



Atlanta 2026 SUN User Conference - Session Agenda

As of October 26, 2025 - Subject to Change



Presenter	Company	Session Title	Description Short	Session Type
	Infor	Agentic AI	Action oriented Agents redefining enterprise landscape and automating complex tasks with a 'human in the middle' approach.	Infor Session
Kurt Kiley	Adams Automation	APS & MRP, Prepare for Success	Implementing Advanced Planning and Scheduling (APS) within an ERP environment is rarely straightforward. Many organizations invest heavily but struggle to see meaningful returns. This session reveals what differentiates successful APS implementations — intentionality. Drawing inspiration from lessons learned on the tennis court, we'll explore how focusing on purpose, alignment, and clear direction transforms APS from a complex software project into a driver of operational excellence. Attendees will leave with practical insights and actionable steps to bring intent to their APS strategy, ensuring lasting impact and measurable results.	Vendor
Aaron Hannan	SPS Commerce	Automate More w/ SPS Commerce: From EDI & PDF Orders to Procure-to-pay	Manual processes slowing you down? Join us to learn how SPS Commerce helps CloudSuite Industrial users automate every step of the order process—from PDF orders to procure-to-pay—without adding internal EDI expertise. We'll discuss how full-service automation and integration capabilities from SPS Commerce help manufacturers and distributors streamline operations, enhance accuracy and strengthen customer relationships. Hear how Infor customers are reducing manual touchpoints, improving cash flow visibility and future-proofing their order management processes with SPS. If you're ready to simplify EDI, onboard customers faster and eliminate PDF chaos, this session is for you.	Vendor
	Infor	Automate Your Day: Build Smart Workflows That Save Time	Learn how to create your own automated workflows using Infor ION and the Workflow Wizard—no coding required. This session will walk you through building simple, time-saving processes that reduce manual effort and help you work more efficiently with the tools you already have. Workflows Vs. AES	Infor Lab
	Infor	Birst Analytics	Working with the new Birst Dashboards/KPIs/Reports	Infor Lab
	Infor	Building Smart Workspaces: Creating CSI Widgets with Mongoose and Infor OS Portal	Explore how Infor Mongoose can be used to design custom widgets that enhance the Infor OS Portal experience in CloudSuite Industrial (CSI). This session will showcase how widgets built with Mongoose can surface key insights, guide user focus, and support tailored workflows within Portal workspaces. We'll share real-world examples and simple design concepts to help you explore what's possible without writing code. Whether you're looking to extend existing workspaces or build something new, this session will offer practical inspiration to get started.	Infor Session
Jesse Brohinsky, John Brown, and John Ring (V)	Lake Companies	Can AI Really Impact the Shop Floor? 10 Things You Need to Be Thinking About	AI may not run on the shop floor, but it can reshape the way work gets done on the shop floor. From smarter planning and proactive alerts to accelerated communications and embedded intelligence, AI is making manufacturing operations more efficient,	V - Gold
Marty Rhodes (V)	Single Source	Case Study: IncentViz – Commission Management for Syteline	Learn how IncentViz helped improve accuracy and reduce monthly commission generation and processing time. In addition to hearing the value IncentViz brings, you'll see the product in action and learn how IncentViz, an integrated solution for Syteline from Single Source Systems, provides a sales compensation platform to manage sales plans, targets and quotas, commissions owed and paid, and even rebates to customers.	V - Silver
Jamie Cote (V)	Cote Consulting	Change Management Changes Everything. My lessons learned so you can be prepared.	Explore the critical role that the psychology of Change Management plays in implementing and maintaining an ERP system that effectively scales with your business. Join me as we take a behind the scenes look at how the core competencies of Change Management evolve from the selection phase, through implementation and ongoing roles through stabilization, optimization and continuous business maturity. You are welcome to bring anecdotal references of specific business use cases for discussion, ask questions or simply attend.	V - Welcome Rec
Jonathan Schroeder	PBC Linear	Complete Automation from Website (CPQ) to Job Packet in Minutes	Using Infor CPQ and CADTalk, PBC Linear has completely automated the process of quoting & then entering an order, creating a new item and creating the necessary job packets to produce that item. A few minutes after a customer uses the online configurator and places an order via their webstore, a complete job packet (including all operational prints and inspection sheets) prints and is ready for the shop floor! Attend this session to learn how PBC did this – and how they have significantly cut down overhead for typical maintenance activities like ECN's and Pricing Updates.	End User



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Rick Sundahl (V) and Tony Filipovic (E)	Grey Wolf Systems & Jerger	Connecting with your Trading Partners – Simplified	While EDI has been around for decades, several companies make it more complex than is necessary. Grey Wolf has been doing EDI for over thirty (30) years. Even Grey Wolf made it complex when first starting out – but learned our lesson the hard way. This session will cover how EDI should be management by exception; benefits (both financial and process) by implementing EDI; the integration with Syteline via API end-points; how	Vendor
	Infor	CPQ		Infor Session
Emily Davies (V)	WM Synergy	CSI Costing Magic: Analyzing Variances and Trends	Discover how to turn costing data into actionable insights. Learn techniques to identify key cost drivers, spot trends, and uncover the stories behind the numbers.	V - Platinum
Andy Mercer (E)	Functional Devices	Custom Load Method Extension Classes: How-Tos and Performance Tips	Custom Load Method Extension Classes are a powerful tool in Syteline to generate data on the fly. In this presentation, I'll be discussing what they are, how they work, and specifically how to make them fast. Code structure is critical with CLMs because of the potential huge amounts of data. As a real-world example, I'll walk through a CLM that we use to generate customer price lists dynamically, which pulls filtered item price records as a base, adds in customer contract and customer contract price records on	End User
Scott Miller and Darrell Menard (V)	Apptrix	CyberSecurity and Security Awareness Training: It's everyone's responsibility!	Cybersecurity awareness training is crucial in today's digital landscape as it equips employees with the knowledge and skills to recognize and respond to potential security threats. With cyberattacks becoming more sophisticated, human error remains one of the leading causes of breaches. Training helps individuals understand the importance of strong passwords, identifying phishing attempts, and recognizing suspicious activity. It fosters a culture of vigilance and responsibility, reducing the risk of costly data	V - Gold
	Infor	Data Strategy	Infor Data Fabric is evolving into a 360 data platform - with a new data warehouse for your ETL and reporting needs, Real time access to enterprise data and official connectors to third party reporting tools	Infor Session
Raj Ethirajan and Jay Janardhan (V)	IntelliDash	Deep AI Insights in the operational areas of Job Costing, Supply Chain Costs, Efficiency and more.	A holistic view of variances, the root cause of the variance, impact of the procurement cost changes, and analysis of efficiency trends using Analytics and AI.	V - Bronze
Cassie Noles (V) and Barbara Bierman (E)	JD Noles Consulting & FireKing International LLC	EDI Answers to Your Questions	Looking for guidance and answers to your questions on your EDI journey? Allow Cassie Noles, owner JD Noles Consulting and Barbara Bierman, IT Administrator of FireKing offer clarity and tips on how to navigate. Let experience be your guide! From the basics to advanced – we have you covered. Bruce Dow and James Noles will also be available room to answer questions!	V - Gold
Carl Andrews, Michael Mochao (V)	Original Software	Ensuring zero downtime for v10 & CSI through automated regression testing	No one likes testing, it's a fact. But updates bring risk and could impact on your system stability. Listen and learn from our customers talking about their testing journey to lower that risk across Syteline and their wider application stack and see how our built-for Syteline, code-free testing platform can support your own journey to complete test coverage using automation.	V - Silver
	Infor	EPM	Set up and modify financial reports	Infor Lab
	Infor	Factory Track Roadmap & Announcements	Get a first look at what's new and what's next for Factory Track. We'll share recent product enhancements, highlights from the product roadmap, and <u>preview exciting new features across Factory Track Warehouse Mobility. Shop</u>	Infor Session
	Infor	Financial Reporting with Infor EPM	This session will explore how Infor Enterprise Performance Management (EPM) users can use financial reporting for dynamic, insight-driven process. Attendees will learn how EPM centralizes data, enhances report automation, and integrates seamlessly with ERP and BI platforms for data accuracy and run close to real time analysis.	Infor Session
John Weber, Scott Robinsky (V)	Decision Resources	Four Forces Redefining the Way You Work	AI, automation, collaboration, and data are redefining work at every level. This session reveals how combining them drives advanced efficiency today and unlocks a competitive advantage for tomorrow.	Vendor
	Infor	From Chaos to Clarity: Real-Life ERP Success Stories	Together with Infor, Customers share how they overcame implementation hurdles, streamlined operations, and achieved measurable ROI. Expect concrete metrics, before-and-after visuals, and actionable takeaways.	Infor Session
Pat Collette and Matt Spanulo (V)	Godian	From Insight to Action: Driving Smart Decisions with Birst Analytics + Infor CPQ/EQ	Discover how to connect the dots between analytics and action. With Godian's Birst QuickStart, organizations gain rapid, scalable insights across financials, operations, sales, and service. Pair that with Infor CPQ/EQ, and you equip your teams to turn those insights into faster, more accurate quotes and winning proposals. This session will show how manufacturers can unify data and sales processes to deliver exceptional customer experiences, improve margins, and accelerate time-to-value.	V - Platinum



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	Infor	GenAI - Embedded	What are the embedded GenAI capabilities that can take advantage of with the base subscription to CloudSuite Industrial	Infor Lab
Tarak Patel (V)	Aleran Software	How CPQ+AI are driving digital commerce adoption for buyers of industrial equipment	Aleran's Connected Commerce is helping industrial manufacturers offer an online experience to existing and prospective customers guiding them through product research, complex configurations, aftermarket parts lookup, and a number of customer service-related activities. Hear first-hand the path toward improved sales efficiency, increased quote conversion and higher customer satisfaction.	V - Gold
	Infor	IDS Forms	How to personalize the new IDS forms	Infor Lab
Deb Kettlety and Dennis Colburn (E)	Linemaster Switch Corp.	Implementing Avalara ECM, Avatax and Managed Returns	This session focuses on the implementation of Avalara ECM, Avatax, and Managed Returns from a user's perspective. We will share our experience with the process from company set up to go live.	End User
	Infor	Increasing Profitability with the Tools You Have: Unlocking CloudSuite Industrial's Service Management Potential	Discover how to unlock hidden revenue by leveraging the Service Management module in CloudSuite Industrial. This session will explore practical strategies for increasing profitability through smarter service operations and selling more serviced parts—using tools you already own.	Infor Session
Mark Feldhamer (V)	LogicData	iShop eCommerce Portal for SyteLine/CSI	This is the only ecommerce storefront and portal <i>exclusively</i> written for SyteLine/CSI. Le	V - Bronze
Greg Keating (V)	Godlan	MES Power, Minus the Headaches: The Prophecy IoT + SyteLine Advantage	In today's global economy, manufacturers must move faster, smarter, and more cost-effectively than ever. Traditional Manufacturing Execution Systems (MES) promise these benefits—but often come with overwhelming complexity and cost. Prophecy IoT delivers the power of MES without the headaches. It captures actionable data directly from the shop floor and transforms it into real-time insights that fuel continuous improvement, boost productivity, and maximize throughput. With deep integration into Infor CloudSuite Industrial (SyteLine), Prophecy streamlines the operator experience—combining production reporting, quality control (including SPC), and equipment maintenance into one intuitive solution.	V - Platinum
Adam Kuhn (I), Garrett Guiles (E)	Infor / Hudson Materials Co.	Multi-Shop Floor	Multi-Shop Floor - Provide an overview of the new Multi-Shop Floor capabilities. Share details around benefits and use cases for when the multi-shop floor functionality can assist companies by adding another layer to their site hierarchy. Hear from Hudson Materials who recently went live.	Infor Session
Price, Cassie Noles (V) and Lele Tran (E)	UniLink and Great Plains Ve	Paper to Performance: Modernizing EDI in Infor SyteLine	manufacturing? Hear firsthand from Great Plains Ventures and the UniLink implementation team as they share the milestones, challenges, and wins of their EDI	V - Silver
	Infor	Personalizations - BEGINNER	Personalize & Extend CloudSuite Industrial and SyteLine: Component Classes, List Sources and Validators	Infor Lab
	Infor	Personalizations - INTERMEDIATE	Personalization Best Practices for Upgrade Safe Extensibility	Infor Lab
	Infor	Personalize & Extend CloudSuite Industrial and SyteLine v10: DataViews - ADVANCED	In this hands-on session, we will explore DataViews from an administrator's perspective. We will use the DataView Wizard to create a runnable DataView, change	Infor Lab
	Infor	Personalize & Extend CloudSuite Industrial and SyteLine v10: DataViews - BEGINNER	In this hands-on session, we will explore DataViews from a user perspective. We'll change the way columns are shown, add groups, change filters, and add summaries. We'll see how these changes can be saved into Layouts and how to switch between multiple Layouts. BEGINNER	Infor Lab
Jack Horst (E)	CNH Reman	Process Intelligence	Join us for an high level exploration of Infor Process Intelligence and its	Infor Session
		Reduce customizations and make them uplift safe	In 2025 CNH Reman upgraded from version 9 to 10 and removed over 60% of their	End User
Ron Clontz & Kyle Me	Guide Technologies	Reimagining Output Management within CSI	forms can transform business processes. Learn how to produce forms with CSI to streamline operations, reduce complexity, and drive digital transformation by	V - Bronze
Casey Witherspoon, Alex West (V) & Devin Moxley (E)	Phocas Software & IMMY	Revolutionize Month-End: Financial Statements and Budgets & Forecasts made easy	statements, drill-down insights, and interactive dashboards. The power of quick, easy budgeting and forecasting in Phocas to keep everyone aligned, whether for sales or financial planning. How to bring all your key business functions together with one central platform for all your BI and FP&A needs. Automating your month-end process and customizing management reports using Phocas.	Vendor
	Infor	Role Based Work Spaces and Hub Pages	How to personalize and get the most out of work spaces	Infor Lab
SUN Board	SUN	Round Table - APS	Round Table - APS	Round Table
SUN Board	SUN	Round Table - Effective Enhancement Request	Round Table - Effective Enhancement Request	Round Table
SUN Board	SUN	Round Table - Finance	Round Table - Finance	Round Table
SUN Board	SUN	Round Table - QCS	Round Table - QCS	Round Table



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SUN Board	SUN	Round Table - Shop Floor	Round Table - Shop Floor	Round Table
SUN Board	SUN	Round Table - Technical	Round Table - Technical	Round Table
SUN Board	SUN	Round Table - Tips & Tricks	Round Table - Tips & Tricks	Round Table
Wendell Greenlees (E)	CyberScience & United Equipment Accessories	Smarter Reporting, Dashboards and Financial Statements	Report Writer (FRW) to make information access and delivery simple, quick, and impactful (images, charts, drill downs). CQ is intuitive, fast, and powerful. With over	V - Gold
Clint McRee (V)	SourceDay	Staying Ahead of Supply Chain Chaos: How Manufacturers Are Building Resilience	In an era of constant disruption, manufacturers face growing challenges in keeping production on track. This session reveals how leading teams are gaining control by transforming supplier collaboration—tackling late acknowledgments, PO changes, and long lead times without reworking their ERP or supplier base. Discover practical strategies to improve visibility and communication in the pre-shipment process, enabling faster, data-driven decisions inside Infor ERP. Leave with actionable insights to boost resilience and keep production moving—no matter what comes next.	V - Silver
John Weber, Tim McManus, Lesley Ransley (V)	Decision Resources	Streamline Shipping in CSI (SyteLine) with License Plates, Load Management, and SmartPack!	Discover how license plating creates pallet-level traceability, how load management drives better truck utilization, and how SmartPack optimizes every carton. This session highlights proven methods to make your shipping processes faster, leaner, and more accurate.	Vendor
Bhavana Musuluri, Pritesh Shah (V) and Matt Bell (E)	CloudLeap & Rocky Mountain Hardware, Inc.	Streamlining Shipping with Piyovi: A Global Solution for Infor CSI/SyteLine	At CloudLeap, we understand the critical need for an integrated shipping platform. Our Piyovi shipping software, a global solution, efficiently manages Infor CSI/SyteLine Orders across a variety of shipping modes, including Small Parcel, LTL, FTL, and 3PL/Broker. The user-friendly interface simplifies key tasks like rate shopping, printing carrier-compliant shipping labels and BOLs, tracking and invoice auditing. We also provide comprehensive support for international shipping, including DG/Hazmat compliance. Hear directly from Rocky Mountain Hardware - Matt Bell our CSI customers, about the positive experiences and benefits they've gained from using the Piyovi shipping software.	V - Bronze
Damien Howley, Rohit Tendulkar (V)	Nimbello	SyteLine Invoice Automation Driven by AI	Traditional OCR has been a helpful tool for invoice capture, but manufacturers need more speed, accuracy, and adaptability to keep up with complex AP demands. In this session, Nimbello and their customers will showcase how their AP process has been automated through augmented OCR with AI-powered capture and matching that integrates natively with SyteLine. By directly leveraging vendor records, GLs, receipts, and POs, AP teams can streamline processes, reduce overhead, and close faster with greater confidence. A customer guest speaker will share their experience achieving higher accuracy, stronger scalability, and measurable cost savings. Attendees will leave with practical strategies to modernize AP and unlock new levels of efficiency.	V - Bronze
Amie Philpot (V)	WM Synergy	SyteLine Service & Units Tracking: End-to-End Visibility for Every Customer	Discover how SyteLine's Service module and Units Tracking streamlines service management with accuracy and control. In this session, we'll highlight practical use cases such as warranty administration, in-house repairs, and onsite service visits, along with service contract management. You'll also see how the module provides complete visibility into serialized units and their full-service history, ensuring every customer interaction is tracked and managed with confidence.	V - Platinum
Rick Fisher, Andy Fred	Nutech Systems	Taking Barcode Data Collection to the Next Level w/ Viewpoint: Nutech puts the spotlight on 3 customer success stories	Join us for an in-depth look at how Viewpoint can help your business achieve greater inventory accuracy, real-time visibility, and streamlined warehouse workflows.	V - Silver
John Perry (V) and Ethan Kinney (E)	Sparkflow Data Analytics (Liventus) and PBC Linear	The Intelligent ERP: Supercharging Your Business Data with AI	Traditional Reporting Is No Longer Enough. Static dashboards and manual reports are reactive, not proactive. Learn how PBC Linear derives AI-driven intelligence directly from their ERP data with natural language Q&A, automated insights, and real-time alerts.	Vendor



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Joey Himes (V)	SolutionsX	Unleashing IDM: Move From Just Storage to Business Automation	Think IDM is just for storing documents? Think again. In this session, we'll explore real-world applications for Infor Document Management that connect directly to your business processes and automate your document activities rather than merely replacing a filing cabinet (or a room full of them). You'll be equipped with actionable ideas you can take back to the office and implement in your organization as soon as next week.	V - Gold
Panel	CAI Software	Unlocking Operational Excellence Through Digital Integration with SyteLine ERP	In this panel discussion, two manufacturers will share how they have successfully enhanced their SyteLine environments by integrating MES and EDI technologies. One manufacturer will discuss how implementing a fully integrated MES has given them real-time visibility into machine operations, labor, and production output—transforming raw data into actionable insights that uncover inefficiencies, reduce downtime, and increase throughput. The other will share how automating data transfer with an integrated EDI platform has eliminated clerical bottlenecks, minimized errors, and strengthened supplier and trading-partner relationships—all while allowing SyteLine to remain the single source of truth.	V - Silver
Tiffany Yan (V)	Qbuild	Unlocking Productivity with ECx Manager &	Are production slowdowns, shipment delays, excess inventory, or inaccurate data	V - Gold
Steve Green, Jason	Copley Consulting	Unlocking the Secrets to Finding and Retaining	Labor shortages, skill gaps, and the rise of automation are reshaping how	V - Bronze
Ryan Pukanski	Volant	Utilizing AES – The Built In Automation Engine	Come see a tutorial on building business logic into AES instead of modifying forms or	End User
Chris Cannady (V)	CADTalk	Why CAD-ERP Integration is a Journey	This presentation examines the critical challenge facing discrete manufacturers:	V - Silver
	Flat World Global Solutions	Open		V - Bronze
	Infor	Open		Infor Lab