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Infor CloudSuite™ CRM Roadmap

Mar - 2020

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Roadmap Status Definitions



Priority requirement requiring further investigation



Requirement defined, development resources not assigned



Requirement defined, development resources assigned



Requirement defined, development completed, awaiting Product Readiness & Launch



Done

Development is Generally Available (GA)



Infor CRM Recent Highlights (8.4.0, .01, .02)

Recent New Features

FEATURES

Sales Force Automation

- ✔ Auto-dedupe of potential matching records of new accounts
- ✔ Assign all items to the same contact
- ✔ Group Favorites
- ✔ Combined common task Exports
- ✔ Improved export performance
- ✔ Account Hierarchy GUI
- ✔ Quick view of frequently used entities (contacts, opportunities, sales orders and activities)
- ✔ Do Not Solicit field defaults updated for GDPR
- ✔ Contour Google API update
- ✔ Configurable Location and Product Lookup

Administration

- ✔ Office Profile Error Notifications email link
- ✔ Account Hierarchy secured actions
- ✔ Manage group export settings
- ✔ Office Profile Groups
- ✔ Group Manager view of default Favorites
- ✔ Dated Exchange Rates
- ✔ Mail error details to your admin
- ✔ Insert & update GroupStatistics performance improvements (uses NHibernate IStatelessSession)

Internationalization

- ✔ User-dependent multi-regional pick lists
- ✔ Default language for multi-regional pick lists.
- ✔ Normalize Base Currency
- ✔ Multiregional Address Formatting
- ✔ Edit address format based on business requirements.
- ✔ Separate language and the regional formats.
- ✔ Contact record level language-defined picklist

Integrations

- ✔ CPQ configurator promotion of SalesOrders with the ERP-LN
- ✔ Sales Intelligence for CRM integration
- ✔ Embedded LinkedIn Sales Navigator integration
- ✔ Embedded Marketo integration with Sales Insight
- ✔ Two-way synchronization of leads and contacts with Marketo.
- ✔ One-way synchronization of accounts, opportunities and Users with Marketo
- ✔ Two-way Quotes & SalesOrder BOD support
- ✔ Marketo Workspace Partition support

Back Office Extension Improvements

- ✔ Improved pricing web services performance
- ✔ Account Invoice Aging
- ✔ Discrete Address compatibility
- ✔ AnyBOD upgrade functionality
- ✔ Language code field for BOD processing
- ✔ Back Office clone functionality
- ✔ BOD Mappings customization link
- ✔ Field Mappings customization link
- ✔ Copy Price Mappings
- ✔ Copy Field Mappings
- ✔ Create new BOD field Mapping records.
- ✔ Entity specific pricing
- ✔ Notes published by ERP
- ✔ Master Data Consolidation
- ✔ Opportunity Pricing Web services
- ✔ Promotion failure notification for ERP
- ✔ Location lookup
- ✔ Product filtering
- ✔ VISUAL multi-site compatibility
- ✔ VISUAL Pricing and Availability web services integration (OAuth 2.0)
- ✔ Supplier party master BODs
- ✔ CSD - Bidirectional quotes and orders with Pricing and Availability

Infor OS

- ✔ Funnel Chart widget
- ✔ Top Prospects widget
- ✔ Infor CRM Opportunities widget
- ✔ Infor CRM Contracts widget
- ✔ Infor CRM Activities widget
- ✔ ION Workflow triggers
- ✔ Ming.le Widget Angular 2.0 update
- ✔ Create and copy new or existing workflows

Xbar 1.3.9

- ✔ Account Lookup ERP ID
- ✔ Filter Opp based on Account
- ✔ Maintenance update

Mobile 3.6.1 / 4.0

- ✔ Maintenance updates
- ✔ Offline Notes
- ✔ New SoHo UI design
- ✔ Multi-region Pick Lists
- ✔ Language translations for Russian, Simplified Chinese, Traditional Chinese, Italian, German, French

Sync for Exchange 1.0.1

- ✔ Maintenance Update

Timeline

JAN-MAR

Xbar 1.4

- ✔ Usability Improvement to display one dialog during Attach to History instead of several when prompting for not found and duplicate contacts
- ✔ Logic to prevent XBar from syncing from multiple machines for a single user

8.4.0.3

- ✔ Defect roll-up
- ✔ Performance improvements Wave I
- ✔ UI enhancements Wave I
- ✔ Forecasts & Quotas
- ✔ Marketo integration improvements

Sync for Exchange 1.0.2

- Defect roll-up

APR-JUN

Mobile 4.1

- Defect roll-up
- Unscheduled Activity Support
- Opportunity Pricing Service calls when Integrated
- SoHo Control Update (Will allow us to bundle controls with the product again)

8.4.0.4

- Defect roll-up
- Account/Contact Images
- Change Group tabs to a dropdown
- Workflow enhancements
- Activity Auto-Fan Out & Associations
- KPIs – Wave I
- Performance improvements Wave II
- REST API Swagger docs for SDATA

JUL-SEP

Xbar 1.4.1

- Mapping improvement – use AppointmentID generation logic instead of GUID for mapping between CRM and Outlook
- Streamline XBar setup with authentication file similar to CE

Sync for Gmail 1.2.1

- Defect roll-up

OCT-DEC

8.4.0.5

- Upgrade safe extensions
- ST upgrade post-provisioning automation
- Defect roll-up
- Projects-Opportunity nesting
- KPI – Wave II
- Performance improvements Wave III
- UI enhancements Wave III
- Marketo integration improvements

2021 +

- Xbar Web Client Add-In
- Performance improvements Wave III+
- UI enhancements Wave III+
- Account summary (360 view, Total Wins, Total OPs, Total Tickets, Invoicing, Shipments, Top X Products, Top Product Margins)
- Quotes auto call follow-up before expiration
- IDM support for Mail Merge and Attachments/Library
- Support Activity association to additional entity types
- Auto Fan Out Activities (Make Activities a standard list view with full group support)
- OOTB Coleman skills
- Job Manager (Filters, data cleanup)

Version Support & Product Lifecycle

CATEGORY	DURATION	FIXES	VERSION
Mainstream	4 yrs from release date	Priority/Severity 1 (critical) and Severity 2 (high) fixes	8.3.0.09 +
Extended	2 yrs from end of Mainstream	Severity 1 (critical) only	N/A
Sustaining	+6 yrs from release date **	Access to pre- existing fixes only (no new fixes)	8.3.0.08 & earlier

Example:

Version	GA DATE	END OF MAINSTREAM	END OF EXTENDED	END OF SUSTAINING
8.4.0.02	Sept 3, 2019	Sept 3, 2023	Sept 3, 2025	TBD

INFOR CLOUDSUITE CRM 8.x – FEATURE HIGHLIGHTS

Roadmap – CY 2020 +

Xbar Enhancements

- Mapping improvement – use AppointmentID generation logic instead of GUID for mapping between CRM and Outlook
- Streamline XBar setup with authentication file similar to CE
- 🔍 HTML Xbar client (compatible with Office 365 online)
- 🔍 Support for customizations

Mobile

- 🔍 App Store Wrapper or Infor Go
- 🔍 Support for multiple participants
- 🔍 Send to CRM

Sync for Exchange Enhancements

- 🔍 Performance and technical enhancements

Integration Enhancements

- Marketo changes trigger Workflows
- Marketo Built in session and log maintenance
- 🔍 Marketo Support for multiple Notes
- 🔍 Marketo Account Manager and Team support
- 🔍 Telephony system integration
- 🔍 Generic 3rd Party Marketing integration

Platform & Technology Enhancements

- Performance enhancements
- Integration insert/updates fire ION Workflows
- Upgrade-safe extensibility
- Automate post-provisioning steps after upgrade
- Store recurring Activities in database (Auto Fan-Out)
- 🔍 Automate BOD template refresh after BOD Pack update
- 🔍 Job Manager enhancements: disable jobs, filters on job execution status, cleanup of old data
- 🔍 Cascade field label changes throughout system
- 🔍 Unified customization platform (desktop & mobile)
- 🔍 Attachments Folder Hierarchy
- 🔍 Enhanced workflow support
- 🔍 History Archiving

Core CRM Functional Enhancements

- KPI Headers
- Add Activity associations for additional entity types (i.e. Quotes, Orders)
- User-Definable Activity Groups (requires auto Fan-Out)
- Images for Accounts & Contacts
- Show Tasks by day under Calendar (from LAN Client)
- 🔍 New Account summary view (360 view, Total Wins, Total Opps, Total Tickets, Invoicing, Shipments, Top X Products, Top Product Margins)
- 🔍 Projects Module (link to Opportunities)
- 🔍 Quick-add Accounts (from Tickets, Opportunity, etc.)
- 🔍 Lead conversion tracking
- 🔍 Expand Ticket defaults

User Interface & Usability Enhancements

- Move Group Tab to Dropdown (main views)
- UI Uplift - Wave II
- 🔍 Auto-schedule follow-up for soon-to-expire Quotes
- 🔍 UI Uplift – Wave III
- 🔍 Add standard Date Range selections (month, quarter, etc.)
- 🔍 Speedsearch enhancements – Wave I
- 🔍 Dashboards

Infor OS Enhancements

- 🔍 Standard Ming.le Homepages
- 🔍 IDM Mail Merge
- 🔍 IDM attachments and library
- 🔍 IDM templates, attachments and library
- 🔍 Coleman Skills
- 🔍 Coleman AI



Timeline





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