STATEMENT OF DIRECTION

Infor CloudSuite Distribution/SX.e

Infor® is committed to being the market leader in wholesale distribution enterprise business applications. We keep ahead of the feature commoditization curve and provide our customers with the solutions they need today and the innovation they'll depend on tomorrow. For our Infor CloudSuite™ Distribution and Infor Distribution SX.e customers, it's a business solution that:

- Solves challenges of the evolving distribution business model

- Improves inventory and warehouse management for better performance

- Meets increasing customer demands for more comprehensive services

- Optimizes the purchase of both stock and nonstock products with advanced order control

- Provides deep distribution industry functionality, yet is easy to implement and intuitive to use

- Scales both vertically and horizontally across multiple entities and sites

- Demonstrates a measureable ROI

THE HUMAN SIDE OF ERP

Channel Partner   **infor**   Alliance Partner

Infor CloudSuite Distribution/SX.e has a rich heritage, built upon more than 30 years of industry experience addressing the needs of wholesale distributors, with a particular focus on the North American industrial and professional trade micro-verticals. Our team's passion and creativity is fueled and driven by the voice of our valued customers.

Our customers successfully use their independent user community along with the Infor Enhancement Request System to network, mindshare, lobby for enhancements, and help to improve the experience of all Infor Distribution users.

By using the Infor OS technology platform, our development team is aggressively creating the next generation of solutions for distributors. Innovative new capabilities in the areas of social business, mobility, analytics, and integration will enhance the ability of customers to make accurate, critical business decisions quickly.

General future direction

Infor plans to continue to accelerate its investment in Infor CloudSuite Distribution/SX.e over the coming years by leveraging Infor technologies and our best-in-class applications, in order to deliver the most complete industry suite for our target micro-verticals. We will continue to develop our core ERP capabilities while also connecting to Infor best-in-class solutions, enhancing extensibility enablement, and leveraging the Infor OS technology platform.

Our goal is to continue to reduce our customers' total cost of ownership by using the latest open technologies and standards, along with reducing hardware complexities and minimizing the use of costly third-party technologies.

Infor will continue to develop and support Infor Distribution SX.e for deployment on premise and in the cloud. Infor Distribution SX.e is also the hub ERP platform for Infor CloudSuite Distribution solutions. This solution gives our customers an additional opportunity to reduce their total cost of ownership and help achieve greater business value with a multi-tenant deployment in the cloud with SaaS pricing.

"Infor Distribution SX.e is our flagship ERP solution for wholesale distribution. We're committed to investing in Infor CloudSuite Distribution/SX.e to ensure that we have the right solution for our distribution customers. We continue to expand the core capabilities of Infor CloudSuite Distribution/SX.e as well as extending the ERP solution through key integrations, extensibility enablement, and the Infor OS technology platform adoption, allowing our distribution customers to stay forever modern."

Catherine Henn,
Director of Product Management, Infor

Cornerstones of our strategic direction

Technology and the cloud

Infor CloudSuite Distribution/SX.e is based on modern technologies and industry standards. Infor CloudSuite Distribution/SX.e delivers extensibility and flexibility as an on premise or cloud suite offering. Our overall goal is to continue to drive down the cost of ownership for customers through the use of tooling and open technologies, and reducing reliance on third parties. A major focus will continue to increase the solution's configurability and customization through modern tooling and eliminating the need for source code changes. This will allow customers to stay current and benefit from the latest functionality.

Beautiful and social user experience

Infor will continue to enhance and enrich Infor CloudSuite Distribution/SX.e's already powerful user interaction and collaboration capabilities, with the goal of achieving a modern, consumer-grade user experience. Working together with Infor's own design agency, Hook & Loop®, we will drive our solutions to deliver a new level of process- and activity-driven ease-of-use across different devices with a continued focus on the HTML5 common standard, delivery of mobile apps that require no training, and extensibility that causes little to no disruption to the core ERP system.

Complete industry suite

Our plan is to continue to develop Infor CloudSuite Distribution/SX.e to better support all of our customers in the various micro-verticals. We will continue to build out new micro-vertical-specific applications and core functionality with Infor CloudSuite Distribution/SX.e, along with a strategy of connecting to other Infor best-inclass products by using Infor ION® for loosely coupled integrations where the products extend or add value to our solution suites.

An Infor industry suite is more than just an ERP application. One of the core areas we are heavily focusing on today and in the future is industry-specific analytics and business intelligence package content, which allow customers to better steer their business with quick access to relevant information. We will continue to work with customers and industry bodies to build and roll out additional industryspecific KPIs and dashboards.

Solution overview

Infor CloudSuite Distribution/SX.e focuses on improving the highly specialized, core processes of distribution companies right out of the box—without requiring expensive, time-consuming modifications that lead to costly and risky implementations.

The core Infor CloudSuite Distribution/SX.e solution includes:

- Order management
- Purchasing
- Advanced inventory management
- Customer management and marketing
- Warehouse management
- Value-added services
- Financial management and reporting
- Employing the next generation
- A fresh, modern user experience

Infor CloudSuite Distribution/SX.e extensions

To further extend your business needs, seamless integration via Infor ION is available for the following Infor solutions:

- Infor CRM
- Infor Ming.le™
- Infor Mongoose
- Infor Document Management
- Infor Lawson Financials
- Infor BI
- Infor Configure Price Quote
- Infor Supply Chain Execution
- Storeroom for Infor Distribution
- Infor Project Job Management
- Infor Order Point
- Infor Proof of Delivery
- Infor Reporting

Recent releases

Infor recognizes the importance of a solid partnership with its customers. We continue to make significant development investments in the core business solution by embracing the best software technology available. It's the combination of our customers' input and this technology that allows us to create the business solutions our customers want. Recent Infor Distribution CloudSuite Distribution/SX.e solution enhancements include:

- **A completely new user interface:** An intuitive and modern user experience is critical in today's business environment where ease-of-use and the ability to self-serve are important to existing and new employees. Additionally, embedded contextual business intelligence, social collaboration, and robust search capabilities empower employees to be more engaged and effective.

- **Embedded with the Infor OS platform:** The Infor OS technology platform gives you unparalleled capabilities for integrating and extending the applications that help make your business successful. By giving you a single, unified platform—with a cutting-edge user experience and unmatched analytical capabilities—Infor OS makes it easier for you to tailor and expand your technology infrastructure to meet the needs of your business. It also helps users feel as instantly familiar with your software as they do with their favorite online shopping and social media platforms. With Infor OS, you'll be ready to deal with the coming wave of digital transformation and stay successful in the face of new challenges.

- **Value-add enhancements:** Providing additional services is one of the best ways distributors are creating differentiation in the market. Enhancements to production availability, fabrication assembly, labor tracking to compare estimates to actual labor for production orders, revision tracking for kits, and costing in value-add are some of the ways you can address these evolving needs.

- **Order-entry enhancements:** A distributor's success is directly tied to how well the organization manages its order-entry process. In the latest release, order-entry enhancements include a quick grid order entry, flagging non-cancellable/non-returnable items, and displaying last cost update with last price paid.

- **Freight recovery:** Better management of freight costs can greatly improve profitability. To meet this need, enhancements have been made to include automated freight allocation on warehouse directs, a freight recovery bump, and a just-in-time recovery bump.

- **Credit card processing enhancements:** To better serve customer payment options, enhancements have been made to allow for CenPOS™ instant payment, maintaining token information within Infor CloudSuite Distribution/SX.e, and processing credit card transactions using multiple merchant accounts.

- **Product sales restrictions:** You can implement restrictions of a single product or product group (including product category, product line, and brand code) from being sold to a customer. This allows you to better support vendor territory sales agreements, as well as internal sales agreements and EPA hazardous materials regulations.

- **Single sign-on:** To streamline the user experience and provide better services, Infor solutions support single sign-on.

- **Store documents in Notes context app:** To provide better access and visibility to important information, you can store documents, URLs, and text in the Notes context app.

- **Integration to Infor CRM:** Infor CRM provides deep insight into customer relationships, including sales history, marketing interactions, social media activity, and more. With the ability to automate sales processes, manage marketing campaigns, and track customer service records, as well as provide worldclass mobile access, Infor CRM delivers the tools needed to turn customer interactions into revenuegenerating transactions.

- **Integration to Infor BI:** With Infor BI integration, you can analyze KPIs and key metrics regarding sales and finance. This real-time visibility allows executives to make better decisions, faster.

- **Multiple rebates per line:** Support for multiple rebates per line allows you to streamline the rebate process and gives you greater flexibility in rebate management.

- **Pricing enhancements:** With a clearer understanding of pricing that you can gain from a warning that notifies you when the last price paid was higher, and access to the last date used on a pricing record, you'll be better able to serve your customers.

- **Integration to mobile apps:** More and more businesses are taking advantage of mobile technology to increase opportunities to provide greater accessibility and better service to employees and customers. A prime example of this is Infor Distribution Proof of Delivery, which allows you to track drivers' locations, accurately track order deliveries, get real-time delivery status information, and more.

- **Sourcing restrictions:** Hide inventory or make it not available for transfer or direct sale outside of a vendor or within a single warehouse or group of warehouses.

- **Serial control processing improvements:** You can track serial numbers at receiving and shipping.

- **Purchasing improvements:** Various improvements to the purchase order functionality have been added, including:
  – Enhanced knowledge of rebates and freight claims
  – Enhanced flexibility in finding purchase orders
  – Reduction in the number of price/cost variances in AP invoicing
  – Reduction in the number of errors with more specific default information by supplier and supplier location
  – Reduction in cost discrepancies by updating open PO costs when vendor cost is updated
  – The ability to tie a purchase order to a kit

- **Product customer reservations:** You can hide inventory or make it not available for transfer or direct sale, for customer commitments, shops, and local market agreements.

- **Product customer forecasting:** You now have access to more accurate forecasting for specific customers or customer ship-tos. The forecast parameters will allow you to have more than one forecast for the customer, define the forecast start and end date, and have forecasted demand separate from usage. There are many features that can enhance your forecasting ability, including receiving contracts via EDI and flat file, and having contract numbers tied to orders and on customer documents.

- **Enhancements to Infor BI integration:** You can use distribution-specific metrics, dashboards, and reports for sales and finance, along with the addition of procurement metrics.

- **Product import (formerly known as Supplier Link):** All of the features supported in the Supplier Link module will be available via a new web user interface technology.

Continued releases

Infor's vision is to help companies retain a competitive advantage by embracing technology. Keeping in step with this vision, Infor Distribution teams plan to leverage the following:

Enhancement Request System (ERS): Infor Distribution will continue to utilize the Enhancement Request System to engage with customers to deliver new features and functionalities to Infor CloudSuite Distribution/SX.e.

Cloud-first delivery: As our customers transition to the cloud, our methodology for delivering our releases must change. Infor Distribution has adopted the cloud-first methodology. With a cloud-first delivery, we will continuously add new features to Infor Distribution CloudSuite and control the changes with settings that customers can turn on when they want to take advantage of new features. For on-premise customers, we will provide new versions of the product based on periodic snapshots of the cloud version.

Extensibility: Infor Distribution will continue to offer changes to Infor CloudSuite Distribution/SX.e via a non-intrusive approach.

This will be done in the following ways:

- **Configurations:** You can select optional features that can be added or activated via screens within the application. Users must be granted permissions to access these features.

- **User personalization:** Your users can make changes that tailor the user experience, such as menu configuration, hiding data elements, and changes to screens—such as grid column sequencing and visibility.

- **Extensions:** Your IT organization can make changes using the developer toolset to add or modify existing screens and logic.

- **Integrations:** You can use Infor ION or web services to connect to other systems.

- **Report options:** You can see an overview of what your report options are in the cloud.

Focus on mobility: People are increasingly making decisions using phones and tablets more than on laptops. Apps aren't just for consumers; they can make business staff more productive too. Rather than have customerfocused employee tied to a computer at a counter, a responsive designed solution can allow the employee to assist customers on the floor in real time. The cloud-first strategy, coupled with a focus on responsive design, will allow Infor CloudSuite Distribution to lead the charge as a true mobile-enabled solution.

Information about this document

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