Infor Distribution SX.e User Guide

Release 11.21.7

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Contents

About this guide

This guide provides information and instructions about the standard navigational features and functionalities of the Distribution SX.e web client.

Intended audience

This guide is intended for users of the Distribution SX.e web client.

Related documents

You can find this document in the product documentation section of the Infor Support Portal, as described in Contacting Infor.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Distribution SX.e overview

Distribution SX.e is an enterprise resource planning (ERP) solution, which is deployed as on-premises software. It is installed and maintained locally by your company.

Distribution SX.e can be modified by Infor or your company to meet your business requirements. If your instance of Distribution SX.e was modified, the information and instructions in this guide might not accurately reflect your environment.

Chapter 2: Browser and display settings

This section provides information and instructions about browser and display settings.

Supported browsers

Distribution SX.e supports the latest versions of these browsers and one version earlier:

- Chrome
- Microsoft Edge
- Microsoft Edge Chromium

Safari 9, 11.x, and 12.x is also supported for Mac OS.

Loading insecure content in Chrome

To avoid browser errors in Chrome, you must allow insecure content if the page does not load after you attempt to open Distribution SX.e.

1. Access the **Chrome Properties** window in the administrative mode.
2. Click the **Shortcut** tab.
3. In the **Target** field, leave a space after the path and then specify **`--allow-running-insecure-content`**.
4. Click **OK**.

Screen resolution

Distribution SX.e is designed to display on a variety of screen sizes. If you view Distribution SX.e on a device with a screen resolution width of at least 770 pixels, the user interface adjusts to fit your screen. If the screen resolution width is less than 770 pixels, components such as scroll bars might not be available or might partially display.

Visual style

To select a visual style, select **More > Theme** on the Application Menu bar in Distribution SX.e. The visual style that you select is also applied to the Infor Ming.le™ context applications.

Preferred language

The default language of Distribution SX.e is English, but you can view the UI in French Canadian or Spanish (Mexican) if these conditions are met:

- Your instance of Distribution SX.e includes the translation files required to change the language.
- Your company is set up for multilingual functionality.
- Your preferred language is specified on your **SA Operator Setup** record.
- Your preferred language is specified in your browser settings.

The date and time formats that are displayed in the Infor Ming.le context applications are also based your language preference.

Changing your UI language

Use these instructions to change the preferred language in Edge Chromium. The preferred language is selected similarly in other browsers.

1. Select **Settings and more > Settings > Languages**.
2. Click **Add languages**.
3. Select **French (Canada)** or **Spanish (Mexico)**.
4. Click **Add**.
5. Click **More actions** for your preferred language.
6. Click **Move to the top**.
7. Sign out of Distribution SX.e, close the browser, and then sign back in.

Viewing product descriptions in your preferred language

If your company has defined product descriptions for an alternate language in **Product Setup**, you can view these in your preferred language.

Use these instructions to implement the use of alternate product languages descriptions in Distribution SX.e.

1. Set up each alternate language in **SA Table Code Value Setup-Languages**.

2 Specify the local language for your company, even if it is English (`EN`), in **SA Company Setup-Required**.

3 Set up alternate language product descriptions for each product in **Product Setup**.

a In **Product Setup**, select the product and click **Edit**.

b On the General tab, click **Enter Description in Multiple Languages**.

c Click **New** to create a new alternate language description.

d Specify these values:

Language
Select the language from the drop-down.

Description 1
Specify the first description in the selected language.

Description 2
Optionally, specify the second description in the selected language.

Extended Description
Optionally, specify the extended description in the selected language.

e Click **OK** to save.

f Repeat steps 3a-3d for each alternate language.

4 Select the preferred language for each operator in **SA Operator Setup-Static Information**.

5 To use the alternate product language description from **Product Setup** that matches the operator's language on pick tickets:

a Select **System Administrator > Administration > Administrator Options > Documents > Sales Orders > Printing**.

b In the Pick Tickets section, select `Warehouse` in the **Language** field.

We recommend that you leave the default selection of `Order` in the **Language** field if you send pick tickets to customers. When `Order` is selected, the alternate language product description printed on the pick ticket is the same language as selected for the sales order. By default, this is the language associated with the customer.

Date and time formatting for the United Kingdom

Set the language preference for your browser to English (United Kingdom) to use the DD/MM/YYYY date format and the 24-hour time format in these applications:

- Distribution SX.e
- Infor Ming.le context applications

Chapter 3: Signing in to Distribution SX.e

This section provides information and instructions about signing in to Distribution SX.e.

Required user records

To access Distribution SX.e, you must have a user record in Infor Federation Services (IFS) with access to Infor Ming.le.

To access a company in Distribution SX.e, you must have an **SA Operator Setup** record set up in that company.

Your system administrator sets up and maintains the user records.

Single sign on

If single sign on (SSO) is implemented in your environment, you can sign in to Infor Ming.le. You can then access Distribution SX.e and other applications without signing in to the individual applications.

If your instance of Distribution SX.e is configured to communicate for Infor ION in the cloud, you must change your browser settings to use SSO.

Updating browser settings for hybrid ION integrations

Only update the SameSite browser settings under advisement of your system administrator.

1. In the browser that you use to access Infor Ming.le, and specify the corresponding value in the address bar:
   - **`chrome://flags`**
   - **`edge://flags`**
2. Search on **`samesite`**.
3. Select **`Disabled`** for these settings:

Chrome

- **SameSite by default cookies**
- **Enable removing SameSite=None cookies**
- **Cookies without SameSite must be secure**

Edge

- **SameSite by default cookies**
- **Cookies without SameSite must be secure**

Sign-in process

The process to sign in to Distribution SX.e depends on your **SA Operator Setup** records and SSO implementation in your environment.

You can sign in to any company in which you have **SA Operator Setup** record. You can sign in with these values:

- The **`User ID`** from your operator record
- The **`User ID`** of the user specified in the **Alternate Login** field on your operator record

If SSO is implemented in your environment, you are signed in immediately after you access Distribution SX.e from the **App Menu** in Infor Ming.le if these conditions are met:

- You have one operator record in one company.
- You do not have an alternate login.

You must select a **`user|company`** combination to sign in if one of these conditions is met:

- You have an operator record in multiple companies.
- You have an alternate login on an operator record.

If prompted, you must change your password before you can sign in.

Caution: If SSO is implemented in your environment and you are signed in to Infor Ming.le, you can sign in to Distribution SX.e without providing your password. You must lock your unattended computer to secure Distribution SX.e. Otherwise, anyone can access Distribution SX.e using your credentials.

Note: If `Would you like to clear the operator’s session?` is displayed when you attempt to sign in to Distribution SX.e, you are already signed in. You might be signed in on another browser tab or window, or you might have signed out of Infor Ming.le without signing out of Distribution SX.e. Click **OK** to disconnect your current session, and then sign in again. If you can locate your current session, click **Cancel** to continue your current session.

If SSO is not implemented in on-premises Distribution SX.e, you must sign in manually.

Signing in to Distribution SX.e with SSO

1. Sign in to Infor Ming.le.
2. Select **App Menu > Distribution SX.e**.
3. If the Distribution SX.e sign in screen opens, select a **`user|company`** in the **User ID** field.
4. Click **OK**.

Signing in to Distribution SX.e manually

1. Sign in to Infor Ming.le.
2. Select **App Menu > Distribution SX.e**.
3. Specify theses values:
   - **`User ID`**
   - **`Password`**
   - **`Company`**
4. Click **OK**.

Chapter 4: User interface and navigation

This section provides information about the user interface and instructions for navigating Distribution SX.e.

User interface components

This table shows the primary components of the Distribution SX.e user interface:

Component	Description
Application Menu bar	Contains the **Menu** button and **Address** field, and shows the open functions. It also contains the **More . . .** menu from which you can access the online help and version and build data for Distribution SX.e.
Grid	See Grids on page 28.
Window	Displays the function. Functions might be comprised of multiple windows or multiple tabs, or views, on one window.
Window header	Shows the function name and can include other information and components, such as record names and numbers, additional menus, and toolbars.

Component	Description
Panel	Collapsible area to the left or right of a window that contains function-related features and information. In inquiry and setup functions, the left panel typically contains the **Search** section and the **Recently Visited** section. See Function searches on page 21. In transaction entry functions, the left panel contains **Header Information** and the **Header Totals** sections. Transaction entry functions also include a right panel that shows the products on the order and the net amount. Most panels are expanded by default until you collapse them. Controlled by the menu function, the state of each panel is retained in your browser's local storage from session to session. It is retained per machine, based on your operator and company. Some panels and sections are expanded or collapsed, based on your activities. The state of such panels are not subject to retention. The far right panel contains the Infor Ming.le context applications. See Context applications in Infor Ming.le on page 37.
Section	Collapsible area in a window or panel that contains related information. To expand or collapse a section, click Show More or Show Less, or the arrow icon. Most sections are open by default until you collapse them. You can personalize the default state of sections in a window. See Personalize feature on page 57. Controlled individually within each menu function, the state of each section with a panel is retained in your browser's local storage from session to session. It is retained per machine, based on your operator and company.
Toolbar	See Toolbars on page 17.
Wizard	See Wizards on page 18.

Data dependency

The data in a record sometimes determines if user interface components, such as windows, tabs, and sections, are displayed. For example, the Nonstock section in **Sales Order Inquiry-Line Detail** is not displayed if the line item is not a nonstock item.

Data dependency does not affect individual fields.

Accessing modules and functions

You can use the **Menu**, the **Address** field, and the **Reports** page to access a function. You can access the **Menu** and **Address** field in the Application Menu bar. You can access the **Reports** page in any Reports category in the **Menu**.

After you access a function, select tabs, or use the toolbar or wizards, to navigate the function.

Menu

The **Menu** contains the modules, categories, and functions that you can access, depending on your operator security. Use the **Menu** to directly access Distribution SX.e functions.

Click the **Menu** button to open and close the **Menu**. Alternatively, press **Esc** to close the **Menu**. If you select a category, such as **`Setup`** or **`Inquiry`**, within a module, press **Enter** to open and close the category. Click a function within a category to open it. Alternatively, press **Tab** or an **Arrow** key to highlight a function, and then press **Enter**.

Open functions are displayed in the Application Menu bar. The active function is highlighted. To navigate to another open function, click the function in the Application Menu bar or the **Menu**. Alternatively, click the active tab, press **Tab** or an **Arrow** key to highlight a different tab, and then press **Enter**.

If space is limited in the Application Menu bar, access additional open functions in the **More** tab.

Address field

You can use the **Address** field in the Application Menu bar to access a function directly. Specify the acronym or name of a function, or a portion of these values, and then select the function from the list.

Click a function to select it, or use the down **Arrow** key to highlight the function and then press **Enter**.

The **Address** field has type-ahead capability. As you type a value, the list is reduced until it matches the value. If a match is not found, you might lack the security to access the function.

Reports page

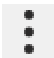
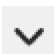
If you select a Reports category, such as **`AR Reports`**, in the **Menu** or **Address** field, the **Reports** page opens. The associated reports are listed by acronym and title in the grid.

To search for a report, specify the acronym for the report in the **Function Name** field. Alternatively, use the **Search** field above the grid to search for the report. This search is not limited to the report acronym. After you locate the report, click the **Right Arrow** to open the report.

You can use the **Report Type** and **Function Name** fields to search a report in another module.

Navigation icons

This table shows the icons that you can use to navigate Distribution SX.e:

Icon	Description
	Action. Click to access the Personalize options for a control in the **Personalize** window.
	Close. Click to close a page or window.
 	Collapse/Expand. Select to hide or show the details within a section.
 	Collapse/Expand. Select to hide or show panels.
	Collapse/Expand. Select to hide or show functions within menu categories. Used in grids to hide or show information contained in a row.
	Left Arrow or Back Arrow. Click to return to the previous page or window.
	Lookup. Select to perform a lookup of the field.
	Menu. Select to expand the detail for the record.
	More. Click to access additional features and functions.
	Right Arrow or Drill Down. Click to open a record, open an inquiry function, or advance to the next page or window.
	Search or **Address** field. Click to access the field. This icon represents the **Address** field only in the Menu Application bar.

Toolbars

Toolbars contain buttons, menus, and other controls that are used to create, maintain, delete, and navigate records and reports. Toolbars are located on window headers and within functions.

The buttons on the toolbars are labeled and include an icon. When you click a button, another window opens.

The **Cancel** button functions differently depending on the function and the action you perform. If you create new record, click **Cancel** to exit the create mode. If you maintain a record, click **Cancel** to undo all changes that were made to the record since the record was last saved. If you create a report, click **Cancel** to cancel the report and return to the **Report Main** window.

Use these keyboard short cuts to access the toolbar on the window header:

- Click in the window header and press **Tab** to highlight the first enabled button. Press **Tab** again to exit the toolbar.
- Press the **left arrow** and **right arrow** keys navigate to the enabled buttons in the toolbar. Press **Enter** to activate an enabled button.

You can also use the shortcuts to access the toolbar within a function. Click in line with and close to the toolbar before you press **Tab**.

Wizards

Wizards provide a graphical representation of your progress when you perform a series of dependent steps in a logical order to complete a task.

Transactional entry functions, such as **Sales Order Entry** and **Purchase Order Entry**, use linear wizards. In addition to tracking your progress, you can use the wizard to navigate the function. Sometimes, you can skip steps and move backwards. For example, in **Sales Order Entry**, you can move from **Select Products** to **Collect Payment** without viewing **Taxes and Totals**. If a view is not represented with a blue circle, you cannot return to that view.

Use these keyboard shortcuts to navigate linear wizards:

- To advance to the next step, click your current step, press **Tab** to highlight the next step, and then press **Enter**.
- To return to a previous step, click your current step, press **Shift+Tab** to highlight the previous step, and then press **Enter**.

Reports use stepped-process wizards. In a stepped-process wizard, you must use the **Next** button in the toolbar to advance to next step. To return to a previous step, press the **Up Arrow** to highlight the previous step, and then press **Enter**.

Distribution SX.e in multiple browser tabs

You can open Distribution SX.e in multiple tabs in your browser. You can drag the tabs to other monitors to view multiple functions simultaneously.

To open an additional tab, select **More > Advanced > New Window** in the Application Menu bar. The function that is active when you create the new tab is displayed in a new tab. We recommend that you do not open a new tab when you are entering a transaction or modifying a record in the active function.

The same user session is used for each tab. To avoid errors, close additional tabs before you sign out.

Accessing online help

The online help for Distribution SX.e is accessed from within the application.

Select **More > Advanced > Help** in the Application Menu bar. This version of online help corresponds to the version of Distribution SX.e that you are using.

You can also access online help at docs.infor.com. Select **Products > Infor Products A-Z**. Click Distribution SX.e, and then click Infor Distribution SX.e online help. This version of the help is updated monthly and reflects the most current version. It might contain information about enhancements and improvements that are not included in the Distribution SX.e version that you are using.

See the Welcome topic for the publication date. To ensure that you are accessing the latest version of the help, clear your browser cache.

If you access online help at docs.infor.com, we recommend that you do not bookmark online help pages in your browser. Because page locations can change each time the online help is updated, your bookmarks can result in `404, page not found` errors. Instead, save the page locally to be read offline. Use your browser tools to save the page or click **Print** to save the page as a `pdf`.

Chapter 5: Searches and lookups

This section provides information and instructions about conducting searches and using lookups.

Global search

The global search window opens when you sign in to Distribution SX.e. You can also select **Menu > Search** to access the global search window.

You can conduct global searches on entities, which are the framework of Distribution SX.e. An entity is any one of these record types:

- banks
- batches
- codes
- customers
- customer products
- customer ship tos
- invoices
- product specific units
- products
- purchase orders (headers)
- purchase order lines
- sales orders (headers)
- sales order lines
- value add (headers)
- value add transactions
- vendors
- vendor ship froms
- warehouses
- warehouse transfer lines
- work orders

Global search results

When you conduct a global search on an entity value, results are displayed in a list on the **Search** window.

For example, if you conduct a search on “grand,” results are displayed for all entities where a match was made with the word “grand.” The **Search** window shows up to five records per entity heading. If more than five records match the search criteria for an entity, you can click **Find More** to show the additional records.

To display a record, click the appropriate link to view an entity, such as **View Customer**.

The left panel for the Search results window contains the **Search In** section. You can select an entity in the **Search In** section to show the search results for that entity only. You can then use the fields in the **Refine** section to narrow your search.

You can conduct a subsequent search from the search results window. Specify a new search value and, then click **Search**. Optionally, you can click **Reset** to clear the results of a search and return to the global search window.

Function searches

You can use basic search or advanced search functionality to search for records within a function.

Basic search

You can conduct a search for records in a function using the **Search** function in the left panel. It contains standard fields for values and options that are related to the function.

See the field descriptions online help topic for the function to view descriptions for fields in the **Search** function.

The search results are displayed in the grid. To narrow your search, use the **Search** field above the grid. To conduct a subsequent search, click **Reset** to clear the existing values.

Basic searches in functions that can yield a large number of results, such as **Purchase Demand Center Entry**, might include a **Record Count** field. Use this field to limit the number of records returned. If the number of records that match the search criteria exceeds the specified record count, a warning message is displayed. Use additional search criteria to narrow the search results.

Advanced search

In an advanced search, you can select the criteria to use in your search. For example, you can only specify the vendor for a basic search in **Vendor Inquiry**. If you conduct an advanced search, you can also specify these and other values:

- City
- State
- Zip code
- Phone number

Advanced search is available primarily in, but not limited to, inquiry functions. If a function is equipped with an advanced search, it is available on the main window of the function.

Select the fields to use for the advanced search from the **Criteria** field. To clear the fields to conduct a subsequent advanced search, click **Reset**.

You can save advanced searches for later use. Saved searches are store in the Distribution SX.e database. You can select saved searches any machine or browser from which you access Distribution SX.e.

You can specify default values in the fields that you selected for a saved advanced search, or you can leave the fields blank. After you load a saved search, you can click **Reset** to clear the default values from the fields. You can then conduct another search using different values. To reload the default fields and values, reload the saved search. To modify a saved search, make the changes and then re-save the search.

Date ranges

If you use date criteria, select both the **From** and **To** date fields. When you initially specify a date in the **From** field, the **To** field is automatically updated with the same date. The value in the **From** field is used as the To date even if you do not select the **To** field as criteria.

For example, you only select the **Promised From** field on **Sales Order Inquiry**. You specify `8/8/2020` in the field, and then click **Search**. Based on these criteria, you might expect the results to show orders from August 8 to the current date. Instead, the results only include orders from August 8.

You can conduct open-ended searches for date ranges, but you must delete the value in the **To** field.

Saving an advanced search

1. In a function with advanced search, click Show More.
2. In the **Criteria** field, select the fields to use in the search.
3. Optionally, specify values in the fields.
4. Click **Search**.
5. Click **Search & Save**.
6. Specify a name.
7. Click **OK**.

Conducting an advanced search

1. In a function with advanced search, click Show More.
2. In the **Criteria** field, select the fields to use in the search.

   Alternatively, select a search from the **Saved Searches** field.
3. Specify values in the fields.
4. Click **Search**.

Recently Visited

The records you last viewed in a function are listed in the **Recently Visited** section in the left panel. Click a record to access the details.

UI Search

You can use your browser's find function to find a word or phrase in your current view of the UI. Depending on your browser, press **CTRL+F** or **Command+F**.

Lookups

In fields that require a pre-defined value, you can perform a lookup if you do not know the value. The pre-defined value can be an existing record or a table-driven value.

Word index lookups and dynamic lookups are supported in Distribution SX.e. If the **Lookup** window contains fields that pertain to the value you are searching for, it is a word index lookup. If the **Lookup** window contains only **Search** field, it is a dynamic lookup.

To conduct an initial search in either type of lookup, specify a value in the field before you click the **Lookup** icon. Search results are then shown in the **Lookup** window.

To conduct a subsequent search, click **Reset** to clear the values in the search criteria fields. To close the **Lookup** window without selecting a record, click **Cancel**.

If a lookup field contains an existing value, the entire value is automatically selected when you initially click in the field. This feature ensures that the old value is fully deleted when you specify a new value or clear the field.

Excluding inactive records from lookup searches

Ensure that the **Active Only** option is selected in the lookup window to exclude inactive records from these lookup searches:

- Product
- Customer
- Ship To
- Vendor
- Ship From

A product is inactive if `Inactive` is selected in the **Status** field in **Product Setup**. Warehouse products and cross-reference products that are tied to an inactive product are also considered inactive.

The **Active Only** option in the Product lookup works in conjunction with facet search criteria, such as Record Type and Status.

By default, the **Active Only** option is selected in each lookup. You can clear the option to include inactive records in your search.

Facet search

A facet is a subset of data from a previous search. You can conduct a facet search to narrow the results of a previous search. You can also conduct a search that is based only on a facet value.

To narrow the results of a previous search, select facets after you search on a value that you specified in lookup field or **Search** field. The facet values with the greatest number of records are displayed in the facet fields. The number of records is displayed parenthetically after each facet value.

For example, you are searching for a customer that sells lumber in Colorado. Your initial search for lumber in the **Customer Lookup** produced over 150 results. You select `CO` in the **State** field to narrow the results to 68 records. After searching by state, you can conduct a subsequent facet search by city to further narrow the results.

To conduct a search on facet values, click **Search** or Show More in the lookup window without first specifying a value in the **Search** field. In the facet fields, you can then select facet values to use in your search.

For example, you are searching for a customer in Colorado. You click **Search** to make values available in the facet fields. You select `CO` in the **State** field, and then click **Search**. After searching by state, you can conduct a subsequent facet search by city or zip code to further narrow the results.

The **Product Lookup** is the exception to facet-based searches. Because of the large number of product records, a search value is also required to generate results.

You can save facet searches for subsequent use. Optionally, you can save a search as the default search. The default search is displayed in the **Saved Searches** field when you access the facet search on a **Lookup** window. You must click **Search** to conduct the saved search.

Saved facet searches are available in all functions with the same type of lookup. For example, a facet search that you saved in the **Product Lookup** in **Product Availability Inquiry** is available in the **Product Lookup** in **Sales Order Entry**.

Saved facet searches are stored in the Distribution SX.e database. You can select saved searches any machine or browser from which you access Distribution SX.e.

Saving a facet search

If you create a default facet search, that search is always displayed when you open the lookup window.

1. In a field with a lookup, click the **Lookup** icon.
2. Click Show More.
3. In the **Criteria** field, select the fields to use in the search.
4. Optionally, select values in the facet fields.
5. Click **Search & Save**.
6. Specify a name for the search.
7. Optionally, select **`Default`**.
8. Click **OK**.

Conducting a facet search

1. Conduct an initial search. Use one of these methods:
   - Specify a value in a field that contains a lookup, and then click the **Lookup** icon.
   - Click the **Lookup** icon, specify a value in the **Search** field, and then click **Search**.
2. In the Facet Search section is not accessible, click Show More.
3. In the **Criteria** field, select the fields to use in the search.

   Alternatively, select a search from the **Saved Searches** field.
4. Select values in the facet fields.
5. Click **Search**.
6. Optionally, conduct subsequent facet searches.

Conducting a facet search without a search value

You can conduct a search using only facet values in all lookup windows, except for **Product Lookup**. Because of the large number of product records, a search value is also required.

1. In a field with a lookup, click the **Lookup** icon.
2. In the Facet Search section is not accessible, click Show More.
3. In the **Criteria** field, select the fields to use in the search.

   Alternatively, select a search from the **Saved Searches** field.
4. Select values in the facet fields.
5. If you are searching for a product, specify a value in the **Search** field.
6. Click **Search**.
7. Optionally, conduct subsequent facet searches.

Facet values in initial lookup searches

When you conduct an initial search in a lookup window, you can include this information:

- Values for the primary entity
- ID number of a facet entity

For example, to search for a threaded flange from vendor number 101, specify **`threaded flange 101`** in the **Search** field in the **Product Lookup** window. The results that display in grid meet the criteria specified for the primary and facet entities. The facet entity is displayed in the corresponding field in the Facet Search section, and available for a facet search. If you did not include the facet entity ID in the initial search, the entity might not be available in the Facet Search section.

To include a facet entity in the initial search, an ID number must be associated with the facet entity. Some entities, such as Product Line, do not use an ID number.

Most recently used (MRU) lookup

Use the most recently used (MRU) lookup feature to view the last five records that you accessed for a given entity or document. Documents that you created through the import process, such as sales orders, are included in the MRU list.

To activate the feature, click in a field with a lookup. The most recent records you accessed are then displayed in a list under the field. You can click record in the list to enter it in the field.

The MRU list does not display if you press **Tab** to advance to the field. You must use your mouse to click in the field to view the list.

The MRU lookup feature, which is available in most fields with a lookup, carries from function to function. For example, an order you maintained in **Sales Order Entry** is included in the most recently used lookup list in **Sales Order Inquiry**.

Autocomplete feature

The autocomplete feature, which can automatically load record data in a field, is available in all fields with a dynamic lookup. Select **`Lookup Autocomplete`** in **SA Administrator Options-System-General** to enable this feature.

If autocomplete is enabled, the value you type determines if a record is selected. If you specify a value that matches a record exactly, that record is automatically loaded in the field. If you specify a value that does not result in record selection, records that contain the value are displayed in a list. You must use your mouse to select a record from the drop-down list or use the lookup if the correct record is not displayed.

For example, suppose you have a **Product Warehouse Product Setup** record for product ABC. If you specify **`ABC`** in the **Product** field, product ABC is automatically loaded because it exactly matches the value that you specified. In another example, suppose you have product records for products ABC-01 and ABC-02. If you specify **`ABC`** in the **Product** field, both products are displayed in the drop-down list because the value did not match a record exactly.

If autocomplete is not enabled, you must select the record you want to use. Even if you specify a value that matches a record exactly, it is displayed in a list. You must select the record from the list to load it in the field. To select the record, use your mouse or use an arrow key to highlight the record and then press **Enter**.

The data displayed in the autocomplete list is configurable. Your system administrator can determine which values are displayed and in what order.

Records with identical product names and descriptions are represented by one entry in the drop-down list for the **Product** field in functions throughout Distribution SX.e. Duplicate records can represent different records, for example, **Product Setup** and **Product Warehouse Product Setup** records. If duplicate records exist, only the **Product Warehouse Product Setup** record is displayed. Because the drop-down list is limited to 10 records, a greater number of different products can be displayed if duplicate records are eliminated. You can user the lookup to view the records with duplicate values.

Character requirements for search values

When you conduct any type of search, specify at least two consecutive characters in the field. Spaces do not count as characters.

Single characters are ignored in some types of searches. If you specify only one character, the search can yield no results or too many results.

For example, you want to search for 2 x 4 pressure treated pine in the **Product Lookup** window. If you specify **`2 x 4`** in the **Search** field, no search results are returned. If you specify **`2 x 4 pressure`**, the results include 2 x 4 pressure treated pine. You would get the same results if you specified **`pr`** or **`pressure`**.

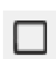
Chapter 6: Grids

Grids display a list of related records in a table format. From a grid, you can review, select, and drill down into a record for further processing.

See Personalize feature on page 57 for information about hiding or changing the order of the columns in the grid.

Grid icons

This table shows the icons you can use to select and access records within a grid:

Icon	Description
	Select. After you select this check box, you can perform actions on the record, such as copy or edit.
	Drill down. Click to view the record.
	Expand/Collapse. Click to hide or show information contained in a row.
	Sort order. Indicates if the column is sorted by ascending or descending order.

Grid options

The grid options include the Export to Excel feature, Row Height options, and Filter options. You can access the grid options from the **More** menu.

Export to Excel

You can use this feature to export the contents of a grid to a Comma Separated Value (csv) file. You can open the CSV file in Microsoft Excel and save it as XLS or XLXS. The method that is used to save the spreadsheet depends on your spreadsheet application.

The columns in the spreadsheet are displayed in order they are displayed in the grid. Hidden columns are not included in the spreadsheet.

Row Height

You can select **`Short`**, **`Medium`**, or **`Normal`** in the **More** menu to change the height of the rows that display in the grid. The default value for this setting is **`Normal`**. If you change this value, it is not saved after you leave the function.

Show Filter Row

When you select **Show Filter Row** from the grid options list, a filter for each column is displayed in the grid header row. The type of filter available depends on the values in the column, for example, alpha, numerical, and date. Each type of filter offers several filter options, such as **`Contains`**, **`Starts With`**, and **`Equals`**. Select **`Clear Filter`** from the grid options list to delete the filter criteria.

Depending on your environment, the filter row for some grids might be displayed by default.

Applying a grid filter

1. If the filter row is not displayed, select **More > Show Filter Row** in the toolbar above the grid.
2. Click the filter icon in the column.
3. Select a filter type.
4. Specify a value in the filter field.
5. Press **Enter** or select **More > Run Filter**.

Grid pagination

You can select a **`Records Per Page`** value to change the number of records that are displayed per page.

When you select a **`Records per page`** value for a grid, that value becomes the default value for grids throughout the application, except grids in lookup windows. The default value is maintained after you sign out. If you change the default value, you must refresh other open functions to apply the new default value.

A separate default value is maintained for grids in lookup windows. Fewer records per page in a lookup window prevents excessive scrolling. The default value for lookup windows is also maintained after you sign out.

Keyboard shortcuts for grids

This table shows the keyboard shortcuts to navigate within the grid:

Cell	Shortcut key
Adjacent cell	Arrow
First cell of the current row	Home
Last cell of the current row	End
First cell in the current column	Page Up
Last cell in the current column	Page Down

You can press **Enter** to change the edit mode of a cell. If the cell is equipped with control that uses a down arrow, then the control opens when you press **Enter**. Editable cells without controls switch to edit mode automatically when you specify a value or click in the cell. You are not required to press **Enter**.

Chapter 7: Infor Ming.le functions

This section provides information and instructions about using Infor Ming.le functions in conjunction with Distribution SX.e.

Infor Ming.le bookmarks

You can click the **Bookmark** icon on the Infor Ming.le menu bar to bookmark a page in Distribution SX.e. You can only bookmark the initial screen of a function. In entry functions, such as **Sales Order Entry**, you can bookmark the initiate and maintain windows.

See the Infor Ming.le online help.

Infor Ming.le Share

You can use the Share function in the Infor Ming.le menu bar to share information from Distribution SX.e with other users. For example, you can share information about a sales order from **Sales Order Entry** or **Sales Order Inquiry**.

Entity information and related key values from the Distribution SX.e function you share posts to each recipient's Activity Feed or Streams page in Infor Ming.le. The posts include drillback links that the recipients can use to view the information in Distribution SX.e.

When you create a post, it contains hashtags links and drill back links. The hashtag links enable recipients to view other posts that pertain to the same topic. The drill back links enable the recipients to view the information you shared. You can delete the links you do not want to share. Additionally, you can add a message in the text box that contains the hashtag links. The hashtag links and messages are displayed in the body of the post. The drill back links are accessed through the drill back icon.

See the Infor Ming.le online help.

Sharing Distribution SX.e information in Infor Ming.le

1. In Distribution SX.e, access the information you want to share.
2. Click the **Share** icon in the Infor Ming.le menu bar.
3. In the text box, edit the hashtag links, and optionally, add a message.
4. Optionally, remove drill back links.
5. Optionally, add attachments.
6. Select the recipients of the post.
7. Click **Share**.

Accessing Distribution SX.e information from an Infor Ming.le post

1. In Infor Ming.le, access your feed and locate a post with a drillback icon.
2. Click the drillback icon to view the list of available drillbacks, and then click a hyperlink to access the information in Distribution SX.e.

Infor Ming.le homepages and widgets

You can create homepages containing role-based widgets that provide information from multiple functions in Distribution SX.e. You can configure homepages to meet your requirements.

A widget is a small, single-purpose application that provides quick, at-a-glance information or quick access to simple interactive functions. Widgets are simpler and faster to access than full applications that might provide more functionality.

Some widgets contain links to inquiry functions in Distribution SX.e. You must be signed in to Distribution SX.e for the link to work.

To access homepages in Infor Ming.le, a Homepages security role must be assigned to your Infor Ming.le user record.

You can create a new homepage for role-based widgets, or you can add them to an existing homepage from the Widget Catalog.

Customer service widgets

Customer service widgets provide relevant Distribution SX.e information to users that interface with customers, such as customer service representatives and accounts receivable personnel.

These customer service widgets are available:

- Customer Lookup

  Shows the customers that are available in the company that is selected in the configuration settings for the widget. You can conduct a search, based on the customer name, to locate a customer. You can expand each available customer to view basic address information.

  Except for the Customer Pricing widget, the information in all other widgets depends on the Customer Lookup widget. The customer number and other information is sent from the Customer Lookup widget to the other widgets.

  Customers that are displayed in the Customer Lookup are based on the company and user ID that are selected in configuration settings for the widget. If you can sign in to multiple companies, you can display different company information in the widgets. You must configure the Customer Lookup widget.
- Customer Balance

  Shows the Total Balance, Memo Misc Credits, Memo Unapplied Cash, and Future Balance. If you are signed in to Distribution SX.e, you can click the customer name and number in the widget to access the customer's information in **Customer Inquiry**.
- Customer Period Balance

  Shows the period balance. You can configure the widget to display the information in different types of charts, such as a line or bar chart. You can hold your mouse over an object that represents a period, such as a bar, to view the exact amount.
- Customer Open Orders

  Shows the Order #, Requested Ship date, Total Invoice Amount, and Stage. You can sort the columns in ascending and descending order and filter the data in the Order # and Total Invoice Amount columns.

  If you are signed in to Distribution SX.e, you can click an order number to open the order in **Sales Order Inquiry**.
- Customer USPS

  Shows the customer address that was validated by the US Postal Service. You can click the **Google Map** to view the customer's location. Google Maps opens in a separate tab.

  If the address is not validated, a message is displayed. Close the message and then click the customer number link to open the customer record in Distribution SX.e. Make the required corrections.

  Note: This widget requires setup. Your system administrator must obtain an ID from the USPS and set up a business rule that includes the ID.
- Warehouse Lookup

  Shows the name and code of each warehouse that is available in the company. If a default warehouse is specified on the customer record, that warehouse is automatically selected. You can conduct a search to locate a warehouse.
- Product Lookup

  Shows the products that are available in the company that is selected in the configuration settings for the widget. You can conduct a search, based on the product name, to locate a product.
- Customer Pricing

  Shows the stocking quantity available orders, the quantity available, and the price and discount amount. The price and discount amount are based on these values:

- The warehouse selected in the Warehouse Lookup widget, or the default warehouse from the customer record that is selected if the Customer Lookup.
- The product that is selected in the Product Lookup.

  If you are signed in to Distribution SX.e, you can click the customer number in the widget to open **Customer Inquiry**.

Creating a customer service homepage

1. Sign in to Infor Ming.le as a user who has access to both Infor Ming.le and Distribution SX.e.
2. Select **App Menu > Homepages**.
3. Select **More > New Page**.
4. Specify a title and description for the page, and then click **Create**.
5. Click **Add Widget**.
6. Select **Categories > Application**.
7. Select `Distribution SX.e` in the **Application** field.
8. Click the **+** icon on these widgets:
   - Customer Lookup
   - Customer Balance
   - Customer Period Balance
   - Customer Pricing
   - Customer Open Orders
   - Product Lookup
   - Warehouse Lookup
9. Optionally, add the Customer USPS widget.
10. Click **Close**.
11. Click **Save**.

Configuring the customer service widgets

1. In Infor Ming.le, open your customer service homepage.
2. On the Customer Lookup widget, click the **More** icon, and then select `Configure`.
3. Select a value in the **Company/User ID** field.
4. Optionally, change these values:
   - **Results Per Page**
   - **Title**
5. Click **Save**.
6. Configure the Product Lookup and Warehouse Lookup widgets.
   a. Click **Configure Widget**.
   b. Select a value in the **Company/User ID** field.
   c. Optionally, change these values:

  - Records Count
  - Results Per Page

d Click **Save**.

7 Optionally, configure values for the widgets that are shown in this table:

Widget	Value
Customer Period Balance	Primary chart type
Product Lookup	Results Per Page
Customer Pricing	Quantity: The default value for the Stocking Quantity Ordered in the widget

Purchasing widgets

Purchasing widgets provide relevant Distribution SX.e information to users that interface with vendors, such as inside sales and accounts payable personnel.

These purchasing widgets are available:

- Vendor Lookup

  Shows the vendors that are available in the company that is selected in the configuration settings for the widget. You can conduct a search, based on the vendor name, to locate a vendor. You can expand each available vendor to view basic address information.

  The information in all other vendor-related widgets is based on the Vendor Lookup widget. The vendor number and other information is sent from the Vendor Lookup widget to the other widgets.

- Vendor Balance

  Shows the Current Balance, Last Invoice, On Order Balance, Rebate Balance, Last Purchase Order Issued, # of Purchase Orders Late, Last Payment, and Last Purchase Order Date. You can click in the vendor number link to open the vendor record in **Vendor Inquiry**.

- Vendor Period Balance

  Shows the period balance. You can configure the widget to display the information in different types of charts, such as a line or bar chart. You can hold your mouse over an object that represents a period, such as a bar, to view the exact amount.

- Vendor Purchase Orders

  Shows PO #, Vendor #, Stage, Ship To Warehouse, Warehouse Name, and Transaction Type. You can search by PO #, Stage, and Transaction Type within the grid. You can click an order number link to open the order in **Purchase Order Inquiry**.

- Vendor Details

  Shows general detail information from the Vendor record such as Expediter, Expediter Phone #, Our Customer#, Invoice Type, Sales Rep, and Sales Rep Phone #. You can click in the vendor number link to open the vendor record in **Vendor Inquiry**.

- Item Usage

Shows Month, Year, Usage, Override Usage, and Reason, based on the values that are selected in the Product Lookup and Warehouse Lookup widgets.

Creating a purchasing homepage

1. Sign in to Infor Ming.le as a user who has access to both Infor Ming.le and Distribution SX.e.
2. Select **App Menu > Homepages**.
3. Select **More > New Page**.
4. Specify a title and description for the page, and then click **Create**.
5. Click **Add Widget**.
6. Select **Categories > Application**.
7. Select `Distribution SX.e` in the **Application** field.
8. Click the **+** icon on these widgets:
   - Vendor Lookup
   - Vendor Balance
   - Vendor Period Balance
   - Vendor Purchase Orders
   - Vendor Details
   - Item Usage
9. If you add the Item Usage widget to your homepage, also add the Product Lookup and Warehouse Lookup widgets.
10. Click **Close**.
11. Click **Save**.

Configuring purchasing widgets

1. In Infor Ming.le, open your purchasing homepage.
2. On the Vendor Lookup widget, click **Configure Widget**.

   To change the settings after the initial configuration, click the **More** icon and then select **Configure**.
3. Select a value in the **Company/User ID** field.
4. Optionally, change these values:
   - **Records Count**
   - **Results Per Page**
5. In the **User Status** field, indicate the status of vendors to view in the widget.
6. Click **Save**.
7. Repeat the previous steps to configure the Product Lookup and Warehouse Lookup widgets.
8. Optionally, configure values for the widgets that are shown in this table:

Widget	Value
Vendor Period Balance	Primary Chart Type
Vendor Purchase Order	Requested Batch Size: The number of records to display

Context applications in Infor Ming.le

Context and utility applications are gadgets or mini applications that provide information at a glance and access to frequently used tools. You use these applications in Infor Ming.le to create and maintain notes, create and maintain contacts, and view and print reports and other documents.

To access the context applications, you must expand the **Context Apps** panel in the Infor Ming.le menu bar. If a context application within the collapsed panel requires attention, a notification dot is displayed on the collapse/expand icon for the panel. The state of **Context App** panel is retained from session to session. If it was closed when you last signed out, it is closed the next time you sign in.

You must expand each context application to access information. If a context application does not contain information, you cannot use the context application in the current function. For example, you cannot add a note to an order you select in search results grid of **Sales Order Inquiry**. If you open the order, you can add notes in other views, such as Header, Line Detail, or Line History.

This table shows the Infor Ming.le context applications that are used by Distribution SX.e:

Note: Your system administrator assigns the titles to each context applications. Those titles might differ from the titles that are documented.

Context application	Description
Activities	Use this application to add, maintain, and delete activities that are related to these entities: • Customers and ship tos • Vendors and ship froms • Contacts See Activities context application on page 40.
Calculator	Use this application to determine the quantity for a product with a dimensional unit of measure in **Sales Order Entry**. See Calculator context application on page 43.
Contacts	Click this application to add, maintain, and view contacts for customers, ship tos, vendors, ship froms, products, and catalog products. You can also create tasks that pertain to a contact. See Contacts context application on page 44.

Context application	Description
Document Management	Click this application to view the documents that are stored in Infor Document Management (IDM), or to upload files to IDM. From this application, you can also access the document within Infor Document Management or share the information in Infor Ming.le. When a user clicks the drillback icon in a post in Infor Ming.le, the shared document opens in IDM. See Document Management context application on page 46.
Interaction Advisor	After you specify a product in **Sales Order Entry**, select this application to view recommended products and promotions that were generated by **Interaction Advisor**.
MaxRecall	Click this application to view a list of documents that are related to the customer or vendor that is specified in the current function. After you click the document you want to view, the **MaxRecall** website opens. You provide your user name and password to view the document.
Notes	Click this application to add, maintain, or view a note that is attached to an entity. See Notes context application on page 47.
Report Viewer	Click this application to view a list of reports and other documents that were sent to this context application. Click a report to view it as PDF or text file. See Report Viewer context application on page 52.
Supplier Access	Click this application to directly connect to your supplier or vendor warehouses to view product availability. After you specify a product in **Sales Order Entry**, you can view product availability in the **Supplier Access** application. You can also select a supplier from which to source the product. See the online help.
Tiers and Preferences	After you specify a product in **Sales Order Entry**, click this application to view products that were grouped and prioritized by these attributes: • Quality • Availability • Location • Price See the online help.

Note: The date and time formats that are displayed in the context applications are based your language preference.

Context application icons

This table shows the icons that you can use to navigate context applications in Infor Ming.le:

Icon	Description
	Attach. Click to attach a file.
	Back. Click to return to a previous view.
	Calculate. Click to perform a calculation.
	Cancel. Click to undo all changes made to an existing record since the record was last saved. If you create a new record, click this icon to exit the create mode.
	Close. Click to close the window.
	Copy. Click to update the **Quantity** field on a sales order line with the calculated amount in the Calculator context application.
	Delete. Click to delete the record.
	Drag. Select to drag the object to a different location.
	Edit. Click to maintain the record.
	Expand or View. Click to open the window for the context application.
	Import. Click to import information from the entity record to the contact record.
	ION workflow. Indicates that the activity that is specified on an Activities record is enabled as an ION workflow. The activity is published as a task in Infor Ming.le.
	Launch. Click to open an application.
	Move right and Move left. In the **Report Viewer** window, click an icon to move an email recipient between the Available and Selected columns.
	New. Click to create a new record, such as a note or contact record.
	New Task. Click to create a new document or task.
	Ownership. Click to view your activities or the activities of other users.
	Refresh. Click to update the display.
	Reverse. Click to reverse the chronological order of the list of notes.
	Save. Click to save the record.
	Select. Click to select a record.
	Send Reports. Click to send a report to an email recipient.

Icon	Description
	Share. Click to share in Infor Ming.le.
	Sort Up and Sort Down. Click to change the sort order of the listed reports by date and time.

Activities context application

Use the Activities context application to add, maintain, and delete activities for these entities: customer, ship tos, vendors, ship froms, and contacts.

You can create activities in the setup, entry, and inquiry functions that are related to the entities, such as **Sales Order Entry** and **Purchase Order Inquiry**.

When you first open a function in which you can create activities, the activities that pertain to the entity are displayed in the Activities app. For ship tos and ship froms, the customer and vendor activities are also available.

If you click a contact in the **Contacts** app, the activities that pertain to the contact are displayed in the Activities app. Activities that pertain to the contact can show activities for more than one entity, such as a customer and a ship to. To change which entity's activities display, select the entity from drop-down list in the **Activities** app.

You can click the **Ownership** button to view your activities or all activities for the entity in the **Activities** app. The appearance of the **Ownership** button changes depending on whether you are viewing your activities or all activities. The button displays as one or two persons.

Only active records are displayed in the **Activities** app. They are displayed in ascending date order. Click the **Sort** button to change the order. Click an activity to view the details of the activity. If a document was referenced in the activity, a link to the document is included on the record. Click the **View** button to view the activity in the **Activities** window. Click the **Back** button to return the list of activities.

To create an activity, access the **Activities** window. The entity that you selected in the **Activities** app determines the default values that are displayed in the **Activities** window, but you can change them. You can create an activity for any entity in any function. If you create an activity for an entity that is not related to the function, you can view the activity on the **All Subjects** tab. Optionally, access a function that is related to the entity. For example, you can create an activity for a vendor in **Customer Setup**. After you create the activity, you can view it in **Vendor Setup** or another vendor-related function.

On each activity record, you must specify an activity. Each user-defined activity is set up in **SA Table Code Value Setup-CAM Activity Code**. If an active ION workflow is specified on the activity code record, the activity is published to Infor Ming.le. The activity is sent to users that are identified for distribution in the ION workflow. When an activity is assigned to you, a task notification is displayed in the **User Menu** in Infor Ming.le. Click the notification to open your **My Tasks** page. Tasks are also displayed on your **Activity Feed** page and in the Homepages Task widget. You must add the Tasks widget to a homepage from the widget catalog.

For information about the **Activity Feed** page, **My Tasks** page, Homepages, and widgets, see the Infor Ming.le online help.

After you finish the activity, you can close the activity in the Activities context application or Infor Ming.le. In the context application, you specify a result. In Infor Ming.le, you click a button that corresponds to a result. Each user-defined result is set up in **SA Table Code Value Setup-CAM Activity Result**. Depending on the ION workflow, other actions might be set up, such as reject or approve.

To search activity records that are not specific to a particular entity, use the **All Subjects** tab in the **Activities** window. For example, in **Customer Setup**, you can search for activities with an Active status within a date range. The results that are displayed can include multiple activities that were created by multiple operators for multiple entities such as customer, vendors, and contacts.

The Notes context application is integrated with the Activities context application. You can associate notes with a specific activity. When you select an activity in the **Activities** app, the related notes are displayed in the **Notes** app.

Security for this feature is specified in **SA Operator Security-Controls**. Functional security is specified in the **Activity Security** field. Access to other user's assigned activities is granted in the **Allow Access to Other Operator Activities** field. If `Yes` is selected, you can create and maintain activities that are assigned to another user.

Creating an activity

Use these instructions to create an activity for a customer, ship to, vendor, or ship from.

Note: The lookup fields in the **Activities** window do not support auto-complete and MRU functionality.

1. In the **Activities** app, click the **Expand** button.
2. Click the entity tab, if required.
3. Click **New**.
4. Optionally, specify another operator to assign the task to.
5. Specify the activity.
6. Optionally, change the start date and time.
7. Associate the activity with an entity.
   a. Select the entity type in the **Subject Type** field.
   b. Specify the associated values, such as customer and ship to or vendor and ship from.
   c. Optionally, specify a contact.
8. Optionally, specify this information:
   - Priority

     Use this value to indicate the priority of the contact for the entity. For example, specify **1** for the manager and **2** for the assistant manager.
   - Document type and document

     Specify the document type and the document that is associated with the activity.
   - Comment
9. Click **Save**.

Creating an activity for a contact

Use these instructions to create an activity for a contact only. You must access the entity record to which the contact is associated, such as the **Customer Setup** or **Customer Ship To Setup** record. Otherwise, you cannot specify the contact on the activity.

1. In the **Contacts** app, select the contact.
2. In the **Activities** app, click the **Expand** button.

   The tab for the contact is selected.
3. Click **New**.
4. Optionally, specify another operator to assign the task to.
5. Specify the activity.
6. Optionally, change the start date and time.
7. Select **`None`** in the **Subject Type** field.
8. Optionally, specify this information:
   - Priority

     Use this value to indicate the priority of the contact for the entity. For example, specify **1** for the manager and **2** for the assistant manager.
   - Document type and document

     Specify the document type and the document that is associated with the activity.
   - Comment
9. Click **Save**.

Adding a note to an activity

1. In the **Activities** app, click the activity.

   The type of activity is displayed in the drop-down list in the **Notes** app.
2. In **Notes** app, click the **Expand** icon.
3. Create the note.

   See Creating a note on page 50.
4. Close the **Notes** window.

   The **Notes** app refreshes to display the note for the activity.

Maintaining or deleting an activity

1. In the **Activities** app, click the **Expand** button.
2. Specify search criteria, and then click **Search**.
3. To maintain an activity:

   a. Click the **Select** icon to open the activity.

b Click **Edit**.
c Make the changes, and then click **Save**.

4 To delete an activity, select the activity and then click **Delete**.

Closing an activity in the context application

1. In the **Activities** app, click the **Expand** button.
2. Specify search criteria, and then click **Search**.
3. Click the **Select** icon to open the activity.
4. Click **Edit**.
5. Select `Inactive` in the **Status** field.
6. Select a value in the **Result** field that indicates why the activity was closed.
7. Click **Save**.

Closing an activity in Infor Ming.le

1. Access the task in your **Activity Feed** or **My Tasks** page, or in the Homepages Tasks widget.
2. View the details of the task.

   On the **Activity Feed** or **My Tasks** page, click Show Details.

   On the Tasks widget, select **More > View Details**.
3. Click one of the available buttons to update and close the activity in the Activities context application.

   The buttons correspond to values that are available in the **Results** field in the **Activities** window. The buttons that are available depend on the ION workflow for the activity.

Searching activities

1. In the **Activities** app, click the **Expand** button.
2. Click **All Subjects**.
3. Specify search criteria, and then click **Search**.
4. Click the **drill down** icon to open the activity record.

Calculator context application

The Calculator context application is available in **Sales Order Entry** if these conditions are met:

- The unit of measure for a product is a dimensional, such as square feet or linear feet.
- You are in **Advanced Line Entry**.

When you sell dimensional products, you can use the calculator to determine the quantity for the line. For example, suppose you sell plywood by the square foot. You sell three pieces of plywood that were cut to 3' x 5' 5-3/4”. Specify the quantity and the product dimensions in the Calculator to determine that total square footage for the three pieces is 48.75 sq/ft.

The values that are specified in the Calculator are cleared when you add the line to the order.

Calculating quantity for dimensional products in Sales Order Entry

1. Select **Sales > Entry > Order**.
2. Create or maintain an order.
3. In **Advanced Line Entry**, specify a product with a dimensional unit of measure.
4. Expand the Calculator context application.
5. Specify the quantity and the dimensions of the product.
6. Click **Calculate**.
7. Click **Copy** to update the **Quantity** field on the sales order line with the calculated value.
8. Add the line to the order.

Contacts context application

You can use the Contacts context application in Infor Ming.le to maintain contact records and create tasks that pertain to the contacts.

Contact record maintenance

You can use the Contacts Manager to add, edit, and delete contacts for these types of records:

- **Customer Setup**
- **Customer Ship To Setup**
- **Vendor Setup**
- **Vendor Ship From Setup**
- **Product Setup**
- **Product Catalog Setup**

In some functions, you can import information, such as the email address and phone number, from the entity record to the contact record.

The contacts that you create for a record are available in **Contact** field in functions throughout Distribution SX.e if these conditions are met:

- The record is referenced in the function.
- The **Contact** field is equipped with a lookup.

For example, you can specify a contact for the customer on the **Initiate** page in **Sales Order Entry**.

You can view existing contacts for the entities that are associated with the active function. For example, you can view the Vendor and Product contacts in **Product Warehouse Product Setup** and **Product Catalog Setup**. The number of contacts per entity is displayed.

You can view contacts in the **Contacts Manager** app in the **Context Apps** panel or in the expanded **Contacts Manager** window. To view a contact record in the **Contacts Manager** window, click the contact record in the **Contacts Manager** app and then click the **Expand** or **Edit** icon. If you click **Edit**, then the record is displayed in edit mode.

Creating a contact record

1. In the **Contacts** app, click the **Expand** icon.
2. Click an entity tab.
3. Click **New**.
4. Specify information for the contact. Click **Save** after you add information to each of these sections:
   - CRM Integration

     If the **Enable Do Not Contact Fields for CRM Integration** option is selected in **SA Administrator Options-Integrations-CRM Integration Options**, the **Do Not Solicit** fields are selected by default. These settings are used to notify customer service reps or any users who use the Contacts application how to handle any solicitation to the contact. These settings apply to all phone numbers, email, and mailing addresses set up for the contact. Use the settings to ensure your company adheres to consumer protection laws that may require that you gain permission from your customer or vendor before contacting them. Review each field and select or deselect, based on the contact's preferences.

     Note: The settings for these fields are sent in API calls and the ContactMaster BOD to your CRM application.
   - Subjects

     By default, the contact is tied to the entity for which you created the contact. For example, if you create a contact in **Customer Setup**, the contact is identified as a customer subject type. The primary key is the customer number. You can add a secondary user-defined key to the default subject. You can also add additional subject types with user-defined primary and secondary keys.
   - Phone Numbers
   - Email Addresses

     Select the **Shipment Notice** option to send shipment notices to this email address.
   - Fax Numbers
   - Addresses

   Select **Primary** to indicate the primary phone number, email address, fax number, and email address for the contact.

   Alternatively, click **Import** to import the information from the entity record to the contact record.
5. Click **Save**.

Task creation

To create a task for a contact in the Contacts context application, the content engagement work flow must be activated in your environment.

After you create a task, it is displayed in your feed or task page in Infor Ming.le. You can assign the task, add an attachment, or share it with another user. When the task is complete, you can mark it as finished.

See the Infor Ming.le online help.

Creating a task for a contact

1. In the **Contacts** app, click a contact.
2. Click the **New task** icon.
3. Specify a due date.
4. Specify instructions in the **Comment** field.
5. Click **Save**.

Document Management context application

Use the **Document Management** context application to view documents that are stored in Infor Document Management (IDM), or to upload files to IDM.

You can view images of the documents or a list of the documents in the context application. You can also view the documents in another browser tab or in IDM.

By default, all of the IDM documents that are associated with the record that you are viewing are shown. To view records that correspond to a specific Distribution SX.e function or table, you can select a context entity that is related to your current view. For example, this table shows the context entities that you can select in the context application in **Product Warehouse Product Setup**, and the related Distribution SX.e functions:

Context entity	Function
VendorMaster	**Vendor Setup**
ICWarehouseMasterFile	**Product Warehouse Description Setup**
ICProductMaster	**Product Setup**
ICProductWarehouse	**Product Warehouse Product Setup**

For a list of context entities and the related functions and tables, see information about supported business context messages in the *Infor Distribution SX.e Configuration Guide for Infor Operating Service*.

Viewing documents in the Document Management context application

1. Expand the **Document Management** context application.
2. To change your view, click the **List View** icon, or the **Picture View** icon. In the Picture View, click the arrows to page through each image.
3. Optionally, select a context entity.
4. To view a document in another browser tab:
   - In the Picture View, click the image.
   - In the List view, click the icon for the document.
5. To view the document in Infor Document Management, click the **Show in IDM** icon.

Adding a file to IDM in the Document Management context application

1. Expand the **Document Management** context application.
2. Drag a file to the context application.

   Alternatively, click **Add File** to select a file.
3. Select a context entity.
4. Select the document type.
5. Specify addition details that are related to the document type.
6. Click **Upload**.

Sharing an IDM document in an Infor Ming.le post

1. In the **Document Management** context application, select the IDM document.
2. Click the **Share** icon.
3. Optionally, edit the message.
4. Optionally, add attachments.
5. Select the recipients of the post.
6. Click **Share**.

Notes context application

Use the Notes context application in Infor Ming.le to create, view, and maintain notes that are attached to Distribution SX.e entities. You can view the notes in the **Notes** app in the **Context Apps** panel or in the maximized **Notes** window.

You can only add notes for the entities that are displayed on the tabs in the Notes context application. The number on the tab indicates how many notes were created for the entity. If the Notes context application is blank and does not display any buttons, you cannot add a note from your location in the function.

See Note availability on page 65 for this information:

- A list of functions in which the Notes context application can be used
- The type of notes that are displayed for each function

The highlighted tab indicates for which entity you are creating the note. If you create a global note, the note is attached to these entities without regard to suffixes:

- Sales orders
- Purchase orders
- Transfers
- Work orders
- Value Add orders

For example, if sales order 1234-00 results in back order 1234-01, the Order Global note is attached to the original sales order and the back order.

When you create a note, you can select these options:

- **`Required`**

  Select this option to ensure that the note is read by all users.
- **`Secured`**

  Select this option to restrict access to the note. If you select **`Secured`**, the other options are not available.

  For operators to view secured notes, **`Yes`** must be selected in the **Allow Access to Secured Notes** field on their **SA Operator Setup-Controls** record.
- **`Print Note`**

  Select this option to choose documents on which the note is printed.

This table shows the documents that you can print, based on the entity:

Entity	Documents
Customer, Customer ship to	Acknowledgment, pick ticket, advanced ship notice, invoice
Product	Acknowledgment, sales order pick ticket, invoice, purchase order, TWL packing slip, Value Add pick ticket, warehouse transfer pick ticket
Catalog product	Acknowledgment, sales order pick ticket, invoice, purchase order, TWL packing slip, Value Add pick ticket, warehouse transfer pick ticket
Purchase order	Pre-receiving report, purchase order, EDI 850 outbound (PO)
Sales order	Acknowledgment, pick ticket, advanced ship notice, invoice, EDI 810 outbound (acknowledgment)

Entity	Documents
Vendor, Vendor ship from	Pre-receiving report, purchase order, and EDI 850 outbound (PO)
Warehouse transfer	Pre-receiving report, warehouse transfer

You cannot attach a note to a tied document in the function in which you created the tie. For example, if you source products from another warehouse, you cannot attach a note to the warehouse transfer or From Warehouse entity from **Sales Order Entry**. You must access the warehouse transfer in Transfer module to add notes to these entities. If you attached notes to Product or Warehouse entities in **Sales Order Entry**, the notes are displayed in the Transfer module because these entity notes are available in both functions. The Warehouse note that you specify in **Sales Order Entry** is displayed as a To Warehouse note in the Transfer module.

Standard and simple notes

Infor Ming.le supports standard notes and simple notes. Standard notes, or integrated notes, are stored in Distribution SX.e. You can print standard notes and flag them as secured or required. Simple notes are stored in the Notes context application. You can only flag simple notes as secure.

The type of note you can create depends on the record. Simple notes are created for these types of records. Standard notes are created for all other records:

- Warehouse records that are created in **Product Warehouse Description Setup**
- Price and discount records created in **PD Pricing Setup**
- Certification and license records created in **Product Certification/License Setup**

Note indicators

If a note is attached to an entity, an indicator is displayed below the entity field or in the associated Notes column in a grid. The notes indicator for a required note is red. The notes indicator for a note that is not required is blue. Only simple notes that are flagged as required generate a notes indicator.

Only simple notes that are flagged as required generate a notes indicator.

Note: Notes for a product might originate from the **Product Setup** or **Product Catalog Setup** record. If a **Product Setup** record exists, notes attached to the product record are displayed. If a **Product Setup** record does not exist, but a **Product Catalog Setup** record is located, the notes that are attached to the catalog record are displayed.

If a note for an entity is required, the Notes window might open automatically when you perform these actions:

- Specify the entity in a function.
- Access a record that contains the entity.

This feature is controlled by business rules that are maintained by the system administrator.

Note organization

The list of notes for an entity is separated into header notes and non-header notes. When you create a note, it is added to the list of notes in the Notes context application in descending order by date. You can reverse the order of the notes list to ascending order by date. You can also use the drag functionality to organize notes. You cannot drag header notes into the non-header notes. Similarly, you cannot drag non-header notes into the header notes.

Note formatting

When you save a new or existing note, it is formatted to 16 lines per page with 60 characters per line including spaces. If a note exceeds 16 lines, one or more additional notes are automatically created, based on the number of lines. For example, if your original note contains 40 lines, three notes are created. The first two notes contain 16 lines each and the third notes contains eight lines. You can edit the additional notes.

The additional notes are saved at the bottom of the list of notes on the **Notes** window. You can reorganize the notes to group the additional notes with the original note.

If a line exceeds 60 characters and contains spaces, the new line starts with the word that contains 61st character. If a word exceeds 60 characters, the new line then begins with the 61st character of the word.

Select the **`Fixed Width Display`** option to resize the text area to 16 lines high by 60 characters wide. Use this option to better assess the amount of content in a note and at what line and word the next line or note begins. The fixed width content is displayed in Courier New font. If you select the **`Fixed Width Display`** option, it remains selected from session to session.

Creating a note

In the **Notes** window, you can add, edit, or delete a note. You can also change the order of the notes.

1. To create a note that is attached to a contact, select the contact in the Contact context application in Infor Ming.le. Otherwise, go to the next step.
2. In the Notes context application, click the **Expand** icon in the **Notes** app.
3. Select an entity.
4. Click **New**.
5. Optionally, select a category.
6. Select **`Text`** or **`URL`**.
7. Specify the text or URL information.
8. Optionally, select **`Required`**, **`Header Note`**, **`Print Note`**, or **`Secured`**.
9. Click **Save**.
10. Optionally, reorder the notes. Click the **Reverse sort order** icon, or follow these steps:
    a. Hold your mouse over a note.
    b. Click the drag icon, and then drag the note to the preferred location.

Printing product notes

When you print notes attached to products in **Product Setup** or **Product Catalog Setup**, you can restrict the documents on which the note is printed. You can also limit the customers or vendors for which the note is printed, depending upon whether it is an external document sent to customers or vendors. You can select to print or exclude product notes for these documents:

- **Sales Entry Processing Acknowledgment Report**

  Product notes, catalog product notes, and external line comments can be printed for order lines and kit components, if the component is set to print, on order acknowledgements. This is a customer document and customer restrictions defined for the product note in the Notes context application are applied.

- **Sales Entry Invoice Processing Report** and **Sales Demand Invoices Report**

  Product notes, catalog product notes, and external line comments can be printed for order lines and kit components, if the component is set to print, on invoices. This is a customer document and customer restrictions defined for the product note in the Notes context application are applied.

  Note: Two settings determine if kit components are printed on documents. These are the **Print On Invoice** option in **Product Setup** and the **Print** option in **KP Component Setup** or **Sales Order Entry-Kit Component**. If the component is not printed, then neither is the component's product note.

- **Sales Consolidated Invoices Report**

  If product notes are set up to print on invoices, then they also print on consolidated invoices. Line comments are not printed on consolidated invoices. This is a customer document and any customer restrictions defined for the product note in the Notes context application are applied.

- **Sales Entry Pick Tickets Report**, **VA Entry Processing Pick Ticket Report**, and **Transfer Entry-Print Pick Ticket**

  Product notes and catalog product notes can be printed for order lines and kit components on regular, bulk, WM, and TWL pick tickets. Regular pick tickets and TWL packing slips are customer documents and any customer restrictions defined for the note are applied. VA and transfer pick tickets are printed regardless of customer or vendor restrictions. To prevent a product note for a restricted customer or vendor from printing on these pick tickets, uncheck the **Pick Ticket** option on the **Notes** window.

  Product notes are printed on bulk sales order pick tickets only when there is no customer restriction.

  Product notes are printed on bulk VA and transfer pick tickets regardless of customer or vendor restrictions.

  Product notes on direct transfers with a customer restriction are not printed if the restricted customer number matches the customer on the tied order.

- **Purchase Entry Processing Print POs Report**

  Product notes and catalog product notes can be printed for order lines on purchase orders.

  Purchase orders are vendor documents and any vendor restrictions defined for the note are applied. Product notes for Direct Order purchase orders with a customer restriction are not printed if the restricted customer number matches the customer on the tied order.

Report Viewer context application

Use the Report Viewer context application in Infor Ming.le to manage your reports. When you select `View` as the **Print Type** for Distribution SX.e reports and other documents, they are listed in the Reports Viewer context application.

The reports are presented in descending order by date and time. You can click **Sort** in the Report Viewer app to change to ascending order.

Documents are available in the Report Viewer context application for seven days. We recommend that you save them before they are deleted from the system. You can also manually delete documents from the Report Viewer.

From the Report Viewer context application, you can perform these tasks:

- Send documents to other users
- View documents as PDF or text files

  If Acrobat Reader is installed on your machine, you can click a document hyperlink to view the document as a PDF file. The document opens in a separate browser page where you can view, print, and save the full document.

  To view a document as a text (.txt) file, select `Override Output Style to Text` on the **Report Information** screen when you print the report.

Note: If a document that you send to `View` is not displayed in the Report Viewer, contact your system administrator. The `PDF Conversion for View and E-Mail` option in **SA Administrator Options-System** must be selected. If the option is not selected, you cannot view the documents in Report Viewer, and emailed documents are sent in a text file.

Sending a report to another user from Report Viewer

1. In the **Report Viewer** app, click the **Expand** icon.
2. Select the reports to send.
3. Click **User**.
4. In the Available column, select the operators you want to receive the reports.
5. Click the **Move** icon to move the operators to the Selected column.
6. Click the **Send Reports** icon.

Chapter 8: Printing

Printing involves producing output in the form of predefined reports, or on-demand printing of certain documents. Use the Reports Viewer context application in Infor Ming.le to manage your reports.

See Report Viewer context application on page 52.

Printing documents, such as purchase orders or sales order receipts, is performed within each order entry function.

On-demand printing

Printing documents from an entry function is on-demand or direct printing. You can use this printing method to print documents for recently completed or existing orders from these functions:

- **Sales Order Entry**

  You can print these documents on demand:

  - Acknowledgments
  - Pick tickets
  - Delivery notes
  - Invoices
  - Receipts

  Acknowledgments and invoices do not have stage restrictions. You can print them at any time as long without changing the current stage of the order. If you print an invoice before the order is processed by the **Sales Entry Invoice Processing Report**, the invoice might not be accurate.

  These restrictions apply when you print sales order documents on demand:

  - If the order approval code on a quote order is the legacy hold code for a margin hold, you cannot print an acknowledgment for a quote order.
  - To print a sales order pick ticket, the sales order must be in Stage 1-Ordered, 2-Picked, or 3-Shipped.
  - You cannot print pick tickets for Quote Orders (QU), Corrections (CR), and unapproved or on-hold orders.
  - You cannot print drop shipped lines, or line item DOs, on pick tickets. You must select `Yes` for the **Print Drop Ship Lines** setting on the **Sales Entry Processing Pick Tickets Report**. When you print a pick ticket on demand, any drop-shipped lines are moved to an order with a higher suffix number. The remaining lines are printed on the pick ticket, and the order stage is advanced to 2-Picked.

Note: You can also print sales order documents on demand from **Sales Credit Release Inquiry** and **Sales Shipping Feedback Entry**.

- **Purchase Order Entry**

  When you demand print a purchase order in **Purchase Order Entry**, the auto print stored report, @ + PO + warehouse, is used to print the purchase order. If you do not use an auto stored report for purchase orders, default options on these reports are used, based on the purchase order stage:

  - **Purchase Demand Print Report**

    Use this report to print POs that are canceled.

  - **Purchase Entry Processing Print POs Report**

    Use this report to print POs that are in any stage other than canceled.

- **Transfer Entry**

  Some restrictions apply when you print warehouse transfer pick tickets

Use **RS Activity Administration** to view all current on-demand print jobs.

Automatically printing documents

If you routinely print documents from these functions, select **`Automatic Print`** to automatically print documents after each transaction is entered or changed:

- **Sales Order Entry**
- **Purchase Order Entry**
- **Transfer Entry**

The setting does not persist from session to session. You must select **`Automatic Print`** each time you sign in to Distribution SX.e. To discontinue automatic printing during a session, clear the check box.

If you automatically print sales order pick tickets, a pick ticket is printed for these orders if the promise date equals the current date:

- Stock Order (SO)
- Counter Sale (CS)
- Return Merchandise (RM)

When a future ship date is indicated, pick tickets are printed if the promised date on the order header is the current date.

Automatic pick tickets are affected the **Additional Days for Calculating Requested Ship Date** setting in **SA Administrator Options-Documents-Sales Orders-Entry Settings** and these values in **Product Warehouse Description Setup-Other**:

- **`End of Day Cutoff`**
- **`Saturday Shipment`**
- **`Sunday Shipment`**

Even if **`Automatic Print`** is selected, some documents still might not print under these conditions:

- Depending on how the printing options are set up, pick tickets do not print if an order's shipped quantity and returned line items is zero.
- Counter Sale (CS) orders do not print automatically if you are forced to tender.
- If an order is maintained, a pick ticket reprints only if a line has been changed or added. If information such as terms or down payment is changed, the pick ticket does not automatically reprint. To prevent picked line items from being picked again, only new or changed line items are included on the reprinted pick ticket.
- Orders on hold do not print until they are approved.
- If a warehouse transfer is tied to a direct sales order that is on hold, the warehouse transfer does not print.
- If a purchase order is created for a direct line item in **Sales Order Entry** and the order is on hold, the purchase order does not print. If a tied sales order is not approved, you are prompted to confirm that you want the purchase order to print.
- Canceled purchase orders do not print automatically when they are canceled in **Purchase Order Entry**. You can print the canceled purchase order using the print on demand function.
  Note: **`Automatic Print`** must also be selected if you use an @ stored report to auto print.

If you print sales and purchase orders on demand, you can select **`Use Where Appropriate`** to send applicable documents to Electronic Data Interchange (EDI) trading partners. In **Sales Order Entry**, an acknowledgment or response to a request for quote can be transmitted to the customer. In **Purchase Order Entry**, the purchase order is transmitted to the vendor.

You can also select **`Use Where Appropriate`** to email the documents to the customer or vendor. The email address must be included in the **Customer Setup**, **Customer Ship To Setup**, **Vendor Setup**, and **Vendor Ship From Setup** records.

Printing a document on demand

1. Navigate to the entry function.
2. Click **Print**.
3. Specify the order or transfer number.
4. Optionally, in **Sales Order Entry**, specify a promo message to add to the document.
5. Optionally, in **Sales Order Entry** and **Purchase Order Entry**, select **`Use Where Appropriate`** to send applicable documents by EDI or email.
6. Optionally, select **`Automatic Print`** to automatically print documents after each order or transfer is entered or maintained.
7. In the Print Options list, select the documents to print.
8. For each document that is selected, specify the print information.
9. Click **Submit**.

Chapter 9: Personalization

You can personalize the user interface (UI) throughout Distribution SX.e and entry default settings in **Sales Order Entry**, **Purchase Order Entry**, and **Transfer Entry**.

Personalization security

These security settings in **SA Operator Setup-Controls** determine the personalization you can perform:

- **Save/Load Web Modifications**

  Enables you to load existing UI modifications and save UI modifications at the level specified. You perform the modifications using the Personalize feature.

- **Save/Load Web Settings**

  Enables you to load existing entry default settings and save entry default settings at the level specified in **Sales Order Entry**, **Purchase Order Entry**, and **Transfer Entry**.

The security settings can be set to the user, profile, or company level. This table shows the level of personalization at which you can save and load settings, based on your security setting:

Save/Load setting	Level of personalization
`Company`	Company, Profile, and User
`Profile`	Profile and User
`User`	User

Profiles for specific job functions, such as a customer service representative, are set up in **SA Table Code Value Setup**. If a profile is specified on an operator record, it does not dictate which personalized Profile settings can be loaded or saved.

Hierarchy of personalization levels

UI modifications and default entry settings that are applied to the user interface are based on this hierarchy:

1. User

2 Profile
3 Company

The highest level of UI personalization that you have saved to your live UI is always applied in your live UI. You cannot return to a lower level of personalization after applying a higher level of personalization unless you perform these actions:

- To apply a lower level of UI personalization, you must delete the higher levels.
- To apply a lower level of default entry settings, you must load the lower level settings and then save them at the higher level.

For example, Profile is the highest level of default entry settings that you saved. Each time you access the live UI, the Profile-level settings are displayed. If you change the Profile-level settings and save them at the User level, the User-level settings display the next time you access the live UI. Because User-level settings are applied before Profile-level settings, you must take these actions to apply the original Profile-level settings:

1 Load the Profile-level settings.
2 Save them at your User level.

The hierarchy does not affect your ability to create and maintain lower levels of UI personalization or entry default settings. You are only prevented from applying the lower levels to your live UI.

Personalize feature

You can use the Personalize feature to customize windows, pop-up windows, and features and functions in the left panel.

The Personalize feature is comprised of the **Personalize** window and the **SA Personalization Administration** function. The **Personalize** window provides access to the layout of the user interface (UI) that you use to change the UI. When you save the changes, a **SA Personalization Administration** record is created. You can modify, copy, and delete the personalization records. If you change the level when you modify or copy a record, the UI changes are applied, based on the hierarchy of personalization levels. When you delete a record, the UI that is restored is also based on the hierarchy.

The UI is comprised of components such as fields, buttons, grids, grid columns, toolbars, field sets, tab sets, expandable areas, and sub views. On the **Personalize** window, these components, referred to as controls, are displayed in containers that are outlined by dotted lines. A window can contain multiple containers. The controls can be nested and arranged in rows and columns within the containers. Containers that are gray are not displayed in the live UI.

This table shows where you can access the Personalize feature:

Component	Personalize access location
Function window	Toolbar of window header
Panel	**More** icon
Pop-up window	**Personalize** icon

If a function is comprised of multiple windows, you must access the window you want to personalize before you access the Personalize feature.

Personalization levels

Personalization can occur at the user, profile, or company level. The **Save/Load Web Modifications** setting on your **SA Operator Setup** record determines the levels at which you can perform these actions:

- Save or load in the **Personalize** window
- Save in **SA Personalization Administration**

Caution: If you save changes at the profile or company level, you affect other users that use the same level. For example, if you personalize **Sales Order Entry** for an existing profile level, the UI for users that applied the same profile level is updated with your changes. The update occurs the next time those users access **Sales Order Entry**.

When you access the **Personalize** window, you must select the level of personalization you want to load. The UI layout for the selected level is displayed on the **Personalize** window. If you select a level that has not yet been created, your current UI layout is displayed. To change the level after you access the **Personalize** window, select **More Actions > Change Options**.

To create or maintain the level, you must save the layout. If the level you save meets these one of these requirements, your live UI updates the next time you access the function:

- The saved level is the same level as the level that is applied to your live UI.
- The saved level is a higher level than the level that is applied to your live UI.

To delete a level, select **More Actions > Reset to Default Layout**.

Control selection

To personalize a control, you must select it. To select a button or tab, click it. To select other controls, you must click the associated action icon.

When you hold your mouse over an action icon, the type of control is displayed. If the control is nested inside other controls, the action icons for the related controls, row, and column are also displayed.

When you click an action icon, the personalization options for the control are displayed. Typically, you can edit and move the control. For some controls, such as Sub Views or Custom Controls, you can access a subsequent **Personalize** window.

You cannot select user fields on the **Personalize** window. User fields are set up and maintained in **SA Administrator Options-System**. To make the user fields visible, you must unhide the User Fields section.

Control edit options

The edits that you can make to a control depends on the functionality of the control. This list includes the changes that are available in the **Edit Control** window:

- **Auto Focus**

  Select this option to make this field active when you first access a view or section in the live UI.

- **Collapsed**

  Select this option to set the default state of a section on a page as collapsed. If certain conditions must be met before a section is available for expansion, then you cannot personalize it. This message is displayed on the **Edit Control** window: `This control has collapse logic that cannot be changed.`

- **Color**

  Click the down arrow to select a color from the color picker to add static color to the control. For grid columns, we recommend that you select colors within the 01 range, such as Slate01, in the first column from the right. For other controls, we recommend that you select colors within the 03 range in the third column from the right.

  You can also specify a hexademical color code in the field. You can obtain a hexademical color code from an online color selecting tool. If you specify a hexadecimal color, then ensure that you can read the text in the light, dark, and high contrast themes.

  You can use personalization to override most default colors. The exception is controls with colors that are based on conditions. If you cannot change the default color for a control, then this message is displayed: `The control has dynamic color that cannot be changed.`

- **Custom Label**

  Specify a different label for the control.

- **Default Sort**

  Select ascending or descending order for a grid column, or leave blank. Use this field to determine how the records are displayed in a grid. Set the default sort order for only one column in the grid. The **Default Sort** field for all other columns must be blank.

- **Hidden**

  Edit Control window indicates that the control is excluded from the window. Select this option to hide the control. If this option is currently selected, then the control is gray.

- **Size**

  Select an alternate size for the control field.

- **Width**

  Specify the width of the column in pixels. If you sized a column with your mouse, then the width is displayed in this field.

You can identify the modified controls on the **Personalization** page. Select **More Actions > Highlight Changes** to highlight the modified controls with an orange border. You must access the **Edit Control** window for the control to view the changes. A control is not highlighted if it was moved, but not otherwise edited.

If you personalize at the User level, then only your modifications are shown. If you personalize at the Profile or Company level, then modifications that are made by you and other users are shown.

You can identify the controls that you edited. On the **Personalization** page, select **More Actions > Highlight Changes** to highlight the modified controls with an orange border. You must access the **Edit Control** window for the control to view the changes. A control is not highlighted if it was moved, but not otherwise edited.

Control position

If you select **Move** after you select a control, you can move a control back or forward. If you move a control in a column, the control moves up or down. You can also drag the control to another location. If you attempt to move a control that cannot be moved, an error occurs.

You cannot move a control to another container except in **Advanced Line Entry** in **Sales Order Entry**, **Purchase Order Entry**, and **Transfer Entry**. The **Personalize** window for Advanced Line Entry contains Extended Fields area and an Available Fields section. The Available Fields area is hidden and contains the controls you do not want to display in the visible Extended Fields area. You can move the controls between the two sections.

To make a control in a hidden container available, make the container and the control available. Hide the other controls in the container that should remain unavailable.

Grid column width

Grid columns are automatically sized, based on the contents of the column. If you re-size a column, it becomes static and does not adjust to the contents of the column. The last column in a grid might not display at your specified width. It might extend automatically for visual purposes.

To change the width of a column, use your mouse or specify the width in the **Edit Control** window for the column. To return to the default setting for the column, clear the width in the **Edit Control** window.

You cannot re-size the selection, drill-down, and row expanded columns.

Applying an existing personalization record to your UI

1. Navigate to the appropriate component, such as a window.
2. Click **Personalize**.
3. Select the level.

   Note: If the level is lower than the level that is applied to your live UI, then the modifications are not applied to your live UI.
4. If you selected `Profile`, specify the name of the profile. name.

5 Click **OK**.
6 Click **Save**.

Modifying the UI in the Personalize window

1. Navigate to the appropriate component, such as a window.
2. Click **Personalize**.
3. Select a level.
4. If you selected `Profile`, specify the name of the profile.
5. Click **OK**.
6. Select the control you want to personalize.
7. Select `Edit`, `Move`, or `Personalize`.
8. To edit the control, specify your preferred settings in the **Edit Control** window, and then click **OK**.
9. To move the control, click `Back` or `Forward`.

   Optionally, drag the control to a new position.
10. Click **Save**.

    Note: If the level that you modified is higher than the current level of your live UI, then the modified level is applied to your live UI the next time you access the function.

Entry default settings

On the **Entry Defaults** page in **Sales Order Entry**, **Purchase Order Entry**, **Transfer Entry**, and **Vendor Invoice Center Entry**, you can specify the default settings that are displayed when you first access the function.

Depending on the order entry function, you can specify these types of settings:

- Default settings for order and line fields, such as warehouse, order mode, and line type
- Work flow preferences

You can also determine if information is displayed and if features are enabled.

To access the **Entry Defaults** page, `Yes` must be selected for the **Allow User to Change Entry Layout** option on your **SA Operator Setup** record.

Entry default setting levels

Depending on these factors, you can load or save default entry settings at the user, profile, or company level.

- **Save/Load Web Settings** on your **SA Operator Setup** record
- Hierarchy of personalization types

You can also select `Current` or `Other` to indicate the type of user or profile you want to load or save. If you select `Current`, you can load or save the entry default settings for the current user, which is you, or profile. If you select `Other`, you can specify the user or profile to load or save.

To change the entry defaults settings that are currently applied to your UI, you do not have to load the settings. After you make the changes, click **Save** to save the settings to your user record. Optionally, click **Save For** to save the settings at the selected user, profile, or company level. All settings are saved in bulk. If a single setting is changed and saved, all of the settings are saved to the database table.

Changes at the profile or company level affect other users that use the same level, unless they have saved settings at their personal level. User settings always take precedence over profile and company settings.

We recommend that you use these options when you first define entry default settings:

- **Save For > Profile**
- **Save For > Company**

Set up the profile and company settings before your users have modified and saved them to their personal settings.

Creating or maintaining entry default settings

1. Navigate to the entry function.
2. Click **Entry Defaults**.
3. Optionally, click **Load** to display existing default settings.
   a. Specify the Load from level and Type.
   b. If you specified `Other` for the type, specify the user or profile.
   c. Click **OK**.
4. Specify the default settings.
5. To update your entry default settings, click **Save**.

   Note: If you selected a Load from level that is lower than the Type that is applied to your live UI, then the modifications are not applied to your live UI.
6. To create or maintain other entry default settings:
   a. Click **Save For**.
   b. Specify the Save To level and Type.
   c. If you specified `Other` for the type, specify the user or profile.
   d. Click **OK**.
7. Exit the **Entry Defaults** window.

Chapter 10: Signing out of Distribution SX.e

This section provides information and instructions about signing out of Distribution SX.e.

Sign-out process

The process to sign out of the Distribution SX.e depends on single sign on (SSO) implementation in your environment and your **SA Operator Setup** record.

You must sign out of Infor Ming.le to sign out of Distribution SX.e if these conditions are met. If you do not sign out of Infor Ming.le, Distribution SX.e reopens.

- SSO is implemented.
- You have one operator record in one company.
- An alternate login is not specified on the operator record.

You can sign out of Distribution SX.e and remain signed in to Infor Ming.le if one of these conditions is met:

- SSO is implemented, and you have an operator record in multiple companies.
- SSO is implemented, and you have one operator record in one company. An alternate login is specified on the operator record.
- SSO is not implemented.

Caution: If you are signed out of Distribution SX.e but signed in to Infor Ming.le, you can sign in to Distribution SX.e without providing your password. You must lock your unattended computer to secure Distribution SX.e. Otherwise, anyone can access Distribution SX.e using your credentials.

Open functions check

When you sign out of Distribution SX.e, open functions are checked to determine if a process must be finished before the sign out is performed. If a process must be completed, you are directed to the corresponding function.

Open function checks are not performed under these conditions:

- The session times out.

- You sign out of Infor Ming.le without signing out of Distribution SX.e.
- You close the browser without signing out of Distribution SX.e or Infor Ming.le.

If you do not sign out of Distribution SX.e, you might be required to clear your previous session before you begin a new session.

Signing out of Distribution SX.e through Infor Ming.le

1 Close all Distribution SX.e functions.

2 In the Infor Ming.le Menu bar, select **User Menu > Sign Out**.

Signing out of Distribution SX.e

1 Close all Distribution SX.e functions.

2 Select **Menu > My Account > Sign Out**.

Appendix A: Note availability

This table shows the functions in which you can create notes and the entities to which you can attach the notes. Most notes are accessible from the main function screen, but some are available only on certain views. For example, Product notes in **Purchase Order Entry** are only accessible in the Select Products view.

Function	Entity
Customer Cash Receipts Entry	Customer, ShipTo, AR Trans
Customer COD Addons Setup	Customer
Customer Inquiry	Customer, ShipTo, Warehouse
Customer Lockbox Entry	Customer
Customer Order Pad Filter Setup	Customer
Customer Payment History Setup	Customer
Customer Price Type Setup	Customer, ShipTo
Customer Rebate Setup	Customer, ShipTo
Customer Setup	Customer, ShipTo, Warehouse
Customer ShipTo Setup	Customer, ShipTo
Customer Transaction Entry	Customer, ShipTo, AR Trans
GL Accounts Setup	GL
GL Budgets Setup	GL
GL Transactions Entry	GL
KP Components Setup	Product
KP Groups Setup	Product
KP Options Setup	Product
KP Substitute Components Setup	Product
KP Tally Mix Setup	Product
KP Work Order Center Entry	Kit, Warehouse, Product
PD Future Price/Cost Changes Setup	Product, Warehouse

Function	Entity
PD Price Discounting Pricing Setup	Vendor Pricing, Customer Pricing, Rebate Pricing
PD Pricing Modifiers Setup	Warehouse
PD Pricing Sheets Setup	Product
PD Special Price Type Discounts Setup	Warehouse
PD Whole Order Discount Setup	Warehouse
Product Additional Bin Locations Setup	Product, Warehouse
Product Adjust Non-stock/Direct Order Entry	Product, Warehouse, Vendor, PO, Warehouse Transfer
Product Administration Exception Processing Center	Product
Product Availability Inquiry	Product, Warehouse
Product Bin Maintenance Entry	Product, Warehouse
Product Catalog Setup	Catalog, Vendor
Product Certifications/Licenses Setup	Certificate
Product Customer Reservations Setup	Customer Reservation
Product Customer Reservations Setup-Detail	Customer Reservation, Customer Reservation Detail, Product, Order, Customer, Warehouse
Product Count Entry	Product, Warehouse
Product Extended Lot# Setup	Product, Warehouse
Product Extended Product Cross Reference Setup	Product
Product Extended Serial# Setup	Product, Warehouse
Product Extended Unit Conversion Setup	Product
Product Extended Whse Cross References Setup	Customer
Product Inquiry	IC Trans, Customer, Product, Warehouse
Product Lines Setup	Vendor
Product Maintain Balances Entry	Product, Warehouse
Product Maintain Costs Entry	Product, Warehouse
Product Qty Adjustments Entry	IC Trans, Product, Warehouse
Product Setup	Product
Product Special Price/Cost Setup	Product
Product Unavailable Inventory Entry	Product, Warehouse

Function	Entity
Product Warehouse Descriptions Setup	Warehouse
Product Warehouse Product Setup	Product, Warehouse
Product Warehouse Transfer Entry	To Warehouse, From Warehouse, Product
Purchase Batch Receiving Entry	Purchase Order, Vendor, Warehouse
Purchase Blanket Release Entry	Purchase Order, Vendor, Warehouse
Purchase Demand Center Entry	Vendor, Warehouse
Purchase Manual Acknowledgment Entry	Purchase Order, Vendor, Warehouse
Purchase Order Entry	Purchase Order, Vendor, Warehouse, Product
Purchase Order Inquiry	Purchase Order
Purchase Receipt of Inventory	Product, Purchase Order, Vendor, Warehouse
Sales Blanket Release Entry	Customer, ShipTo, Order
Sales Credit Release Inquiry	Customer, Warehouse, Order
Sales Customer Pricing Inquiry	Customer, ShipTo, Product, Warehouse, Customer Pricing, Customer Rebate
Sales Order Entry	Customer, ShipTo, Warehouse, Contact, Product, Catalog, Customer Pricing, Order, Customer Reservation, Customer Reservation Detail
Sales Order Inquiry	Customer, AP Trans, Order, Warehouse
Sales Shipping Feedback Entry	Customer, ShipTo, Order, Warehouse
Sales Shipping Feedback Split to Backorder Entry	Customer, ShipTo, Order, Warehouse
Transfer Approve Transfer Inquiry	Warehouse Transfer, From Warehouse, To Warehouse, Warehouse
Transfer Entry	Warehouse Transfer, From Warehouse, To Warehouse, Product
Transfer Exception Receipts Entry	Warehouse Transfer, From Warehouse, To Warehouse, Warehouse
Transfer Receipt Of Inventory Entry	Warehouse Transfer, From Warehouse, To Warehouse, Product
Transfer Shipping Feedback Entry	Warehouse Transfer, From Warehouse, To Warehouse
Transfer Demand Center Entry	From Warehouse, To Warehouse
VA Enter Late Charges Entry	VA, Warehouse
VA Internal Labor Time Entry	VA, Warehouse, Product
VA Order Entry	VA, Warehouse, Product

Function	Entity
VA Order Inquiry	VA, Warehouse, Product
VA Product Defaults Setup	Warehouse, Product, VA Setup
VA Receipt Of Inventory Entry	VA, Warehouse
VA Shipping Feedback Entry	VA, VA Section, Warehouse, Product
Vendor Apply Misc Credit Entry	Vendor
Vendor Inquiry	Vendor, AP Trans
Vendor Invoice Center Entry	Vendor, Invoice
Vendor Purchase History Setup	Vendor, Warehouse
Vendor Setup	Vendor
Vendor Ship From Setup	Vendor
Warehouse Transfer	To Warehouse, From Warehouse, Product

Appendix B: Troubleshooting

This appendix provides causes and solutions to issues that can occur when you navigate Distribution SX.e.

Changes to the user interface are not displayed

After Distribution SX.e is upgraded to a new version, you cannot view the changes that are included in the upgrade.

`Cause`: The cached files that are stored by your web browser are from a previous version of Distribution SX.e. You cannot view the upgraded version of Distribution SX.e because your browser uses the outdated cached files to load the application.

`Solution`: Clear your browser cache. After an upgrade, your system administrator should instruct you to clear your cache. The system administrator can also set up a group policy that clears each user's cache when the user signs out.

Before to you clear your cache, sign out of Distribution SX.e. This table shows the instructions to clear your cache, based on your browser.

Web browser	Instructions
Chrome	**1** Click **Customize and control Google Chrome**. **2** Click **History**. **3** Click **Clear browsing data**. **4** Select a time range. **5** Select **`Cached images and files`**. **6** Click **Clear data**.
Edge	**1** Select **More > Settings**. **2** Click **Choose what to clear**. **3** Select the **`Cached data and files`**. **4** Click **Clear**.
Edge Chromium	**1** Click **Settings and more**. **2** Click **History**. **3** Click **Clear browsing data**. **4** Select a time range. **5** Select **`Cached images and files`**. **6** Click **Clear now**.

Web browser	Instructions
Safari	Select **Develop > Empty Caches**.

Note: We also recommend that you clear your cache if the browser crashes or is slow to load. Cached files typically load faster than files that are accessed from a server, but too many cached files can adversely affect browser performance.

If your cache is cleared, and you still cannot access new feature, you might lack the required functional security on your **SA Operator Setup** record.