

FourthShift 8.0 Product Demo

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Fourth Shift Summit

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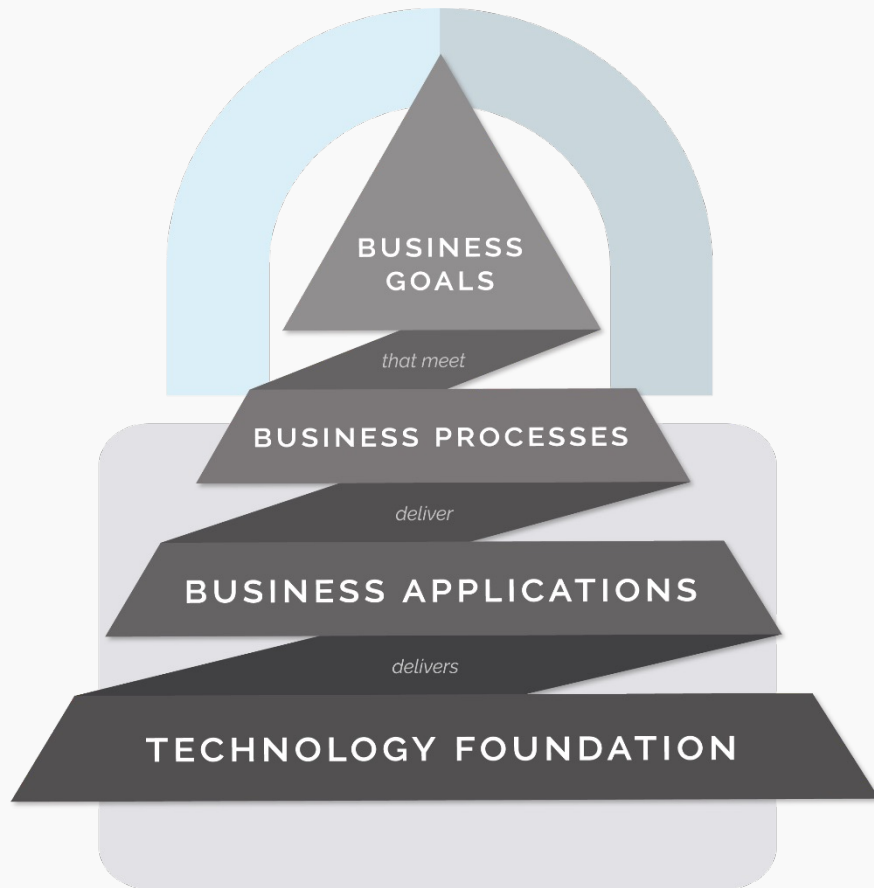


01 Windows Authentication

02 Web UI

03 Manufacturing Features

04 Financial Features



The ICG Approach

To compete, technology must be core to the foundation of your business. Without a solid & flexible technology foundation, your business—no matter what you do—will struggle to deliver business applications & processes. ICG's approach is to architect a secure technology foundation that delivers all business applications & processes. This is referred to as perpetual evolution and allows businesses to continually upgrade their digital capabilities and the foundation underneath them.








Windows Authentication

- **8.0 adds Windows Authentication**
- **Optionally, Automatic (single sign on)**
- **Assign existing FS accounts to Windows Users**
- **Transactions appear under assigned FS User ID**
- **Supported in Web UI and Traditional Client**



Set Authentication Method and Windows Account in PASS screen

Password Maintenance

PASS   Reports  Tools  Help 

Minimum Expiration: Maximum Expiration: Expiration Notice:
Minimum Password Length: Maximum Retries:
Starting User Id:

User Id	Password	Retype Password	Access Codes	Operator Name	Exp	Sta
→ AAA			*	DEFAULT SYSTEM ADMINISTRATOR	Y	A
→ ABC			*	DEFAULT SYSTEM ADMINISTRATOR	Y	A
→ ICG	<input type="text"/>	<input type="text"/>	*	ICG ADMIN	N	A
→						
→						
→						
→						
→						
→						
→						
→						
→						

Authentication: Windows Account:
E-Mail:
Date Updated: Auth User:

Select Authentication Method during Logon – or no prompt if Automatic Login

FourthShift™ ?

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User ID

FSSUMMITICGADMIN

Password

.....

Authentication:

Fourth Shift Windows

Sign In

Date: 092222

Release: 8.00C

Lock Server: SUMMITFS-CUSM

Database Server: SUMMITFS-CUSM

SystemIdentChar: MR

CUSM - Fourth Shift - System Control

File Edit Tools Options Help

FourthShift™

Sign On

User Id: FSSUMMITICGADMIN

Password: [Empty]

Authentication: Fourth Shift Windows

Date: 092222

Release 8.00C

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Lock Server: SUMMITFS-CUSM

Database Server: SUMMITFS-CUSM

SystemIdentChar: MR

OK Cancel

Enter Your Password And User Id, Or Exit

WebUI

- **User Friendly Web Interface**
- **Advanced Finder**
- **Sortable and Searchable Grid**
- **Keyboard Shortcuts**
- **Portals**
- **Fully Customizable**

Changes in Green are in new to FS 8.00C

All Others are From 7.5 to 8.00B




Finder Window






Stock Status By Item Inventory History

SSII Reports ▾

Item Description

007 

Um: Tot Roll Cost:
Mb: Inv Acct No:
PInr: Item Type:

Item Finder      ...

Item	Item Description	UM	Make/Buy Code	Type	Order Policy
007	TEST-ITEM	LB	M		
100-BUY	100-BUY	EA	B		
100-PARENT	100-PARENT	EA	M		
1234	IPHONE	EA	B		
123D	MENDED FABRIC	EA	B		
123E	FINISHED FABRIC	EA	M		
19-BLACK	19" FRAME, BLACK	EA	M		
19-BLUE	19" FRAME, BLUE	EA	M		
19-FRAME	FRAME, UNPAINTED - 19" ROAD BIKE	EA	M		
19-GREEN	19" FRAME, GREEN	EA	M		
19-RED	19" FRAME, RED	EA	M		
19-YELLOW	19" FRAME, YELLOW	EA	S		
21-BLACK	21" FRAME, BLACK	EA	M	N	3

- [R] Contains
- Does Not Contain
- Equals
- Does Not Equal
- Is Empty
- Is Not Empty
- Ends With
- Does Not End With
- Starts With
- Does Not Start With

Page 1 of 9 25 Records per page ▾

Item	Description	Inv Cd	Total Qty	Tot. Value
19-FRAME	FRAME, UNPAINTED - 19" ROAD BIKE	On Hand= O	30	638.700
Um: EA	Tot Roll Cost: 21.290	Insp= I	0	.000
Mb: M	Inv Acct No: 01-00-00-12100	Ship= S	0	.000
Pinr: 310	Item Type: N	Hold= H	0	.000
Buyr: BYR	Item Status: A	Internal Wip=	0	.000
Ord Pol: 3	Preferred Loc: <input type="text"/>	External Wip=	0	.000
Lt: Y	On Order: 20	Total=	30	638.700
Sr: N		Allocations=	30	638.700

Sequence: L Starting: Stk: PN Bin: 200 Ic: Mfg Date:

(6 Results)

- = Equals
- ≠ Does Not Equal
- ∅ Is Empty
- ⊕ Is Not Empty
- < Less Than
- ≤ Less Than Or Equals
- > Greater Than
- ≥ Greater Than Or Equals

Stk	Bin	Ic	Quantity	Value	Lst Cnt	Lot	Mrp	Atp	Mfg Date
[R] <input type="text"/>	[R] <input type="text"/>	[R] <input type="text"/>	= <input type="text"/>	= <input type="text"/>	= <input type="text"/>	[R] <input type="text"/>	[R] <input type="text"/>	[R] <input type="text"/>	= <input type="text"/>
FG	A100	O	12.00	255.48			Y	Y	
PN	100	O	9.00	191.61			Y	Y	
PN	100	O	3.00	63.87		002	Y	Y	10/23/2017
PN	100	O	2.00	42.58		003	Y	Y	10/27/2017



Manufacturing

- ITMB, F9 Planning Detail shows Last Consumed and Transaction Dates
- COMT Line Detail, 3 new References
- IMTR Moving Staged Material
 - COCF to enable/disable

Changes in Green are in new to FS 8.00C
All Others are From 7.5 to 8.00B



“Last Transaction” fields

Item Master Item Detail Lot Detail **Planning Detail**

ITMB Reports ▾ Tools ▾ Help ▾

Item	Description	Um	Rev	M	I	S	L	S	Ord	Insp
19-FRAME	FRAME, UNPAINTED - 19" ROAD BIKE	EA		M	N	A	Y	N	3	N

Pin ←-----Lead Time-----→

Plnr	Buyr	Pol	Run	Fix	Insp	Qty
310	BYR	N	5	0	0	

Stk Bin

Preferred Loc:

Fcst Cd: Yield: % Dec Pre Cd: Atp:

Gateway Wc: Fcst Prd: Dmnd Fnc: Png Fnc:

Lot Size Day: Lot Size Qty: Safety Stock: Lot Size Min: Lot Size Mult:

LI Cd: Rpln Cd: Revw Date:

Purchase Order Autoclose Tolerance: %
Manufacturing Order Autoclose Tolerance: %

Last Inventory Consumed Date: Last Inventory Transaction Date:

Text No:

New Reference Fields in COMT Line Detail

Customer Order Standard Product Detail

COMT Reports ▾ Tools ▾ Help ▾

Customer Ord Co Rev

Co Number Id Csr Sta Date Customer Name

CO 01 100030 140 REL 100517 THE BIKE CHAIN

Ln# L Prom Tr Ln# R

Ln# Typ S Item Order Qty Um Dlvry Lt Sta Unit Price Extd Price F

001 C S 19-BLACK 10 EA 100617 0 4 10.000 100.000 Y

Descr: 19" FRAME, BLACK

Tax Exempt: Fed: N State: N County: N Muni: N Date Last Ship: 100517

Commission Code: 140 Ovr: N Shipped Quantity: 10

Price Adjustment: S/D: D 90.00 % Price Source: M In Shp Qty: 0

Reqst Dlvry: 100617 Cust Po Ln#:

Customer Item

Conv Order Qty Um Unit Price Trit: 0

1 10 EA 10.000 Item: 19-BLACKTEST






Description: 19-BLACK BIKE

Text No: Reference

Ext Text: N

Moving Staged Inventory Between Locations

Inventory Move

IMTR   Reports  Tools  Help 

From Loc To Loc If Order Related

Item	Stk	Bin	I C	Quantity	Stk	Bin	I C	O S	Order No	Ln#
→ 19-FRAME	01	SHIP1	S	5	01	SHIP2	S	C	CO-12345	001
Doc:		Lot: 1234			Lot: 1234					
→										
→										
→										
→										

Remark: MOVING BETWEEN LOCATIONS

Financial

- Control GL accounts for INVA and G-Type POs
 - GLCF to enable, GLCA to allow/deny
- Audit records for CROV E to Type 0
- OVAR closed order variance details are retained in database table, to support future analysis (MCST screen, data extracts)
- Customer and Vendor terms now allow to provide the discount till due date (net days)

Changes in Green are in new to FS 8.00C
All Others are From 7.5 to 8.00B



Control G/L Accounts for G-Type PO and INVA

G/L Configuration Banking Configuration

GLCF

Unit No: 001

Periods: 12

Curr Prd: 10 - 17

Bdgt Prd 13: N

Master Account Number: _____

Header: DV-PL-DT-ACCNT

Mask: DD-PP-TT-AAAAA

Default: 01-

Posting Error Handling: R

Mfg To G/L Error Handling: I

Mfg To G/L Trans Limit: Y

Validate Po Exp: Y

Validate Inv Adj: Y

Last Batch No: 000459

G/L Chart of Accounts G/L Account Attributes

GLCA

Starting G/L Account Group/No: 10100

Account Group/No	Account Group/No Description	A T	C T	A I	User Code 1	User Code 2	Consl'd G/L Account No Aaaa
→ 21400	ACCRUED VACATION	L	P	A			2140
→ 22000	EMPLOYEE FICA TAXES WITHHELD	L	P	A			2200
→ 22100	EMPLOYEE FEDERAL TAXES WITHHELD	L	P	A			2210
→ 22200	EMPLOYEE STATE TAXES WITHHELD	L	P	A			2220

Return G/L Account Attributes

G/L Account Attributes

User Code _____

3 4 5 6 7 8 9 10 11 12 13 14 15





Code

Allow Po Exp: N

Allow Inv Adj: N

CORV Audit Record

Item History Audit [History Detail](#)

AUDT   Reports  Tools  Help

Page: 1

Func: CROV No: 19-BLACK 19" FRAME, BLACK

Opid: ICG Date: 09/28/2022 Time: 09:12:18

Field Desc	History
CROV METHOD	E
ITEM	19-BLACK
DEBIT ACCOUNT	01-00-00-12200
CREDIT ACCOUNT	01-00-00-60000
TRANS AMT	66520.800
TOT INV QTY	11087
CST TYP OLD	1
CST TYP NEW	0
CST CD OLD	4
CST CD NEW	4
MATL OLD	10.000
LABOR OLD	4.080
VAR OVRHD OLD	8.160
FIX OVRHD OLD	0.000
MATL NEW	10.000
LABOR NEW	6.080

MCST Screen for Status 6 MO (OVAR data is retained)

MO Cost Analysis Cost Detail

MCST Reports Tools Help

Mo Number: **MO-1039** Plnr: 330 Ord Sta: REL Mo Rev Date: 053117 Gateway: WHEEL Wc Name: WHEEL ASSEMBLING

Ln#: 001 Order Qty: 50 Um: EA Sta: **6** Typ: M Item: SB-WHL-FRONT Date: 012497 Need Date: 123179 Sched Date: 013197 Description: FRONT WHEEL, STATION

Rct: 47 EA

	Matl	Labor	Var Ovrhd	Fix Ovrhd	Outside	Total
Standard :	4000.000	125.000	250.000	.000		4375.000
Order:	4080.000	100.000	200.000	.000	.000	4380.000
%	102.0	80.0	80.0			100.1

Starting: Com Typ: N Pt Use: Ln#/Seqn: 000 Component:

Pt Use	Seq	T Y	Component/ Resource/Wc#	Required Quantity	Q T	Um	Issued Quantity	Standard C Eval Cost	Order Cost	C C
→****	000	X	ATL PARENT	0	I	EA	47	.000	.000	Y
→10	010	R	WC[R]WHEEL	25.00	I	HR	20.00	375.000	300.000*	Y
→10	010	N	FAN-100	50	I	EA	51	4000.000	4080.000	Y
→										
→										

Sched Date: 013197

CUID Cash Discount Days can equal Net Due Days

Customer Master Name/Address Detail **Financial Detail**

CUID Reports ▾ Tools ▾ Help ▾

Cust Id Customer Name Contact Phone Csr
100010 COLORADO BIKE AND SKI FRANCISCO CORREIA 303-410-7005 110

----- Bank References -----
#1: #2: Prt:

----- Financial Data ----- ----- Credit -----
Ytd Shpmts: Limit: By: Date:
Ytd Sales: ----- D&b -----
Ytd Sv Chg: Ref #: Class: Rat'G: Date:
Ytd Pay'Ts: ----- Std Terms: ----- -----
Unapp Crdt: Cash 1 %: Days: Cash 2 %: Days:
Unapp Cash: Net Days: -----
Total A/R: ----- Statements -----
Over 30 : Print: Cycle: Service Charge: Rate:
26-30 : A/R Cust: Open/Bal Forward:
1-25 : Last Inv Date: Last Pay Date:
Current: ----- Multiple Currencies -----
Hold/Unapp: Curr Code: Ctrl Curr:
Text No: Start Date: Edi Acknowledgement:
Ext Text: N ----- Pre-Printed Status Defaults -----
Invoice: Credit Memo:



Financial, Continued

- **INVR report, new parameters (U) to exclude items without stock and (S) to specify item status**
- **APTB report, new sorting options**
- **ARTB report, new "past" and "future" columns**

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New INVR Parameters

Batch Setup | Batch Execution | Process Copy | Process Owner

BSET | | | Reports ▼ | Tools ▼ | Help ▼

Process Id: INV Owner: AAA Last Executed: 012820 Created: 110217 Modified: 092222

Desc: INVENTORY REPORT Abort On Abnormal End

Seq Skip This Task |

Num	Task	Parameters	Special Setup Required		
→ 01	INVR	a g	N	N	Y
→					
→					
→					
→					
→					
→					
→					
→					

Task: INVENTORY VALUATION REPORT REQUIRED ENTRIES: NONE

Parameters: 1. SORT BY ACCOUNT NO, LOCATION, PRODUCT LINE OR ITEM TYPE
FORMAT: A, L, P, Z

2. SELECT PROD LINE(P) OR ACCT NO(A) RANGE FORMAT: BXX..XX EXX..XX

3. AMOUNT SORT; OMIT HEADERS; TOTAL PAGE ONLY FORMAT: D Y G

4. CHOOSE ONE INV CODE TO REPORT; WITH INV FORMAT: H, I, O, S; U

5. CHOOSE ONE ITEM TYPE; WITHOUT ITEM DESC FORMAT: N, T, X, R; W

6. CHOOSE ONE ITEM STATUS FORMAT: SE, SA, SP, SO

New APTB Report Parameters, New Omit Headers Parameter (many reports)

Batch Setup | Batch Execution | Process Copy | Process Owner

BSET | | | Reports ▼ | Tools ▼ | Help ▼

Process Id: Owner: Last Executed: Created: Modified:

Desc: Abort On Abnormal End

Seq Skip This Task

Num Task Parameters Special Setup Required

Num	Task	Parameters	Special Setup Required	<input type="text"/>	<input type="text"/>	<input type="text"/>
→	01	APT		N	N	Y
→						
→						
→						
→						
→						
→						
→						
→						

Task: A/P AGED TRIAL BALANCE REQUIRED ENTRIES: 1

Parameters: 1. ENTER THREE AGING CATEGORIES IN DAYS FORMAT: A999/999/999
2. VEND ID FROM/THRU; AGE BY INV DATE FORMAT: FX..X TX..X V
3. ENTER AGING DATE & INV CUTOFF DATE FORMAT: DMMDDYY CMDDYY
4. PAST OR FUTURE; MIN A/P BAL; MULT-CURR FORMAT: P OR U B9..9 M
5. SORT BY VEND NAME, CURR, VCL1, VCL8 OR PAY FORM FORMAT: OXXXX
6. OPEN INV, DEC OPT; MANUAL PMT, SORT BY DATE FORMAT: I N H S
7. OMIT HEADERS FORMAT: Y

Questions?

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