System-Wide Features

POWER/SHIFT

PowerShift is a full-featured, comprehensive enterprise resource planning (ERP) system designed to manage and control all aspects of the enterprise. You configure (and reconfigure, as desired) how you use PowerShift to support simple or complex business environments. PowerShift is FLEXIBLE. It supports lean manufacturing concepts with or without Kanban. It supports make-to-stock, make-to-order, configure-to-order and engineered-to-order items. Forecasts or master scheduled orders can drive the planning system. Production employees enter completion data in real time to provide complete visibility into shop floor operations. Radio frequency (RF) data collection is supported and PowerShift includes integration to other systems. PowerShift is sold as a complete package: no surprises with additional purchase requirements after the implementation starts. Rapid system implementation is a proven process, and total data migration makes PowerShift the leader and the best choice for a cost-effective and successful ERP implementation.

| System Options Maintenance | Data Dictionary Inquiry | Customer Service Inquiry | Workstation: 230 on Host: luci | AR Inquiry | Sales Order Summary | Inventory Status Inquiry |

CA-1   PowerShift   SP1   XEDI1   Drop File Interface Options - EDI   11/27/2012
Enterprise level

EDI Drop files active?
EDI administrator email address
Directory for seq files
Default user ID
Default shipping branch
Delimited or Fixed length?
Field delimiter
Use existing line numbers?
Skip price validation?
Use header date if line date is blank?
Use EDI pricing?
Use system pricing?
Use system pricing when zero?
Adjustment window (days)
Date wanted offset
Date promised offset
Expected ship date offset
Auto-obligate orders?
Drop directory
Archive directory
File prefix - sales orders
Polling interval
Skip customer item validation
Skip minimum order qty check

| System Options Maintenance | Data Dictionary Inquiry | Customer Service Inquiry | Workstation: 230 on Host: luci | AR Inquiry | Sales Order Summary | Inventory Status Inquiry |

CA-1   PowerShift   SP1   XOP1   Order Processing Options   11/27/2012
Enterprise level

Credit management active?
Display cost/margin in product config?
Print company name on sales orders?
Print company name on packing slip?
Update sales history by cust by item?
Allow address changes in order entry?
Create shipment when supply received?
Allow item substitution?
Default reason for customer credit hold
Default reason for credit limit hold   CREDT
Default reason for order limit hold
Credit release/hold permission   Y
Non-credit release/hold permission   Y
Order processing availability   A
Quote transfers to check ATP?
Popularity tracking active?
Calculate credit based on gross amount?
Default output device for online orders
Disallow overshipments in OC?
Send email on overshipment?
Allow entry of zero qty on order line   Y
Warn user if date not on shop calendar?
MDI import listing active?
MDI transfer listing active?
MDI required for SO confirmation

System options determine how PowerShift operates, enabling you to immediately adapt to changing conditions without costly consultants or programmers

[Modify] [Cancel] [Other info] [Print] [Reasons] [Mfg branch]
[Branch settings] [OK]

Sample Lookup

BLUI   Item number lookup

Sort by [Item no]

- Export dclr
- Invty cd
- **Item no**
- Material
- Pref vendor
- Prod cl
- Size
- Stk UOM
- Style
- Xref

○ Starts with
○ Contains
○ Restart at

[Advanced] [Refresh]

Item no		Stk UOM	Prod cl	Item type	Buyer			
100SUP		EA	FP	Finished good	AA			
101		EA	FP	Finished good	AA			
101-1	...int	EA	RM	MRP dependent item	AA			
101-2	...all point	EA	RM	MRP dependent item	AA			
101-3	...point pen	EA	RM	MRP dependent item	AA			
11011-0...	...int pen	EA	RM	MRP dependent item	AA			
	...rrywood	EA	CUST	MRP dependent item	AA			
11011-002	Lock assembly	EA	CUST	MRP dependent item	AA			
11011-003	Light fixture	EA	CUST	MRP dependent item	AA			
11011-004	Custom Hardware Kit	EA	CUST	MRP dependent item	AA			
11011-005	Hutch, cherrywood	EA	CUST	MRP dependent item	AA			
11011-006	Curio cabinet, cherry...	EA	CUST	MRP dependent item	AA			
11011-007	Marchaum serial numbered	EA	RM	MRP dependent item	AA			
		EA	CUST	Finished good				
		EA	CUST	Finished good	AA			
		EA	CUST	Finished good	AA	2,000 CA-FG	M1	
		SH	RM	MRP dependent item	BUY	217 CA-INV	V10	
		BARS	RM	MRP dependent item	BUY	1,913 CA-INV	F1	
		EA	RM	MRP dependent item	AA	-4 CA-INV		
		EA	FP	Finished good	AA	1 CA-FG		
		EA	RM	MRP dependent item	AA	-4 CA-INV		
		EA	RM	MRP dependent item	AA	-4 CA-INV		
		EA	RM	MRP dependent item	AA	-1 CA-INV		

Find Data Quickly with Lookups

- **Common lookup routines are used throughout PowerShift**
- **Each user determines how lookups are performed; one user might look for items by number and another by description or buyer**
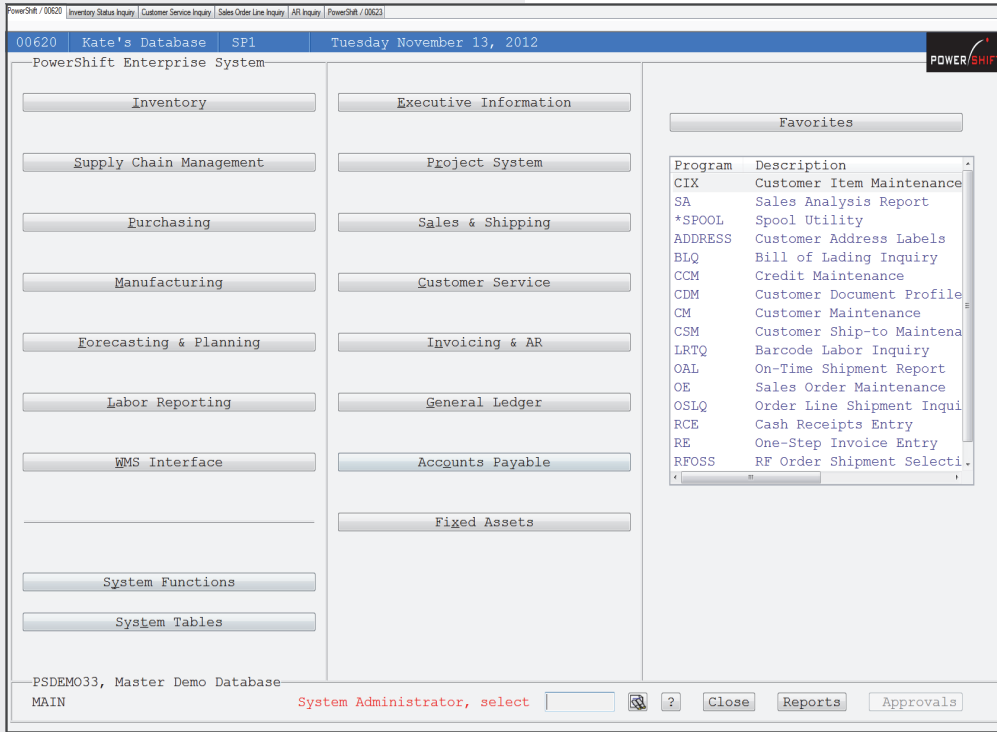- **Filters limit display to open orders, active records, etc., as the user chooses**

- **Drag & drop columns to see data presented the way you want it**
- **Size columns as desired**
- **Use scroll bars to see more**

[Select] [Cancel] [Page up] [Page down] [View image]

POWER SHIFT

The PowerShift Main Menu
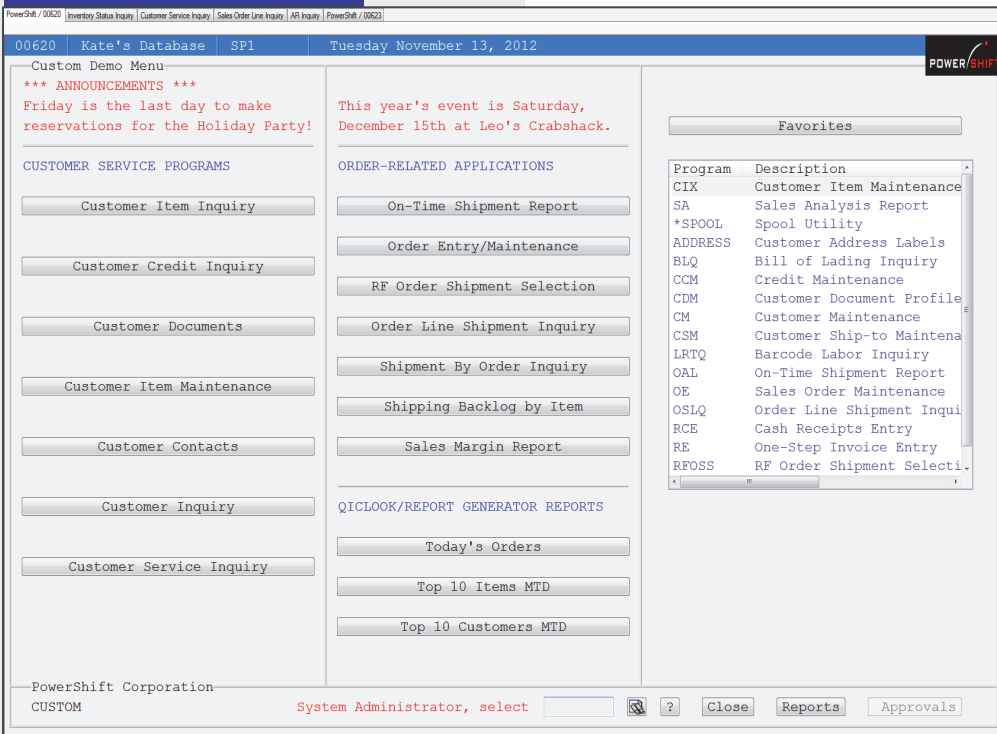
Standard User Interface

- Accepts point-and-click as well as keyboard input.

- Accelerator keys speed keyboard entry.

- Terminology in all applications is consistent; definitions are provided in the online glossary.

- F1 displays online help, including:
  - Overviews by functional area (e.g., inventory, general ledger, purchasing).
  - Background information provides higher level details about functions and includes formulas for calculated fields.
  - Road map outlines job streams so you can see the operational sequence of related programs.
  - Detailed help defines fields, acceptable entries, and possible actions available within a program.

- Each user can define favorite applications for most efficient execution.

- Notes can be transferred from one application to another without rekeying; transfer can be automated.

Navigation

- Run a program by clicking a menu button, pressing its accelerator key, or by entering the program name directly.

- Select field values from lists you create to standardize entry.

- Lookup field values from drop-down menus.

- Jump from one program to another without re-entering the record information.

- View supporting information with the click of a button or by pressing an accelerator key.

- F1 displays help for the currently running program.

Sample Custom Menu

Customizable Menus

- **Pass parameters to and execute custom reports**

- **Design menus by work activities or by job stream**

- **Users manage their own favorites**

- **Favorites re-sequence by frequency of use**

- **Approvals button is active if user has approvals pending**

- **You control the initial menu displayed for each user**

POWER SHIFT

Flexible Reports & Inquiries

- Every report and inquiry offers runtime, sort, selection and program options.
- Runtime options include the output device and whether or not selected options are printed on the report.
- Sort options include sort order, report breaks and whether or not to use totals only reporting.
- User-specified selection options.
- User-specified program options such as actual, average or standard costs.
- Date shortcuts can be used in options.
- Save selected options by user.
- View reports on the screen with the PDF viewer.
- Add comments and execute key word searches and forward and backward scrolling on displayed reports.

Inventory Sort Options

Runtime | Sort | Selection | Program | Program2

Sort options	Print order	Reverse order?
Branch		☐
Item number		☐
Product class		☐
Product subclass		☐
Inventory acct code		☐
Size		☐
Material		☐
Style		☐
Color		☐

Sales Order Selection Options

Runtime | Sort | Selection | Program

Selection options	From	To
Branch or branch grp	CA GROUP	California -- All Regions
Org or org group		
Customer number		
Item number		
Order number		
Currency		
Ship branch		
Expected ship		
Date ordered		
State		
Product class		
Customer name		

- **Save any PowerShift report multiple times with different sort, select & program options Example: Save different AR trial balance reports with aging by due date, aging by invoice date and another to list invoices that are 61 or more days late**

- **Date shortcuts (e.g., today, beginning of the month, end of month, etc.) minimize changes to selected/saved options**

Purchase Order Program Options

Runtime | Selection | Program

Program options	
Include history?	☐
Print sales tax licenses on PO?	B
Exclude closed PO lines?	☐
Exclude voided PO lines?	☐
Print engineering drawing number on PO?	☑
Print surcharge detail?	☐
Print GL account information?	☐
Print compliant manufacturers?	N
Certificate of compliance message	
Print demand order information?	☐
Print signature line at bottom of PO?	☑
Output for EPI import?	☐
Print UOM description?	☐
Print vendor item number	Y
Print P=Date promised or W=Date wanted	W

SQL Accessibility

Access PowerShift from:

- **Microsoft Excel**
- **Microsoft Access**
- **Crystal Reports**
- **any ODBC-enabled application**

Approvals

- You decide where approvals are required, including: purchases, sales orders, sales shipments, sales invoices, sales credit memos, bills of material and ECOs.
- You determine criteria that triggers that approval(s) is required.
- Approvals button on all of a given user's menus indicates the need for approval.

Email Integration

- Exceptions are emailed to appropriate parties for resolution.
- CC or BCC documents to any number of recipients.

Security

- You choose who can run what programs.
- Assign users to categories to simplify who accesses what.
- You decide who can update the general ledger.
- You decide the default menu for the user.
- You decide if the user can override their default branch group.
- You decide if the user can override their default printer assignment.

Order / Batch Numbers

- You decide how the number is generated.
- You decide the length of the number.
- Optionally include a constant as part of the number.

Job Scheduler

- You decide when reports are run.
- You choose how scheduled reports are distributed (e.g., via email, fax and/or printed to local or remote printers).
- Schedule GL registers and journal updates as well as reports.

User Fields

- User fields enable you to add fields to master files for custom data.
- You decide the size, type (e.g., alphanumeric, numeric, Y/N or date) and if an entry in the field is required or optional.
- Build tables to validate user fields.
- User fields are integrated into standard lookups.
- Print user fields on documents as desired.

Notes

- Master files include the ability to add up to 9999 lines of notes.
- Notes can be assigned as printing or non-printing and in addition the codes from 0-9 can be used for selective printing on specific document copies.
- A common user interface is used for the maintenance of all notes.

Addresses

- A common user interface is used for the maintenance of all address data.
- Enter the zip/postal code to bypass entry of city and state/province.
- State/provinces and countries are validated by a user-maintainable table.

Field Validation

- Many fields are validated against user-defined tables.
- Enter data directly or select from a displayed list.
- Fields are validated to ensure the entry of accurate data.

Date Shortcuts

- Numerous date short cuts for setting beginning-of-month or end-of-month or a set number of days in the past or future.
- Use date short cuts when saving report and inquiry options to eliminate need for periodic changes.
- A date can also be selected from a calendar or entered from the keyboard.

Document Management System

- You determine when the document is generated.
- You define document characteristics (e.g., logos, boiler plate text, duplex printing).
- You specify to whom and how documents are distributed (e.g., send a hard copy to the customer, fax the outside sales rep, and email copies to the affected buyers).
- Print custom fields and notes on documents.
- You can add custom labels or applications on a generated document as a standard part of the document setup.

PowerShift Supports Output to:

◆ **Printers** ◆ **Spoolers** ◆ **Email** ◆ **SQL/ODBC** ◆ **PDF** ◆ **HTML** ◆ **Text** ◆ **XML** ◆ **CSV** ◆ **Fax** ◆ **Excel** ◆ **EDI**

W W W . Q A N T E L . C O M
8 0 0 . 6 6 6 . 3 6 8 6