

Customer Operations Suite

The Fourth Shift Customer Operations Suite gives users advanced functionality in the areas of customer order entry, price books, and sales analysis.



Overview.

This suite helps manufacturers improve customer service by providing easy access to customer information, product pricing, customer credit status, online available-to-promise values, and sales reporting to assist with analyzing your sales by product lines and customers.

Benefits.

The Customer Operations Suite provides you with increased:

- **Efficiency:** Simplify processes, such as order entry and tracking, so customer orders are handled more efficiently
- **Flexibility:** Define prices in the manner that fits your business with flexible options and multiple criteria
- **Analysis:** Access the information you need for forecasting, budgeting, market targeting, and sales analysis

Features and functions.

Order entry.

Fourth Shift order entry simplifies record keeping and analysis of customer orders, thereby helping your staff to provide a high level of customer service. Order entry functionality allows you to:

- Maintain and analyze customer order activity completely online, including creating new customer orders, modifying existing orders, and printing order acknowledgments
- Verify the availability of ordered items—at the time of order entry—prior to making shipment promises
- Instantly recalculate the available-to-promise status to reflect the latest information in the system
- Keep track of customer details using catalog items to cross-reference customer information with item master information and display the customer's item information, description, and unit of measure on order acknowledgments

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- Print reports in either your own local currency or the customer's currency when using multi-currency management and selling to customers in other countries
- Enter and print customer or order-specific extended text messages on order acknowledgments, add global text messages, such as standard terms information, for printing on all customer orders; extended text messages can be up to 2,500 characters per page and up to 99 pages in length
- Apply discounts, taxes, and commissions to each line item.
- Automatically calculate order totals and check the customer's credit limit

Advanced price book.

The Fourth Shift advanced price book is used to define price books and the items contained in each price book, as well as for the assignment of price books to customers. With interactive access to relevant price information, you can provide more effective customer service during order entry. Advanced price book functionality allows you to:

- Easily add groups of items to a price book based on multiple selection criteria, copy price book contents to another price book, either with the existing price information or with user-specified breakpoint settings
- Define prices based on list price, standard cost, user-specified set of cost data, an absolute amount, or any combination of these approaches to fit the system to your pricing strategy
- Establish a different pricing formula, if desired, for each item in a price book and each breakpoint for an item
- Create breakpoints for items within a price book that can be totally independent; you can have an unlimited number of quantity breakpoints
- Assign price books to customers based on market segments, geographic region or other customer grouping criteria appropriate to your marketing strategy, you can also have customer-specific price books
- Reflect valid price book usage based on the customer's in- and out-effectivity date; you can reflect pending price book changes and special promotions, and access this information interactively during order entry to provide effective customer service
- Suggest better pricing opportunities for your customer, due to promotions or pending price changes, because the system automatically recommends the lowest possible price based on the most current price book, the item being ordered, and the order quantity
- Define price books using either standard item master or catalog items; catalog item information includes a 25-character part number and a catalog item description, cross-referenced to your item master; catalog items are catalog-specific

- Set-up price books to use your local currency or any of the foreign currencies defined in your system; when taking an order, the system will automatically display the correct price in the appropriate currency based on the controlling currency established for each customer.

Sales analysis.

Fourth Shift sales analysis helps manufacturers manage cash flow and gross profits, and can be used to analyze customer buying patterns as well as payment history. The module can be tailored to your evaluation and reporting needs. Sales analysis functionality includes:

- Comprehensive and flexible sales, and profit reporting at detail and summary levels
- Extensive historical data that helps you predict and plan for future business cycles, and growth
- Information that enables you to analyze customer buying habits by product line, size, geography, industry, and many other user definable criteria
- Bookings and commission tracking so you know "who, what, when, and for how much"
- Twelve sample reports that can be used as guides for developing custom inquiries and reports
- SQL reporting services

To learn more about how the Fourth Shift Customer Operations Suite can enhance your manufacturing business, contact your Fourth Shift representative or visit www.fourthshift.com.

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