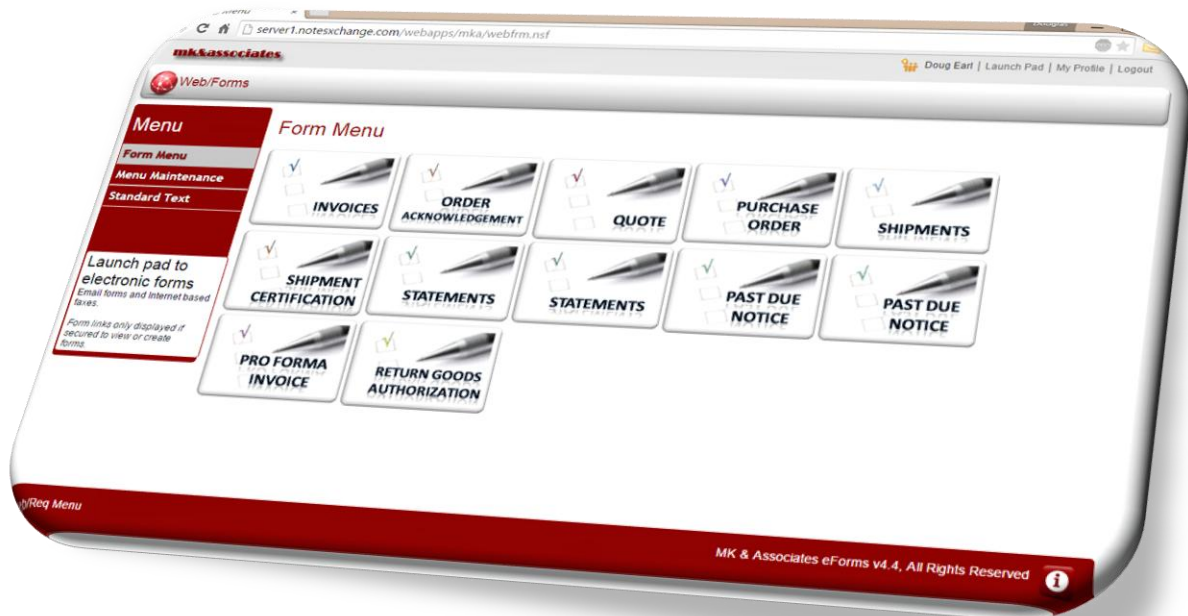


# Web/Forms Automation System for InforXA

## General Overview

The Web/Forms Automation System is an easy, AUTOMATED system that creates and sends electronic forms and/or email messages based on data in Infor XA and other systems. Choose from the many standard forms, such as a PO or Invoice, or create your own custom form.

Communicate better and more frequently with customers and suppliers—less expensively—by letting your systems do the work for you. Also, track and retrieve what was sent—quickly and easily—with a complete electronic history of each form.



## Common Issues and Problems

Forms are necessary to interact with your customers and suppliers, but generating and sending them (and tracking them) can be very time-consuming and costly.

### **Here are the top 10 issues we hear from our customers about forms:**

1. Don't like the way they look. Too confusing. Too much information we don't use.
2. We would like to send out purchase orders, acknowledgements, and advanced shipment notifications, but it is just too much work.
3. The cost of mailing and faxing is actually very high—tens of thousands of dollars a year.
4. We still file away a paper copy of every invoice, PO, and other forms. Filing cabinets take up an entire room and tracking down forms is time-consuming.
5. When our customer service group emails invoice or PO information, no one else knows what was sent to the customer or supplier, or when.
6. Customers keep asking for invoices to be re-sent. Scanning and emailing takes a lot of time.
7. We want to send out past due notices and/or statements more than just once a month.
8. We need a special pro forma invoice to go with overseas shipments.
9. We need a return goods authorization form that has our custom information on it.
10. COM or Release Accounting is where we enter and maintain orders, but the technical data is in a database. How do we get our technical specs on our order acknowledgement without a lot of programming?

## Major Benefits/Business Case

WHY use the Web/Form System? It automates tasks. It saves time. It saves money.

### Reduce Cost

- Eliminate forms, envelopes & postage
- Reduce printing
- Eliminate fax calls

### Increase Productivity

- Automate the delivery of the PO, Invoice, Order Acknowledgments, Shipment Notification, and Past Due Notification
- Access online form history quickly and easily
- Eliminate the print process and need for spool files

### Be Proactive

- Send Order Acknowledgements when an order is entered
- Send a Shipment Notice when the product ships
- Send Past Due Notices as soon as Invoice is overdue

### *One Web/Forms customer reported:*

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- ❖ “So far just this year we’ve processed”:
  - Over 37,000 Invoices
  - Over 21,000 Order Acknowledgements
  - Over 26,000 Past Due notices
  - Over 1,8000 Purchase Orders
  - Over 20,500 Shipment Notifications



**DELIVERED WITHOUT A SINGLE STAMP!**

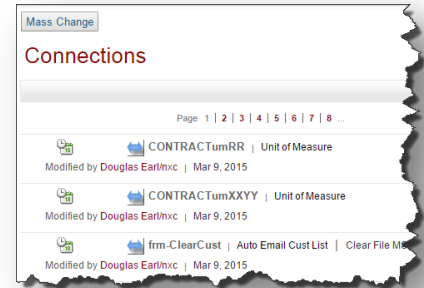
**OVER \$50,000 IN POSTAGE SAVINGS JUST THIS YEAR.**

**OUR A/R HAS NEVER BEEN BETTER!**

## Key Application Features

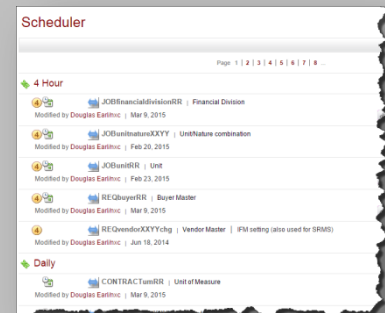
### ❖ Connect

The ability to connect to information from almost anywhere. For example: Infor XA, Oracle db, Microsoft Access, or even Excel. Using SQL/JDBC/ODBC, the most universal connection standards, information can be extracted and used to create and email electronic forms, alerts, and reports.



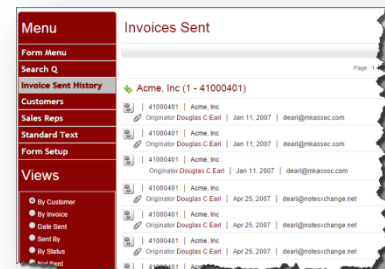
### ❖ Control

Send dynamic email messages manually or automatically on a schedule – from once-an-hour to once-a-week. Customer and/or supplier address books are provided that synchronize with XA. Maintain information in one place. Send to multiple customer or supplier contacts, and even send a copy to the sales person or buyer. The system can “check” for data triggers of when to send alerts, forms or reports. For example, send a **shipment notification** whenever a shipment is made or an **inventory alert** when the inventory level drops below the minimum.



### ❖ Auditable

Retains a copy of the rendered email message just the way it was sent. Provides lookups by date sent, by customer, or supplier, and more. Easily re-send a copy of any message.



### ❖ Forms

Merge information into graphical full color forms that can be emailed and printed. When the customer or supplier opens the email, they see **your** form with **your** logo, not an attachment or plain text message. Jazz up your information for customers, suppliers, and even for your own sales force, managers, or employees.



## ❖ Ready-to-Use Standard Forms

These Web/Form “modules” have already been integrated with Infor XA for quick implementation that takes just two or three days. Examples of some of these standard forms are listed at the end of this document.



### Order Acknowledgments

- Send to separate email address
- Copy sales rep setting per customer



### Shipment Notifications

- Send to separate email address
- Copy sales rep setting per customer



### Invoices

- Send to separate email address
- Copy sales rep setting per customer



### Purchase Orders

- Send to multiple emails
- Copy buyer setting per supplier



### Statements



### Past Due Notices







### ❖ Centralized accessibility and form management

When customer service or buyers scan and email forms from their desktop today, those forms likely end up in private email.

On the other hand, Web/Forms provides a centralized “form management system” where every form sent is kept in history for future reference and where it can easily be re-sent if needed.



### ❖ Role-based security

Manage security by groups and roles. Employees with different authority see different menus and options.

Need finance able to send invoices, but customer service to only view? No problem.



### ❖ Designed for web access

Web/Req is created uniquely for the web with open source technology, like dojo, for up-to-date features such as pop-up search and type ahead. Built on the powerful IBM XWorks platform, it provides choices for flexible and scalable hardware solutions.





## ❖ Real Automation

### Not spool file dependent!

The Web/Forms system creates and sends forms every hour to once-a-month based on a schedule you control.

Send Order Acknowledgements hourly and Invoices nightly. Send Past Due notices weekly and statements monthly. Just process your orders and invoices like you normally do – the Web/Forms system does the rest.

Forms are built from the data processed in XA or other systems, not on spool file copies of forms like most other form systems. This means you have full flexibility to add or remove information on the form – not just what happens to be in the spool file.

Web/Forms is NOT an overlay so you can truly customize your form and move information where you want it to be. Be creative with color.



A web based system that integrates form design, automation, and email delivery. The system provides new and greater efficiencies. Communicate with customers and suppliers faster with significantly less cost using a system you already have – email.

**Sample Standard Web/Forms**

Invoice



*Increase Efficiency and Effectiveness*

**MK & Associates**  
 1785 R.W. Berends, S.W.  
 Grand Rapids, MI 49509  
 Phone: 616.532.5006  
 Fax 616.532.5859

**INVOICE**

Invoice: **609**  
 Date: 04/08/2009

**PLEASE REMIT TO**

**MK & Associates**  
 1785 R.W. Berends, S.W.  
 Grand Rapids, MI 49509

**SOLD TO:** Radio Shack Globals  
 445 Main Street  
 Atlanta, MI 30067

**SHIP TO:** Radio Shack Globals  
 445 Main Street  
 Atlanta, MI 30067

Due On	Terms
05/08/2009	2% 10 Net 30

Customer	Order	Purchase Order Number	P.O. Rev
101	11109		

Shipping Instructions	Carrier	Ship Date	Ship Weight
Sold to shipping instructions		04/08/2009	10LB

Description & Comments	Quantity	U/M	Price	Amount
1200 - MOTHERBOARD, 166 MHZ Backordered quantity - (1) Test Description 1	1	EA	\$5.00	\$5.00

Taxes			
			\$0.00
<b>Net Sales</b>	\$5.00		
<b>Misc Charges</b>	\$0.00		
<b>Freight</b>	\$0.00		
<b>Taxes</b>	\$0.00	<b>Amount Due</b>	\$5.00

**Order Acknowledgement**



*Increase Efficiency and Effectiveness*

**MK & Associates**  
 1785 R.W. Berends S.W.  
 Grand Rapids, MI 49509  
 Phone: 616.532.5006

**ACKNOWLEDGEMENT**

Order No.: **11085**  
 Date: 06/30/2008

**SOLD TO:** Mike's Test Customer  
 1785 R.W. Berends  
 Grand Rapids, MI 49509

**SHIP TO:** Mike's Test Customer  
 1785 R.W. Berends  
 Grand Rapids, MI 49509

Terms	Purchase Order No	Total Weight
2% 10 Net 30	11233	20 LB

Carrier	Ship Date
	06/30/2008

Description & Comments	Quantity	U/M	Price	Amount
1200 - MOTHERBOARD, 166 MHZ Test Description 1	2	EA	\$1.00	\$2.00
1100 - PROCESSOR, 2.1 GHZ	1	EA	\$449.95	\$449.95
1201 - MOTHERBOARD, 200 MHZ	1	EA	\$1.00	\$1.00

		Special Chgs & Freight	ORDER TOTAL
<b>Total Net</b>	\$452.95		<b>\$452.95</b>

**Purchase Order**



**Increase Efficiency and Effectiveness**

**MK & Associates**  
 1785 R.W. Berends S.W.  
 Grand Rapids, MI 49509  
 Phone: 616.532.5006

**PURCHASE ORDER NUMBER**

P.O. #: **P000795**  
  
 Revision #: 0  
 Date: 09/02/2008

**VENDOR:** 008739

RADIO SHACK  
 925 COUNTY RD E. EAST #170  
 MN 55127

**SHIP TO:**

HI-TECH COMPANY - MAIN WAREHOUSE  
 3456 W WATER ST  
 OAKBROOK IL 60999

**Supplier Contact:** Douglas C Earl  
**Phone:** 616.885.0719

Ship Via	Terms	F.O.B.
Pemstar	Pemstar	Pemstar
Buyer	Buyer Phone/Fax	Buyer Email
Douglas C Earl	616.885.0719	doug@notesxchange.net

Please include our PO number and part numbers on packing slips for timely payment.

**ALL CUSTOM PARTS MUST COMPLY WITH THE LATEST PRINT REVISION.**

Items received prior to the due date specified on this PO will be treated as "Invoiced to MK & Associates" on the PO due date and paid accordingly.

Receiving Instructions - Ship Attn: Douglas C Earl

Qty	U/M	Part	Description	Catalog #	Delivery Date	Unit Price	Amount
1	EA	1105	MOUSE		deliver on 09/16/2008	\$5.0000	\$5.00

**TOTAL \$5.00**

Shipment Notification (ASN)



**Increase Efficiency and Effectiveness**

**MK & Associates**  
 1785 R.W. Berends S.W.  
 Grand Rapids, MI 49509  
 Phone: 616.532.5006

**SHIPMENT NOTIFICATION**

Order No.: **11109**  
 Shipment Date: **Wed 04/08/2009**

**SOLD TO:** Radio Shack Globals  
 445 Main Street  
 Atlanta, MI 30067

**SHIP TO:** Radio Shack Globals  
 445 Main Street  
 Atlanta, MI 30067

Terms		Purchase Order No		Total Weight	
2% 10 Net 30				10 LB	
Carrier		Transport Terms		Shipping Instructions	
				Sold to shipping instructions	
Truck & Trailer Number		Pro Bill Number		Bill of Lading #	
				62	
				Shipment ID	
				01-0000430	
Description & Comments			Quantity	BO Qty	U/M
1200 - MOTHERBOARD, 166 MHZ Test Description 1			1	1	EA

Statement

[NEW! Combination Marketing and Jasper Reports PDF](#)

Instead of sending the same form in email and PDF, send a *cover email* and PDF form. Include in the *cover email* the latest company or industry information, marketing pitch or customer appreciation comments. Standard text is easy to modify so you can change it every month if you want to.

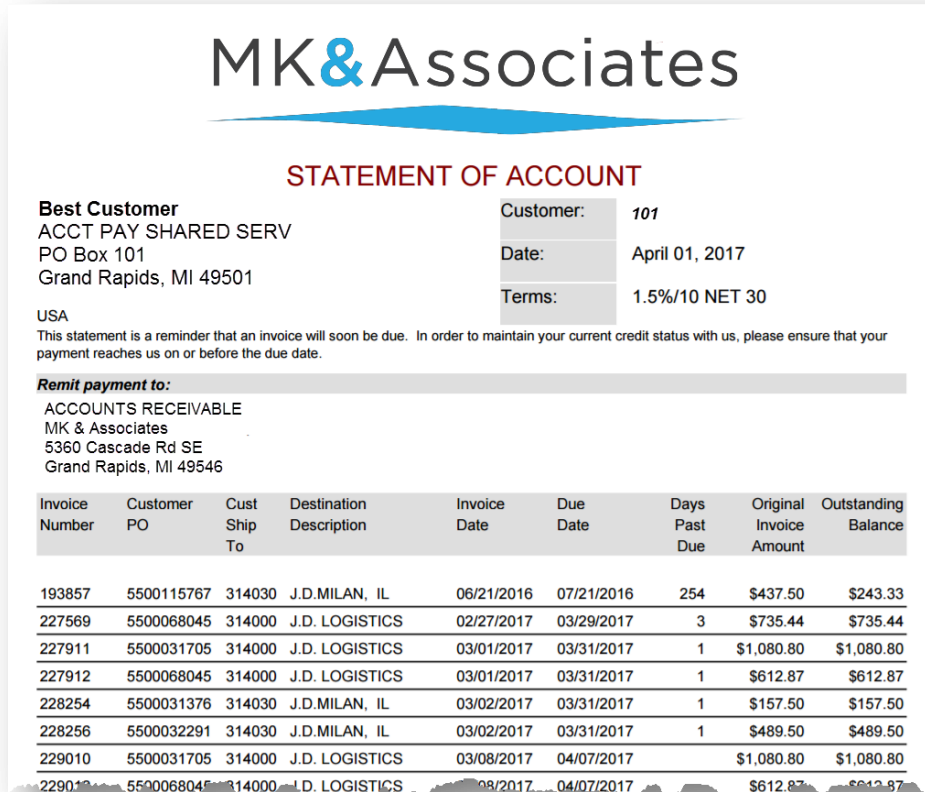
Here is an example of an International Finance Statement *cover email* and PDF statement with full pagination including page headers and footers for companies who still print. The PDF format is now universally accepted for document management systems as well.

Present a pixel perfect form worthy of your companies' professionalism and quality.

Cover Email



Statement PDF



<b>MK &amp; Associates</b>				<b>For:</b>				
STATEMENT OF ACCOUNT				Best Customer 101				
Invoice Number	Customer PO	Cust Ship To	Destination Description	Invoice Date	Due Date	Days Past Due	Original Invoice Amount	Outstanding Balance
232189	5500075854	314000	J.D. LOGISTICS	03/29/2017	04/28/2017		\$906.90	\$906.90
<b>Current</b>		<b>30 Days</b>	<b>60 Days</b>	<b>90 Days</b>	<b>Over 90</b>	<b>Total Outstanding</b>		
\$9,330.07		\$3,076.11	\$0.00	\$0.00	\$243.33	<b>\$12,649.51</b>		

**Past Due Notice**



**PAST DUE NOTICE**

**Top City Inc. / J&S Truck Acc**  
 2970 N Dupont Hwy  
 Dover, DE 19901

Date: 07/27/2009

The following invoices show open on your account and **ONE OR MORE ARE PAST DUE** on your account at this time.  
 To ensure the continuance of your existing credit terms, immediate payment must be received on these invoices.

**Remit payment in US Dollars to:**

Your Company, 555 Industrial Drive, Anywhere, MI 49555

Invoice #	Customer PO	Invoice Date	Due Date	Days Past Due	Invoice Amount
509689 CD 19813 Customer order	Bowden Gary	06/11/09	07/11/09	16	\$550.00
510037 CD 20178 Customer order	Dennis Gary	06/26/09	07/26/09	1	\$668.00
510095 CD 20232 Customer order	Golt Adam	06/30/09	07/30/09		\$514.00
510096 CD 20243 Customer order	Gooss Dick	06/30/09	07/30/09		\$667.00
510164 CD 20283 Customer order	Adams Bill	07/07/09	08/06/09		\$637.00
510262 CD 20376 Customer order	Golt Adam	07/10/09	08/09/09		\$77.85
510291 CD 20430 Customer order	Ralkin	07/13/09	08/12/09		\$668.00
510462 CD 20602 Customer order	Replacement 510291	07/21/09	09/19/09		\$606.25
510463 CD 20603 Customer order	Hurst Dave	07/21/09	08/20/09		\$55.95
510515 CD 20676 Customer order	Mountaire	07/23/09	08/22/09		\$514.00