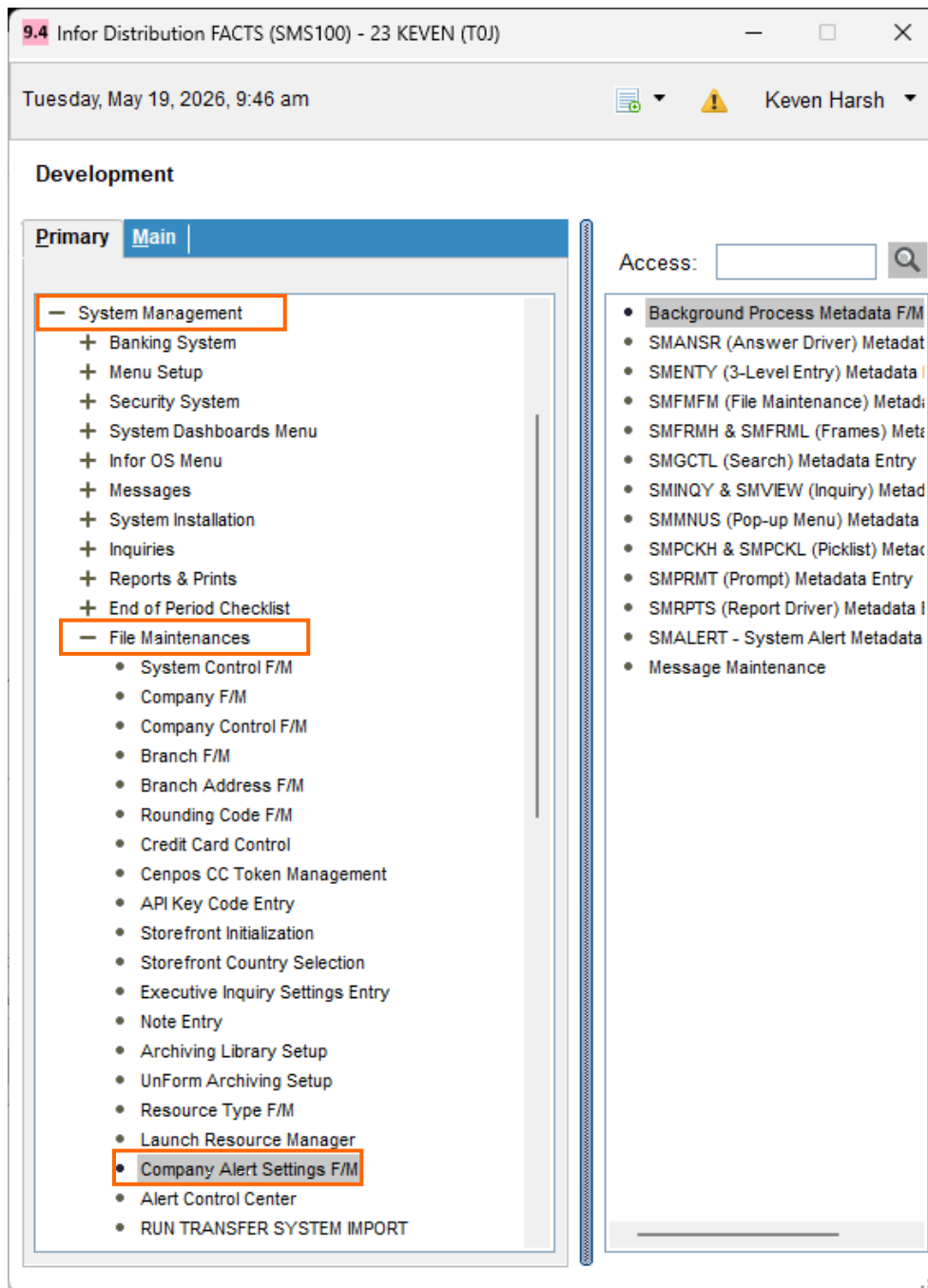
- Investigate the reason for the lock by checking whether another user has the document open or if a crash left the session active. Resolve the issue to unlock the document.
- In this example, the document was intentionally opened in **Direct Invoice Entry** to trigger the warning. To resolve it, close that window so the document is no longer in use.
- In a real-world scenario, resolving what is blocking the document typically involves identifying whether another user has it open or if a system crash left a session active. This may require asking a coworker to close the document or having an administrator clear a stuck session (an 'AB end').
- Once the document is closed, the system considers it unlocked, and it is safe to re-run the preview.

17. Controlling and managing system alerts

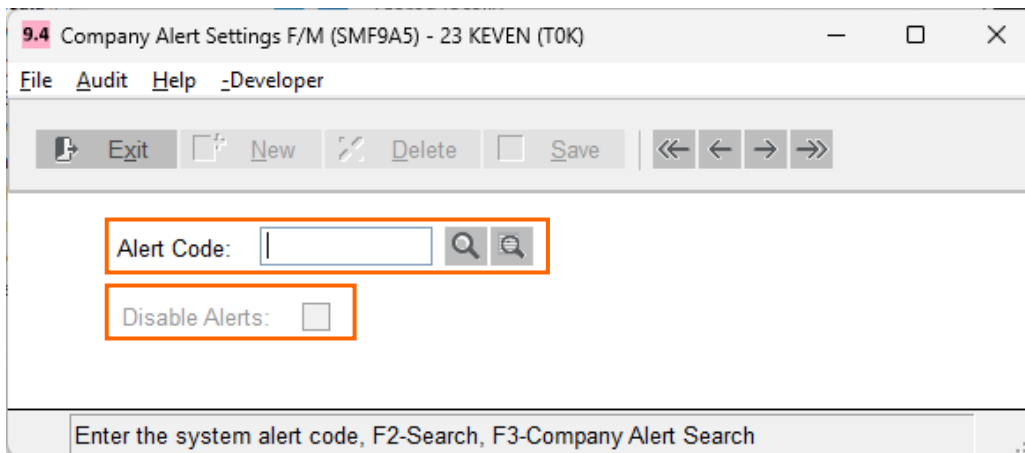
This feature allows you to control alert generation at three levels: individual alert, company, and system.

Let's look first at the option to disable individual alerts at the company level:

- Navigate to **System Management->File Maintenances-> Company Alert Settings F/M** (program SMF9A5)

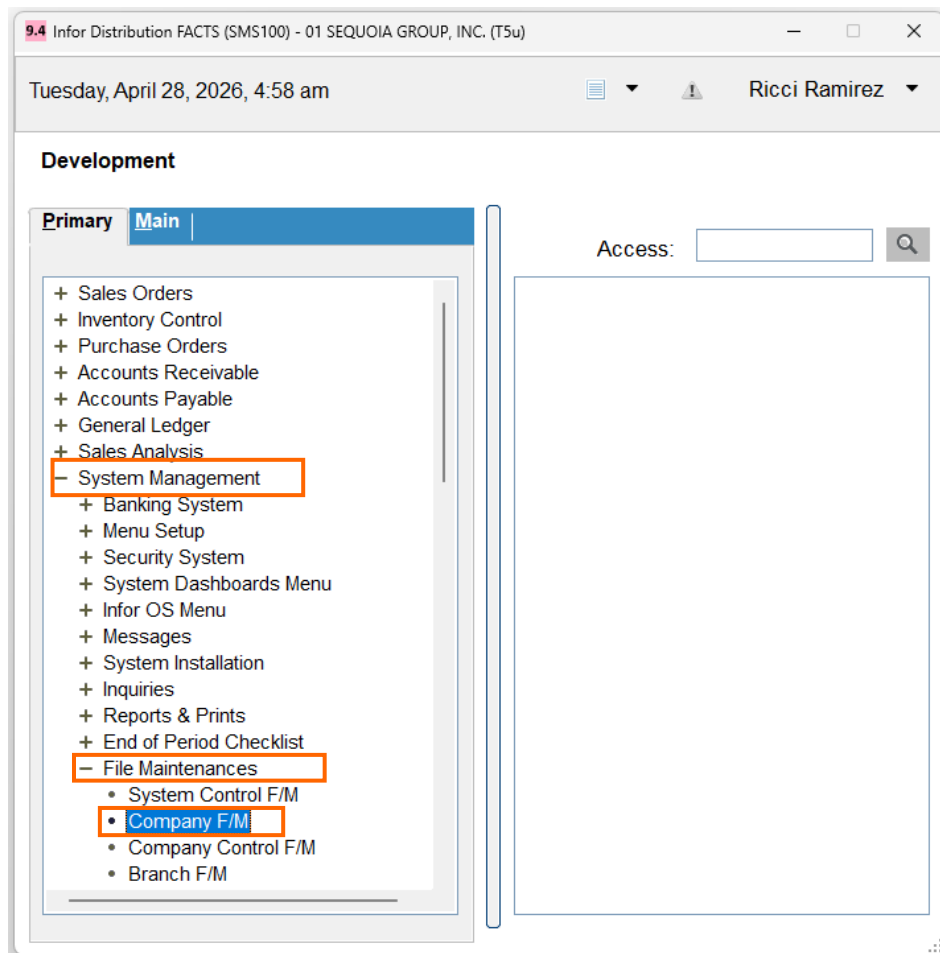


- In the **Company Alert Settings F/M**, you can select the alert code you want to disable and check the box to disable that alert code in the company you are currently signed into.



Next let's look at the option to disable all alerts for a specific company.

- Navigate to **System Management->File Maintenances-> Company Control F/M** (program SMF920)



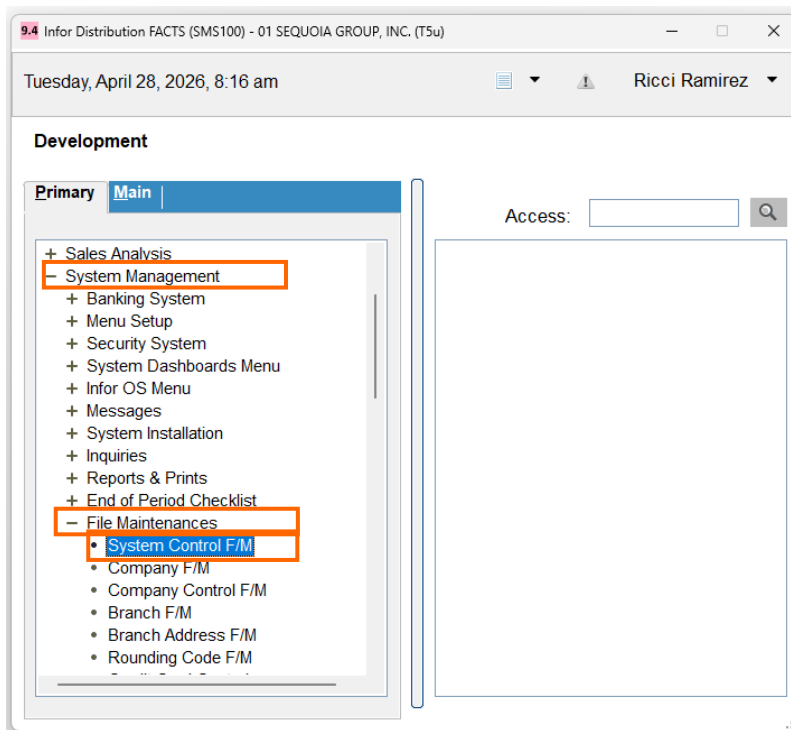
- Open **Company Control F/M** and locate the **Raise Alerts** checkbox, which determines whether alerts are enabled or disabled for that company.

The screenshot shows a window titled "Company Control F/M (SMF920) - 01 SEQUOIA GROUP, INC. (T5x)". The window has a menu bar with "File", "Audit", and "Help" options. Below the menu bar is a toolbar with buttons for "Exit", "New", "Delete", "Save", and "Case Issues". The main area is divided into tabs: "General", "Modules Used", "Security/Settings", "Email", "Case Control", and "API Settings". The "Case Control" tab is selected. The "GL Setup" section includes fields for "Length of GL #:" (6), "GL # Print Mask:" (000-00-0), "Branch Position:" (4), "Dept Position:" (6), and "Length of Dept:" (1). The "Commission Flag:" is set to "X - Calculate", "Commission Basis:" is "ICSP", "Gross Margin % Basis:" is "P - Use Price", and "Date Format Mask:" is "MMDDYY". The "Override Password:" is "APM" and "Credit Card Processor:" is "C - CenPOS". The "Raise Alerts:" checkbox is checked and highlighted with a red box. Other options include "Substitutes to eCatalog:", "SO Companions to eCatalog:", "TEMP Ship-To Tax Code:", "Currency Code:", "Use Menu Messages:", and "Record Logs for API, CenPOS:". A status bar at the bottom reads "Right justify (1) or left justify (2) item numbers?".

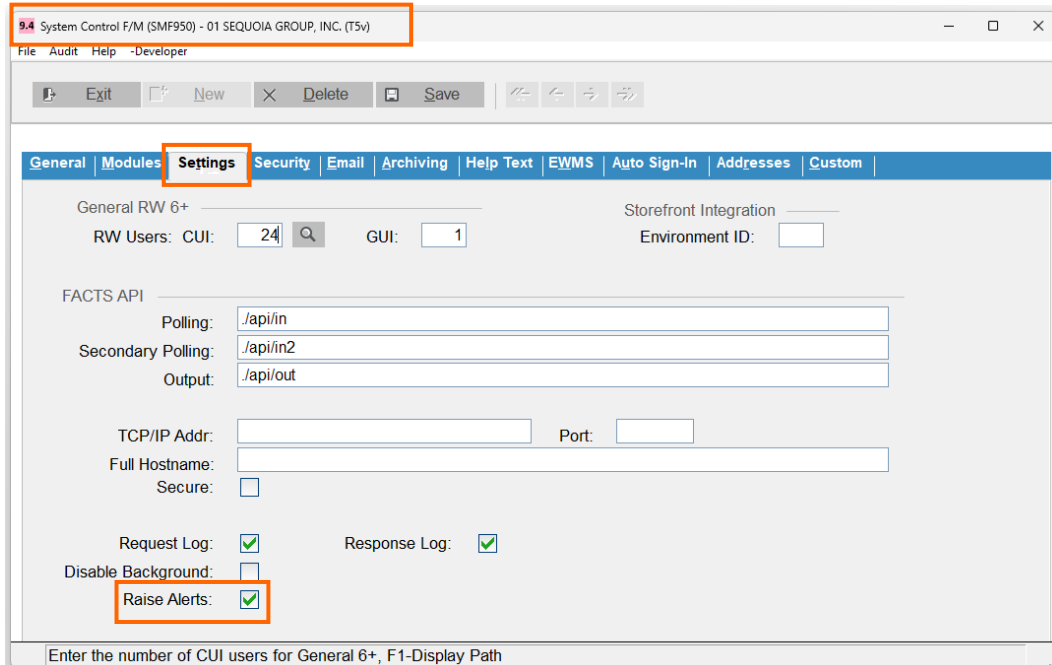
- Use the **Raise Alerts** checkbox at the company level to control alert behavior for the entire company.

Last, we will look at the option to disable all alerts for the entire system

- Navigate to **System Management->File Maintenances-> System Control F/M** (program SMF950)

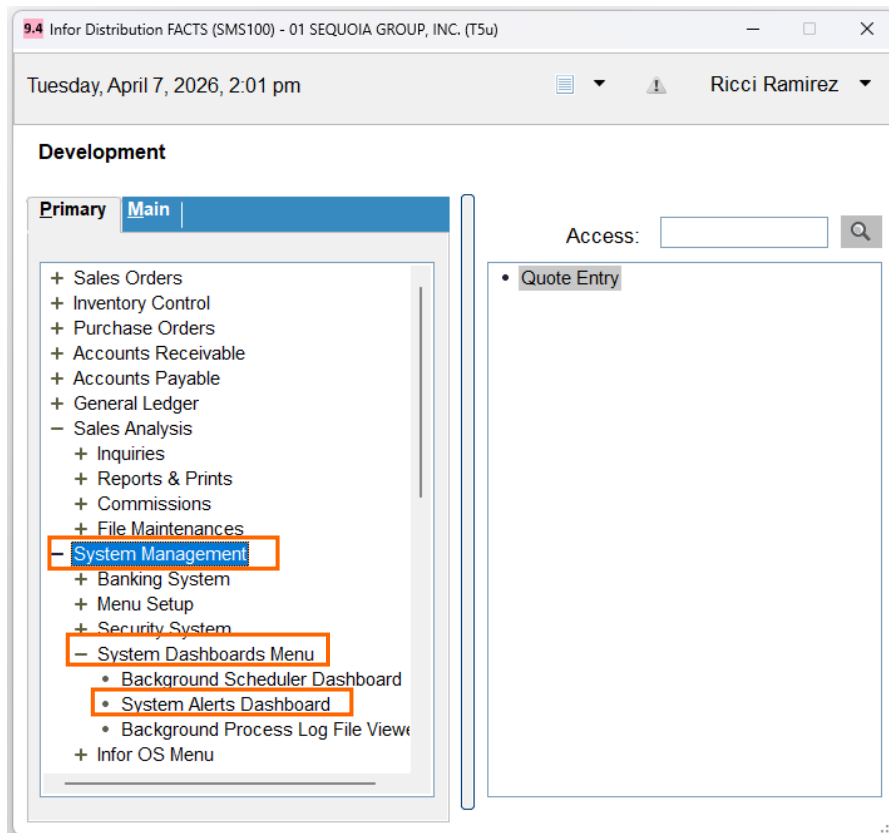


- Open **System Control F/M** and click **Settings**. Locate the **Raise Alerts** checkbox, which is used to enable or disable alerts across the entire system.



- Use the **Raise Alerts** checkbox in **System Control F/M** → **Settings** to control alert behavior across the entire system.
- When unchecked, all alerts are disabled, regardless of company.

- Navigate to **System Management->System Dashboards Menu->System Alerts Dashboard** (program ALE100).



- For this example, we will press the enter key for 'all users.'
- If an alert has been disabled through **Company Alert Settings F/M**, it will be reflected in the **Active** column.

System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5w)

File Help

Done Alert Details Manage Subscriptions Security Codes

User: All Filter:

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	0		No	0
ALERT-FM	File Maintenance Process Detected	0		Yes	0
API-TIME	API Timeout	0		Yes	0
APIERROR	Notification of an API failing during proce...	0		Yes	0
AR-CRDLIM	Customer Over Credit Limit Alert	0		Yes	0
AR-PYMTDUE	Customer Payment Due or Past Due AL...	0		Yes	0
BK-I1 DXML	Delivery of XML in Background Procedu...	0		Yes	0
BK-I2 CERR	Connection error to Infor OS database	0		Yes	0
BK-I2 OUT	Delivery of XML to Infor OS failure	0		Yes	0
BK-IMS CER	IMS Connection error	0		Yes	0
CrdHold	Notification of SO Credit Hold/Release	0		Yes	0
CustHold	Customer Hold	0		Yes	0
DbtHoldPO	Notification of PO Debit Hold/Release	0		Yes	0
DirectPO	Direct Ship PO	0		Yes	0
DocDelFail	Doc Delivery Failure	0		Yes	0
ERR XMLGEN	Build of XML in background procedure f...	0		Yes	0
ERROR	An error occurred in FACTS	0		Yes	1
EmFail	Email Failure	0		Yes	0
FLDCHANGE	Field Change Detected	0		Yes	0
GL-IMPORT	GL Journal Entry Imported via API Access	0		Yes	1
IC-5HI	5-Hi Order Point Maximum Dollar Increa...	0		Yes	14
IC-ABLTP0	Abnormal Lead Time on a PO	0		Yes	7
IC-ABLTT0	Abnormal Lead Time on a Transfer	0		Yes	7
IC-ABUSAGE	Abnormal Usage	0		Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0		Yes	14

- If an alert appears as **inactive**, you can still subscribe to it. The system saves your subscription in a standby state, so it is not lost. When the alert is re-enabled by an administrator, your subscription automatically becomes active, and you will begin receiving notifications without additional setup.
- To review the alert's status, click **Alert Details**.

System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5w)

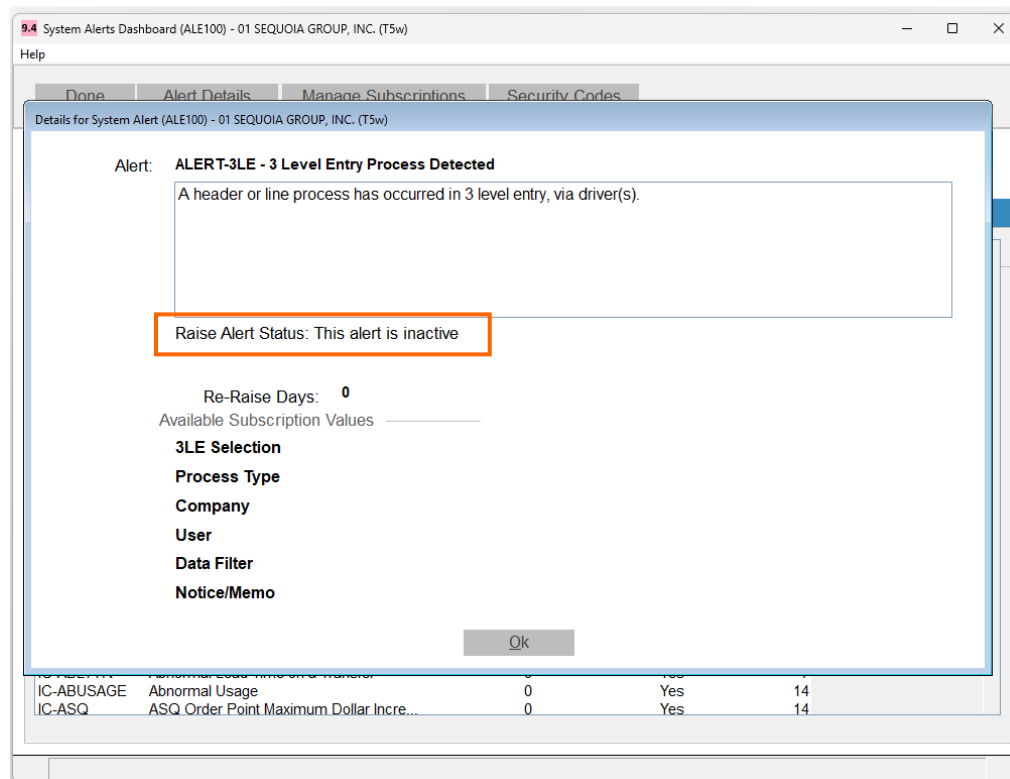
File Help

Done **Alert Details** Manage Subscriptions Security Codes

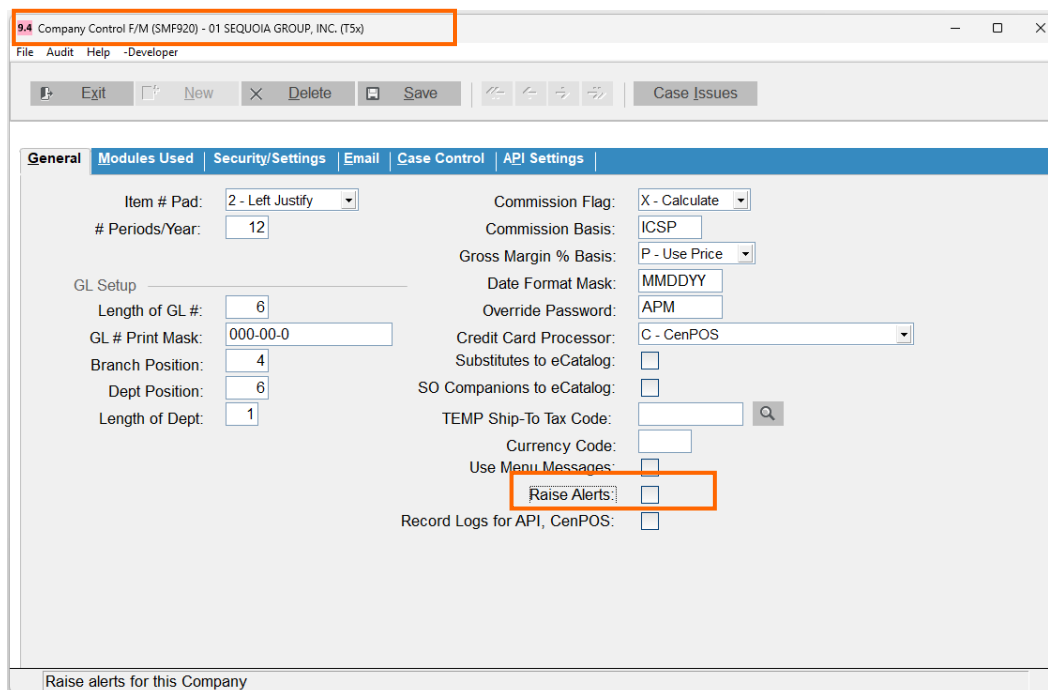
User: All Filter:

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	0		No	0
ALERT-FM	File Maintenance Process Detected	0		Yes	0
API-TIME	API Timeout	0		Yes	0
APIERROR	Notification of an API failing during proce...	0		Yes	0
AR-CRDLIM	Customer Over Credit Limit Alert	0		Yes	0
AR-PYMTDUE	Customer Payment Due or Past Due AL...	0		Yes	0
BK-I1 DXML	Delivery of XML in Background Procedu...	0		Yes	0
BK-I2 CERR	Connection error to Infor OS database	0		Yes	0
BK-I2 OUT	Delivery of XML to Infor OS failure	0		Yes	0
BK-IMS CER	IMS Connection error	0		Yes	0
CrdHold	Notification of SO Credit Hold/Release	0		Yes	0
CustHold	Customer Hold	0		Yes	0
DbtHoldPO	Notification of PO Debit Hold/Release	0		Yes	0
DirectPO	Direct Ship PO	0		Yes	0
DocDelFail	Doc Delivery Failure	0		Yes	0
ERR XMLGEN	Build of XML in background procedure f...	0		Yes	0
ERROR	An error occurred in FACTS	0		Yes	1
EmFail	Email Failure	0		Yes	0
FLDCHANGE	Field Change Detected	0		Yes	0
GL-IMPORT	GL Journal Entry Imported via API Access	0		Yes	1
IC-5HI	5-Hi Order Point Maximum Dollar Increa...	0		Yes	14
IC-ABLTP0	Abnormal Lead Time on a PO	0		Yes	7
IC-ABLTT0	Abnormal Lead Time on a Transfer	0		Yes	7
IC-ABUSAGE	Abnormal Usage	0		Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0		Yes	14

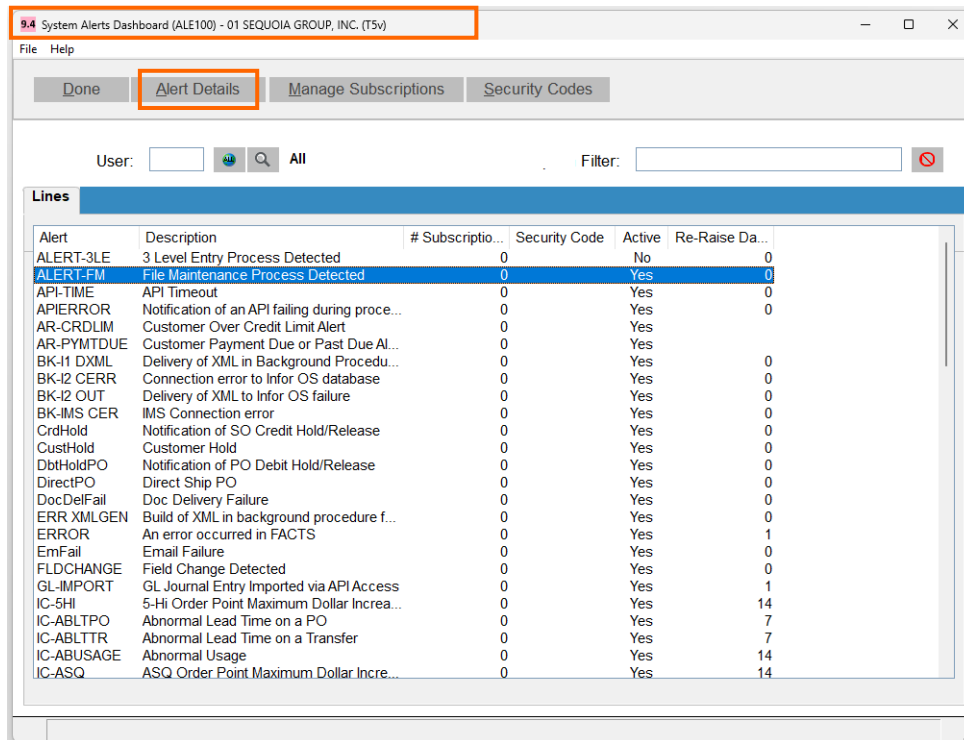
- Use this view to see the alert status across all three levels: **system, company, and individual alert.**



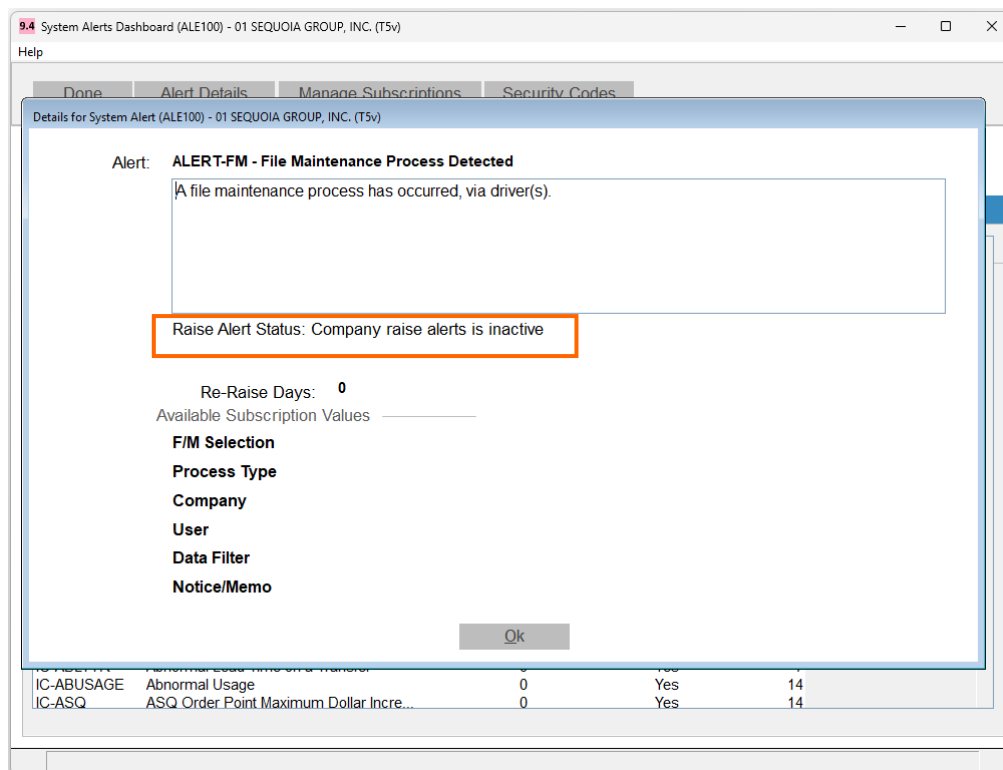
- Return to **Company Control** (program SMF920) and uncheck the **Raise Alerts** option to disable alerts for the company.



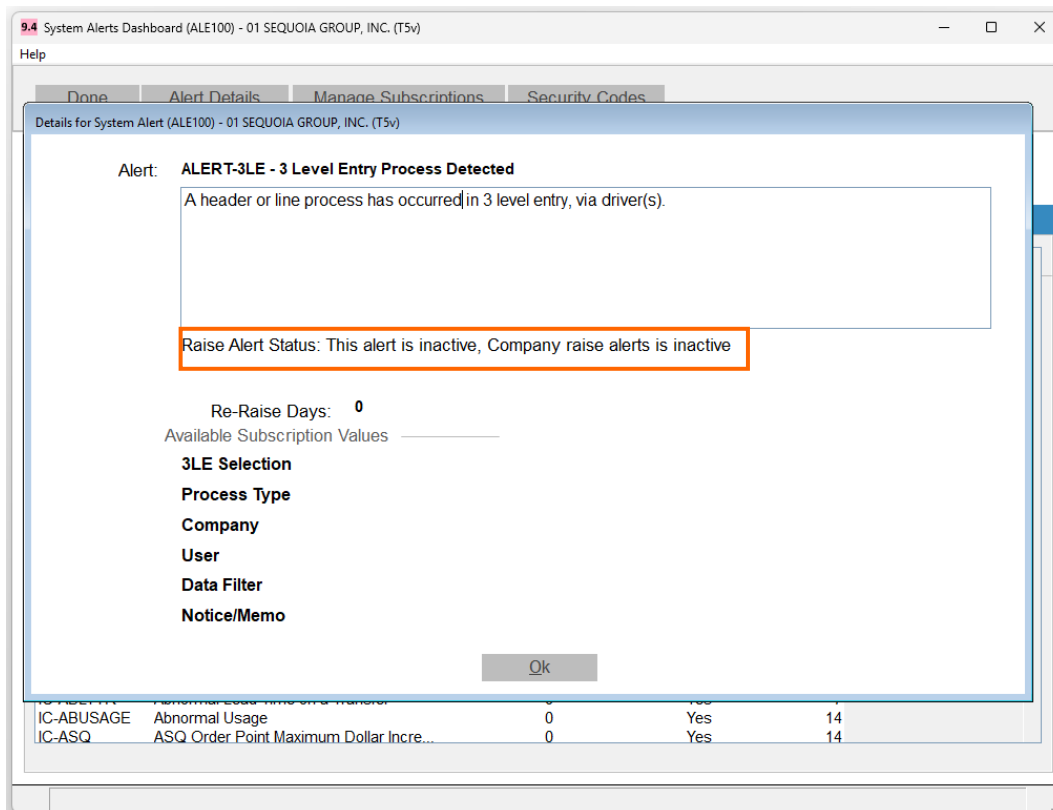
- Click **Save**, then return to the **System Alerts Dashboard** program. Select an active alert and click the **Alert Details** button.



- Review the details and note that the **company's alert setting is now inactive**.



- Click **OK**, then select an inactive alert and click **Alert Details**. The details will show that both the **individual** alert and the **company-level** settings are **inactive**.



- Click **OK**, then return to **System Control F/M** (program SMF950). Locate the **Raise Alerts** option and uncheck it to disable alerts at the system level.

9.4 System Control F/M (SMF950) - 01 SEQUOIA GROUP, INC. (T5w)

File Audit Help -Developer

Exit New Delete Save

General Modules **Settings** Security Email Archiving Help Text EWMS Auto Sign-In Addresses Custom

General RW 6+ Storefront Integration

RW Users: CUI: GUI: Environment ID:

FACTS API

Polling: Secondary Polling: Output:

TCP/IP Addr: Port:

Full Hostname: Secure:

Request Log: Response Log:

Disable Background: **Raise Alerts:**

Raise alerts

- Click **Save**, then return to the **System Alerts Dashboard**. Select an active alert and click **Alert Details**.
- Review the information and note that both the **company** and **system** alert settings are **inactive**.

9.4 System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5v)

Help

Done Alert Details Manage Subscriptions Security Codes

User: All Filter:

Details for System Alert (ALE100) - 01 SEQUOIA GROUP, INC. (T5v)

Alert: **API-TIME - API Timeout**

An API process has timed out while waiting for a response.

Raise Alert Status: Company raise alerts is inactive, System raise alerts is inactive

Re-Raise Days:

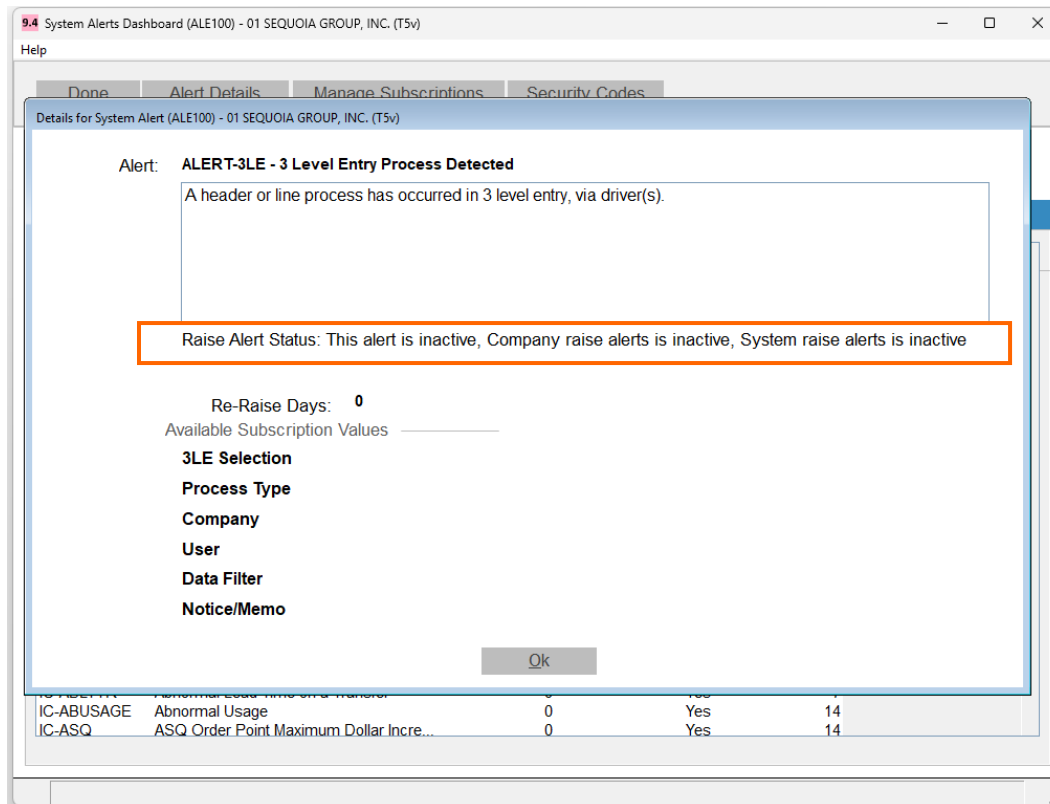
Available Subscription Values

Request ID

Ok

IC-5HI	5-Hi Order Point Maximum Dollar Incre...	0	Yes	14
IC-ABLTP	Abnormal Lead Time on a PO	0	Yes	7
IC-ABLTR	Abnormal Lead Time on a Transfer	0	Yes	7
IC-ABUSAGE	Abnormal Usage	0	Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0	Yes	14

- Press **OK**, then click **Alert Details** for an inactive alert. The details will show that the **individual, company, and system** levels are all **inactive**.



* The Alert Details button in Exceptions Control Center also displays the status of the alert at the alert, company, and system levels.

18. Other new alerts

18.1 PGMLAUNCH – Program Launch

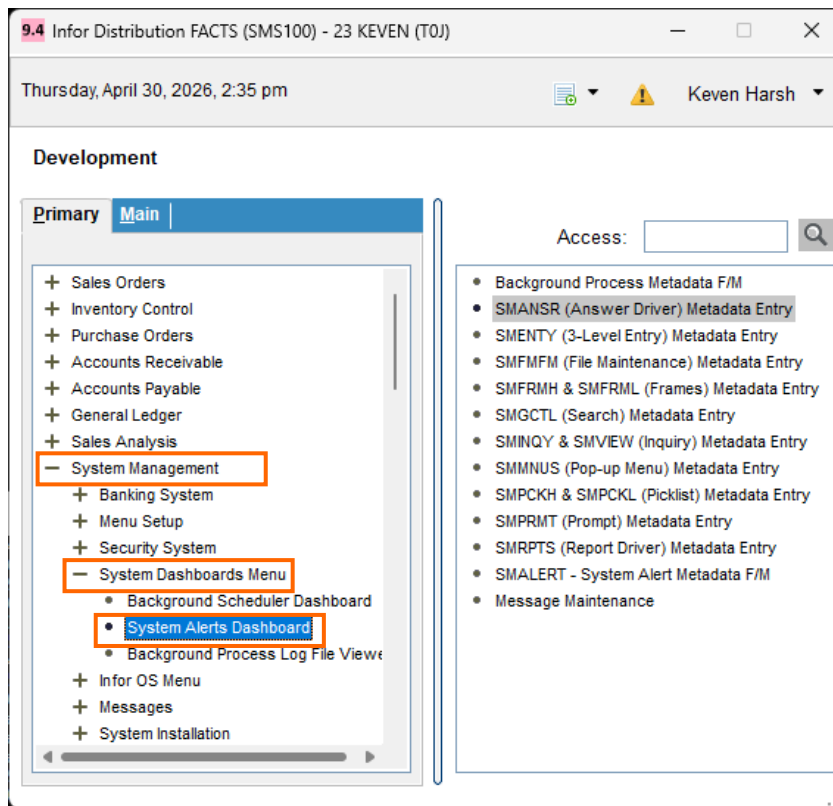
Use this alert to track when a program is opened by a user.

Configure tracking by:

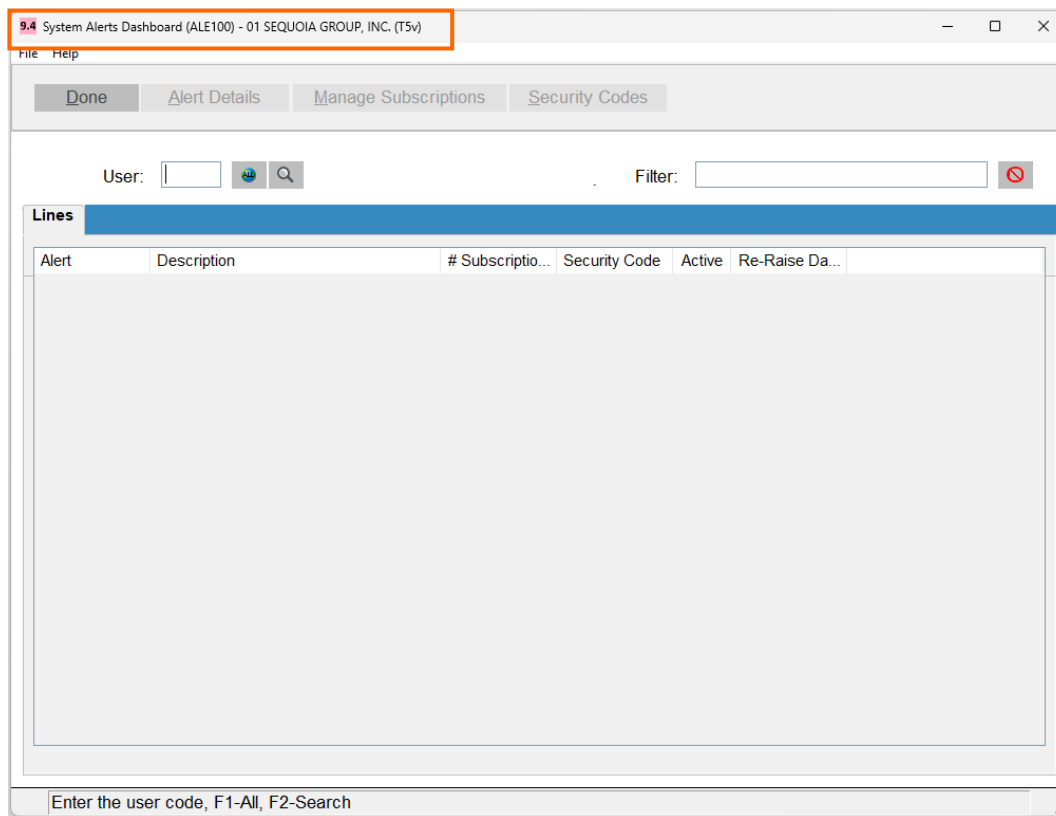
- ✓ Program (specific or all)
- ✓ Company
- ✓ User

Use for auditing user activity and monitoring access to sensitive programs.

- Navigate to **System Management-> System Dashboards Menu->System Alerts Dashboard** (program ALE100).



- Open System Alerts Dashboard.





- In this example, user 'KRH' is used. Then, **PGMLAUNCH** is opened by double-clicking it.

9.4 System Alerts Dashboard (ALE100) - 23 KEVEN (TOK)

File Help

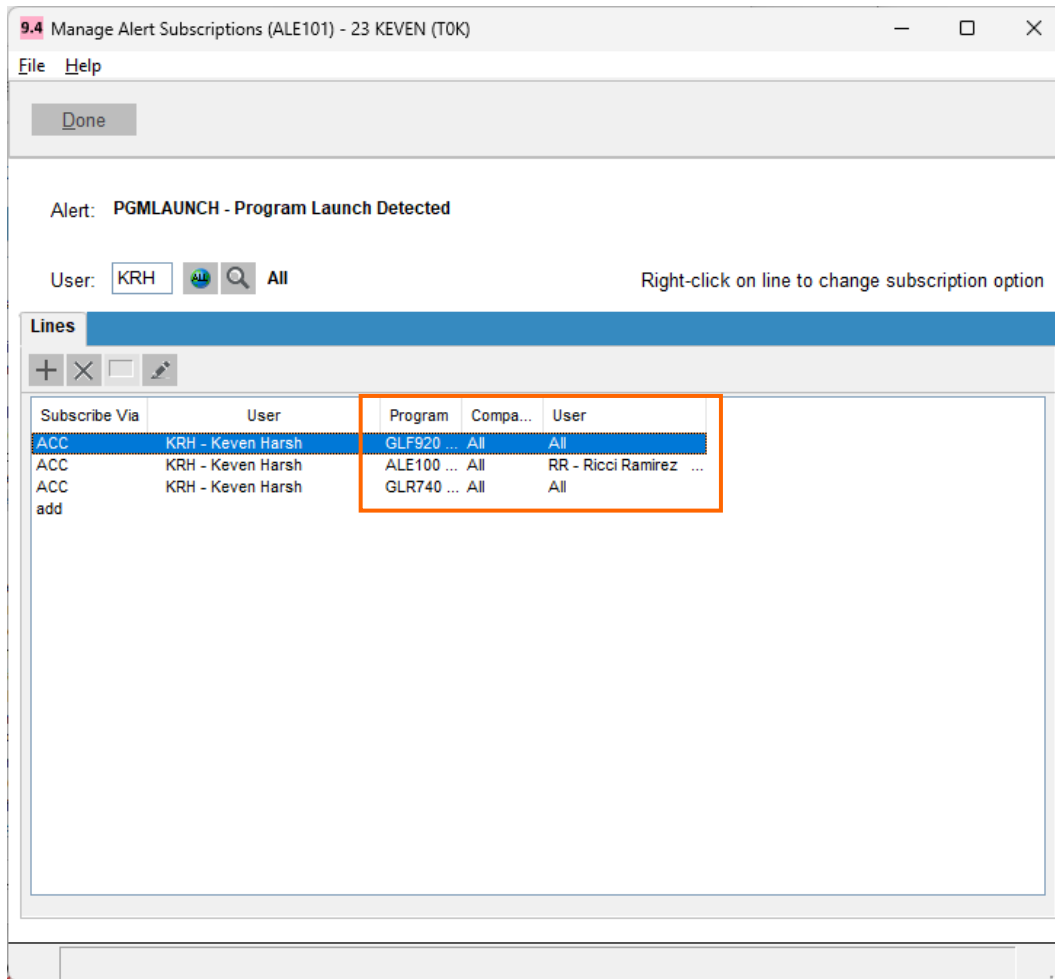
Done Alert Details Manage Subscriptions Security Codes

User: KRH   Keven Harsh Filter:

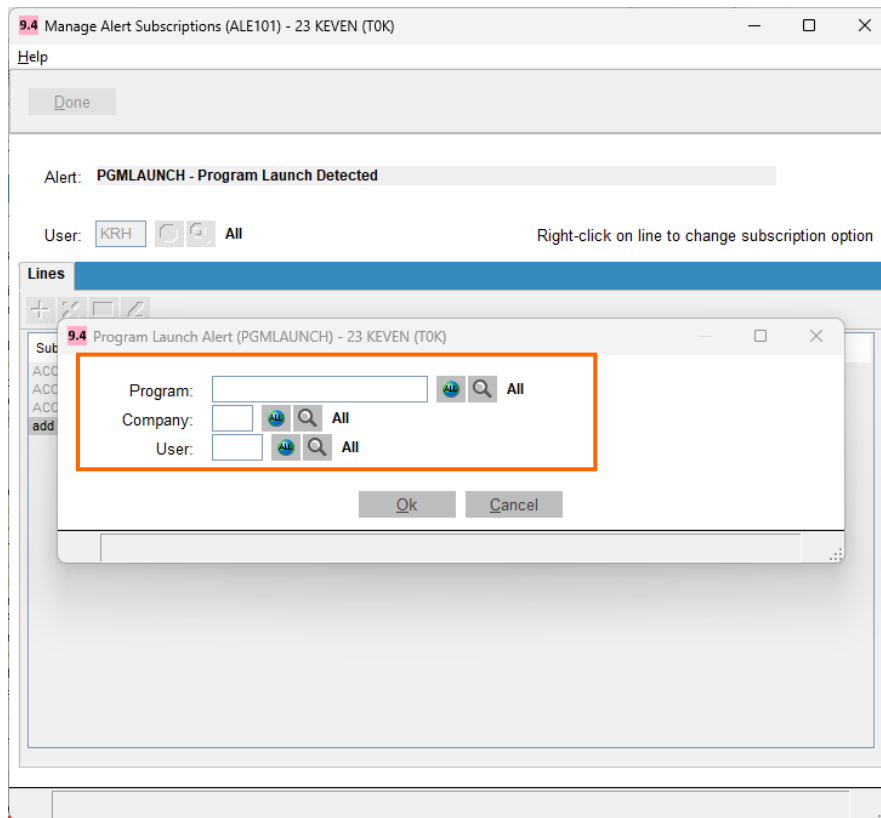
Lines

Alert	Description	# Subscripti...	Security Code	Active	Re-Raise D...
IC-TRNDLIM	Seasonal Trending Limits Applied	0		Yes	30
IC-VENDCRO	Vendor Credit Overdue	0		Yes	7
IC-VENDRNR	Vendor Return Not Received	0		Yes	7
IOSBODIN	Infor OS CE BOD incoming via I3 backg...	0		Yes	0
JOBSTREAM	Job Stream Processing	0		Yes	0
LTSRP-EXC	Notificaton of item's available quantity ...	0		Yes	0
MCBOMInAPI	Notification of MC BOM ticket arriving v...	0		Yes	0
MCFMLInAPI	Notification of MC FML ticket arriving vi...	0		Yes	0
OrderInAPI	Notification of Sales Order document a...	0		Yes	0
PGMLAUNCH	Program Launch Detected	3		Yes	0
PMHold	PM Project billing on hold	0		Yes	7
PO-RCPTISS	PO Receipt Issue	0		Yes	0
PO-RCPTRTN	PO Receipt Return	0		Yes	0
PO-SPECORD	Special Order Receipt Alert	0		Yes	0
POCITEM	Notification of PO companion item's up...	0		Yes	0
PRHours	PTO hours will be exceeded	0		Yes	14
PlanReqMCB	Notification of BOM Planning Request	0		Yes	0
PlanReqMCF	Notification of Formula Planning Request	0		Yes	0
PlanReqPO	Notification of Purchase Planning Requ...	0		Yes	0
PlanReqSO	Notification of Order Planning Request	0		Yes	0
PlanReqTR	Notification of Transfer Planning Requ...	0		Yes	0
PreAuthExp	Pre-auth Credit Card Transaction is Ex...	0		Yes	1
PurchInAPI	Notification of Purchase Order docum...	0		Yes	0
QT_IN_LVL	Check Inventory Levels for Quoted ite...	0		Yes	0
QuotelnAPI	Notification of Quote document arrivin...	0		Yes	0

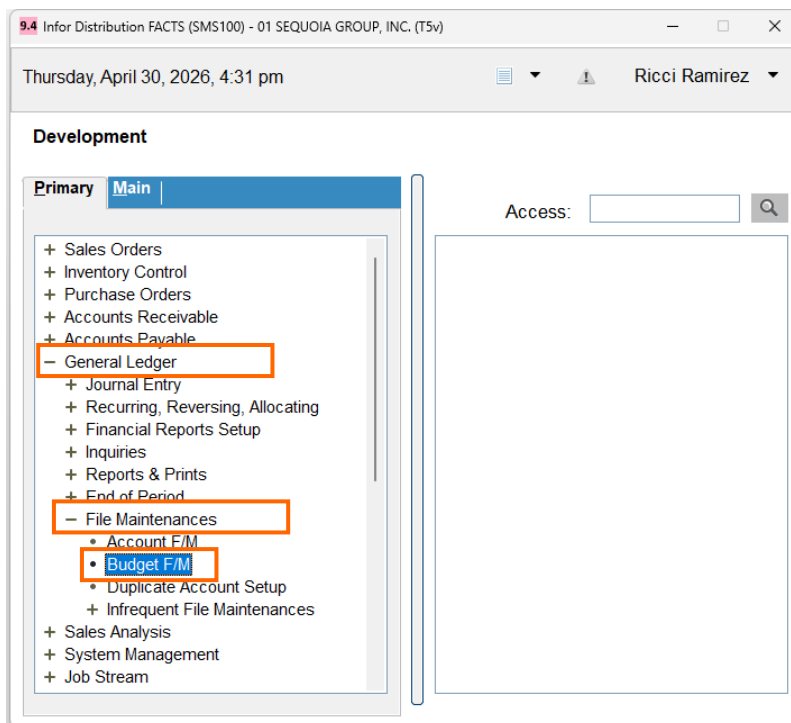
- For this example, the user is subscribed to alerts for the programs **GLF920**, **GLR740**, and **ALE100** for the user **'RR'**. This means that when user **'RR'** goes into any of these three programs (GLF920, GL740, or ALE100) user **'KRH'** will receive an alert indicating that user **'RR'** accessed the program."



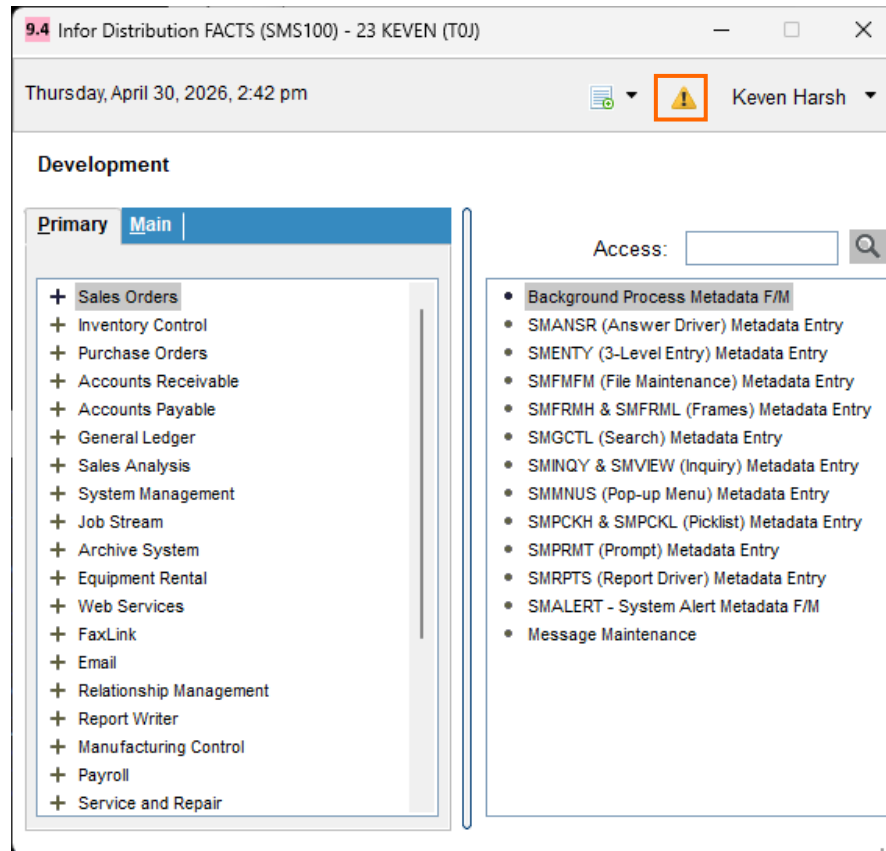
- You may click **Add** if you wish to create a new alert subscription. Then define the criteria by selecting what should be tracked, such as specific programs, companies, or users.



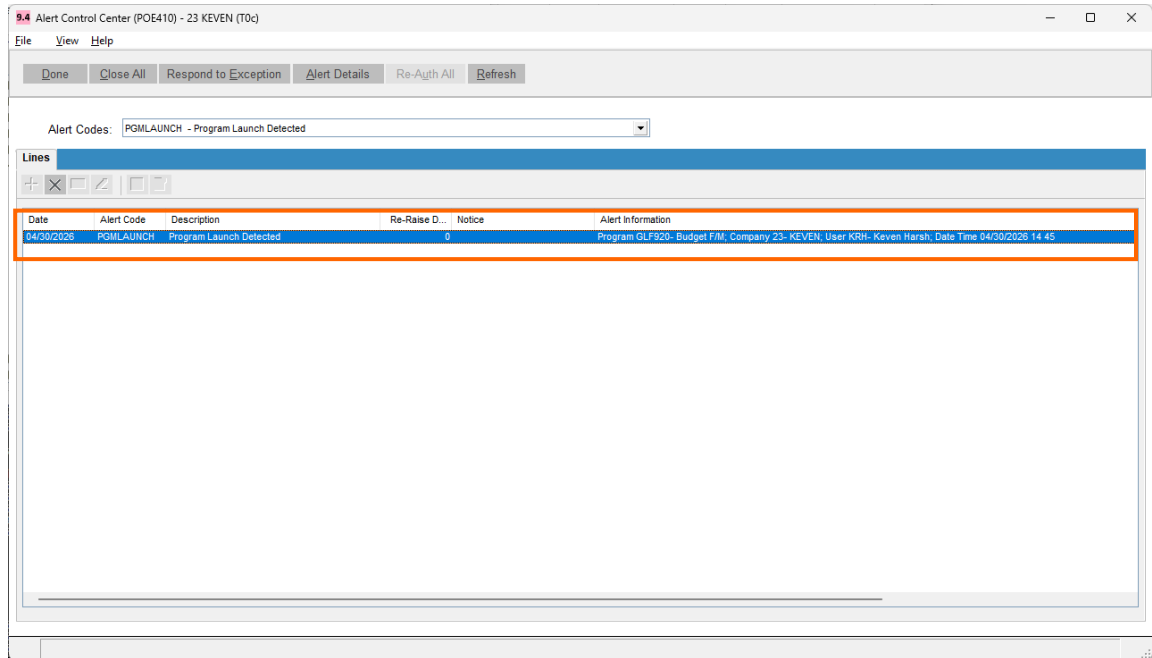
- Press **OK**.
- Navigate to **General Ledger-> File Maintenances->Budget F/M (program GLF920)**



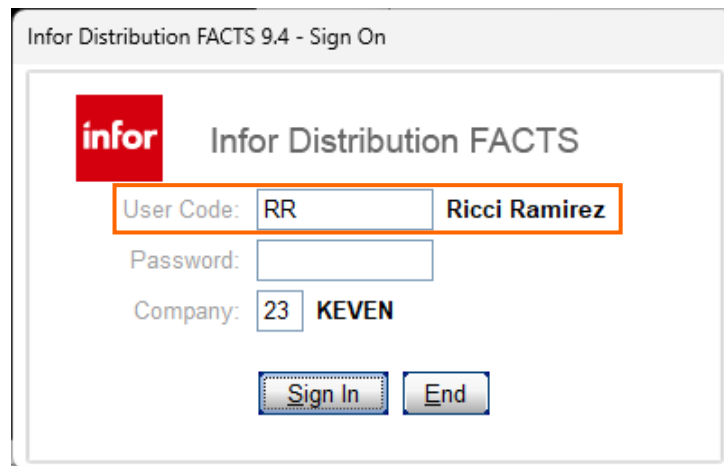
- To test the first setup, launch **Budget F/M** program
- Click **Cancel**.
- Exit the program to trigger the alert.
- Wait a moment for the system's background processor to process the alert.



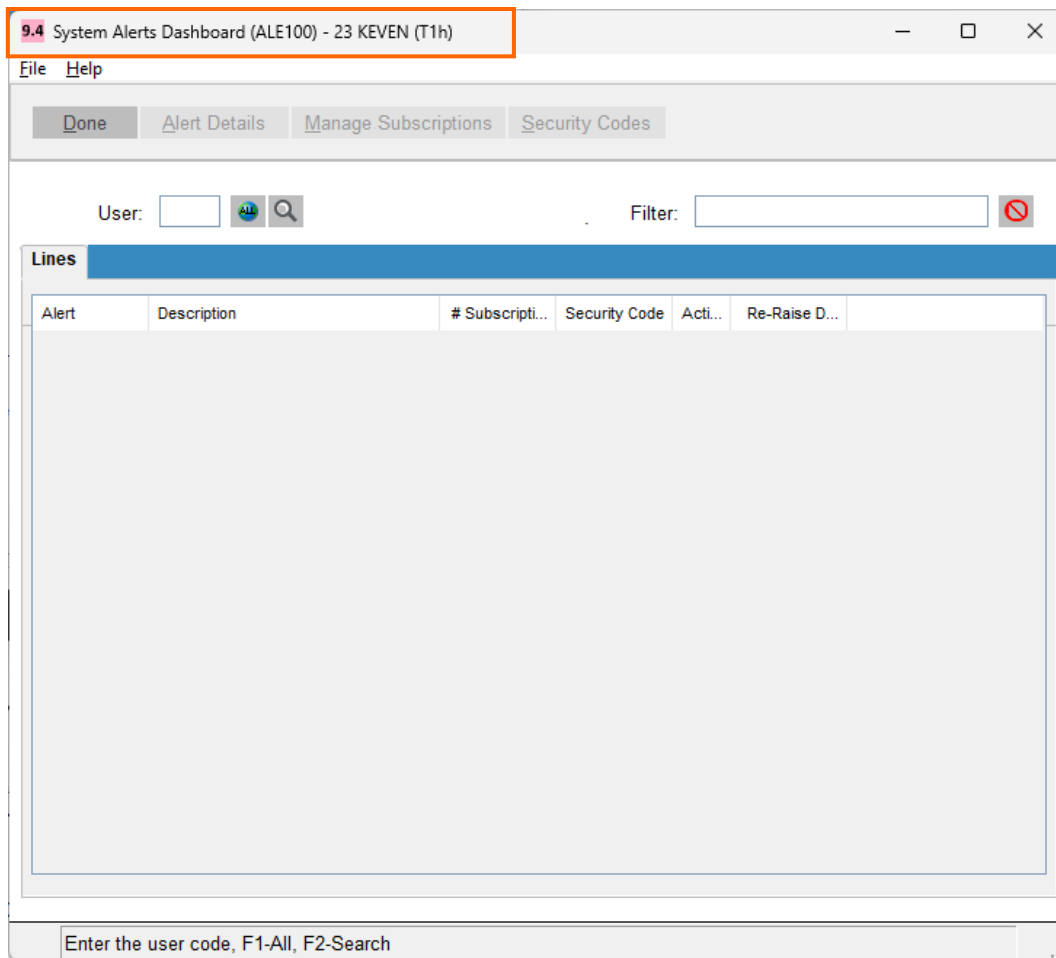
- In this document's example, the alert shows that user '**KRH**' accessed the **Budget F/M** program in company **23**. Clicking the colored icon opens the **Alert Control Center**, where the alert details display the user, company, date, and time of the action.



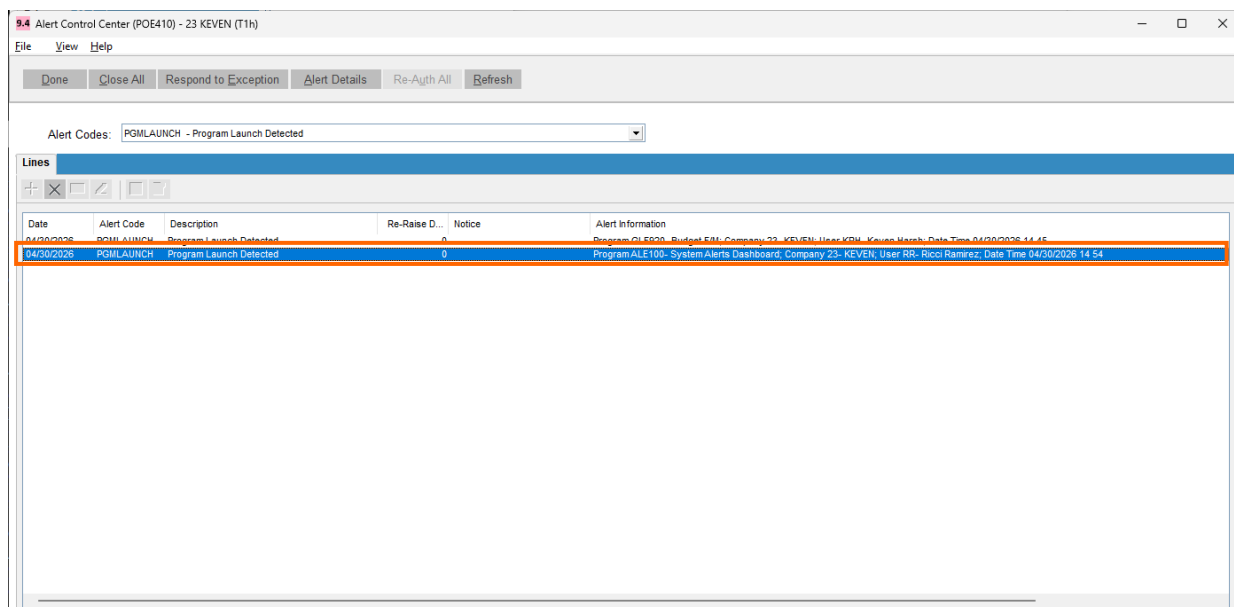
- Log in using a different user. In this example, we are using 'RR.'



- Open **System Alerts Dashboard**.



- Click **Done**.
- Log back in to FACTS as user '**KRH**' (subscribed to alerts for user RR accessing the System Alerts Dashboard), then open the **Alert Control Center**.
- Review the alert showing that user '**RR**' accessed **System Alerts Dashboard**, confirming activity tracking.



- Click **Done**.

18.2 FLDCHANGE – Field Change

Use this alert to monitor changes to specific data fields in real time, even before the record is saved.

- Navigate to **System Management-> System Dashboards Menu->System Alerts Dashboard** (program ALE100).

The screenshot shows the Infor Distribution FACTS (SMS100) - 23 KEVEN (T0J) interface. The window title is "9.4 Infor Distribution FACTS (SMS100) - 23 KEVEN (T0J)". The date and time are "Thursday, April 30, 2026, 2:35 pm". The user is "Keven Harsh". The interface is titled "Development" and has a "Primary" tab selected. The "Main" menu is open, showing a list of system management options. The "System Alerts Dashboard" is highlighted with a blue selection bar. The "Access:" field is empty. The "System Alerts Dashboard" is listed in the "Access:" field.

Development

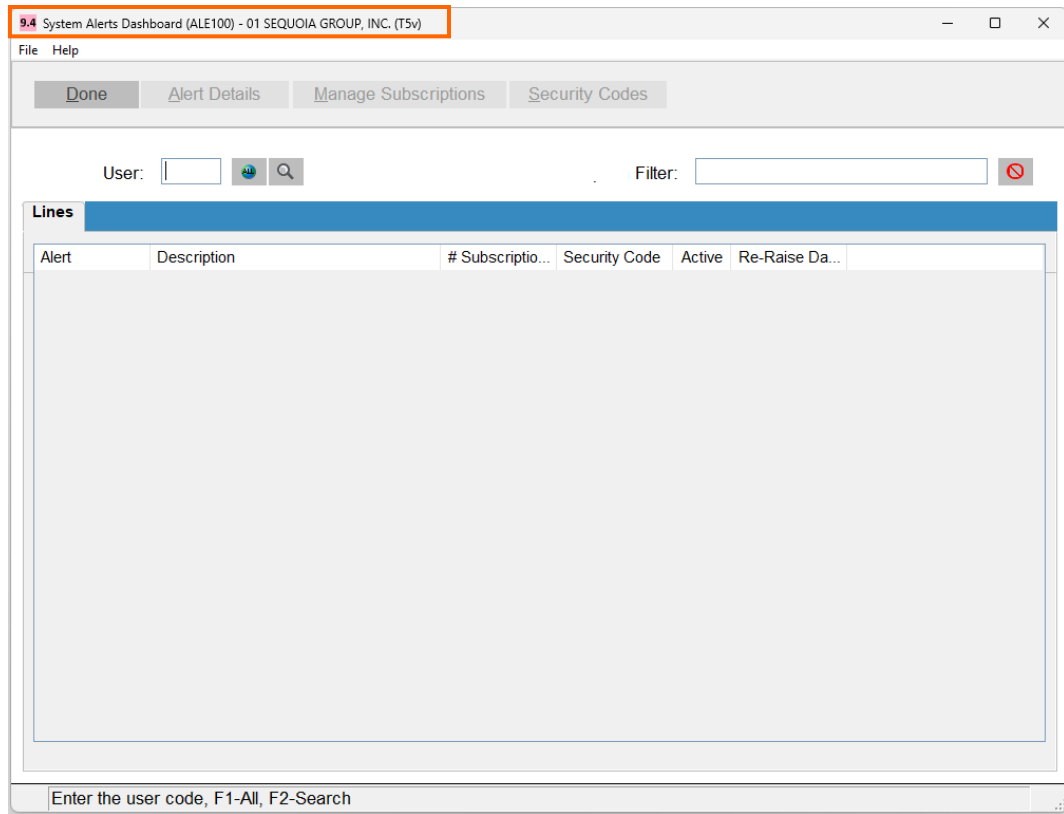
Primary Main

- + Sales Orders
- + Inventory Control
- + Purchase Orders
- + Accounts Receivable
- + Accounts Payable
- + General Ledger
- + Sales Analysis
- System Management
 - + Banking System
 - + Menu Setup
 - + Security System
 - System Dashboards Menu
 - Background Scheduler Dashboard
 - System Alerts Dashboard
 - Background Process Log File View
 - + Infor OS Menu
 - + Messages
 - + System Installation

Access:

- Background Process Metadata F/M
- SMANSR (Answer Driver) Metadata Entry
- SMENTRY (3-Level Entry) Metadata Entry
- SMFMFM (File Maintenance) Metadata Entry
- SMFRMH & SMFRML (Frames) Metadata Entry
- SMGCTL (Search) Metadata Entry
- SMINQY & SMVIEW (Inquiry) Metadata Entry
- SMMNUS (Pop-up Menu) Metadata Entry
- SMPCKH & SMPCKL (Picklist) Metadata Entry
- SMPRMT (Prompt) Metadata Entry
- SMRPTS (Report Driver) Metadata Entry
- SMALERT - System Alert Metadata F/M
- Message Maintenance

- Open System Alerts Dashboard.



Enter the user who will receive the alert and select FLDCHANGE. In this example, we entered 'RR' as the user. As you can see the user has 9 alerts already set up.

9.4 System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T62)

File Help

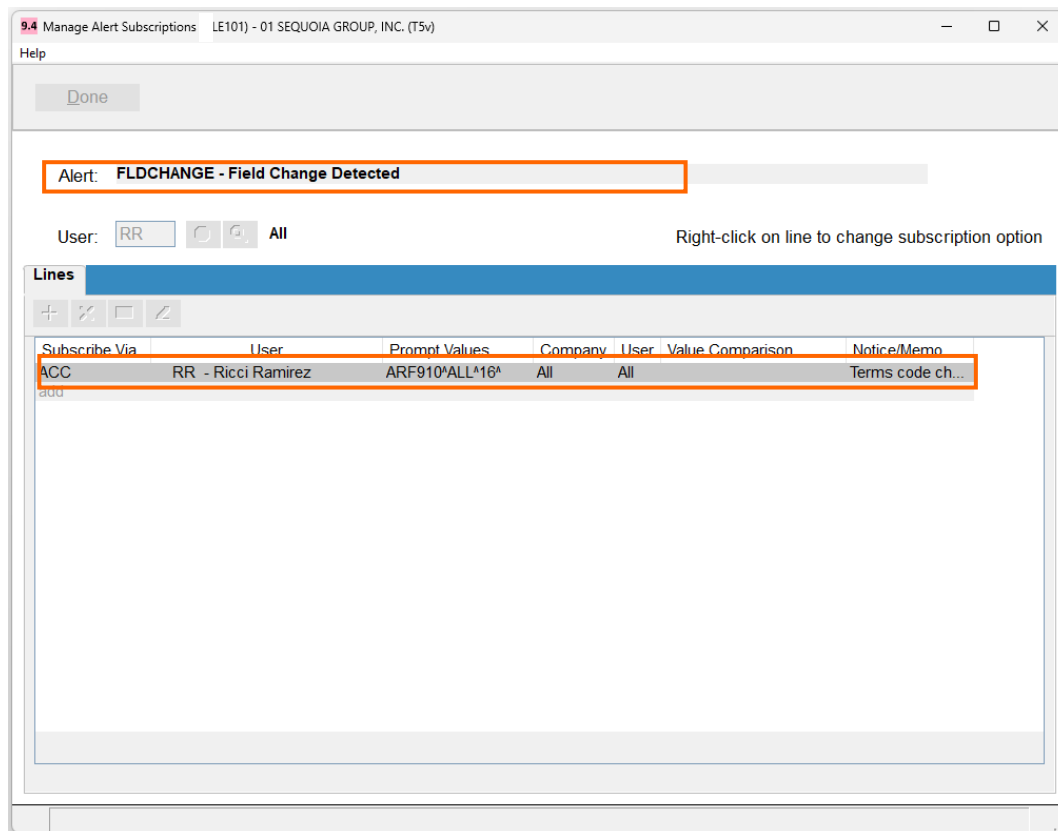
Done Alert Details Manage Subscriptions Security Codes

User: Ricci Ramirez Filter:

Lines

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	4		Yes	0
ALERT-FM	File Maintenance Process Detected	0		Yes	0
API-TIME	API Timeout	0		Yes	0
APIERROR	Notification of an API failing during proce...	0		Yes	0
AR-CRDLIM	Customer Over Credit Limit Alert	0		Yes	
AR-PYMTDUE	Customer Payment Due or Past Due Al...	0		Yes	
BK-I1 DXML	Delivery of XML in Background Procedu...	0		Yes	0
BK-I2 CERR	Connection error to Infor OS database	0		Yes	0
BK-I2 OUT	Delivery of XML to Infor OS failure	0		Yes	0
BK-IMS CER	IMS Connection error	0		Yes	0
CrdHold	Notification of SO Credit Hold/Release	0		Yes	0
CustHold	Customer Hold	0		Yes	0
DbtHoldPO	Notification of PO Debit Hold/Release	0		Yes	0
DirectPO	Direct Ship PO	0		Yes	0
DocDelFail	Doc Delivery Failure	0		Yes	0
ERR XMLGEN	Build of XML in background procedure f...	0		Yes	0
ERROR	An error occurred in FACTS	0		Yes	1
EmFail	Email Failure	0		Yes	0
FLDCHANGE	Field Change Detected	0		Yes	0
GL-IMPORT	GL Journal Entry Imported via API Access	0		Yes	1
IC-5HI	5-Hi Order Point Maximum Dollar Increa...	0		Yes	14
IC-ABLTPO	Abnormal Lead Time on a PO	0		Yes	7
IC-ABLTTTR	Abnormal Lead Time on a Transfer	0		Yes	7
IC-ABUSAGE	Abnormal Usage	0		Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0		Yes	14

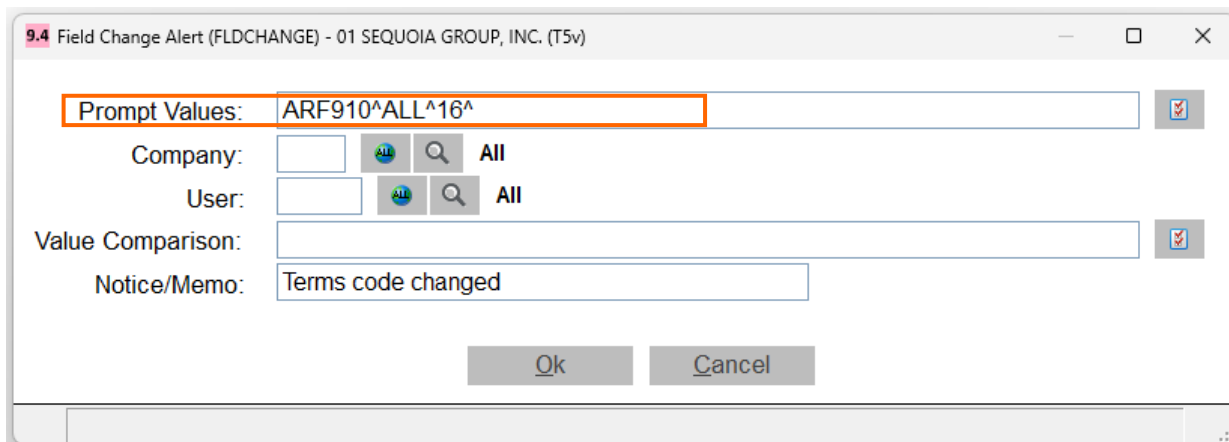
Press **Enter** to see the alerts that this user has set up.



The **Prompt Values** field is used to specify the exact data field you want to audit. These values can be difficult to interpret, as they often appear as system-level names without clear descriptions.

You may need the help of our technical staff to know what values to enter when setting up field level alerts.

On the **right** side of the **Prompt Values** field, there is a button that displays a breakdown of what these values represent.

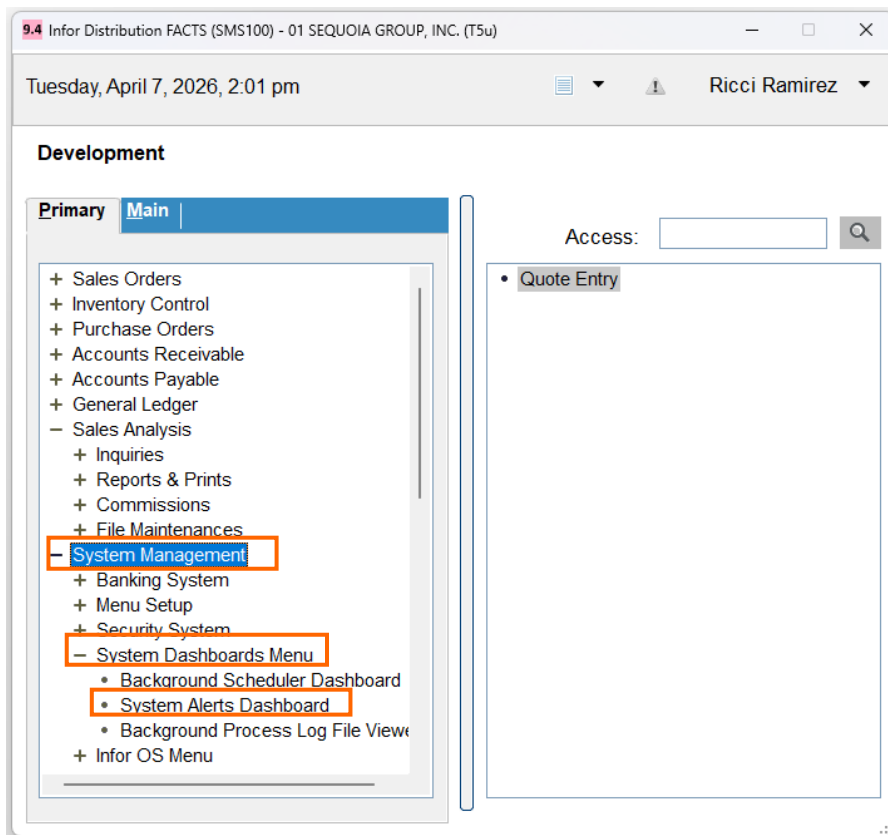


The resulting window shows the details.

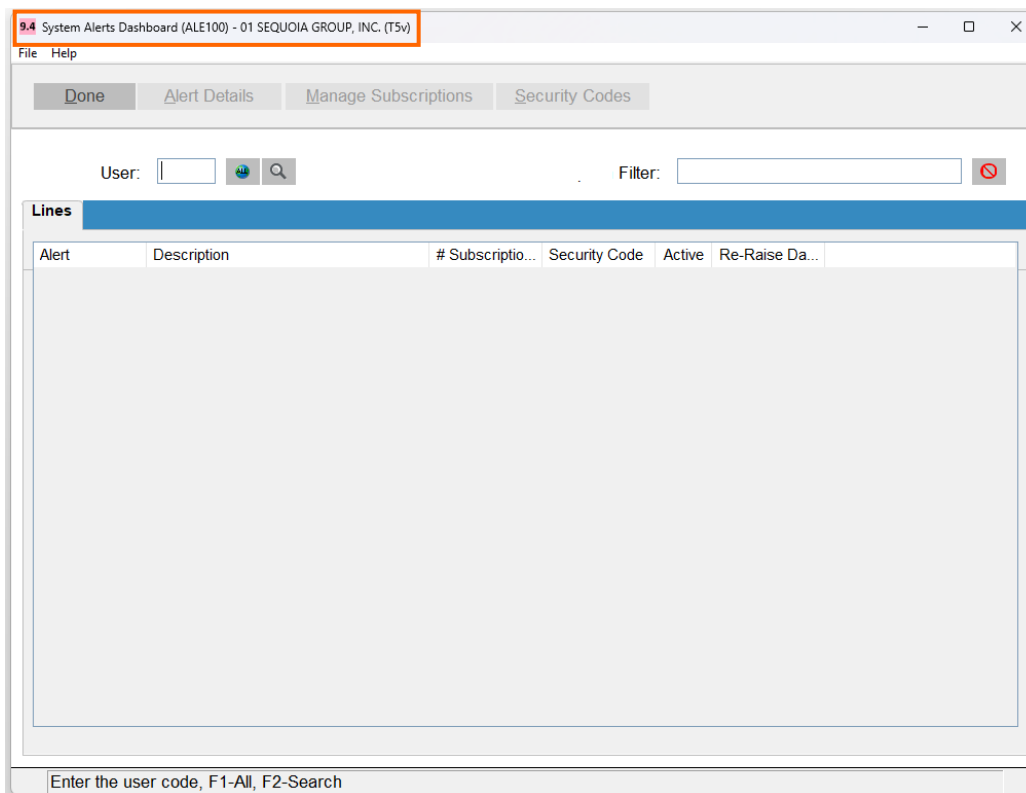
In some cases, setting up these entries is best handled by partners or knowledgeable developers, since the built-in lookup tool provides limited descriptive information.

18.3 ALERT-3LE – Entry Programs

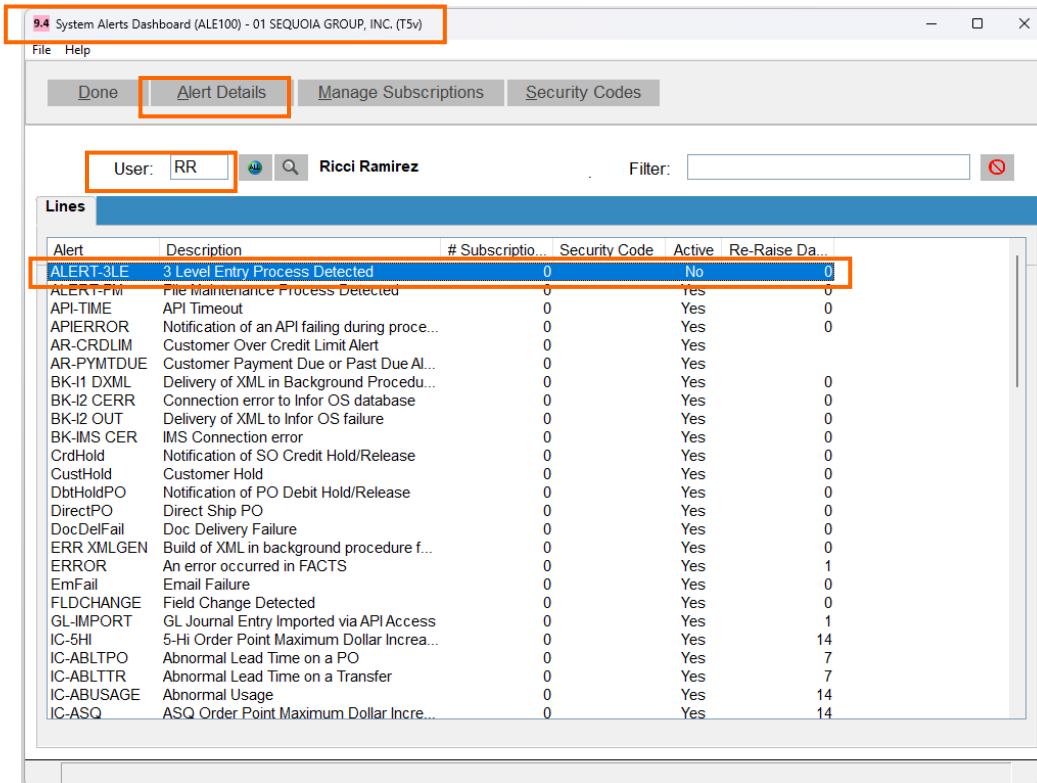
- This alert is similar to the Program Launch and Field Change alerts but specifically tracks actions within three-level entry programs such as Order Entry, Purchase Order Entry, Sales Order Document Inquiry, etc.
- Navigate to **System Management->System Dashboards Menu->System Alerts Dashboard** (program ALE100).



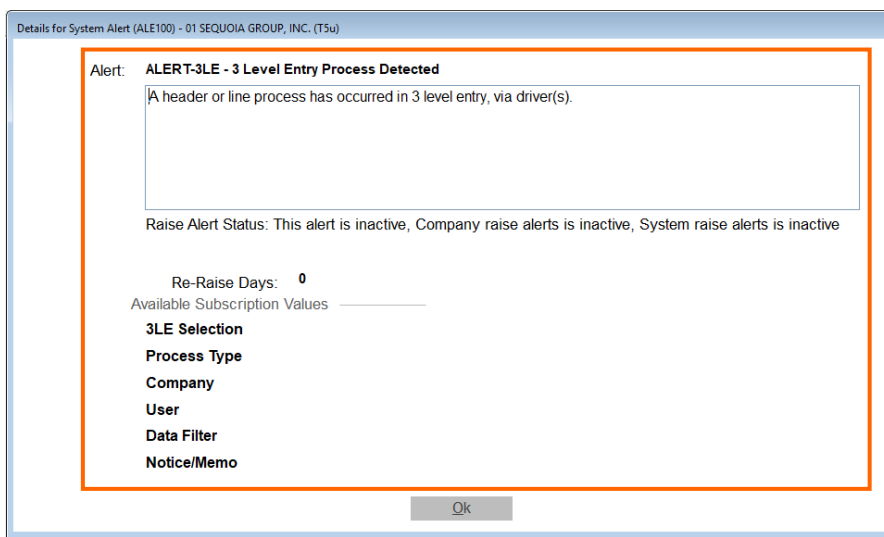
- We will open **System Alerts Dashboard**.



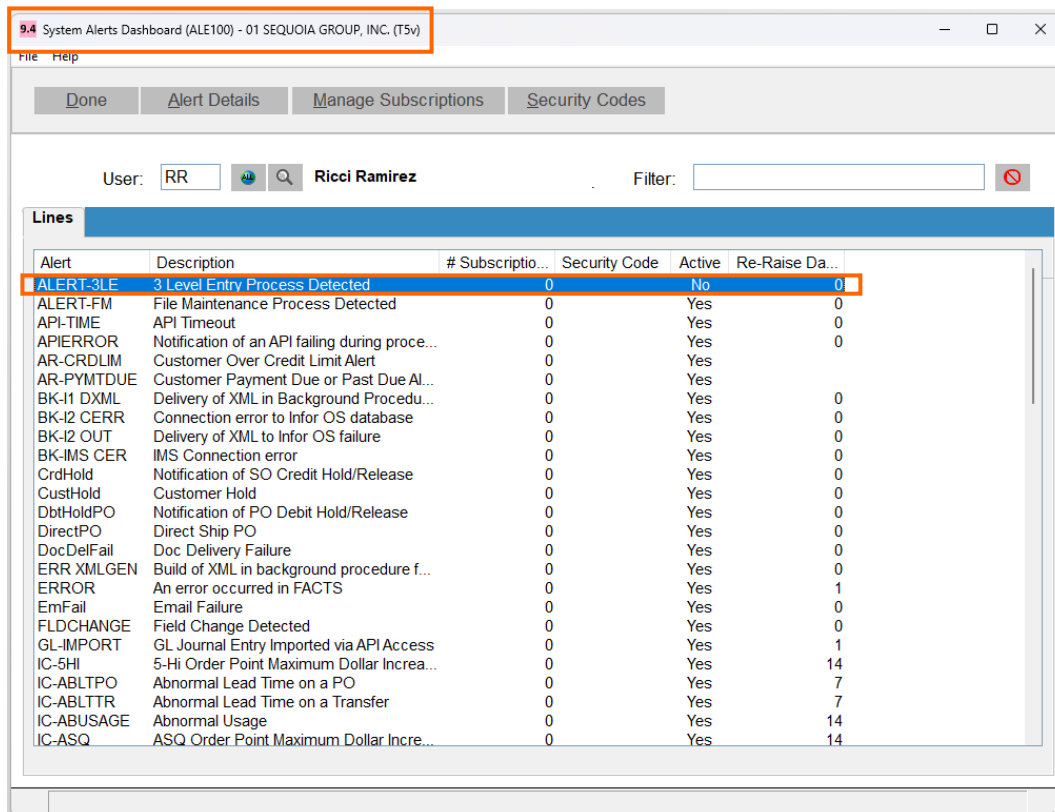
- In the **User** field, enter a user. In our example we are using 'RR', select **3 Level Entry Process Detected** and click on **Alert Details**.



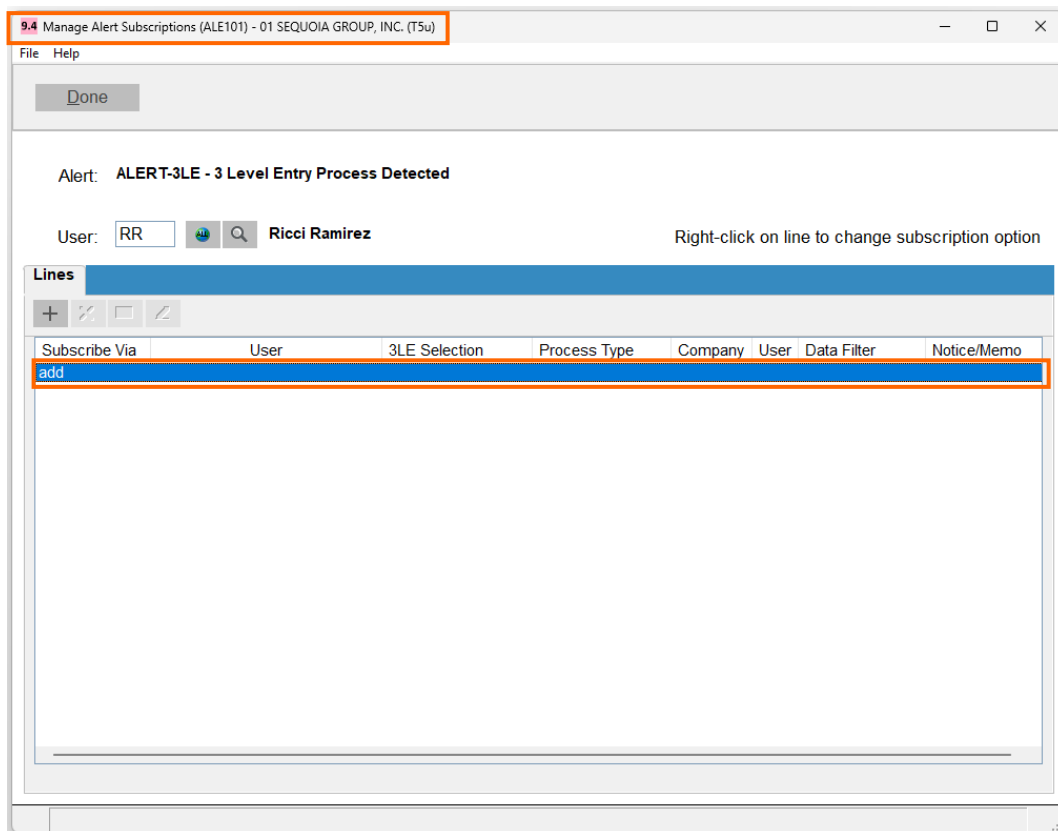
- The **Details for System Alert** window explains how the alert works. Only changes made through the FACTS drivers are detected. Changes made outside of the drivers do not trigger the alert.



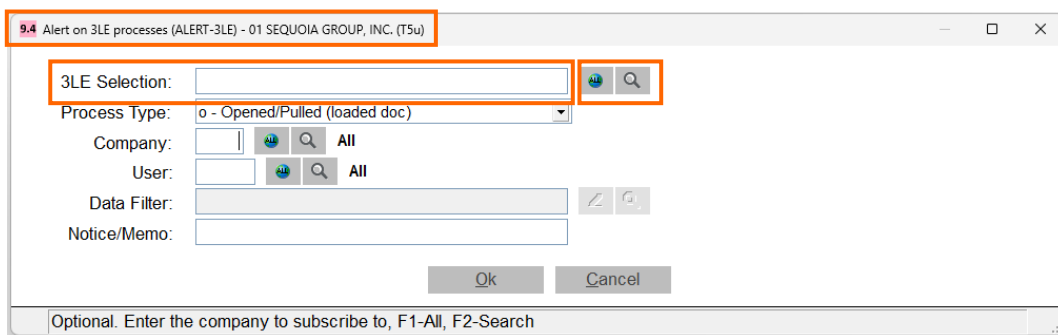
- Now press **OK**.
- In the **System Alert Dashboard** window, use a double-click to open **ALERT-3LE**.



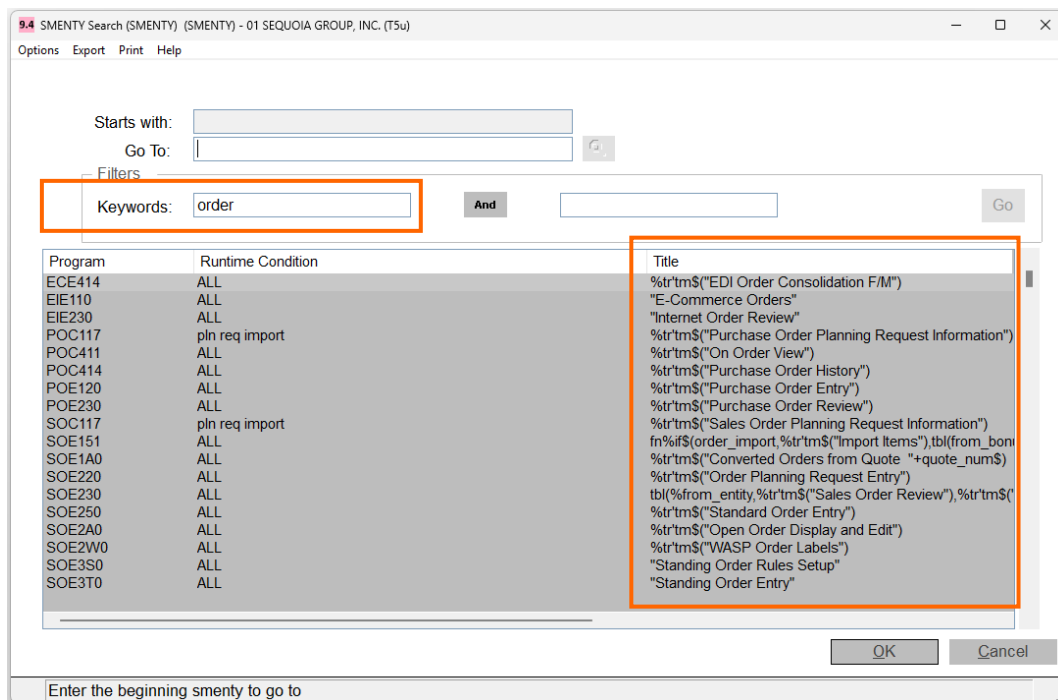
- The **Manage Alert Subscriptions** window will appear. Use the **Add** option to create a new alert.



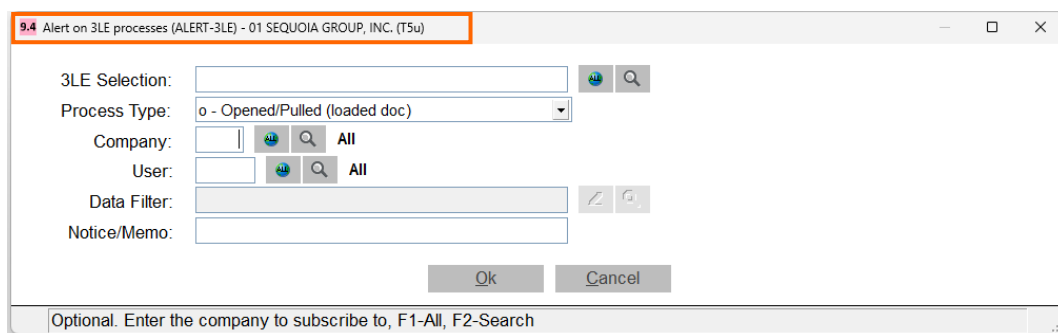
- The **Alert on 3LE Processes** window is displayed.
- The **3LE Selection** value consists of a code and a condition separated by a caret (^). This format identifies the three-level entry program the alert monitors.
- Use the **F2 Lookup** button to search by keyword.



In this example, the keyword **order** is used to perform the search. The system then displays all programs that include **order** in their name.



- Click **OK** to return to **Alert on 3LE processes** window.



The **Process Type** field identifies whether the action applies to the **header** or **line** section.

Header processes involve actions on the document as a whole (e.g., load, delete, close), such as the following:

- ✓ **Launch/Start (entered program):** Tracks the exact moment a user enters or launches a specific program. Although this is often handled by the **Program Launch** alert, it can also be tracked here.
- ✓ **Opened/Pulled (loaded doc):** Tracks when a user pulls up a specific document to view it.
- ✓ **Created/Updated (saved/updated doc hdr):** Tracks when changes are made to the main document, such as completing and saving updates to the header.

- ✓ **Delete/Cancelled (deleted doc):** Tracks when a document is fully deleted. The alert only triggers once the document is successfully removed; if the deletion is canceled, no alert is generated.
- ✓ **Saved/Closed (end of doc):** Tracks when a document is saved and closed, while remaining in the main entry screen (for example, staying on the screen to enter another document).
- ✓ **Finished/Exited (exited program):** Tracks when the document is closed and the user exits the program completely.

Line processes involve actions on individual lines (e.g., add, remove, edit), such as the following:

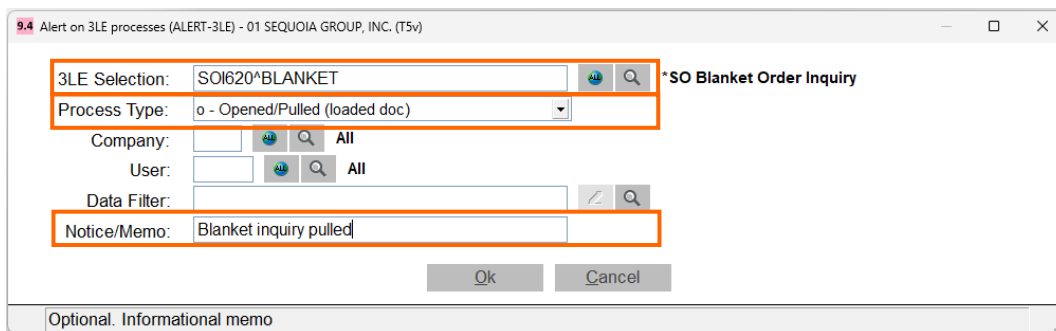
- ✓ **Added Line:** Tracks when a completely new line is added to a document. It does not trigger while the information is being entered; it only fires once the line is fully added and saved.
- ✓ **Removed Line:** Tracks when a specific line is deleted from a document. If the deletion is started but then canceled, the alert will not fire.
- ✓ **Edited Line:** Tracks when a change is made to an existing line (not a new one). The line must be saved for the alert to fire. If a value is changed but not saved, the alert will wait. This is different from the **Field Change** alert, which triggers immediately when a value is entered.

Company and User: Fields to specify if you want to track a particular company or user, or just track 'any or all'.

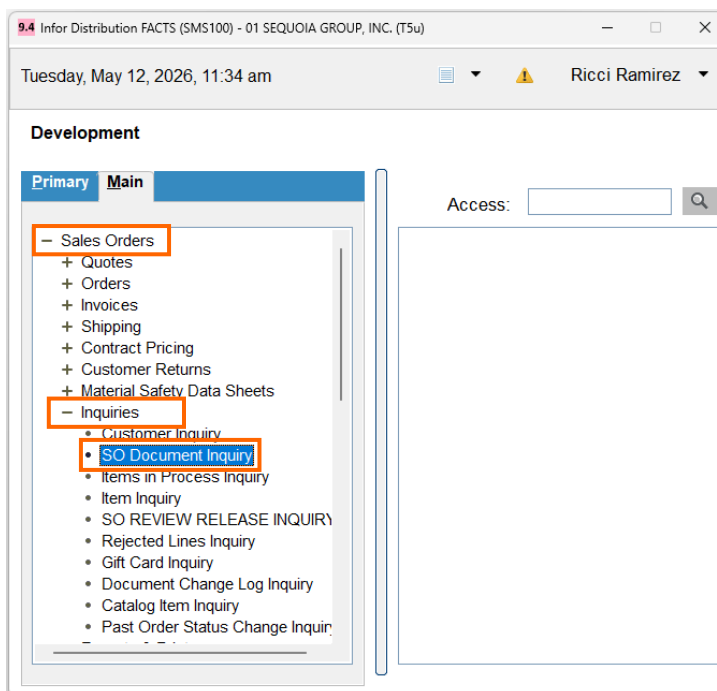
Data filter: An optional field to further refine your tracking.

Notice/Memo: A free-form entry field where you type the custom text that will display in the alert control center when it fires.

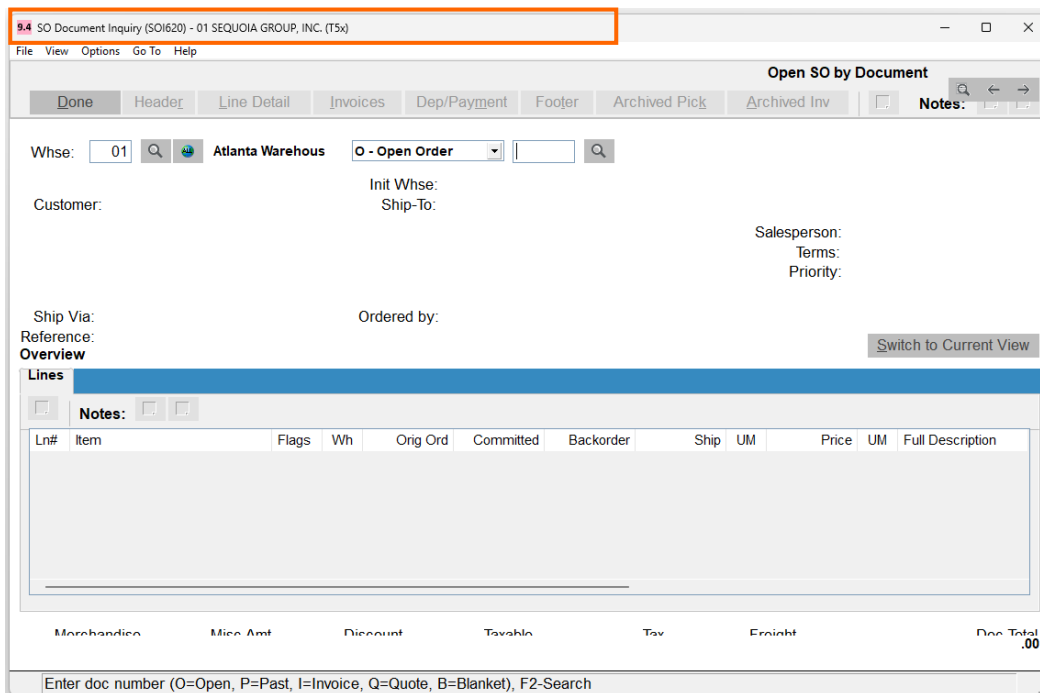
- For this example, the **Three-Level Entry Selection** is set to *** SO Blanket Order Inquiry (SOI620^BLANKET)**. The asterisk indicates a translated description, and the ^ separates the code and condition used to track the program.
- Because the goal is to track when a document is pulled up, the **header-level process for loading an opened document** is used. This is a post-occurrence alert. The system does not trigger the alert while values are being entered; it only fires when the document has successfully loaded on the screen.
- Leave the **Data Filter** field blank to track all documents in the program. Enter a custom memo, such as **'Blanket inquiry pulled.'**



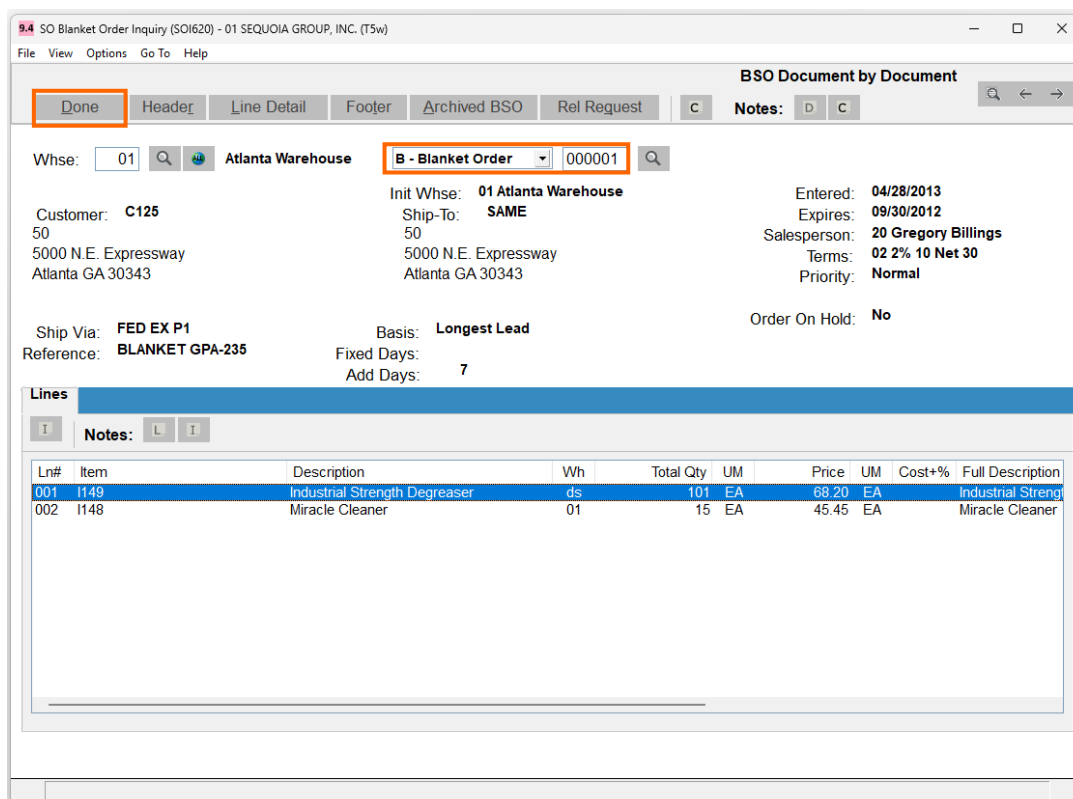
- Navigate to **Sales Orders-> Inquiries-> SO Document Inquiry** (program SOI620).



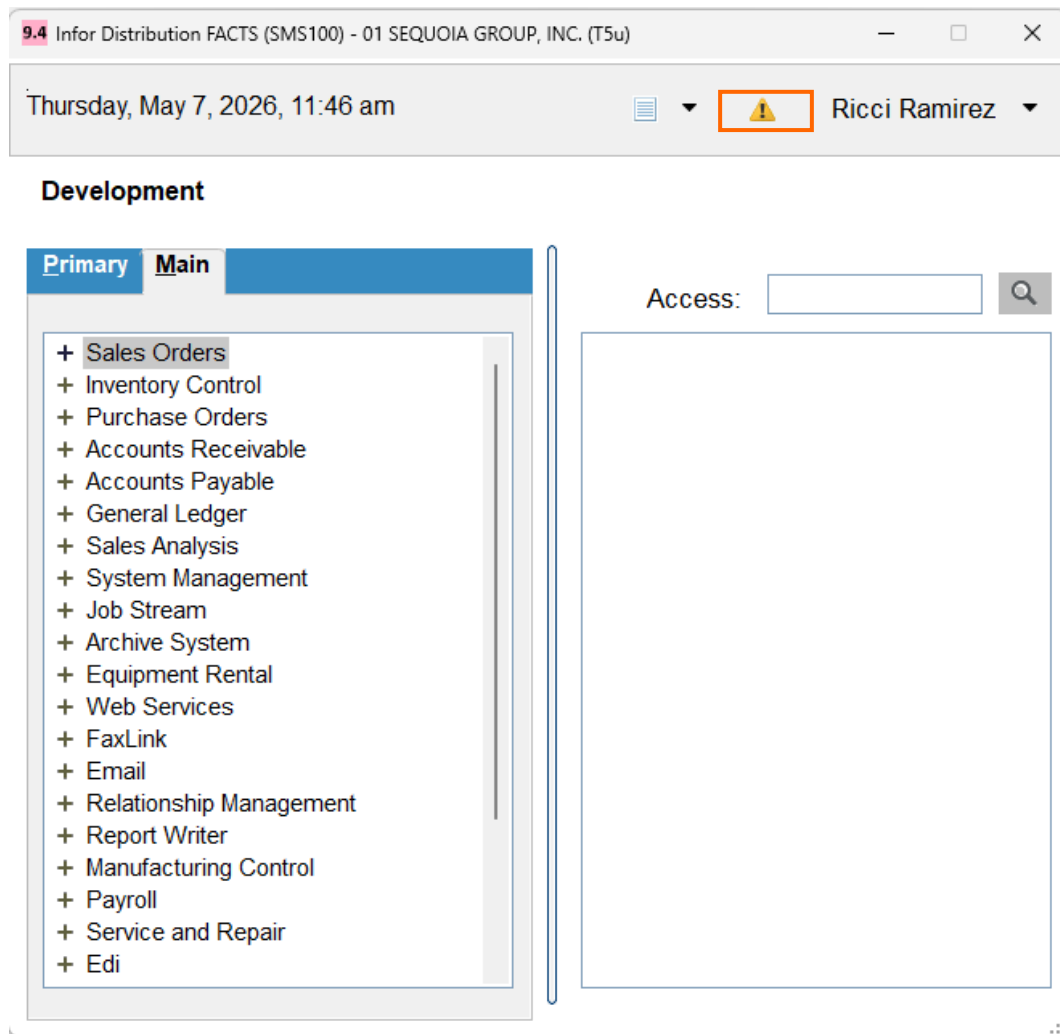
- Open SO Document Inquiry.



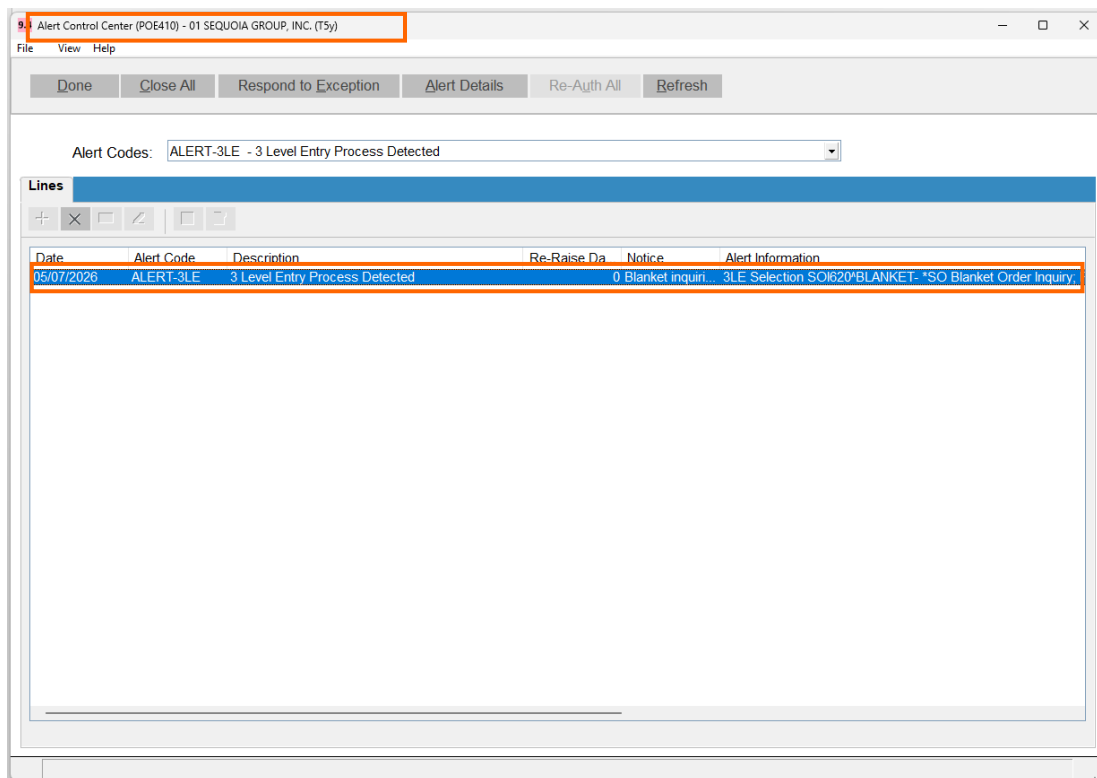
- For this example, we use **Blanket Order 000001**. After it is selected press **Done**.



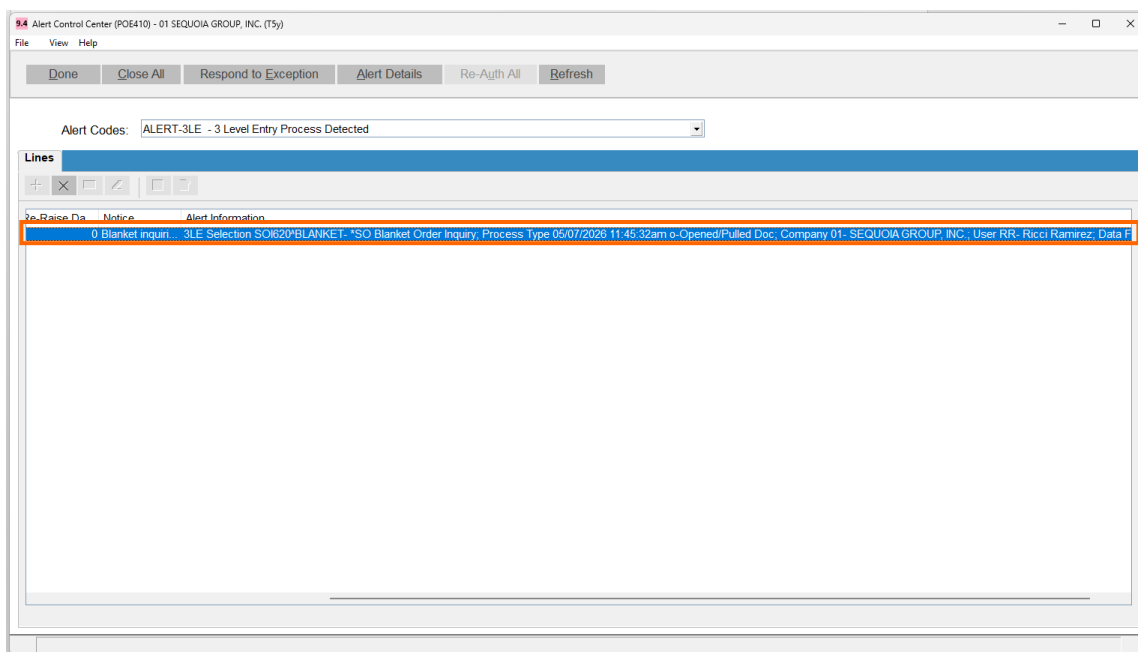
- The triangle in the main menu turns **yellow**, which indicates that an alert is active.
- Click on the **yellow** triangle to see the alert.



- The **Alert Control Center** shows the alert for a **3 Level Entry Process Detected**.



- The system provides expanded information, including the exact date and time the action occurred, the process type, and the specific file and record key that were impacted.



- Return to the **Alert on 3LE Processes** window. In this example, the alert is set to **MCE110^ALL (Bill of Materials Entry)** for a **line removed** action. The **Notice/Memo** field is set to **'BOM line removed.'**

9.4 Alert on 3LE processes (ALERT-3LE) - 01 SEQUOIA GROUP, INC. (T5w)

3LE Selection: MCE110^ALL *Bill of Materials Entry

Process Type: - Removed Line

Company: All

User: All

Data Filter:

Notice/Memo: BOM line removed

Ok Cancel

Select 3LE driver-managed process

- Navigate to **Manufacturing Control** → **Bill of Materials** → **Bill of Materials Entry** (program MCE110).

9.4 Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Tuesday, May 12, 2026, 2:52 pm Ricci Ramirez

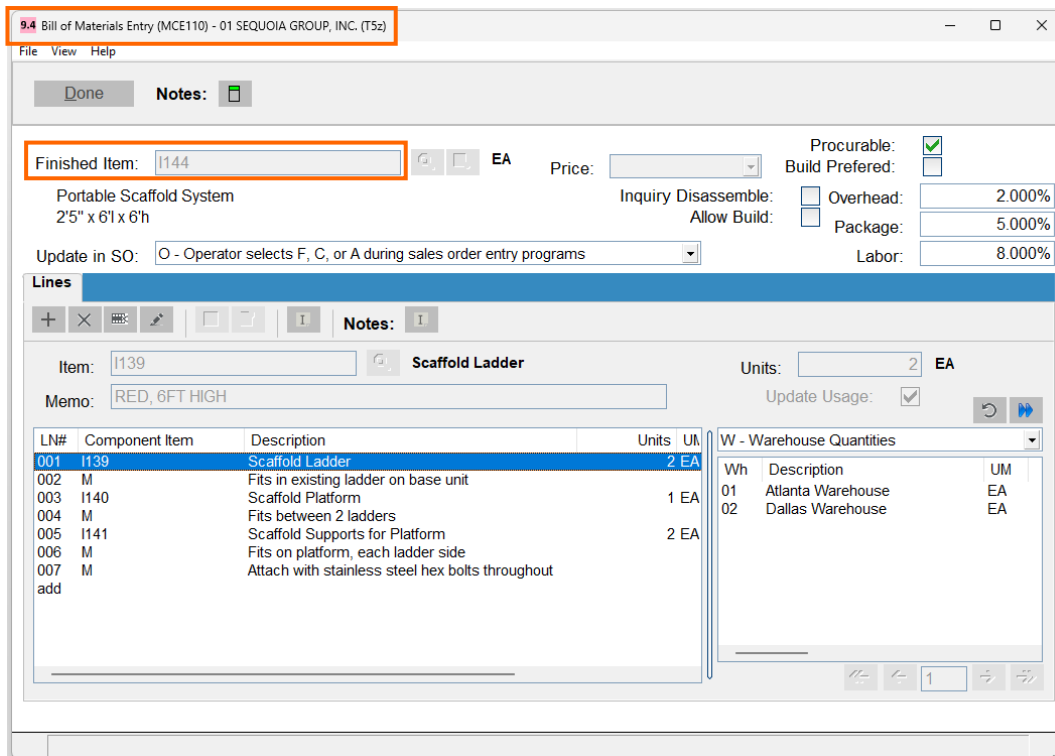
Development

Primary Main

Access:

- + Archive System
- + Equipment Rental
- + Web Services
- + FaxLink
- + Email
- + Relationship Management
- + Report Writer
- Manufacturing Control
 - Bill of Materials
 - Bill of Materials Entry
 - Production Planning
 - Buyers Control Center BOM
 - Production Entry
 - Production Ticket Print
 - BOM Ticket Review
 - Production Confirmation
 - BOM Production Register
- + Formulation
- + Inquiries
- + Reports & Prints

- Open **Bill of Materials Entry**. In this example, the **Finished Item** we use is **I144**.



- We then need to add an item. For this example, we will use **I100**.

9.4 Bill of Materials Entry (MCE110) - 01 SEQUOIA GROUP, INC. (T5z)

File View Help

Done Notes:

Finished Item: I144 EA Price: Procurable:
 Portable Scaffold System Inquiry Disassemble: Overhead: 2.000%
 2'5" x 6'1 x 6'h Allow Build: Package: 5.000%
 Update in SO: O - Operator selects F, C, or A during sales order entry programs Labor: 8.000%

Lines

+ Notes:

Item: I100 Pallet Loading Hand Trucks Units: 1 EA
 Memo: Update Usage:

LN#	Component Item	Description	Units	UM
001	I139	Scaffold Ladder	2	EA
002	M	Fits in existing ladder on base unit		
003	I140	Scaffold Platform	1	EA
004	M	Fits between 2 ladders		
005	I141	Scaffold Supports for Platform	2	EA
006	M	Fits on platform, each ladder side		
007	M	Attach with stainless steel hex bolts throughout		
add				

W - Warehouse Quantities

Wh	Description	UM
01	Atlanta Warehouse	EA
02	Dallas Warehouse	EA

Enter the units needed to produce one finished item

- The line with the product is now added.

9.4 Bill of Materials Entry (MCE110) - 01 SEQUOIA GROUP, INC. (T5z)

File View Help

Done Notes:

Finished Item: I144 EA Price: Procurable:
 Portable Scaffold System Inquiry Disassemble: Overhead: 2.000%
 2'5" x 6'1 x 6'h Allow Build: Package: 5.000%
 Update in SO: O - Operator selects F, C, or A during sales order entry programs Labor: 8.000%

Lines

+ Notes:

Item: Units:
 Memo: Update Usage:

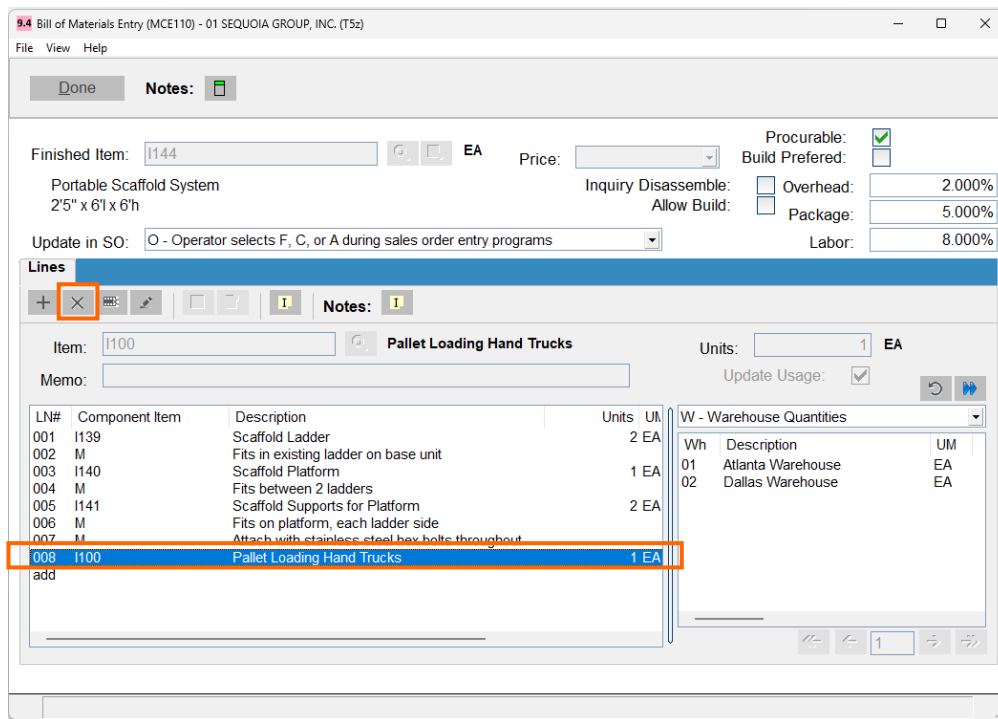
LN#	Component Item	Description	Units	UM
001	I139	Scaffold Ladder	2	EA
002	M	Fits in existing ladder on base unit		
003	I140	Scaffold Platform	1	EA
004	M	Fits between 2 ladders		
005	I141	Scaffold Supports for Platform	2	EA
006	M	Fits on platform, each ladder side		
007	M	Attach with stainless steel hex bolts throughout		
008	I100	Pallet Loading Hand Trucks	1	EA
add				

W - Warehouse Quantities

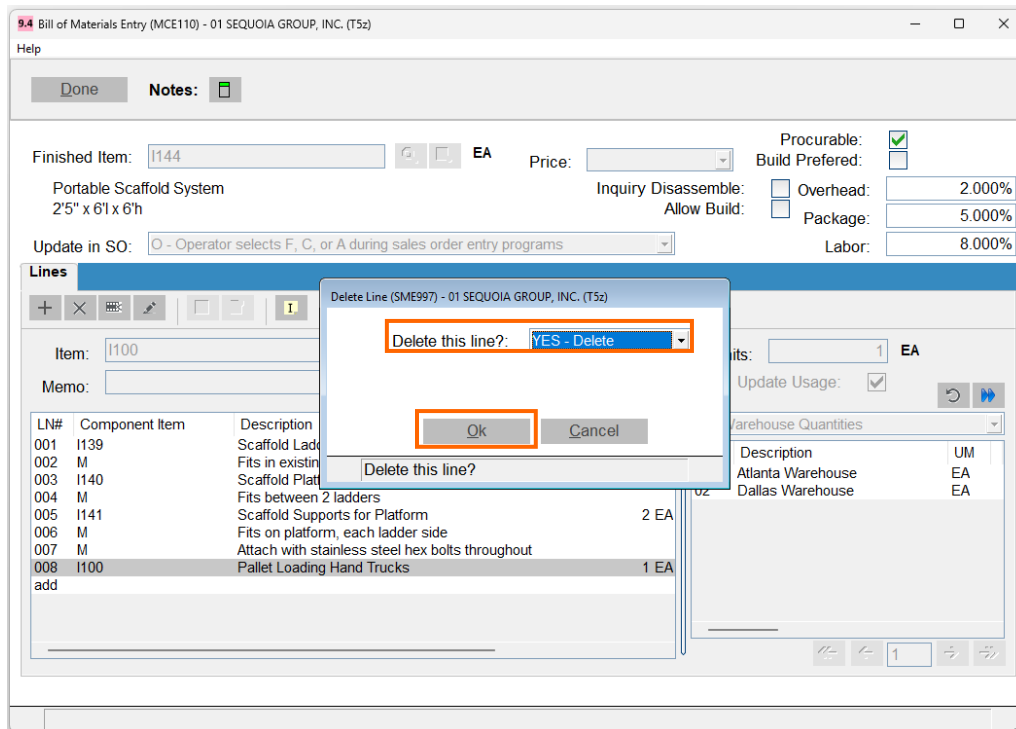
Wh	Description	UM
----	-------------	----

Enter the item number (M=memo), F2-Search

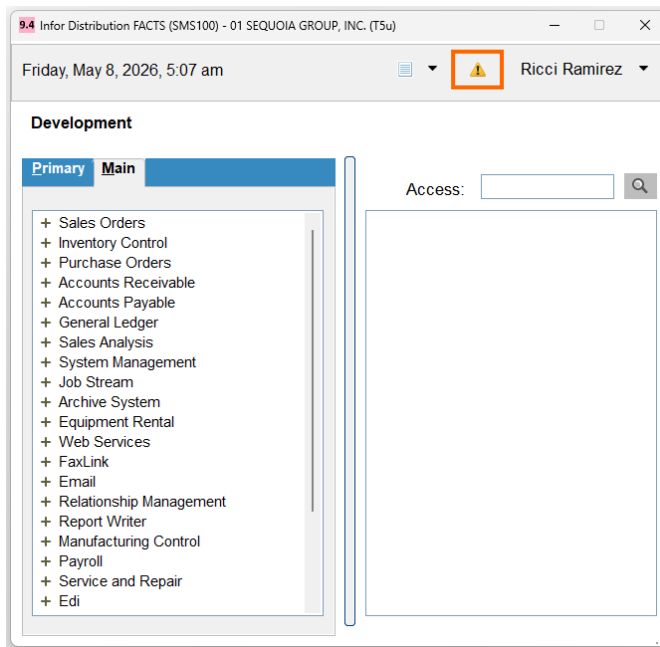
- For this example, item I100 is removed. Select the item from the list and use the X option.



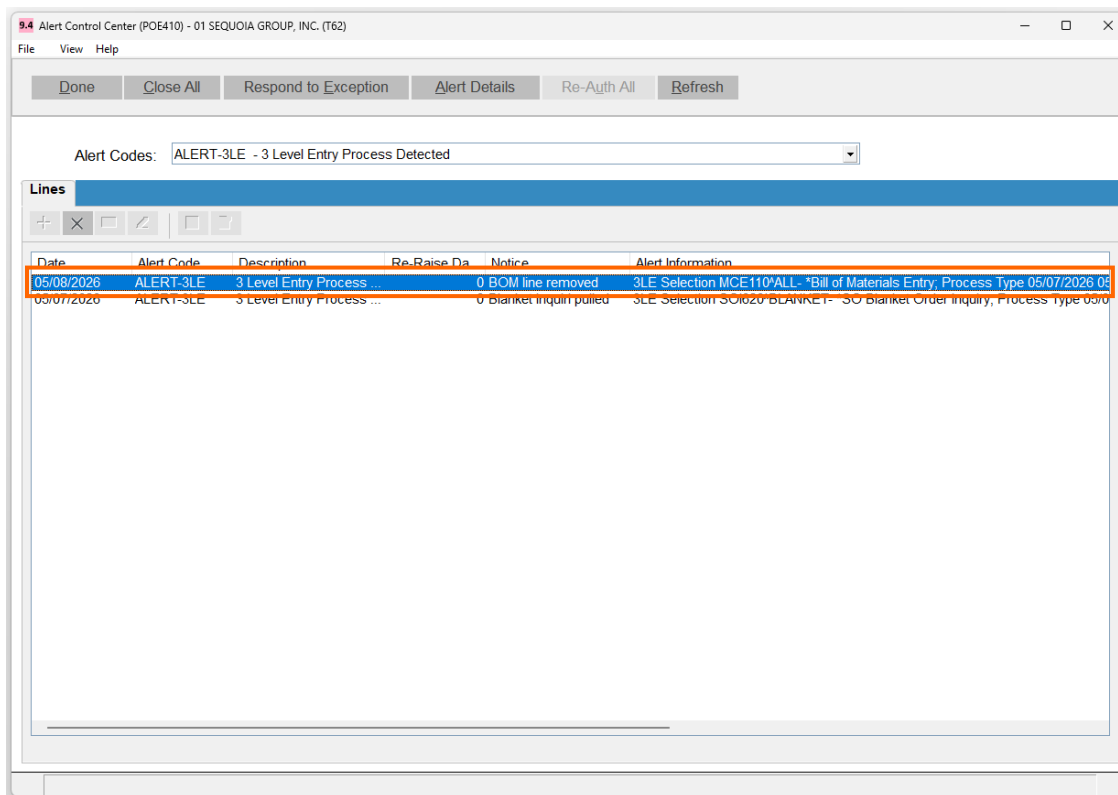
- Confirm the deletion of the item.



- Return to the **Main Menu**. Click the yellow triangle to open the **Alert Control Center**.



- The window shows the alert for the line removed in **Bill of Materials Entry**.



- The next example demonstrates the alert for a line added during invoice processing.
- Return to the **Alert on 3LE Processes** window. Set **3LE Selection** to a **Direct Invoice Entry**, **Process Type** to **Added Line**, and enter **'Invoice-added line'** in **Notice/Memo**.

- Navigate to **Sales Orders-> Invoices->Direct Invoice Entry** (program SOE320).

- Open **Direct Invoice Entry**, then click the search button for the **Doc/Cust** field.

9.4 Invoice (SOE320) Next Invoice - 01 SEQUOIA GROUP, INC. (T5x)

File Edit View Options Go To Help

Done Header Line Detail Archived Pick Archived Inv Close Notes

Doc/Cust Ship-To: Init Whse: 01 Atlanta Warehouse

Price Level:
 Invoice: 05/08/2026
 Shipped: 05/08/2026
 Turbo Token:

Lines

Item: GM %:

Ship Direct: Exceptional Sale: Usage Date:

Ordered Shipped Committed Backordered Price Extension

LN#	Item	Flags	Wh	Ordered	UM	Shipped	Price	T	UM	GM%	Source

Weight: .000 Units: 0 Mdse: .00 Ext: .00

Enter document or cust number, F1-Add, F2-Cust Search, F3-Document Search

- In this example, **C103** is selected and confirmed with **OK**.

9.4 Customer Search (ARCUST) (ARCUST) - 01 SEQUOIA GROUP, INC. (T5x)

Options Export Print Help

Sort By: A - Alpha Search

Starts with:

Go To:

Filters

Keywords: tag And Go

Alpha	Customer Name	City, State
BARNES MAC	C104 6Y	Atlanta, GA
BIKES FOR	C132 Bikes for Tykes	Atlanta, GA
BRADLEY MA	C119 Bradley Manufacturing Co.	Atlanta, GA
DISCOUNT I	C125 50	Atlanta, GA
GEORGIA PR	C123 Georgia Print Machines, Inc.	Atlanta, GA
PEACHTREE	C118 50	Atlanta, GA
PORSCHE PI	C120 Porsche Pieces, Inc.	Atlanta, GA
SOUTHEASTE	C100 Southeastern Industrial	Atlanta, GA
SOUTHEASTE	C115 Southeastern Service Company	Atlanta, GA
TAGGART TR	C103 Taggart Transcontinental	Waco, TX
WINCHESTER	C129 Winchester business machines	Manetta, GA
WORD PROCE	C130 50	Marietta, GA

By Ship-To By Buyer **OK** Cancel

Enter the beginning alpha to go to

- In this example, item **I100** is added to the invoice.

9.4 Invoice (SOE320) Invoice Document D00215 Taggart Transcontinental - 01 SEQUOIA GROUP, INC. (T5x)

File Edit View Options Go To Help

Done Header Line Detail Archived Pick Archived Inv Close Notes: D C

Customer: C103 Taggart Transcontinental 4920 Old Dixie Road Waco, TX 75220

Ship-To: SAME Taggart Transcontinental 4920 Old Dixie Road Waco, TX 75220

Init Whse: 01 Atlanta Warehouse

Document: D00215

Price Level: 0

Invoice: 05/08/2026

Shipped: 05/08/2026

Lines

Item: GM %:

Ship Direct: Exceptional Sale: Usage Date:

Ordered Shipped Committed Backordered Price Extension

Wh:	01	Ordered	Shipped	Committed	Backordered	Price	Extension				
LN#	Item	Flags	Wh	Ordered	UM	Shipped	Price	T	UM	GM%	Source
001	I100	B	01	3	EA	1	228.00	C	EA	49.56	

add

Weight: 79.000 Units: 1 Mdse: 228.00 Ext: 228.00

PRESIDENT'S COUSIN

- Return to the **Alert Control Center** to review the invoice alert.

9.4 Alert Control Center (POE410) - 01 SEQUOIA GROUP, INC. (T62)

File View Help

Done Close All Respond to Exception Alert Details Re-Auth All Refresh

Alert Codes: ALERT-3LE - 3 Level Entry Process Detected

Lines

Notice Alert Information

0 POM line removed 3LE Selection MCE110MALL - *Bill of Materials Entry, Process Type 05/07/2026 05:11:20am - 009-Removed Line, Company 01 - SEQUOIA GROUP, INC.; Use

0 Invoice - added line 3LE Selection SOE510*INVOICE - *Direct Invoice Entry, Process Type 05/08/2026 11:02:05am a-002-Added Line, Company 01 - SEQUOIA GROUP, INC.; Us

0 Blanket inquiry pulled 3LE Selection SOI620*BLANKET - *SO Blanket Order Inquiry, Process Type 05/07/2026 11:45:32am o-Opened/Pulled Doc; Company 01 - SEQUOIA GROUP

- The next example sets an alert for **Non-PO Receipt Entry**.

9.4 Alert on 3LE processes (ALERT-3LE) - 01 SEQUOIA GROUP, INC. (T5w)

3LE Selection: POE220*ALL *Non PO Receipt Entry

Process Type: o - Opened/Pulled (loaded doc)

Company: [] All

User: [] All

Data Filter: []

Notice/Memo: Receipt Entry opened

Ok Cancel

Optional. Informational memo

- Navigate to **Purchase Orders->Receiving->Non-PO Receipt Entry** (program POE220).

9.4 Infor Distribution FACTS (SMS100) - 01 SEQUOIA GROUP, INC. (T5u)

Friday, May 8, 2026, 6:30 am Ricci Ramirez

Development

Primary Main

+ Sales Orders

+ Inventory Control

- Purchase Orders

+ Entry

- Receiving

- Receiving Document Print
- Receipt Entry
- Non-PO Receipt Entry
- Document Fill Report
- Receipt Register

+ Invoice Receiving

+ Cost Contracts

+ Vendor Rebates

+ Inquiries

+ Reports & Prints

+ End of Period

+ File Maintenances

+ Accounts Receivable

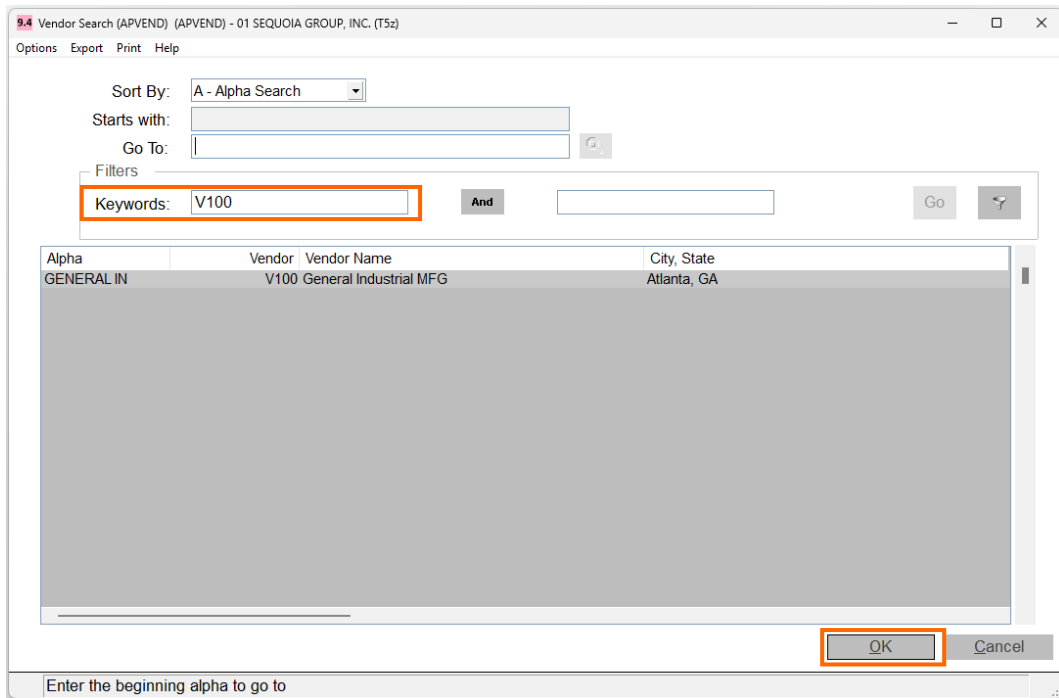
+ Accounts Payable

+ General Ledger

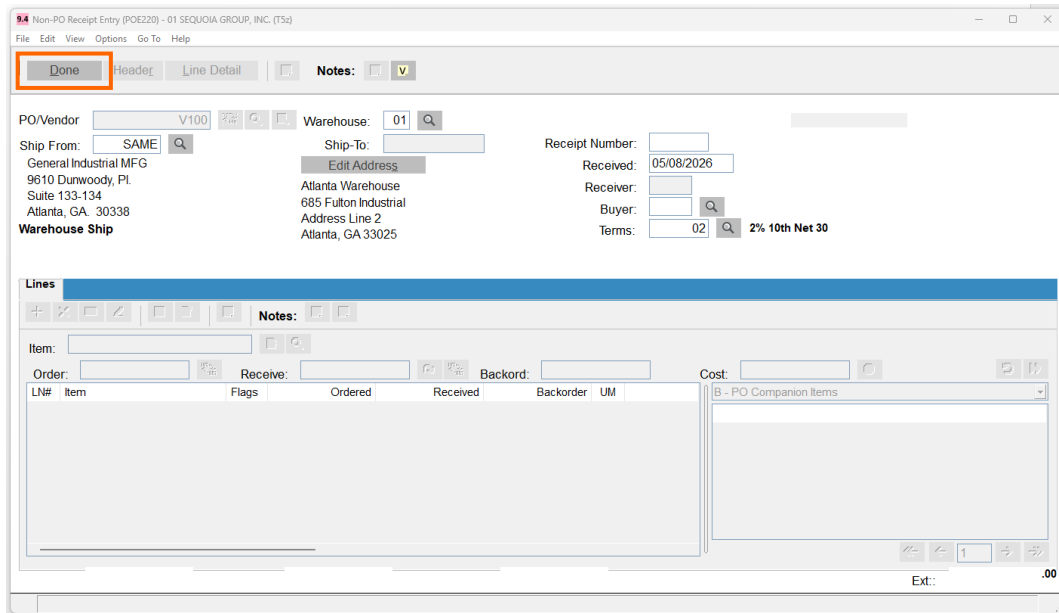
Access: []

- Open **PO Receipt Entry**. For this example, a document for vendor **V100** is selected

and confirmed with **OK**.

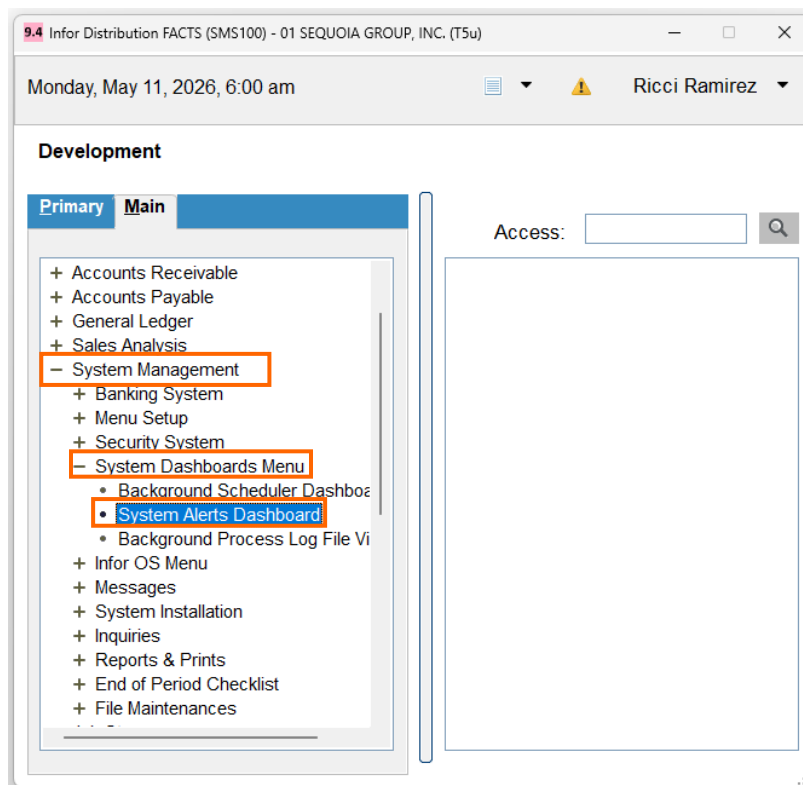


- Press **Done**.



18.4 ALERT-FM – File Maintenance

- The **File Maintenance (FM) Process Detected Alert** works very similarly to the Three-Level Entry alerts we discussed, but it is specifically built to track user actions inside file maintenance programs.
- Navigate to **System Management-> System Dashboards Menu->System Alerts Dashboard** (program ALE100).



- In the **User** field, enter a user. In our example we are using **'RR.'**

9.4 System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5x)

File Help

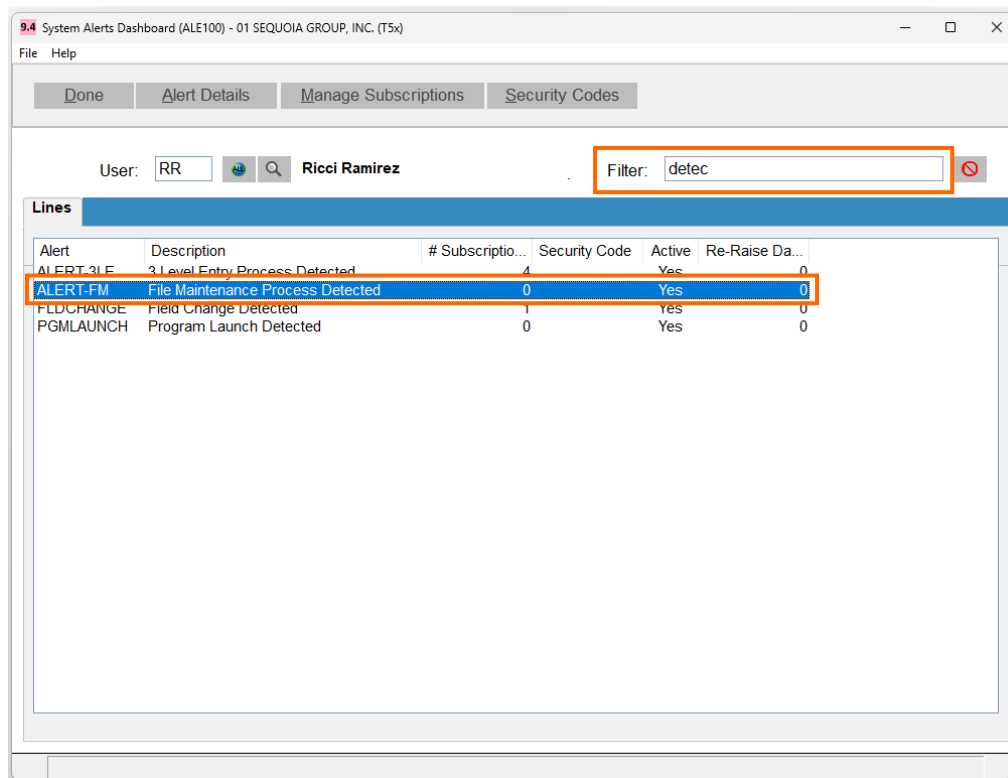
Done Alert Details Manage Subscriptions Security Codes

User: RR Ricci Ramirez Filter:

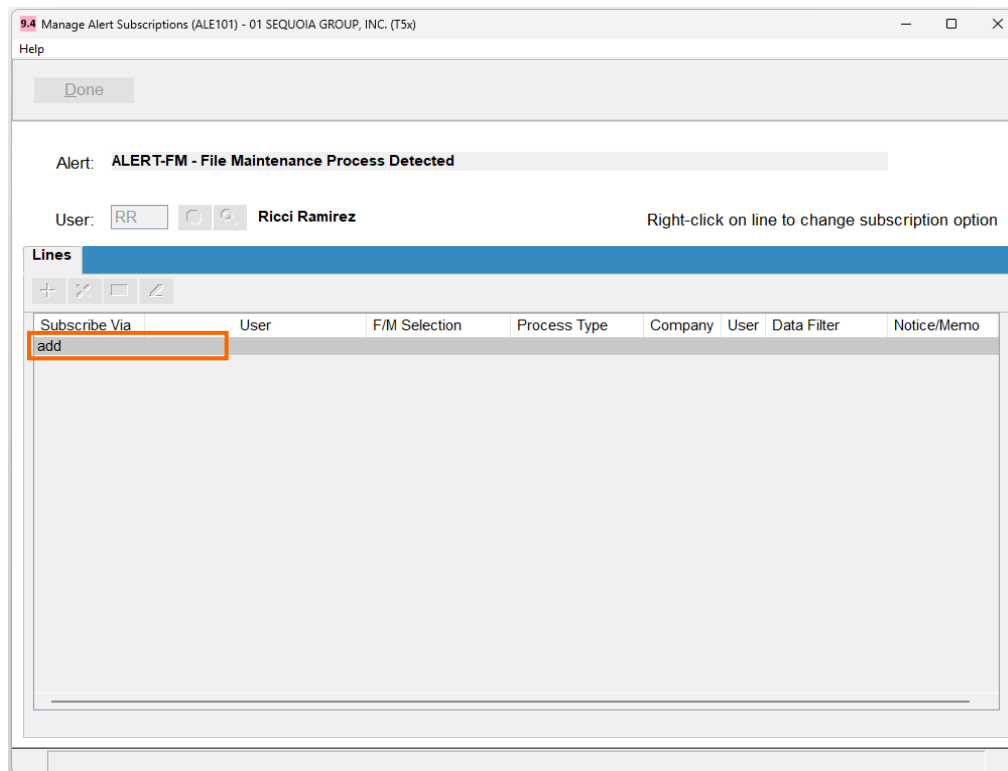
Lines

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	4		Yes	0
ALERT-FM	File Maintenance Process Detected	0		Yes	0
API-TIME	API Timeout	0		Yes	0
APIERROR	Notification of an API failing during proce...	0		Yes	0
AR-CRDLIM	Customer Over Credit Limit Alert	0		Yes	
AR-PYMTDUE	Customer Payment Due or Past Due Al...	0		Yes	
BK-I1 DXML	Delivery of XML in Background Procedu...	0		Yes	0
BK-I2 CERR	Connection error to Infor OS database	0		Yes	0
BK-I2 OUT	Delivery of XML to Infor OS failure	0		Yes	0
BK-IMS CER	IMS Connection error	0		Yes	0
CrdHold	Notification of SO Credit Hold/Release	0		Yes	0
CustHold	Customer Hold	0		Yes	0
DbtHoldPO	Notification of PO Debit Hold/Release	0		Yes	0
DirectPO	Direct Ship PO	0		Yes	0
DocDelFail	Doc Delivery Failure	0		Yes	0
ERR XMLGEN	Build of XML in background procedure f...	0		Yes	0
ERROR	An error occurred in FACTS	0		Yes	1
EmFail	Email Failure	0		Yes	0
FLDCHANGE	Field Change Detected	1		Yes	0
GL-IMPORT	GL Journal Entry Imported via API Access	0		Yes	1
IC-5HI	5-Hi Order Point Maximum Dollar Increa...	0		Yes	14
IC-ABLTPO	Abnormal Lead Time on a PO	0		Yes	7
IC-ABLTTR	Abnormal Lead Time on a Transfer	0		Yes	7
IC-ABUSAGE	Abnormal Usage	0		Yes	14
IC-ASQ	ASQ Order Point Maximum Dollar Incre...	0		Yes	14

- A **filter field** has been added to help narrow the displayed information. Use a double-click to open **ALERT-FM**.



- Click on **add**.



- The **Alert on FM Processes** window will appear. Use the displayed fields to configure the alert.

F/M Selection: Selects the file maintenance program to track. The **Data Filter** field remains unavailable until a program is selected.

Process Type: Specifies the user action that triggers the alert. Options include entering the program, opening/pulling a record, creating, updating, deleting, cancelling, saving, or closing.

Be aware that tracking **Save** actions may generate multiple alerts. If the user saves and then exits immediately, separate alerts may be triggered for both actions.

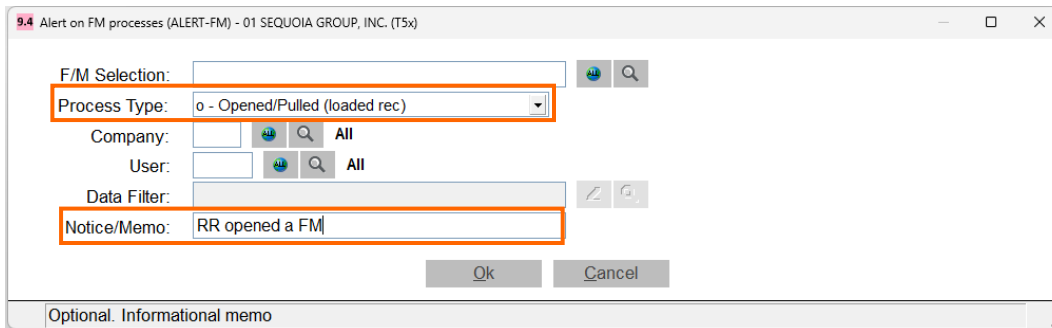
User and Company: These fields can be left broad to monitor all activity. To track a specific user, enter the exact **User/ Company ID**.

Data Filter (Targeting the Alert): This field is used to define specific conditions so the system only generates relevant alerts. Using the **Data Filter** will likely require assistance from our technical team.

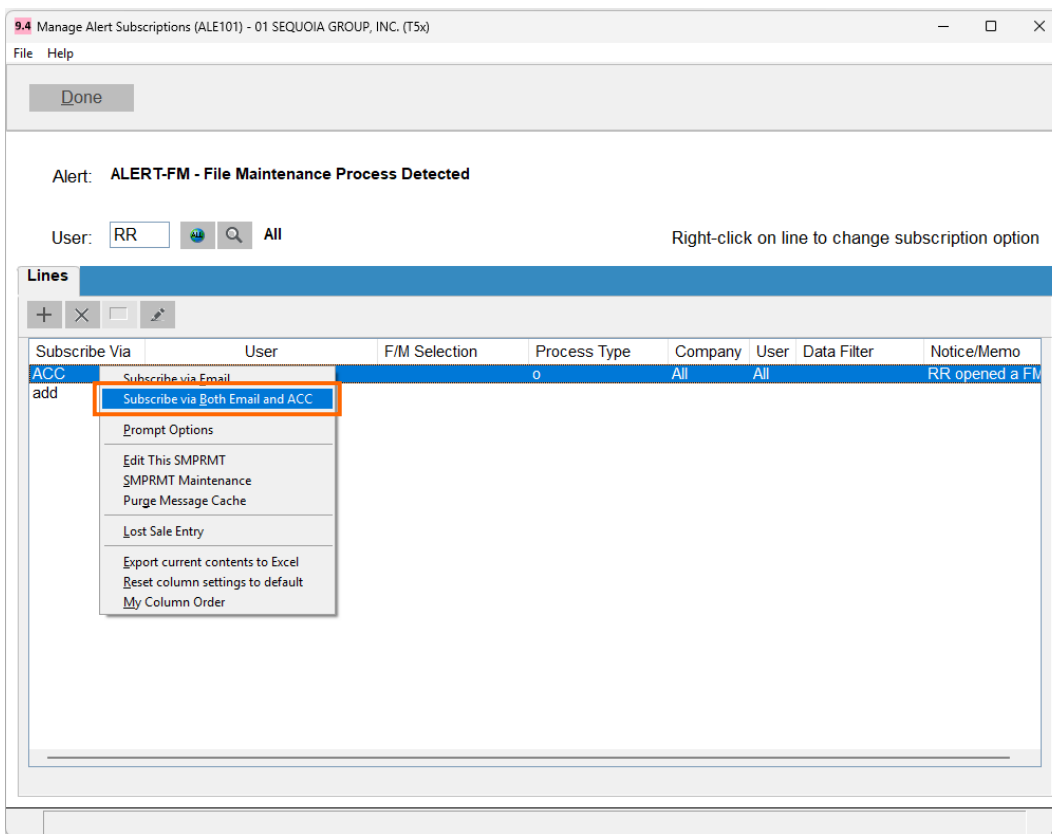
- ✓ **Inline Filtering:** Short rules (under 30 characters) can be entered directly in this field.
- ✓ **Extended Filtering (E-Notation):** Complex rules may require more space than the field allows. Entering an **E** followed by up to 7 characters opens the extended filtering screen. This window provides 10 separate fields across 5 tabs for building advanced filtering rules.

Notice/Memo: Defines the custom message displayed in the **Alert Control Center** when the alert is triggered.

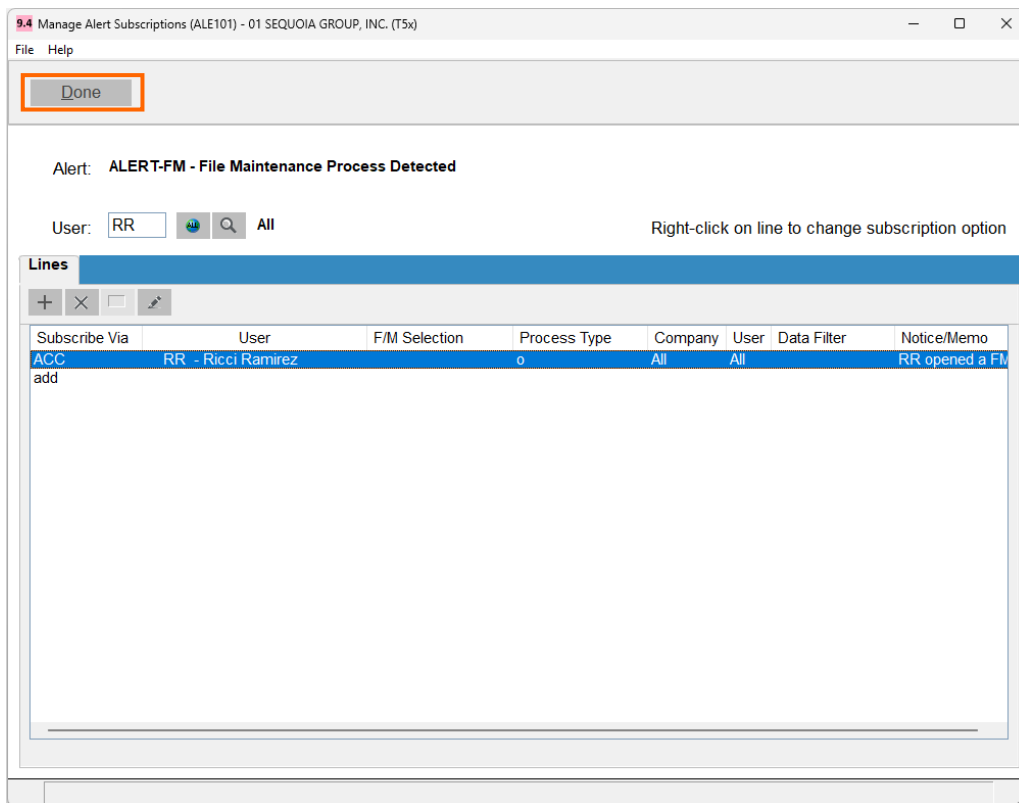
- In this example, **Process Type** is set to **Opened/Pulled**, and the message **'RR opened an FM'** is entered in **Notice/Memo**. The action is confirmed with **OK**.



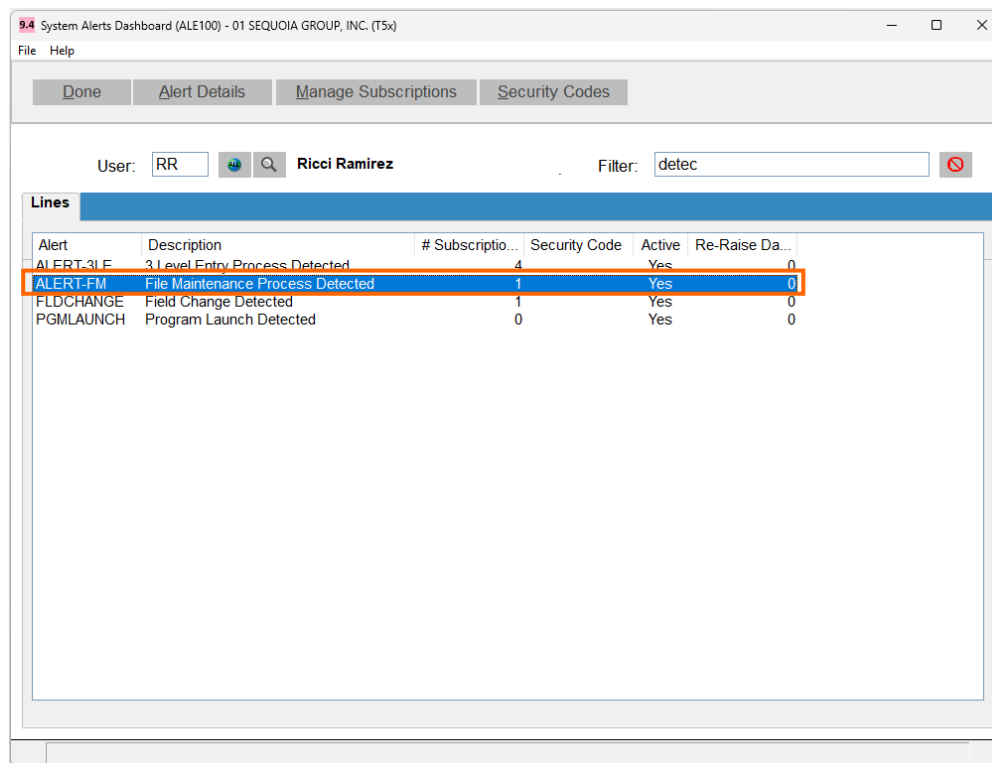
- Use a right-click to select **Subscribe via Both Email and ACC**.



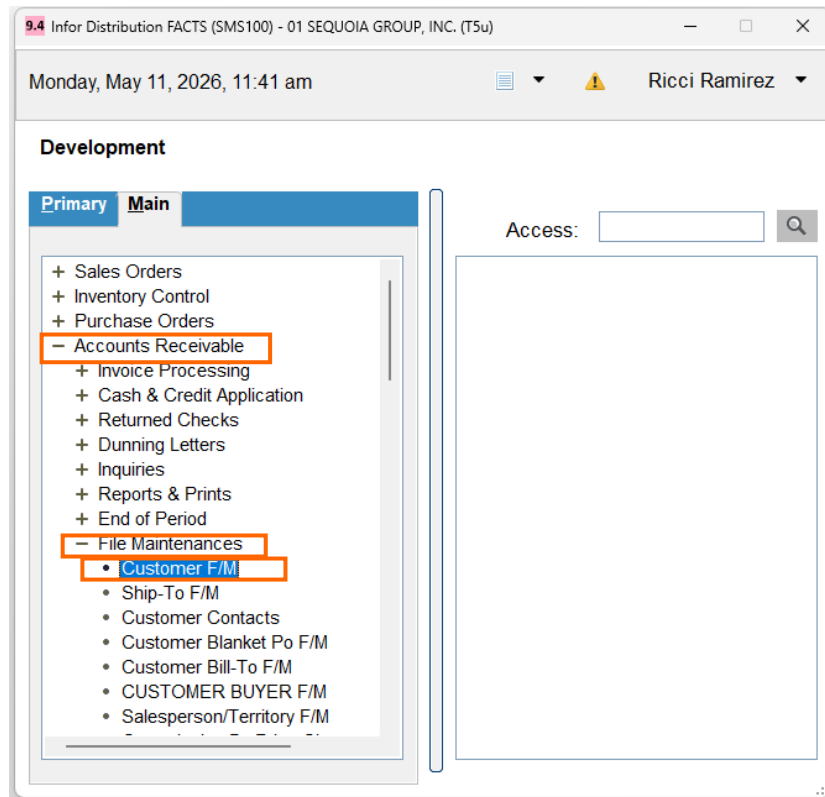
- Press **Done**.



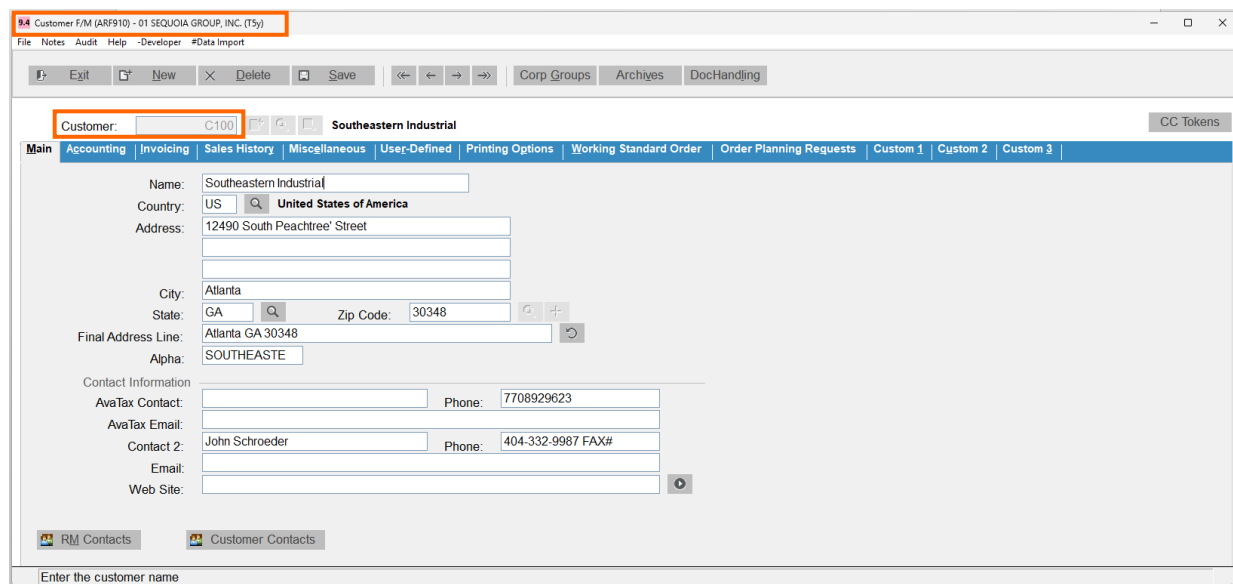
- Press **Done** to return to the **System Alerts Dashboard** window, where the **File Maintenance Process Detected** alert is displayed.



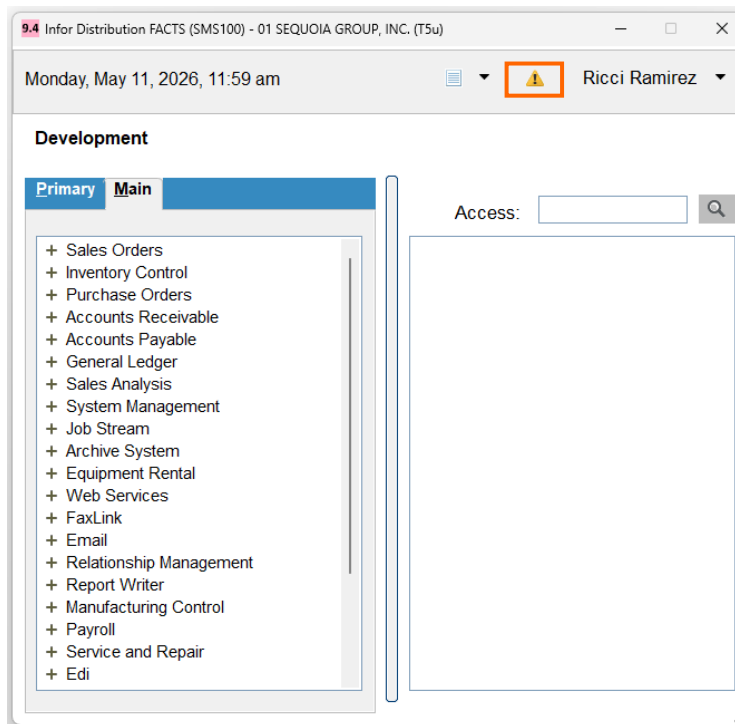
- Navigate to **Accounts Receivable->File Maintenances->Customer F/M** (program ARF910).



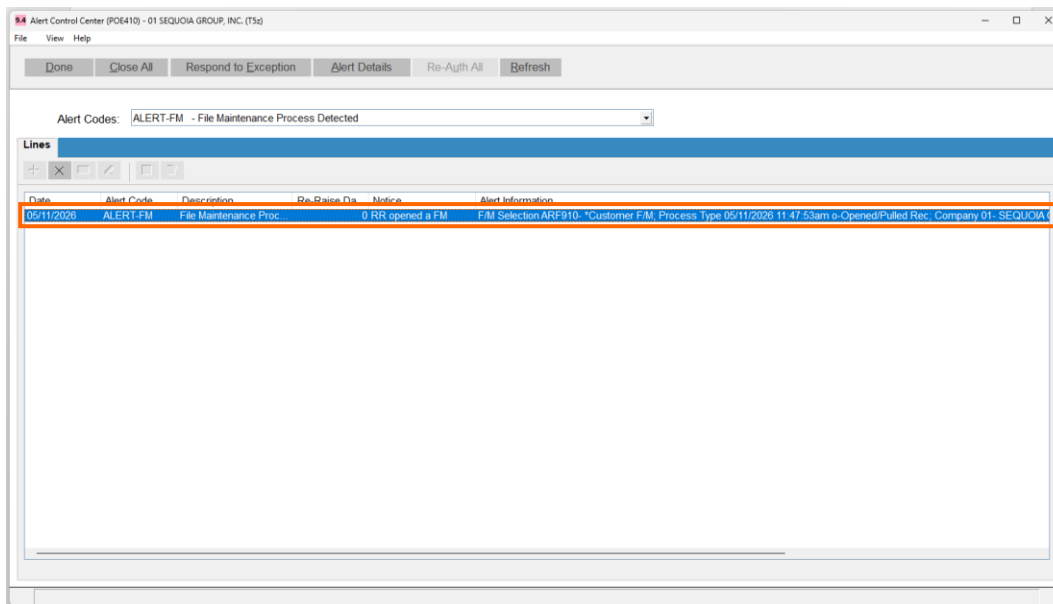
- Open **Customer F/M**. For this example, we are going to look up **Customer C100**.



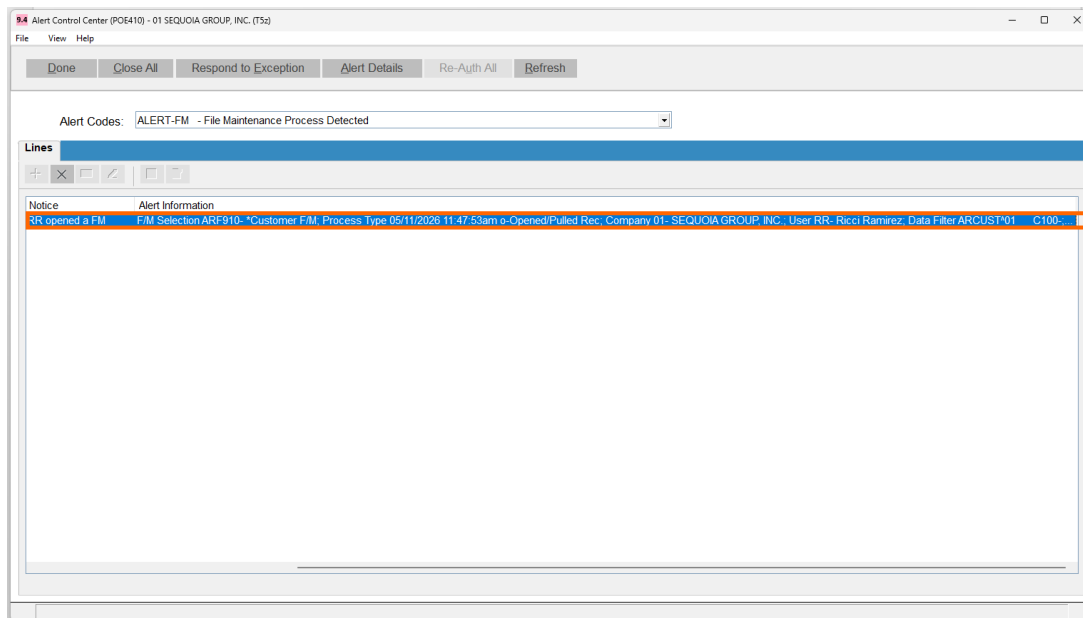
- Click the triangle in the **Main Menu** to open the alerts.



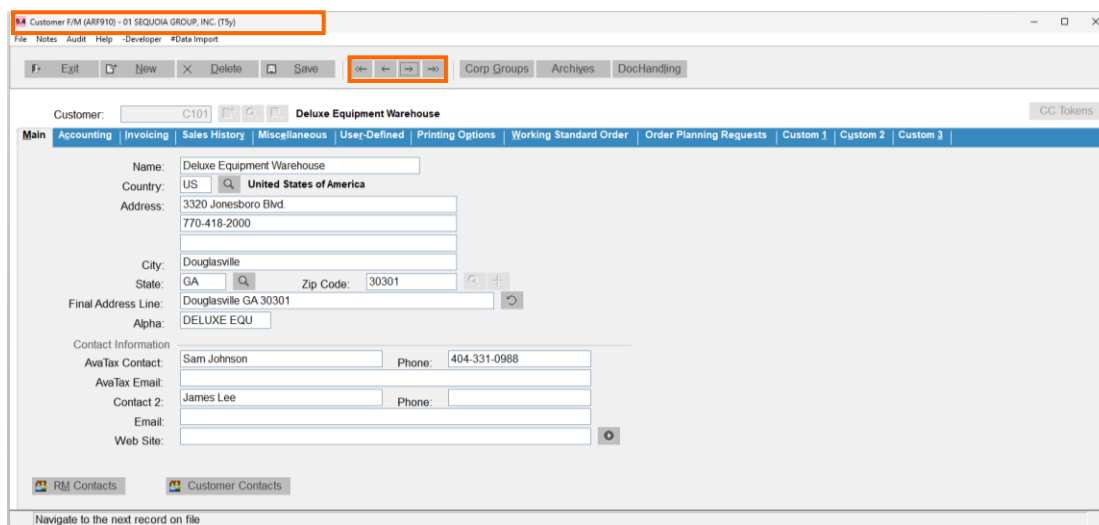
- The alert triggers when the **C100** record is successfully opened. The alert is then displayed in the **Alert Control Center**.



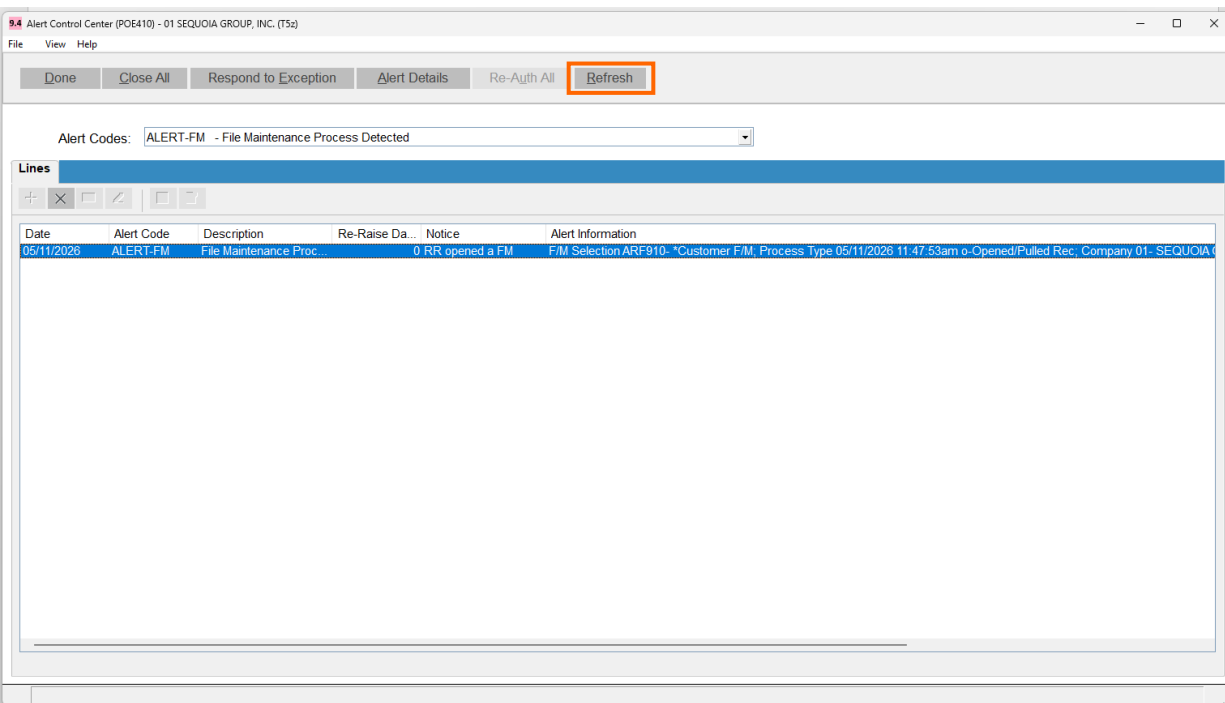
- The alert details automatically provide, among others, the date and time the record was opened, the process type (in this case, 'opened'), along with the company and user.



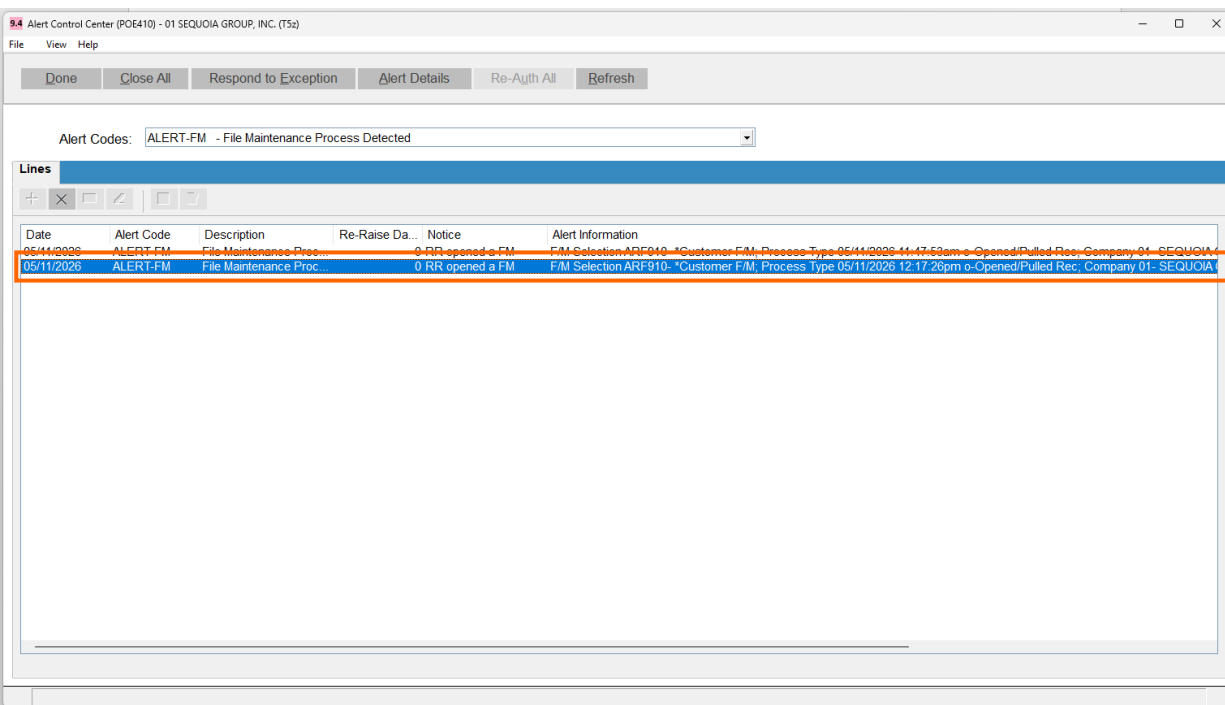
- Return to **Customer F/M** and move between customers using the arrows.



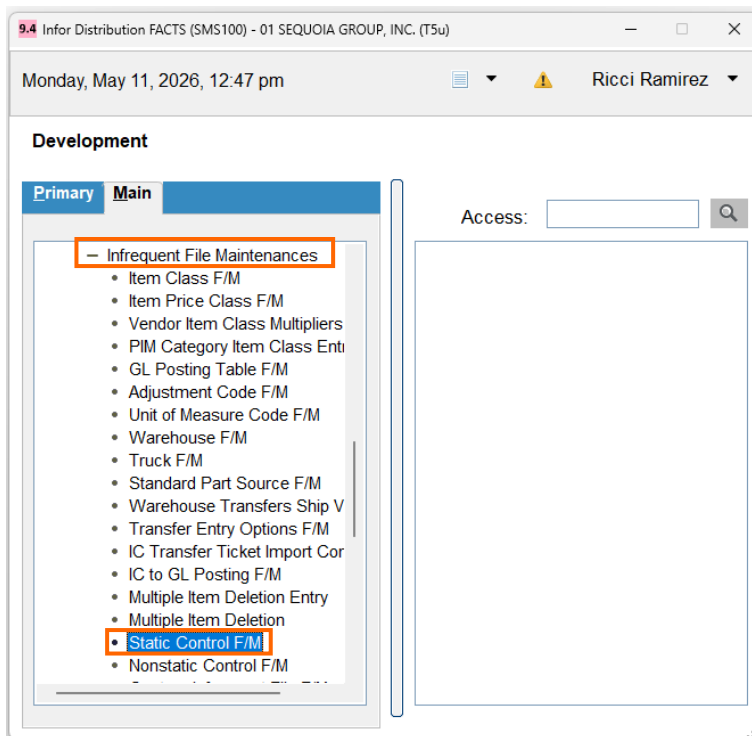
- Return to the **Alert Control Center** and click **Refresh**.



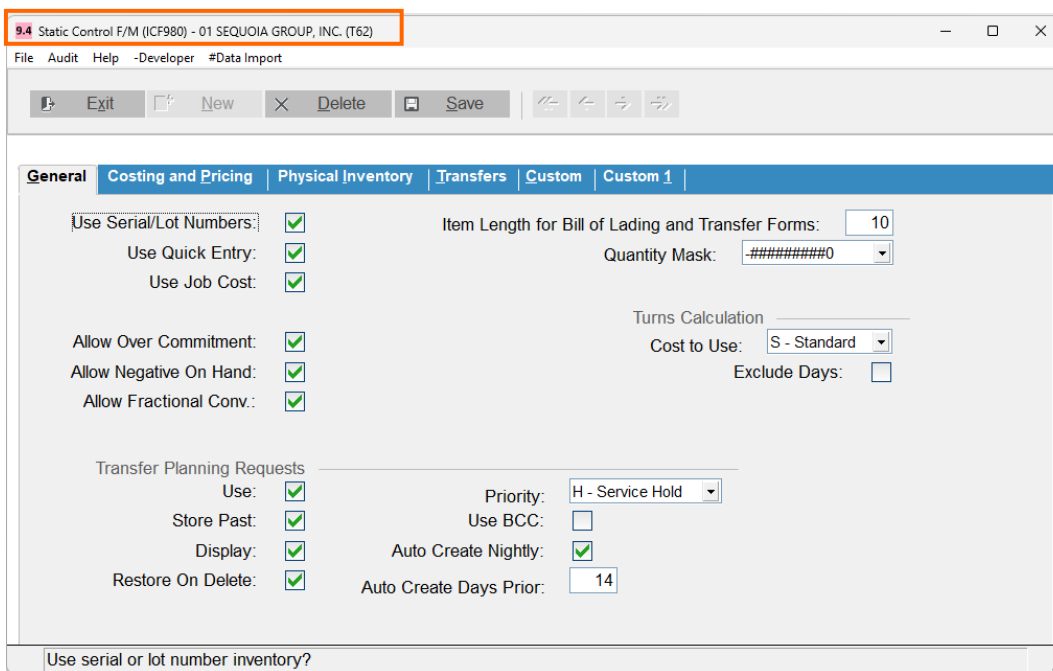
- The alert is displayed in the **Alert Control Center**. This alert does not only trigger when a specific record is manually entered or searched. It also tracks every record opened through the system's navigation arrows while moving between files.



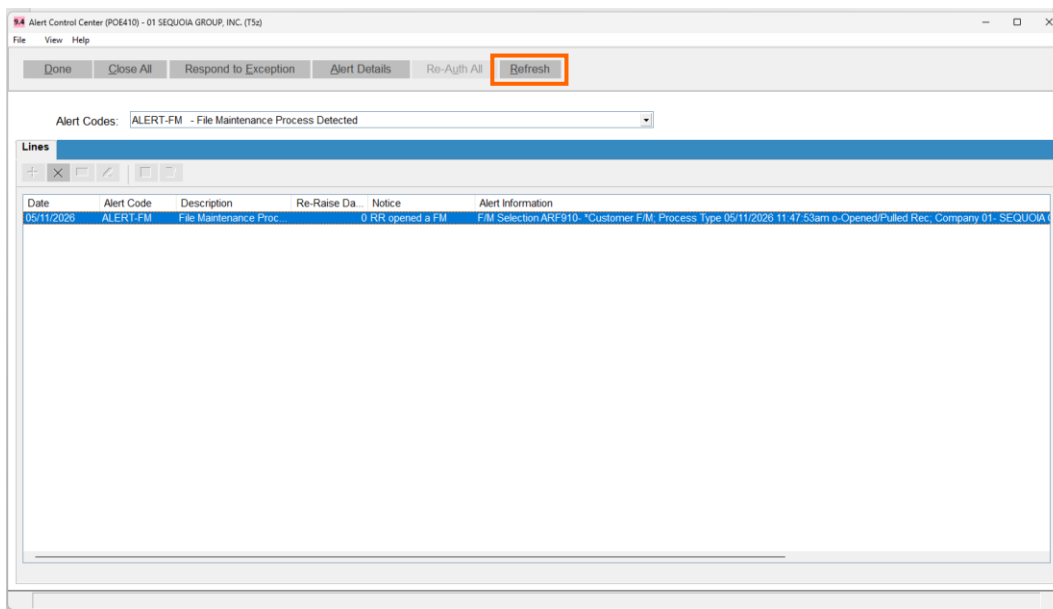
- For the next example, navigate to **Inventory Control** → **File Maintenances** → **Infrequent File Maintenances** → **Static Control F/M** (program ICF980).



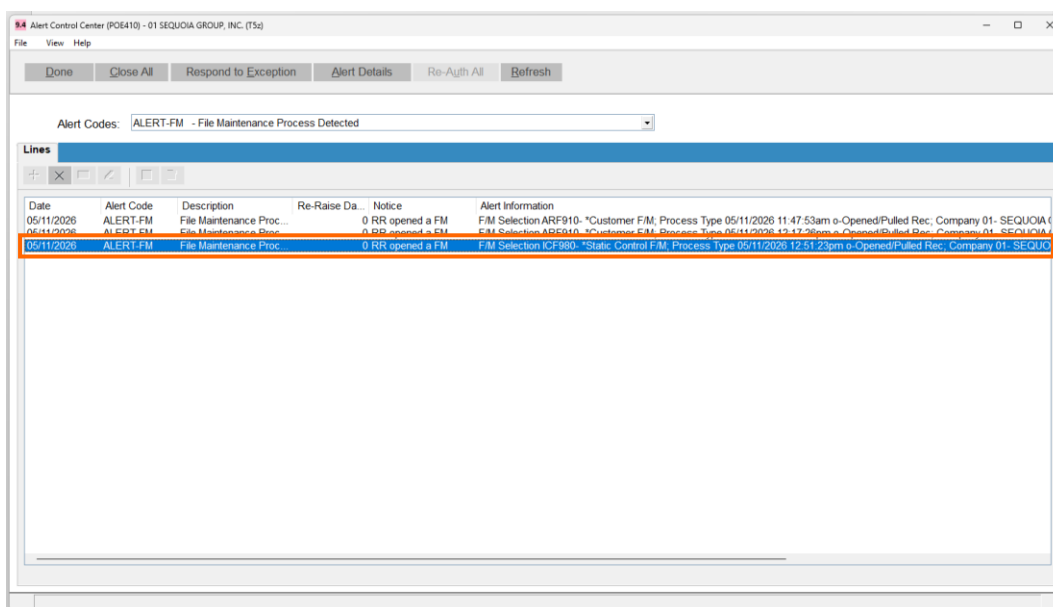
- Open **Static Control F/M**.



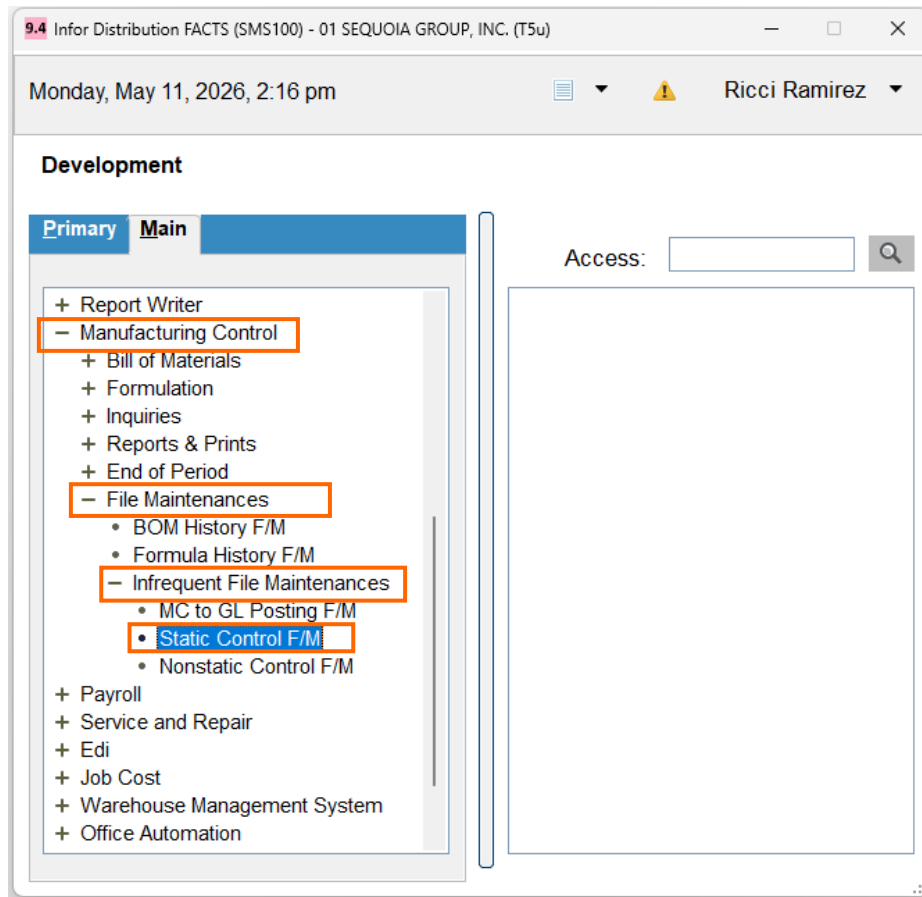
- Because the static control file contains only one record, the file opens directly without requiring a key or document search.
- Return to the **Alert Control Center** and click **Refresh**.



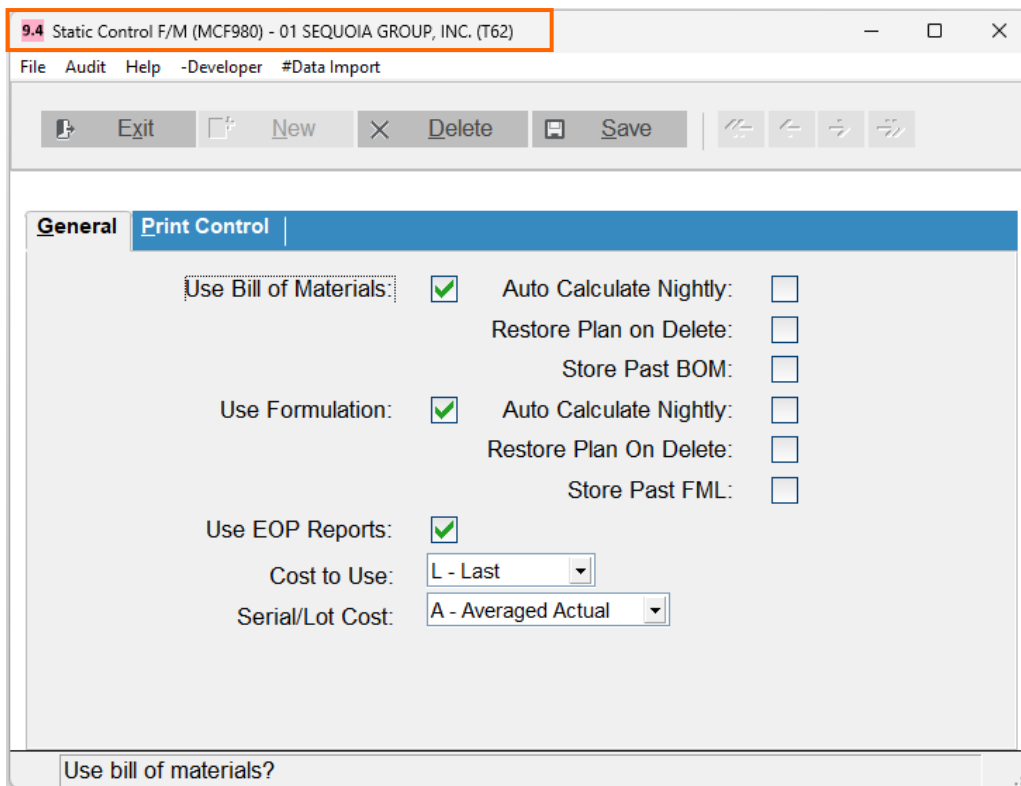
- Since the file contains only a single record, the system automatically loads it when the program starts, which immediately triggers the alert.



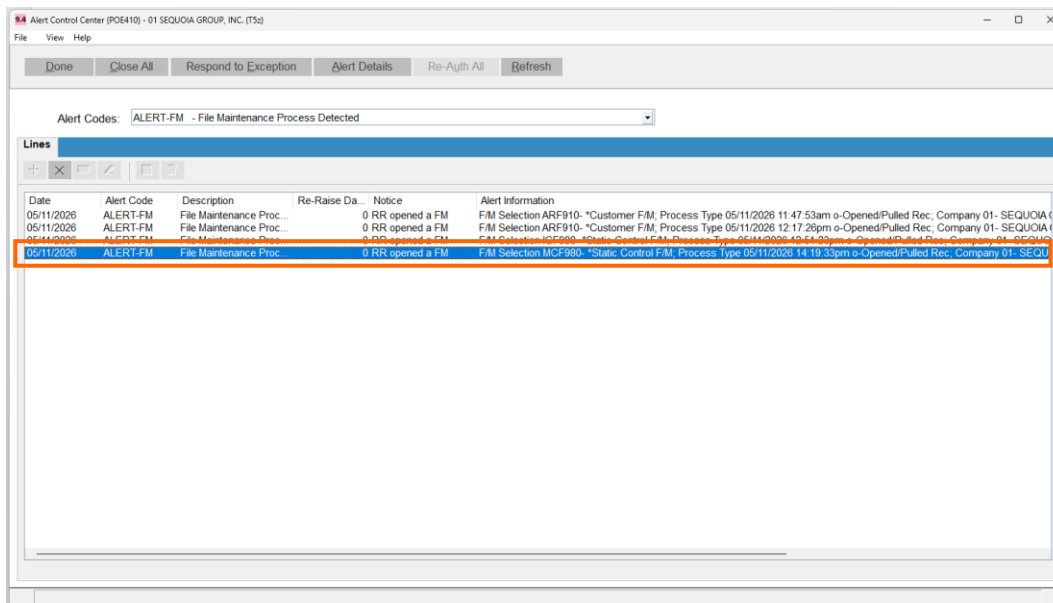
- For the next example, navigate to **Manufacturing Control** → **File Maintenances** → **Infrequent File Maintenances** → **Static Control F/M** (program MCF980).



- Open **Static Control F/M**.



- Click **Exit**.
- Return to the **Alert Control Center** and click **Refresh**.
- The window displays a new alert automatically generated for **MC Static Control F/M**.



- In the **System Alerts Dashboard**, use a double-click to open **ALERT-FM**.

System Alerts Dashboard (ALE100) - 01 SEQUOIA GROUP, INC. (T5x)

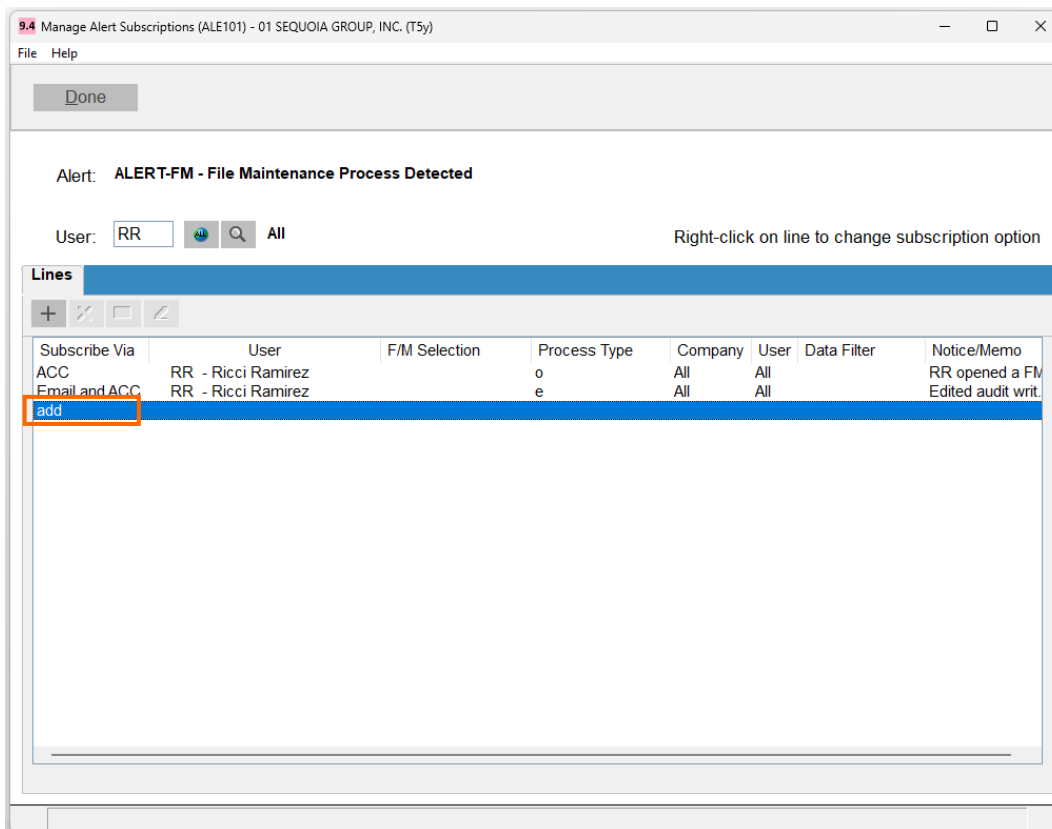
File Help

Done Alert Details Manage Subscriptions Security Codes

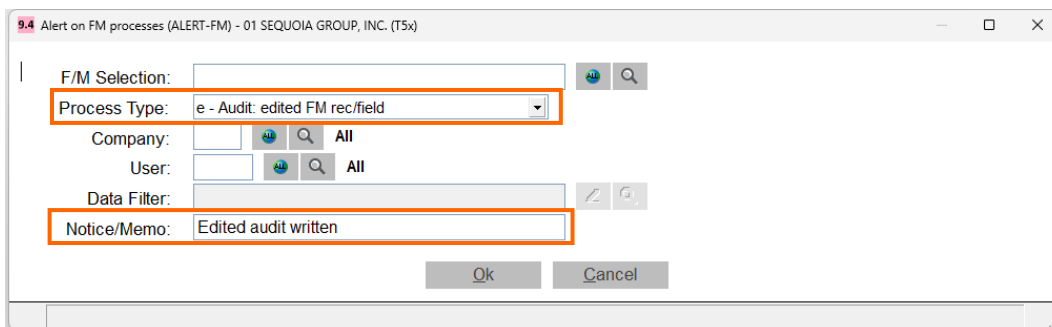
User: RR Ricci Ramirez Filter: detec

Alert	Description	# Subscriptio...	Security Code	Active	Re-Raise Da...
ALERT-3LE	3 Level Entry Process Detected	4		Yes	0
ALERT-FM	File Maintenance Process Detected	1		Yes	0
FLDCHANGE	Field Change Detected	1		Yes	0
PGMLAUNCH	Program Launch Detected	0		Yes	0

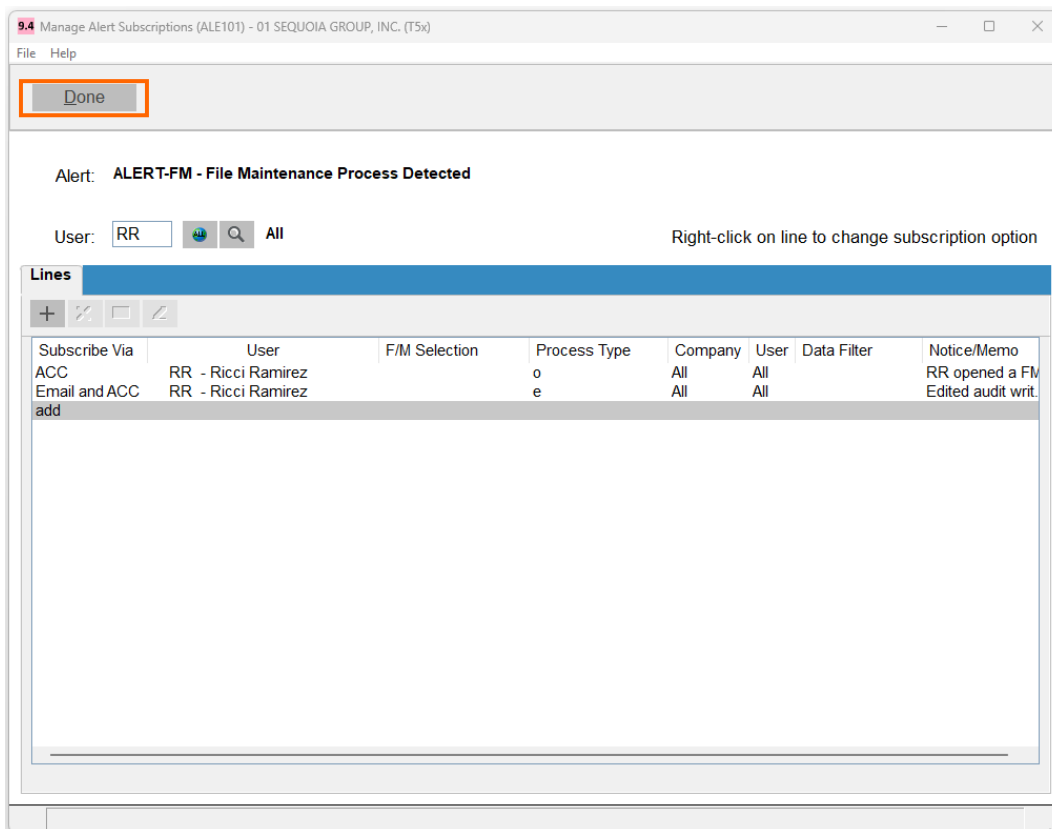
- This example tracks an audit edit, meaning an audit record is written when a field is edited.
- Click **add**.



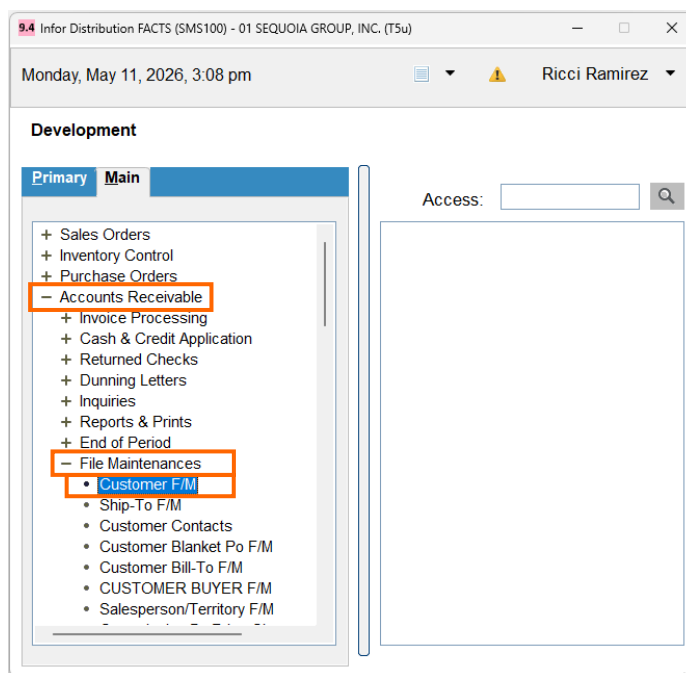
- In this example, **Process Type** is set to **e-Audit: edited FM rec/field**, and **'Edited audit written'** is entered in **Notice/Memo**. The action is confirmed with **OK**.



- Press **Done**.



- Navigate to **Accounts Receivable** → **File Maintenances** → **Customer F/M** (program ARF910). **Customer F/M** is selected because the file already has auditing enabled.



- Open **Customer F/M (ARF910)** and click **View All Audited Files**.

Customer F/M (ARF910) - 01 SEQUOIA GROUP, INC. (T5y)

File Notes Audit Help --Developer #Data Import

Change Audit Settings For This File

View Audited Changes To This File

View All Audited Files

Change Audit Settings For This File

CC Tokens

Main

Purge Audit Records for Files by Date

Name: _____

Country: US United States of America

Address: _____

City: _____

State: _____ Zip Code: _____

Final Address Line: _____

Alpha: _____

Contact Information

AvaTax Contact: _____ Phone: _____

AvaTax Email: _____

Contact 2: _____ Phone: _____

Email: _____

Web Site: _____

RM Contacts Customer Contacts

Enter the customer number, F1-Next, F2-Search

- The **View All Audited Files** window shows all audited files. Locate **ARCUST** in the list.

9.4 View All Audited Files (SME018) - 01 SEQUOIA GROUP, INC. (T5y)

File Help

Exit View Audit Purge Audit

All files listed here are currently being audited. All files NOT listed are not currently being audited.

File	Description
A2CBSC	Customer Bonus Class
A2CBUY	Valid Customer Buyers
A2CCON	Customer Contacts
A2CTYP	Customer Contact Type File
A2DLPC	Dunning Letter Print Control
A2INPC	AR Invoice Print Control
A2SPRC	Statement print positions
ACCNTL	ARCHIVE CONTROL
ACINDX	ARCHIVE INDEX FILE
APRHIS	REGISTER HISTORY
APSTAT	STATIC CONTROL
APTCDS	AP Terms Codes
APVEND	VENDOR MASTER FILE
ARA	AGING INFORMATION/CONTROL
ARAJCD	Adjustment codes
ARC	CASH RECEIPTS INFORMATION/CONTROL
ARCSMP	Cash Receipts Elec. Payment Map File
ARCUST	AR Customer Master File
ARD	DUNNING LETTERS CONTROL
ARDEFT	Customer Defaults Record
ARDUNL	DUNNING LETTER TEXT
ARG	GL POSTING TABLES
ARN	Nonstatic Control

- Press **Exit**.
- In this example, customer **C01** is selected, and **'something new'** is entered in the **Address** field.

- Click **Save** and then click **Exit**.
- Return to the Alert Control Center and click Refresh.
- Return to the **Alert Control Center** and click **Refresh**. The window now displays an alert for each field that was changed. Opening the extended alert details shows the date, time, impacted file, and the specific key (C101). The details also include the field alias, the original value, and the new value entered.

In Code	Description	R.	Notice	Alert Information
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e - Audit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 found_slip*, NoticeMemo Edited audit written
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e - Audit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 gp1_coma_jmh*, NoticeMemo Edited audit w...
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e - Audit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 awb_pay_bill*, NoticeMe...
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e newAudit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 address_something new - NoticeMemo Edited audit written
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e newAudit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 Douglasville Douglasville Alabama...
ERT FM	File Maintenance Proc...	0	Edited audit written	FM Selection ARF910 - Customer F/M, Process Type 05/11/2028 07 11 10am e Audit Edited RecField, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 gener_discov*, NoticeMemo Edited audit wr...
ERT FM	File Maintenance Proc...	0	RR opened a FM	FM Selection ARF910 - Customer F/M, Process Type 05/12/2028 07 10 46am o - Opened/Pulled Rec, Company 01 - SEQUOIA GROUP, INC., User RR - Ricci Ramirez, Data File ARCUST01 C101 - NoticeMemo RRR opened a FM