

# Top 5 reasons to upgrade Infor M3 Equipment

Infor® M3 Equipment is a comprehensive ERP solution designed for companies that rent, sell, service, and repair assets or equipment. Infor M3 Equipment is built for the following micro-verticals: equipment dealers, service providers, and rental companies.

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## CLOUD READY

The latest release of Infor M3 Equipment offers modern software, a beautiful user experience, and equipment industry specific pre-configured best practices—now available in the cloud as Infor CloudSuite™ M3. With hundreds of upgrades over the past few years, major investments in migration tools, and the benefits of the cloud—Infor can provide you with a smooth path to the future—all within a secure infrastructure built specifically for equipment companies like yours.

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## LATEST FEATURES WITHOUT MAJOR UPGRADES

With the new delivery model in the latest release of Infor M3 Equipment, you can take advantage of the solution's new functionality quickly. Each year, we deliver a new release of Infor M3 Equipment that includes hundreds of new and improved capabilities—both technical and industry specific—that you can take advantage of without launching a major upgrade project. For example, in the latest release of Infor M3 Equipment, you get support for geographical market requirements, including new asset depreciation methods, special rental rate calculations, and enhanced visibility into tax calculations.

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## FEWER MODIFICATIONS

Infor M3 Equipment continues our focus on helping customers substantially reduce modifications. A combination of industry-specific functional enhancements and powerful tooling combine to provide an environment where modifications can be eliminated or minimized. An analysis of recent customers upgrading to the M3 13.x platform showed that, on average, customers reduced their modifications by 68%.

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## NEW VALUE-ADDED SOLUTIONS

Infor M3 Equipment provides extended capabilities and a range of new value-added solutions within M3, including CRM for Equipment. Combining M3 Customer LifeCycle Management (CLM) with M3 Equipment Quotation Management forms a powerful new solution that covers sales force automation, as well as configure price quote of equipment, service, and rental opportunities. With new capabilities for equipment lifecycle visibility through M3 Equipment Transaction register and M3 Equipment Profitability Portal, Infor M3 Equipment give you detailed equipment operational and financial information in a single view.

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## NEW COLLABORATION AND ANALYTICS PLATFORMS

Infor M3 Equipment connects to Infor BI to deliver the latest in industry-focused KPIs and dashboards. Infor BI works within Infor Ming.le™ to support operational decision-making with in-context business intelligence. The predefined analytics content for M3 includes more than 490 metrics and 170 KPIs across 70 dimensions that are delivered through 27 configurable dashboards.

## ROADMAP FOR INFOR M3 EQUIPMENT

2013/14	2015	2016
New Equipment Transaction Register that brings operational transactions from the separate order flows (WO, rental, sales) into a single view	New mobile field service solution—Infor Mobility for Field Service (MFS)	Further enhancements to MFS including support for iOS, mobile phones, off-line capabilities, M3 Service Orders
Serial number-based pricing	Enhanced maintenance customer order (MCO) periodic invoicing (capabilities from M3 service orders)	New—Infor CloudSuite Equipment Rental
Rewritten equipment quotation trade-in process	Ability to change the warehouse on a purchase order together with a new supply chain rebuild function to take care of the implications of the change	Further enhancements to the move of work order transactions function
Significant enhancements to the rental re-rent (X-hire process)	Rental planning board enhancements including drag and drop and extended mouse-over information	Further MCO periodic invoicing enhancements including better support for accruals
Graduated best-price calculation for rental agreements	Support for six-day week rental pricing calculations	Enhanced rental agreement price simulation
New rental counter function	New rental statistics function “Rental Daily Flash”	Rental invoice history per equipment or serial number
New work order labor and cost approval process and function	New equipment quotation management (EQM) quick quote feature	Split rental line across several warehouses to improve sourcing capabilities
New reservation process and function for order flows (for example rental and EQM)	Simplified move of work order transactions to correct mistakes	Support for bulk items (cables, etc.) in the rental planning board
New sales order screen that allows the user to define what fields to display thus minimizing the number of panels	Enhanced flexibility of MCO invoicing through a rewrite of the function to the latest M3 programming standards	More flexibility in the maintenance scheduling board (MOS199)

*Disclaimer: This roadmap reflects the direction Infor may take with regard to the products or services described herein, all of which is subject to change without notice.*

## STRATEGIC OBJECTIVES

### Lower Total Cost of Ownership

Continue to hone deployment and maintenance effort by delivering packaged localizations and industry-specific configurations. These localizations and customizations will include pre-packaged data models, reports, embedded analytics, and business process flows.

### Specialize by Industry

Offer industry-specific suites with prepackaged integration, role-based business process flows, and analytic content for focus verticals, particularly equipment dealers, service providers, and rental companies.

### Enable Adoption of High-value Extension Applications

Provide high-value expansion opportunities for customers with packaged Infor ION-based integrations to mobile, d/EPM, Supplier Exchange, Business Intelligence, Infor Reporting, Local.ly, Infor Rhythm for Commerce, and Warehouse Management.

### Make Modernization Seamless

Enable customers to upgrade easily and efficiently through predefined content packs, cloud, or phased upgrades particularly for Infor Ming.le™ adoption.

### Expand Globalization

Provide standard support for 43 countries; support more localizations within Infor M3 and Infor Local.ly in the future, to help customers as they expand into new geographies.

## 10x HIGHLIGHTS

### New HTML5 browser operating within Infor Ming.le

Enables Infor M3 Equipment customers to take advantage of many more Infor solutions and use the full power of Infor Ming.le, including social business collaboration with integrated workflows, alerts, and contextual business intelligence.

### New software delivery model

Provides major functional updates to customers faster, on an annual basis.

### M3 Equipment in the cloud

Infor M3 Equipment is now available in the cloud as Infor CloudSuite M3. Equipment customers can swap their traditional maintenance for software as a service (SaaS) user pricing and have access to the latest functionality through the cloud.

### More certified Infor ION integrations to Infor best-in-class solutions

M3 customers can take advantage of Infor's rich portfolio of business applications.

### Deeper industry functionality for our focus industries

Reduces need for customer-unique modifications and third-party solutions and expands vertical reach.

### Significant investment in M3

More than 1,200 enhancements over last major release.

## LANGUAGES

Danish	•	Japanese	•
Dutch	•	Norwegian	•
English	•	Polish	•
Finnish	•	Portuguese	•
Flemish	•	Russian	•
French	•	Simplified Chinese	•
German	•	Spanish	•
Hungarian	•	Swedish	•
Italian	•	Turkish	•

Partners can provide: Hebrew and Greek

# 10x CORE FEATURES

## SALES

New transportation solution

Multiple sales-persons per order (also included in the rental and MCO flows)

New supplier rebate/parts marketing program support

Enhanced sales price and discount handling for equipment

Special price agreements (ship and debit)

Promotion management pricing and discounting process improved and possibility for entering orders prior to the promotion

Payment terms on customer order line rather than just at the order header

New process for managing sales orders requiring prepayment

Improved back order prevention

Enhanced parts supersession capabilities (also used in other order flows)

New screen in the sales order flow to define what the sale is being made again (for example equipment, industry, etc.)

New low value price matrix capability

## EQUIPMENT

New customer service desk

New equipment cost and revenue summary function

New equipment transaction register

New equipment “life” concept

New Equipment Profitability Portal

## INVENTORY MANAGEMENT AND PARTS PLANNING

Kit in purchase and auto kit price calculation

Attribute controlled kits

Improved location-based inventory checks

Automatic cartonization suggestions for packing

Improved slotting capabilities for put-away in goods receipt

Automatic recount of physical inventory counts based on user defined tolerances

Territorial roll-up calculations for demand figures in a distributed network

Improved statistics

New work order parts staging and delivery address

Significant enhancements to Core (repairable equipment management)

New “parts surplus return” process and functions

New function for pre-assembly of kits (example hoses)

Inventory sharing function (share excess stock information)

New equipment reservations

## DELIVERY MANAGEMENT

Freight outbound transport management including integration to third-party freight forwarders, freight shopping, charges, and package value handling

Warehouse Mobility improvements provide more coverage, simplified processes

Pack and ship improvement for load building

Picking and inventory control improvements

New picking workload overview capabilities

Supply chain orders—upstream changes of dates

Customer Channels with new ship to customer ID

## FINANCE

Approximately 200 improvements over M3 10.1

New equipment cost/revenue summary and new equipment transaction register

Cash management extended to all order flows and new end-of-day processing

Enhanced and consistent credit limit management

Prepayment control on sales orders

Introduced support for US sales tax without the need for Vertex

Enhanced delegation of authority process for supplier invoices

Ability to connect supplier invoices to Customs invoices

New Warranty Claim Management solution

## MANUFACTURING

New Quality module

Lot management including strict rotation, lot-numbering rules, etc.

Manufacturing—Back-flush labor- and process-time at put-away

Auto Reporting of MO Operation times based on quantity produced

## PURCHASING

Staging of packages in receipt process

Infor ION integration to Infor Supplier Exchange

New rules for automatic consolidation of purchase order proposals

Extended purchase order approval flow

Ability to convert a purchase proposal to a distribution orders

Kits on purchase orders

New purchase order preview feature to print a PO without creating the real PO

New feature to create relationships between POs

Handling of supplier rebates on promotional products where there are special commercial terms

## INFOR 10X ENABLED

HTML5 client multi browsing with personalization, Web Mashups and flexible start pages

Support for Infor Ming.le—use of workflows and alerts connected with all existing 200+ app messages and new user defined application messages

9 certified Infor ION integrations and more to come

Content-rich analytics based on Infor BI and Business Vault

Harmonization of users to simplify management and enable use of Workflow

Over 1,100 M3 functions now have bookmarks

# 10X COMMON COMPONENT ADOPTION

## INTEGRATIONS

- Inforce
- M3 Customer LifeCycle Management (CLM)
- Infor Supplier Exchange
- Infor Corporate Performance Management (CPM)
- Infor BI
- Infor Configure Price Quote (CPQ)
- Infor E-Commerce and Infor Rhythm for Commerce
- Infor Supply Chain Execution

## NEW LOCALIZATIONS

- India
- Brazil

## MOBILE

- Infor M3 CLM applications
- Infor M3 Warehouse Mobility

## ANALYTICS

- Infor BI
- Industry-specific M3 Analytics for Equipment
- Infor Reporting

# Infor M3 Equipment: **Why Upgrade?**

<b>CAPABILITIES</b>	<b>Old Versions</b>	<b>M3 10.1</b>	<b>10x On-premise</b>	<b>UpgradeX</b>
New delivery model for functionality	●	●	●	●
Cloud deployment and SaaS on AWS by Infor	●	●	●	●
Infor Ming.le enabled for a modern user experience and social collaboration	●	●	●	●
Workflow, alerts, and contextual BI	●	●	●	●
HTML5 client for multi-browser and device	●	●	●	●
ION enabled	●	Some	●	●
Additional country support	<39 countries	41 countries	3 countries	3 countries
Web-based mashups	●	●	●	●
New equipment cost/revenue summary and new equipment transaction register	●	●	●	●
Equipment Profitability Portal	●	Limited	●	●
CRM for Equipment	●	●	●	●
M3 Report Manager	●	●	●	●
Infor BI Dashboard/ d/EPM	●	●	●	●
Enhanced equipment quotation management	●	●	●	●
Supply chain orders for WOs	●	●	●	●
Transfer of WOs between facilities	Limited	Limited	●	●
Create MCOs from history	●	●	●	●
New warranty claim management solution	●	●	●	●
Parts marketing programs/rebates	●	●	●	●
Service definitions defined on levels other than item	●	●	●	●
Change of serial number on WOs/MCOs	●	●	●	●

## CAPABILITIES

	Old Versions	M3 10.1	10x On-premise	UpgradeX
Cash management across all order flows	●	●	●	●
Rental best-price calculation	●	●	●	●
Rental deposits	●	●	●	●
Rental and damage waiver	●	●	●	●
Reservations in main order flows	●	●	●	●
Re-rent (X-hire)	Limited	Limited	●	●
Lost sales in all order flows	●	●	●	●
EQM trade-in	●	Limited	●	●
EQM sales tax simulation	●	●	●	●
Serial-number based pricing	●	Limited	●	●
Transportation	Limited	Limited	●	●
Supplier rebates	Limited	Limited	●	●
Multiple sales persons per order	●	●	●	●
Parts supersession	Limited	Limited	●	●
Low value parts price matrix	●	●	●	●
Kits on POs	●	●	●	●
Attributes for kits	●	●	●	●
Territorial roll-up	●	●	●	●
Core management	Very Limited	Limited	●	●
Parts surplus return	●	●	●	●
Inventory sharing	●	●	●	●

## CAPABILITIES

	Old Versions	M3 10.1	10x On-premise	UpgradeX
Mobile warehouse management	Very Limited	Limited	●	●
User-defined PO proposal consolidation rules	●	●	●	●
PO approval flow	Limited	Limited	●	●
Convert PO to DO	Manual	Manual	●	●
Kits on POs	●	●	●	●
Preview POs	●	●	●	●
PO relations	Limited	Limited	●	●
Fixed asset depreciation	Limited	Limited	●	●
VAT calculations for equipment	Limited	Limited	●	●

● Yes      ● No      ● In Progress

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