

# M3 Portals

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September 2022



# Today's speakers



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# M3 Portals

## Challenge

M3 customers find it time consuming and inefficient finding, updating and creating information on behalf of their end-customers, whilst end-customers can find it frustrating calling service centers to obtain information. The situation affects staff productivity and customer satisfaction

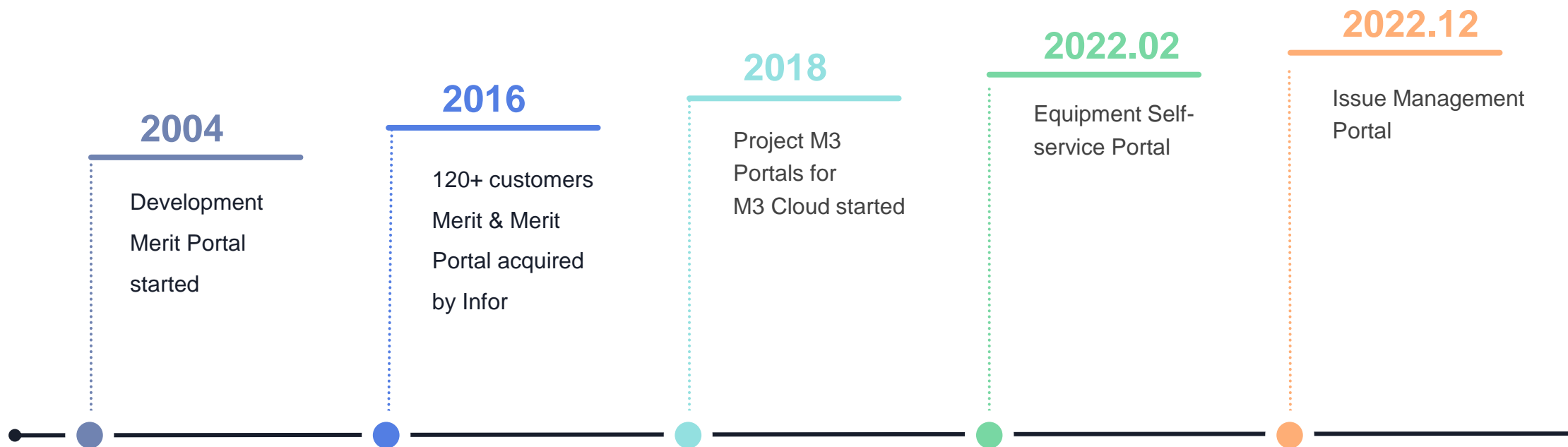
## Capability

Self-service portal providing a streamlined customer experience, allowing customers to find and update information themselves and initiative requests

## Value

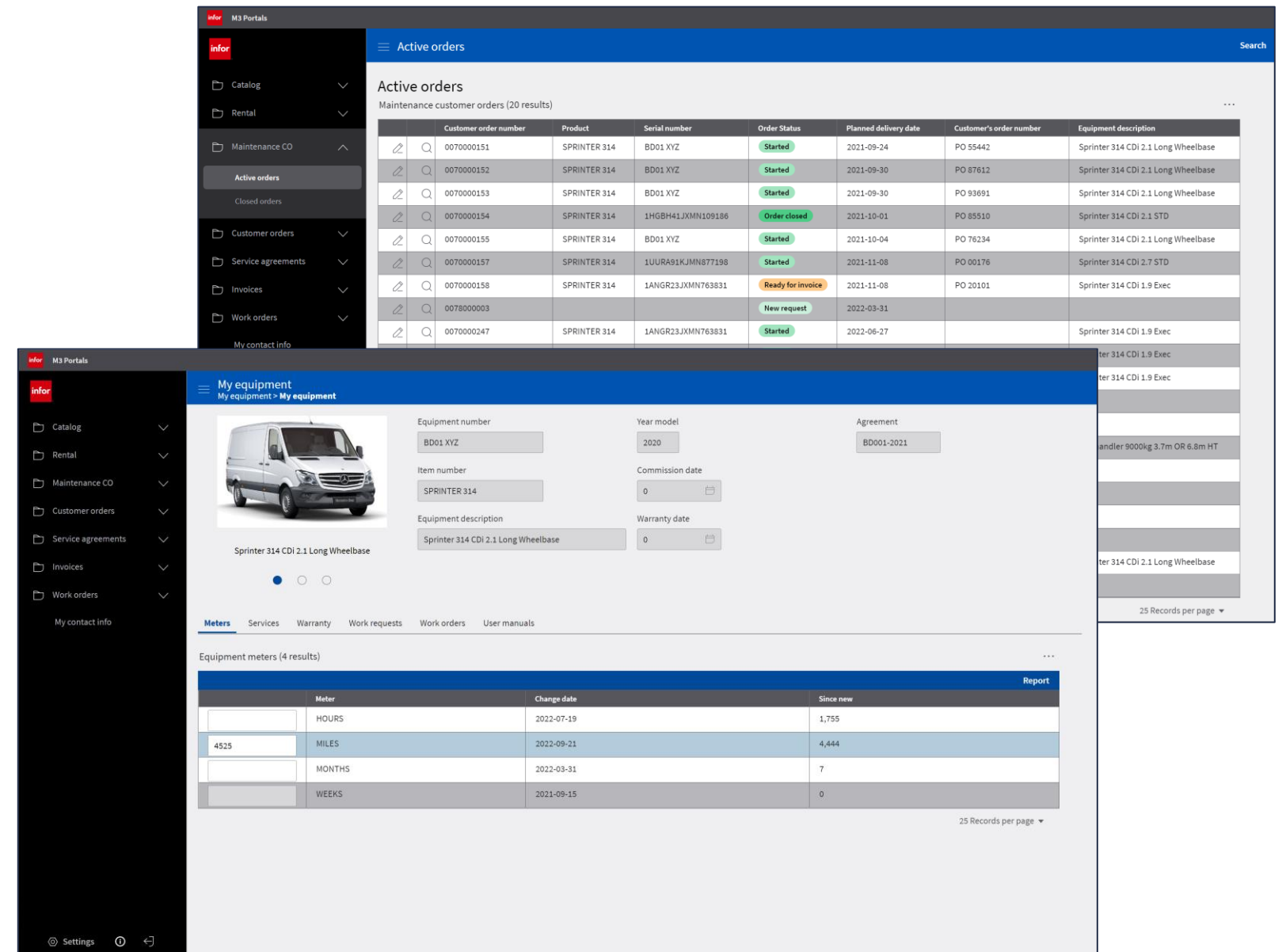
- Improve employee productivity
- Streamlined customer experience
- Improve service levels
- Improve customer loyalty

# Background

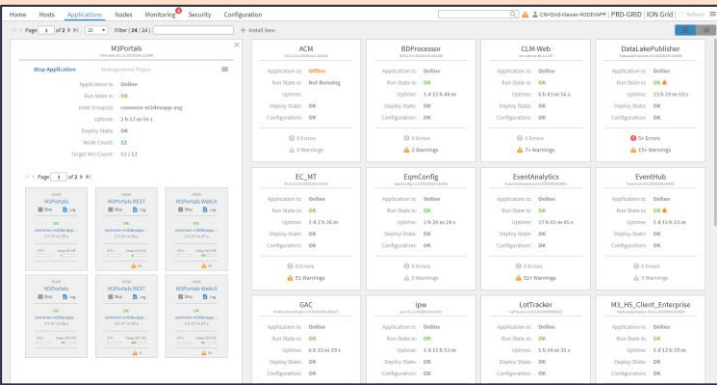


# Streamlined user experience through self-service portal

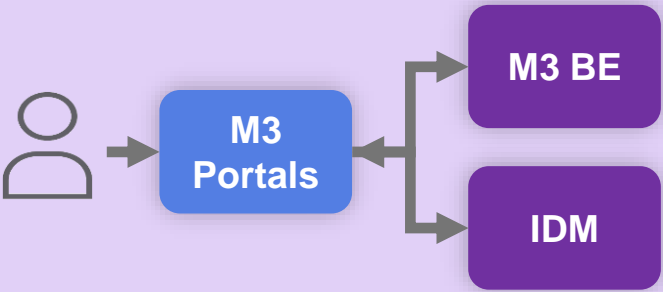
- Targeting zero end-user training requirements
- Highly configurable user experience
  - Role-based menus, panels and processes
  - Configured list views, detail panels, field value colors, replace values with descriptions
- Security to ensures that external customers only have access to their information
- Integration with Infor Document Management and external document locations
  - Access electronic content (manuals, guides, images, invoices...)
- Operates on any device with a browser and offers a responsive experience



# M3 Portals

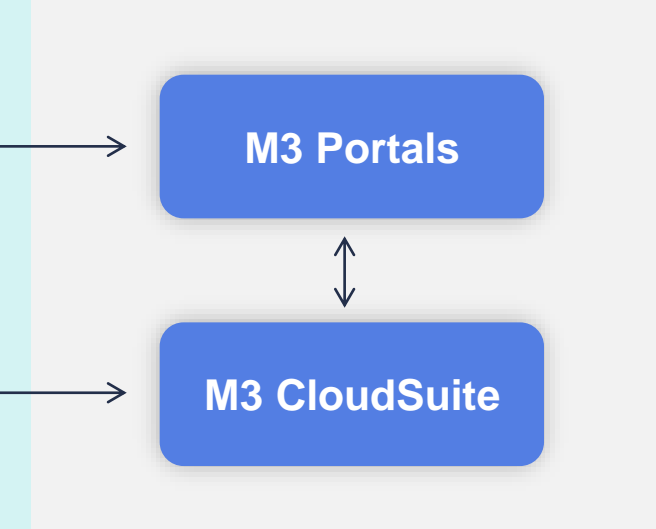
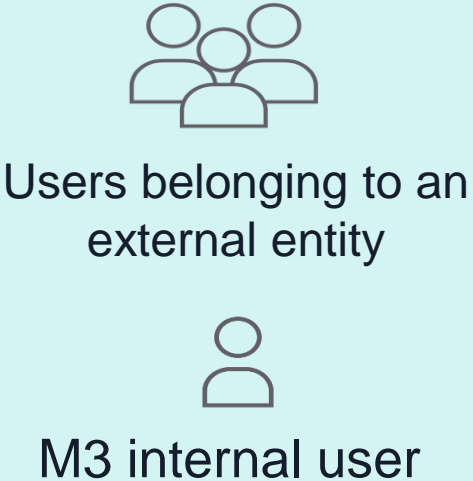


- Grid Application
- Running in the same Grid as M3 BE



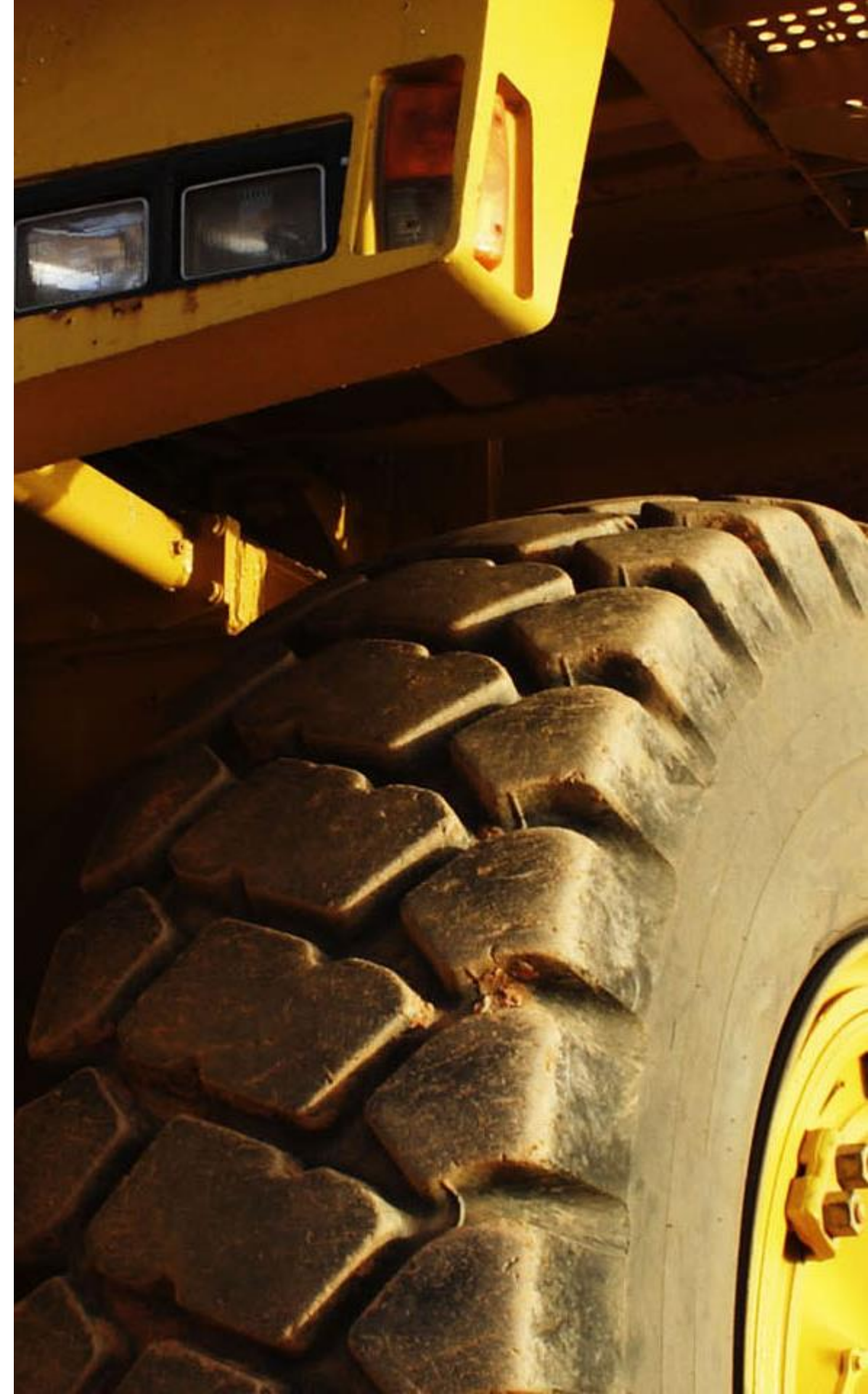
- Accessed using direct URL, outside Infor OS Portal
- Generic API's for data retrieval
- Function specific API's

- Infor OS External Entities
  - Used by M3 customers to provide their customers with access to M3 Portals
  - M3 Portals is accessed using a direct URL, outside Infor OS Portal
  - “External user” – Infor’s “customers partner” (customers, suppliers and other partners)



# Equipment Self-service Portal

- Provides a 360 view of an equipment and related information
- Self service for your customers and partners
  - Search for equipment information including service history, pending work and warranty information.
  - Create service request
  - Update meter values (equipment usage)
  - Create rental contract requests
  - View invoices
  - Maintain their own company and contact information
- Integrated to Infor Document Management allowing customers to see images, user manuals, instruction videos, certificates and other relevant information
- Launched under controlled availability - February 2022.
- Beta project in Canada





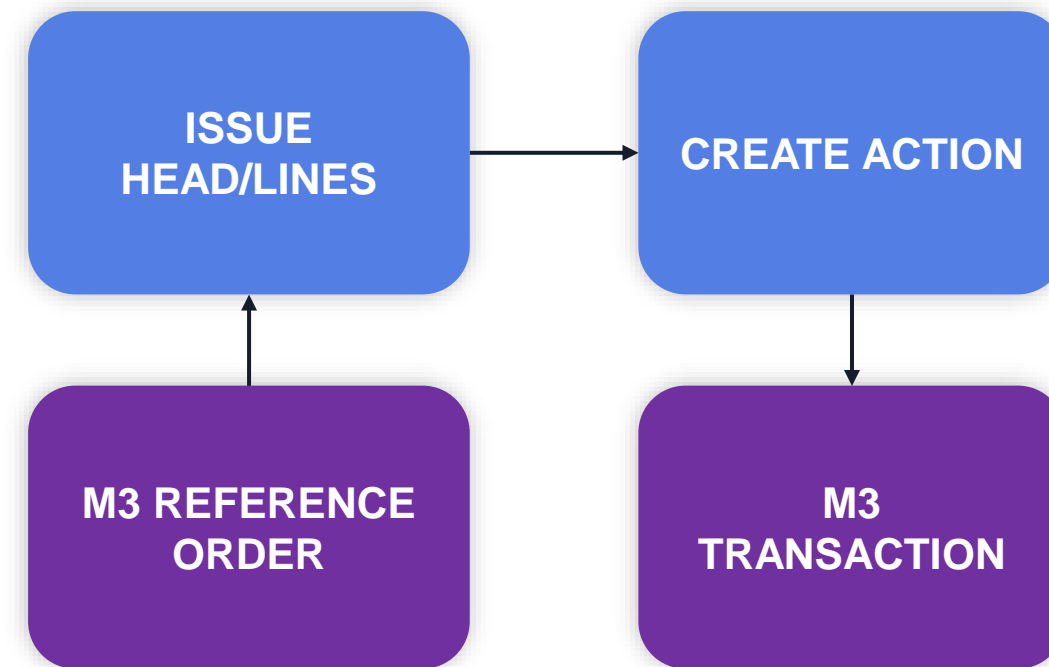
# Issue Management Portal

- Improved customer service
  - Complaints/claims/issues based on customer orders/invoices
  - Complaints/claims relating to goods, services and general feedback
  - Replacement orders, returns and credits
  - Customer/partner self service
  - Information transparency
- Get control of your reversed logistics process
  - Ticket/issue system related to M3 orders/transactions
  - Handling complaints/claims/issues through the supply chain
  - Financial control through M3 accounting
  - Lot recall
    - Lot/order traceability
    - Create issues/actions to recall item/lot



# Issue Management Portal

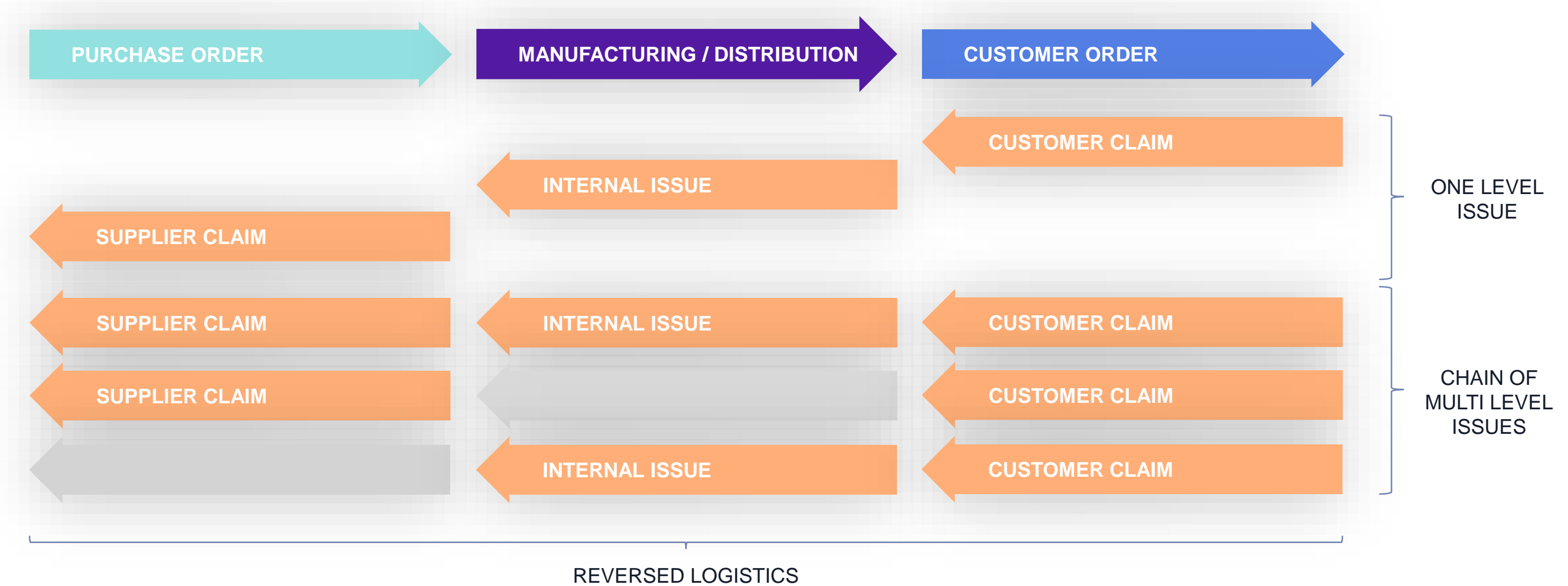
- Create issues (claims, complaints, request for returns, etc.) through a self-service web portal
- Create from / link to a M3 order
- One issue head with multiple issue lines
- Create one or multiple actions (M3 transactions) from an issue line
- Automatic processing of actions using predefined templates
- Follow up status and do inquiry
- Workflow integration
- Role based and configurable processes, menus and panels



Reference categories	Action codes
101 – Manufacturing order	000 – Manual (no M3 transaction to be created)
111 – Manufacturing order material	101 – Manufacturing order
251 – Purchase order	201 – Supplier claim
311 – Customer order	301 – Customer order return
401 – Requisition order - Stock positive	310 – Customer batch order
411 – Requisition order - Stock negative	311 – Customer order
511 – Distribution order	401 – Requisition order - Stock positive
921 – Replenishment order	411 – Requisition order - Stock negative
	511 – Distribution order
	921 – Replenishment order

# Issue Management Portal

- Chain of related issues



# Real-time value at work

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