Enhanced XA Development
with
Enterprise Integrator
and
System Link

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Enterprise Integrator + System Link

• Included in Flex
• Development tools
• Deliver creative solutions to meet your unique requirements
  – New functions, integration, automation
Enterprise Integrator + System Link

- EI Business objects – XA and User Defined, business logic, custom transactions
- Publish and subscribe
- System-Link provides off-line load capabilities
Requirement-Drop Ship Cust. Orders

• Does not make sense to stock all items
• High costs to manage low volume items

Replace this:  
- Identify demand
- Create PO
- Receive items
- Stock items
- Pick items
- Ship items
- Invoice

With This:  
- Create Customer Order
- Invoice
Approach- Drop Ship CO’s

1. Flag ‘drop ship’ items with code in item master
2. At end of order entry, identify those items
3. Identify Vendor and price from Purchasing files
4. Use System Link to create PO
   - Pass customer information to PO
5. Vendor notifies when shipment occurs
   - Action to ‘receive’ enables 3 way match
   - Trigger to invoice
Development - Drop Ship CO’s

![Diagram of Infor ERP XA Power-Link interface]

- **XA**
- **Custom**
- **Presentation**

- **File**
- **Customize**
- **Navigation**
- **Help**

- **Default**

- **Infor ERP XA**
  - Customer Service
  - Engineering
  - Production
  - Materials
  - Procurement
  - Integrator
  - Environment
  - Tooling Management
  - RF Physical Inventory
  - Requisition Approval
  - Intercompany orders

- **Drop Ship**
  - Purchase Order Items
  - Purchase Orders
  - Customer Orders and Quotes
  - C.O. Holds
  - C.O. Line Items
  - Item Warehouses
  - Quotes
  - Scheduled Receipts
  - Shipment Notices
  - Drop Ship Control
  - Drop Ship Vendors
  - Drop Ship Transactions
  - Drop Ship ASN Transactions
  - Drop Ship Orders
  - Drop Ship Receiving
Development-Drop Ship CO’s

Vendor related information
Development-Drop Ship CO’s

CO PO workbench with error transaction object
Development-Drop Ship CO’s

Receive, Pick, Ship, Financials, Error Txns
Transaction object with Template
Requirement - Intercompany Orders

- Company has multiple locations
- Some plants use parts produced by other plants
- Some plants use XA....some do not
- Need an easy way for using plants to create/maintain PO’s and supplying plant to create/maintain CO’s.
- Need to make sure lead times are acceptable
Plants that use XA

- Using plant creates PO in Procurement Mgmt
  - Automatically create a CO for supplying plant
- Using plant adds line item to PO
  - Checks to ensure acceptable lead time
  - Adds CO line item for supplying plant
- Maintain PO allowed only if outside 2 weeks.

create/maintain PO’s and supplying plant to create/maintain CO’s.
Approach(es)-Intercompany Orders

Plants that don’t use XA

- Web access using Catavolt Extender Application
- Login to XA, initiate electronic requisition approval process (CISTECH solution)
- Approval of requisition creates PO
  - Checks to ensure acceptable lead time
  - Adds CO and CO line item for supplying plant
Approach(es)-Intercompany Orders

Solution

• When PO is created or maintained, System-Link will load the Customer Order, linking by user sequence and User defined fields

• Vendor Customer cross reference table for related information
Workbench for working with transactions
Special template to default values and identify as an intercompany order
Development - Intercompany Orders

Custom edits to check dates against lead time
Development - Intercompany Orders

Review errors and Reprocess from this object
Requirement-Better Supplier Comm.

- PO’s are sent, need to confirm supplier can meet delivery date or propose an alternative
- XA needs to reflect actual status
- Minimize maintenance
Approach-Better Supplier Comm.

- Supplier accesses web application using Catavolt XA Extender
- Presented with PO information
- Accept PO
  - Creates VA transaction
- Propose change: ½ of order will ship one week late
  - Reduce quantity of initial PO Line item
  - Create second PO line item with new date/quantity
Supplier has proposed new Dock Date and split Qty
Select Scheduled Receipt to process and click the Accept Supplier Proposal Action. SL does the rest.
Development-Better Supplier Comm.

Handle error messages returned by System-Link
Requirement - Automated Cust Orders

• Creation and maintenance of customer orders from large customer is time consuming
• Order information is available from their web site
• Automatically create and maintain customer orders in XA
• Minimize manual intervention
Approach- Automated Cust Orders

- Extract orders into CSV file
- Automatically create CO’s for new orders
- Automatically update existing CO’s if date or quantities change
  - delete all lines and reload with the new demand
Enterprise Integrator + System Link

- Future of XA Development
- Catavolt Extender adds to your toolkit
- What are you waiting for?
  - CISTECH can provide education or support pilot projects