



0.50
67,543.1
35,300.00
23,283.50
1,778,806.4



Reporting and Automation for Macola

Does your ERP solution provide you with tools to deal with increasing volumes of orders to maintain revenues without increasing costs? Today distributors and manufacturers are faced with supply chain pressures of compliance and delivery. WiSys Agility automation allows you to process higher volumes of Macola transactions in spreadsheets.

Agility Explorer is both an analytical tool and a transactional tool that can monitor data as well as act on that data. This business intelligence tool for Macola will help change data into helpful information and powerful knowledge. Agility Explorer works with Progression, Macola ES or Macola 10. It also comes with Design Studio which was used to create these solutions. If you know how to create Crystal Reports, you can learn to use

this tool to create your own automation solutions. With Agility Explorer and the WiSys Business Objects, for example, you can review purchase orders and then receive on multiple purchase orders, or you could confirm ship multiple customer orders.

Agility Explorer has the power to make your company far more efficient and productive by applying easy to construct components. Upper management users can utilize Business Intelligence Dashboard components and spreadsheet style grid components to monitor daily or weekly activity levels. Operational users can use Process Grid components to perform their jobs more quickly and efficiently. Using grids for viewing and processing transactions is very effective and Agility Explorer excels in this area.

Automation

20 Automation Applications provided with WiSys Agility



ORDER ENTRY		
OE Confirm Bill	OE Confirm Ship	OE Billing
OE Invoices	OE Invoice Void	OE Order Acknowledgement
OE Order Unbill	OE Unconfirm Ship	OE Pick Management
OE Desktop Console		
PURCHASE ORDER		
PO Receiving	PO Close Line Process	PO Receiver to AP Voucher
IM Reorder Advice – PO Create		
PRODUCTION ORDER PROCESSING		
POP Pick Tickets	POP Production Advice	
SHOP FLOOR		
SF Close Shop Orders	SF Report Operations	SF Scrap Reporting
SF Online Picking Automation		

OE Billing/Invoicing

This spreadsheet style grid allows you to bill multiple orders all at once.

STEP 1 Enter the freight amount, miscellaneous amount and Cmt's.

STEP 2 Press the Bill button and an option screen allows you to bill, invoice and print an invoice.

STEP 3 Just select yes or no to invoice and all orders are processed.

The screenshot displays the 'OE Order Billing' application interface. It features a large spreadsheet-style grid with columns for 'Ord...', 'Ord No', 'Status', 'Ord Dt', 'Cue No', 'Bill To Name', 'Frt Amt', 'Misc Amt', 'Cmt 1', 'Cmt 2', 'Cmt 3', 'Oe Po No', 'Tot Dollars', and 'Tot Taxable Sls Amt'. The grid contains multiple rows of order data. A red circle with the number '1' highlights the 'Frt Amt' and 'Misc Amt' columns. A red circle with the number '2' highlights the 'Bill' button at the bottom left. A red circle with the number '3' highlights the 'Do you wish to Invoice' dialog box, which has a 'Yes' button selected. The dialog box also has 'OK' and 'Cancel' buttons. The bottom of the screen shows a 'Billing' button and an 'Order' button.

OE Pick Management



STEP 1 Filter the orders to what you want to process such as customer number and ship via.

STEP 2 If you have backorders you can fill them with one button click.

STEP 3 You can easily change the ship quantity to whatever you want for backorders.

STEP 4 Last just click the Pick Ticket button to print all the pick tickets.

The screenshot displays the OE Pick Management interface. At the top, there are tabs for Alerts, Shortage, Backorders, and Confirm Ship in process. A table lists orders with columns for Ord No, Status, Line, Cus No, Ship Via Cd, Item No, Loc, Qty Ordered, Qty To Ship, Qty Bkrd, and BO. A red circle 1 highlights the 'Ship Via Cd' column. A red circle 2 highlights the 'Qty To Ship' column. A red circle 3 highlights the 'Qty Bkrd' column. A red circle 4 highlights the 'Pick Ticket' button. To the right, a 'PICKING TICKET' is shown with a barcode and a list of items to be picked, including 'Parts Washer, Clean & Refill', 'POP Backfill', 'Bristol Mailbox', 'Unitec Speakers', 'Item 3', 'Item 2', 'Item 1', 'Industrial Thermocouple Assy', 'Solar Flashlight', 'Jewelry Heart', 'Luggage Tag', 'Danchuk 1956 Chevy', 'Danchuk 1955-1960 Chevy', 'Danchuk 1955-1956 Chevy D...', 'Shade for 14729 (10x10)(13...)', and 'Shade for 1601C 14.5 x 14.5 x 10.5H X .5 White TA'.

IM Reorder Advice

STEP 1 Change the quantity recommended to what you want to order.

STEP 2 Click the PO Create button and all the items are ordered and consolidated on one PO by vendor.

The screenshot displays the IM Reorder Advice interface. A table lists items with columns for Print?, Vend No, Vend Name, Item No, Item Desc 1, Item Desc 2, Loc, Request Date, Qty Recommended, Reorder Lvl, Qty Avail, Qty On Hand, Qty Allocated, Qty Bkrd, and Qty. A red circle 1 highlights the 'Qty Recommended' column. A red circle 2 highlights the 'PO Create' button. To the right, a 'PURCHASE ORDER' is shown with a barcode and a list of items to be ordered, including '8040-4CM2-TSA C...', 'SYS-T1650', 'SCREW M1.6X4M...', 'Plate', 'Strainer Element', 'Horses Weather...', 'BZX8-AC15 SOT-23...', 'HORIZON DOG L.E.', 'Bass Weathervan...', 'Unit Component', 'Transmitter Comp.', 'Strainer', 'A', 'A-BIN', 'A-BIN LOT', 'A-SERIAL', 'B-BIN', 'B-BIN LOT', 'B-SERIAL', 'B-SERIALIZED item n...', 'BILLET', 'AL Billet', 'Butterfly Nut', 'C', 'C-BIN', 'C-BIN LOT', 'C-SERIALIZED item n...', 'C1', 'Cable Modem', 'Cap', 'Casters', 'Charger', 'Cover', 'Film', 'O-Ring', 'Flange', 'Folk', '3D Hog', 'STRAIGHT PLUG', and 'Motor Electric'.

PO Receiving



STEP 1 Filter to find what you want to receive, like the PO Order.

STEP 2 Fill in the quantity to receive as well as bin and lot information if required.

STEP 3 Click the Receive button to process all the entries at once.

PO Receipts - X

Ord No	Item No	Item Desc 1	Qty Ordered	Request Dt	Qty Received	Qty Remaining	Qty To Receive	Doc Dt	Bin	Mult Bin	Lot	Se...	Pack No	Carrier Cd	Bill No
14578															
1457800	2 CSPW10022401	LABEL FRONT NBLSEN	110.0000	7/28/2016	85.0000	25.0000	25.20	3/21/2018		N		N			
1457800	13 CSPW200679	CARD PCI DVB ASI I/O	141.0000	7/28/2016	85.0000	56.0000	56.00	3/21/2018		N		N			
1457800	14 CSPW210020R75	SCREW PAN PHIL 4-40	115.0000	7/28/2016	85.0000	30.0000	25.00	3/21/2018		N		N			
1457800	15 CSPW21965	SPACER NYLON #4 X 0	115.0000	7/28/2016	85.0000	30.0000	25.00	3/21/2018		N		N			
1457800	16 CSPW22338	LABEL ADHESIVE SELF	85.0000	7/28/2016	55.0000	30.0000	30.00	3/21/2018		N		N			
1457800	17 CSPW23399	NUT 4-40 HEX 1/4 ZINC	115.0000	7/28/2016	85.0000	30.0000	30.00	3/21/2018		N		N			
1457800	18 CSPW241870R250	SCREW PAN PHIL 4-40	170.0000	7/28/2016	110.0000	60.0000	60.00	3/21/2018		N		N			
1457800	20 CSPW24442	SPACER NYLON #4 X 0	115.0000	7/28/2016	85.0000	30.0000	30.00	3/21/2018		N		N			
1457800	21 CSPW24470	CONN D HARDW SCREWLO	230.0000	7/28/2016	170.0000	60.0000	60.00	3/21/2018		N		N			
1457800	22 CSPW70006201	PWB ASSY FRONT PANEL	117.0000	7/28/2016	85.0000	32.0000	32.00	3/21/2018		N		N			
1457800	23 CSPW70006301	PCB ASSY REAR MODULE	115.0000	7/28/2016	85.0000	30.0000	30.00	3/21/2018		N		N			
1457800	24 CSPW200680	CARD PCI ATSC MASTER II I/O	27.0000	7/28/2016	.0000	27.0000	27.00	3/21/2018		N		N			

Filter: [Mult Bin], 'N' And Contains[Ser/Lot], 'N' And [Qty Remaining] >= '0.0000' And [Request Dt] >= '7/15/2016' And [Request Dt] < '7/29/2016' And Contains[Ord No], '14578' -

Receive PO Order

Reporting

ACCOUNTS RECEIVABLE		
AR Aging		
INVENTORY		
IM Inventory Master List	IM Inventory Location Master List	IM Serial/Lot Trace
Cycle Counting Variance Reports		
ORDER PROCESSING		
OE Order Status	OE Order Daily Order Calendar	OE Order History Pivot
OE Open Order Master List	OE Order History Master List	



OE Order Status



STEP 1 Enter your filter criteria, such as date range.

STEP 2 Select the order status you want to see, such as all in process orders.

STEP 3 Further filter if needed on your own column filters.

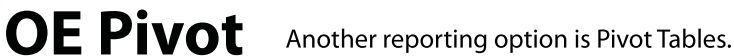
The screenshot shows the 'OE Order Status' window. The main table lists orders with columns for Status, Ord Dt, Ord Type, Ord No, Promise Dt, Request Dt, Co Po No, Cut No, Bf To Name, Ship To No, Ship To Name, Ship To Addr 1, Ship To Addr 2, and Ship To Addr 4. A red circle '3' highlights the 'Bf To Name' column. On the right, the 'Filter' panel is open, showing 'Range Criteria' for 'Earliest Promise Dt' (The Month and Next Month) and 'Earliest Request Dt' (All Dates). A red circle '1' highlights the 'Earliest Request Dt' filter. Below the range criteria, the 'Status' section has checkboxes for various order statuses, with 'Packing List Printed (6)' selected. A red circle '2' highlights this selection. At the bottom, there are buttons for 'Inv Tox', 'Item Master', 'Inv Loc', 'PO Linked', 'POP Full', 'SP Full', 'Comments', 'Line Audit', 'Can Build', and 'Captured BOM'.

IM Multilevel Item View

Reports can be filtered and you can drill deep into data. In the Inventory location master list, all columns from the inventory master and inventory location are available. You can filter on each column, like the Multi Bin flag and the purchase or manufacturing columns. Drill into open PO's and drill again to see the PO itself. On each screen you continue to have more options to drill into your data.

The screenshot shows the 'IM Inventory Loc Master List' window. The main table lists items with columns for Item No, Item Desc 1, Loc, Status, Ser List Prg, Multi Bin Prg, Pur Or Mfg, and Qty On Hand. A red arrow points from the 'Pur Or Mfg' column to the 'PO Order' button in the bottom toolbar. The 'PO Order' button is highlighted. To the right, the 'PO Order Dialog' window is open, showing fields for PO No (15343), Vend No (01CAR002), Release (00), Vend Name (CARDKEEPER INC.), Curr Cd (USD), Print Post Fg (X), Ord Status (C), Loc (00), Po Type (N), Chg Cancel Cd, Receive Comp Fg (Y), P1 Price Fg (Y), Base Info From To Cont, Ord Dt (9/21/2016 12:00:00 AM), Print Dt (9/21/2016 12:00:00 AM), Byr Fltr (4), Ap Terms Cd (ER), Ship Via Cd (18), Fob Cd (ORG), Tax Schedule, Col Ppd Cd, Accum Taxable Amt, Vend Late Cnd Fg, Acknowledge Fg (N), Confirm Fg (N), Ord Weight (0.000000), and Order Lines. The 'Order Lines' section at the bottom shows a table with columns for Ord No, Line, Vend No, Job No, Item No, Item Desc 1, Item Desc 2, Ord Status, Hn No, Sb No, and Dp No.

STEP 2 Click on a value and see the underlying data in a detailed grid.



STEP 4 Highlight information and instantly create a graph from the highlighted data.



ACCOUNTS RECEIVABLE

AR Mgmt Interactive Dashboard

ORDER PROCESSING

OE Processing Dashboard

OE Sales History Dashboard

AR Management Dashboard

Analytic Dashboards with drill capability are also available. The included AR dashboard lets you see receivables as well as AR turn. Just click on your criteria and the list dynamically adjusts to show only the selected criteria. From there just drill into the information. In the example below, we are filtering by the less than 30 category and just looking at customers in the pie chart to print and e-mail an invoice to a customer.

