

**Portable Intelligence's RF Plus and TM Plus provide seamless integration with VISUAL Project**



**Who should use VISUAL Project?**

Companies that have a very long multi-stage production cycle (over months or years) that may require partial shipment and progress billing such as companies that manufacture stadiums, automotive or aerospace.

**The key feature of VISUAL Project** is that each project is assigned one warehouse and all project activity takes place in that one (virtual) warehouse. Project automatically tracks all costs (materials & labor) for each project in a unique warehouse.

Many people know that Portable Intelligence Inc.'s RF Plus and TM Plus are tightly integrated with Infor's Visual Commercial product and this extends to Infor's Visual Project as well.

RF Plus for Visual Project does not have special setup or integration requirements. From an implementation perspective, **there is no difference from a standard RF Plus implementation** aside from a different Visual Project key is required from Infor.

**Process:** A customer would not see a difference for example when issuing RM to a WO either in Visual Commercial or Visual Project. However, in the background, if it's Visual Project, RF Plus will forward additional information such as Work Breakdown Structure (WBS) and Department Codes.

**Inventory with multiple warehouses:** Receipt of a PO into a either a warehouse – regardless of whether it is for Project or Commercial, they both work the same way. Similarly, inventory movement such as transfers or IBT's or physical inventories are also treated the same way in Project as they are in the standard Commercial version.

**Infor's VISUAL Project - Fact Sheet**

Infor's VISUAL Project solution helps project-based businesses manage many projects with ease and accuracy. Its features unite project managers with integrated data for capturing costs, maintaining contracts and projects, handling long lead-times, and delivering on-time complex projects.

### Tools included to help control project lifecycles:

- Separate Request for Proposal capabilities with specific project references for each estimate.
- Multiple Project Billing/Invoicing Methods, such as Milestone, Shipment, Progress, and Time and Materials.
- Project Budgeting and Costing by Work Breakdown Structure, allowing time phased comparison and variance reporting.
- Project Inventory Management, including MRP by Project, Commingling Options, Virtual Project Warehouses, and Customer-Owned Material Control.
- Project Profitability Tracking by Project and/or Business Line.
- Bi-Directional Integration with Microsoft Project.
- Project scheduling capabilities with visibility to linked Production Orders.

### Case Study

#### **Recent Pi Customer Implementation of RF Plus and TM Plus with Visual Project**

Large US based multi-location company (USCO) has many projects, and each is assigned to a (virtual) Warehouse (always a one-to-one relationship).

USCO receives a Customer Order (CO) to manufacture an Item. They buy materials to make the Item with a Purchase Order (PO). The PO is tied to a Work Order (WO) which informs the manufacturing team how to build the Item.

USCO utilizes Visuals Demand Supply Link to link PO's to WO's. Because they are linked, any part received on a PO will be auto issued to that specific WO. Typically, as soon as it's issued in Visual, it's consumed and not visible in system. For example, if USCO does not use that Part for 2 months, it's sitting on a shelf yet consumed in Visual, so there's no visibility of that part in Visual.

As a solution to this long delay between receipt and production, Portable Intelligence created a unique solution. Upon receipt of a Part for a Project PO we break the link between the PO and WO. When the Part is received, it is not auto issued to the WO and therefore is now visible inventory in Visual. USCO still needs that product connected to the Project WO, so even though the link is broken, RF Plus creates a label upon receipt for the inventory identifying that it belongs to a specific Project WO.

To start production, USCO scans the Part and issues to the WO. Once the Item is built, they do FG receiving and can then ship it out.