Stora Teknikdagen

Extensions med mere

Mathias Andersson

TECHNOLOGY

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Agenda

01 News and Highlights

02 Automation – Workflow Design

03 Examples

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M3 Workspace uplift

CloudSuite(s)	Potential Business /Tech.Impact
All M3 CloudSuites	Moderate / Moderate
Decision maker	**Architecture**
All Roles	MT
	2024.10

Uplift of important M3 Workspaces to the new Infor standard providing improved visibility on important KPI’s and updates without delving into detailed transactional data.

Problem

- Existing Workspaces provide an extensive amount of information that can be daunting to the user and, in most cases require the user to open M3 functions to perform their regular actions

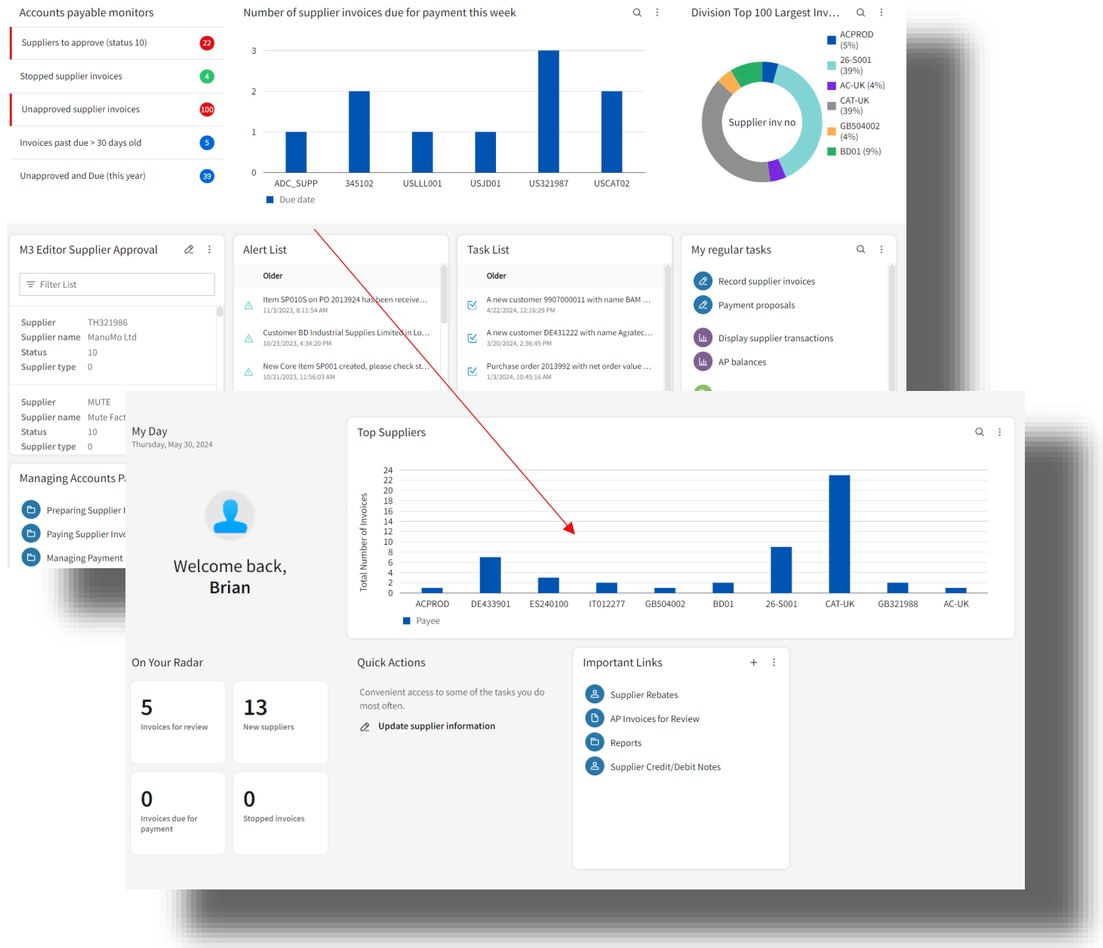
Solution

Uplift the existing and important Workspaces to the latest Infor design standards and latest widgets to simplify the workspace layout and interactions. Workspaces include:

- Warehouse Manager
- Production Manager
- AR Controller
- Rental Depot Manager
- GL Controller
- Quality Manager
- Service Management

Benefits

- Streamlined use with better user interaction
- Clearer indication of important KPI using the new ‘On Your Radar’ widget, with drill-down capabilities



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Purchase Manager

mingle-portal.inforcloudsuite.com/v2/SLSGDENA011_TRN/45485db2-6091-4da3-a658-8efe2856efac

M3 Cloud Suite Start Page | Purchase Manager Workspace | Purchase Manager | TRN | Mathias And

Top 5 Suppliers / Nb of Purc…

Purchase order number	4002511396
Warehouse	001
Supplier	ABS001
Lowest status - purchase order	85
Highest status - purchase order	85
Order date	2024-04-30
Buyer	BARAND0
Purchase order number	4002511397
Warehouse	001

Planned Purchase Orders

Planned Purchase Orders with errors	
Planned Purchase Orders with Warnings	
Planned Purchase Orders to release	
Planned Purchase Orders to reschedule	
Delayed Purchase Order Proposals	

Delivery Notes in my Warehouse

Delivery Notes with invalid data	3
Advised for shipment	2
Notified for transport	7
Staged quantity	1
Goods received	61

Claims / Returns

New Claims	
Approved Claims to be processed	
In Process Claims	

Purchase Orders - Actions before…

Orders to print / send	51
Orders to confirm	10
Orders not confirmed and due soon	0
Orders partially confirmed	0
Expected PO Lines	100

Alert List

No Alerts Available

Task List

No Tasks Available

Quick links

- Consignment Stock
- Delivery Schedules
- Supplier Delivery Notes
- Supplier returns
- Items
- Suppliers
- Purchase Agreements

Purchase Orders - Orders not Re…

Preliminary orders	5

My requested planned POs, POs …

My PO Requests in my Warehouse	4

Purchased Items

Preliminary Items	100

Suppliers

Preliminary Suppliers	54

Purchase Manager Workspace

mingle-portal.inforcloudsuite.com/v2/SLSGDENA011_TRN/5d6ddb93-0277-4fc0-8c51-d20ca4e0592a

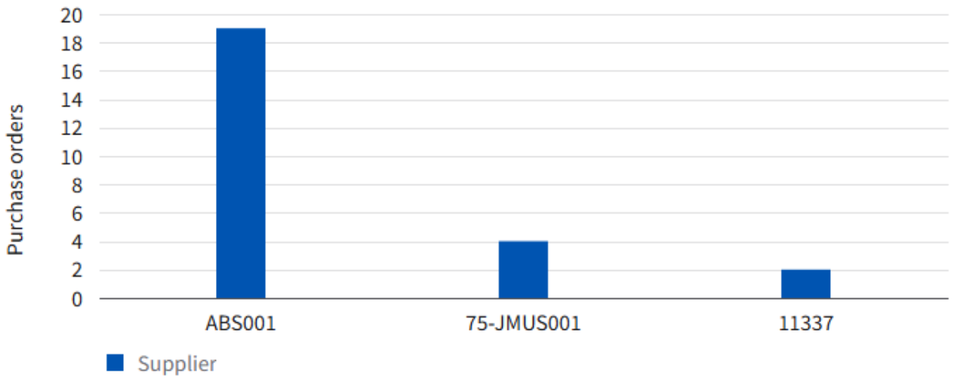
M3 Cloud Suite Start Page | Purchase Manager Workspace | Purchase Manager | TRN | Mathias Ande

My Day

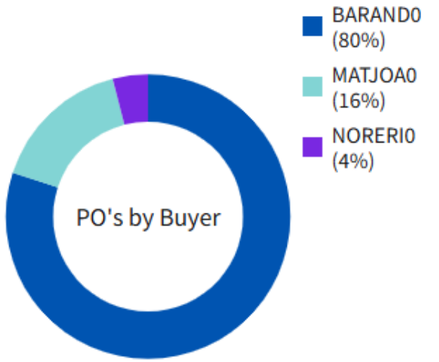
Tuesday, December 10, 2024

Welcome back,
Mathias

Top Suppliers



PO Monitor



On Your Radar

4 Delayed order lines	**1** PO Approvals
0 New suppliers	**0** Stopped suppliers

View all | View snooze list

4 Delayed order lines — Review

Quick Actions

Convenient access to some of the tasks you do most often.

- **Create Planned Purchase Order**
- **Release Planned Purchase Order**
- **Update Supplier Information**
- **Receive Purchase Order**
- **Supplier List Information**
- **Supplier Creation**

Important Links

- Purchase Agreements

Updates to M3 Output Management

CloudSuite(s)	Potential Business /Tech.Impact
All M3 CloudSuites	Minor
Decision maker	**Architecture**
	MT

Enable xtendM3 to customize media logic and export/import functionality for customers own languages

Problem

- Basic flexibility for controlling media options, for example, the delivery mechanism for the printouts, only covered partner media control
- Manual steps when moving customer’s own languages for documents between environments

Solution

- Enable xtendM3 to customize media logic, allowing users to control the delivery options for printouts, adding control based on users, in addition to the already existing partner media control
- Enabled the possibility to use export/import functionality for customer's own languages for documents.

Benefits

- Creates more flexibility for controlling media options, for example, the delivery mechanism for the printouts can now be based on user
- Customers own languages including custom translations can be moved from a test environment to a production environment, which in turn provides a simpler process, saving time and effort

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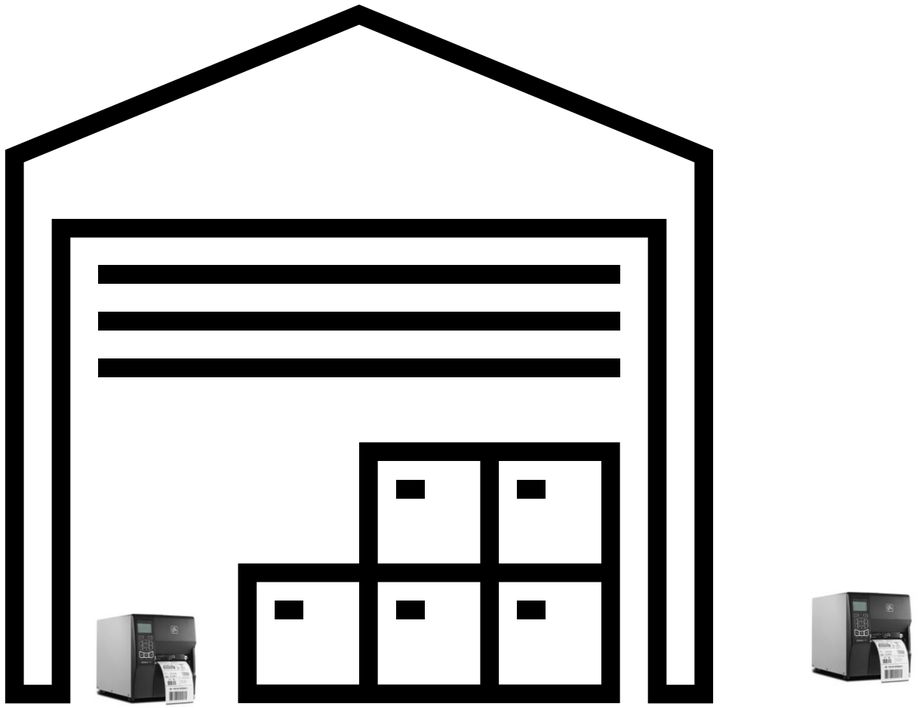

Good weather?

Division

AAA

Apply

MNS205,CRS945 ETC

Printer file	User	Location	Media	Sequence no	To email address
	ANDMAT				
	AUBTEHI0		*MAIL	1	tehi…bry@infor.c…
	BARAND0		*MAIL	1	and…com
	BIRSUM0		*MAIL	1	sum…@infor.com
	BIZTAN0		*M…	1	tan…en@infor.c…
	BOBHAR43		*M…	1	bob.hartman@infor.com
	BRELAR0		*M…	1	lars.bremer@infor.com
	CAITRE0			1	trevor.cain@infor.com

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Good weather?

KB2305177

Subscribe Actions

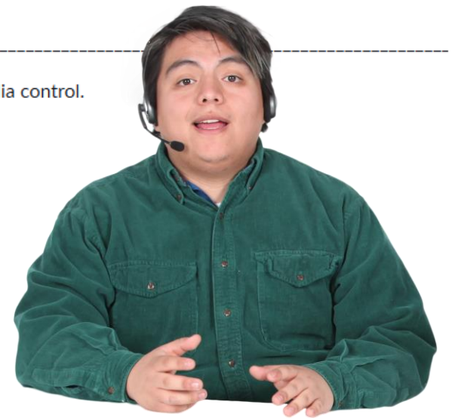
Extension point for custom partner media control

Revised by Isabelle Gallo-Grosos • 29d ago • 38 Views • ☆☆☆☆☆

Article Information

Description : How to use the XtendM3 for custom partner media control.
Resolution :
Create an XtendM3 extension

1. Select Administration Tools > XtendM3 and create new extension:



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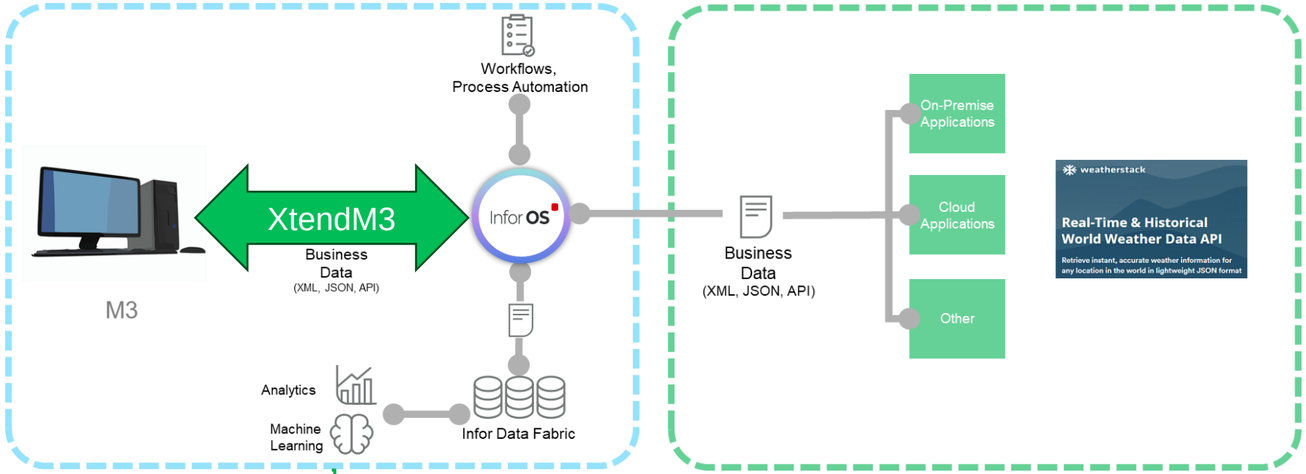

Yes

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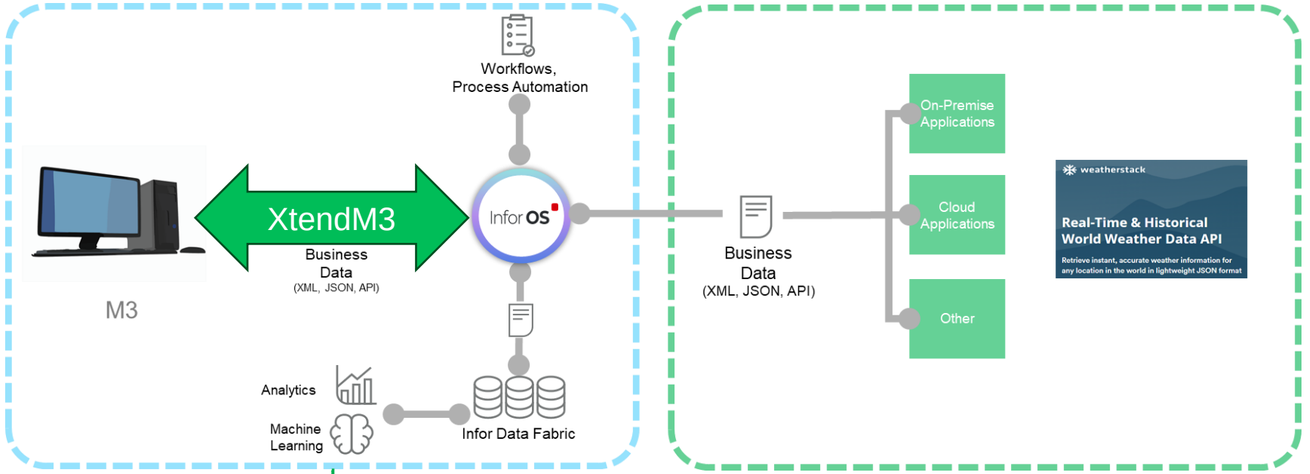
Good weather?



Doubtful...

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Marketplace

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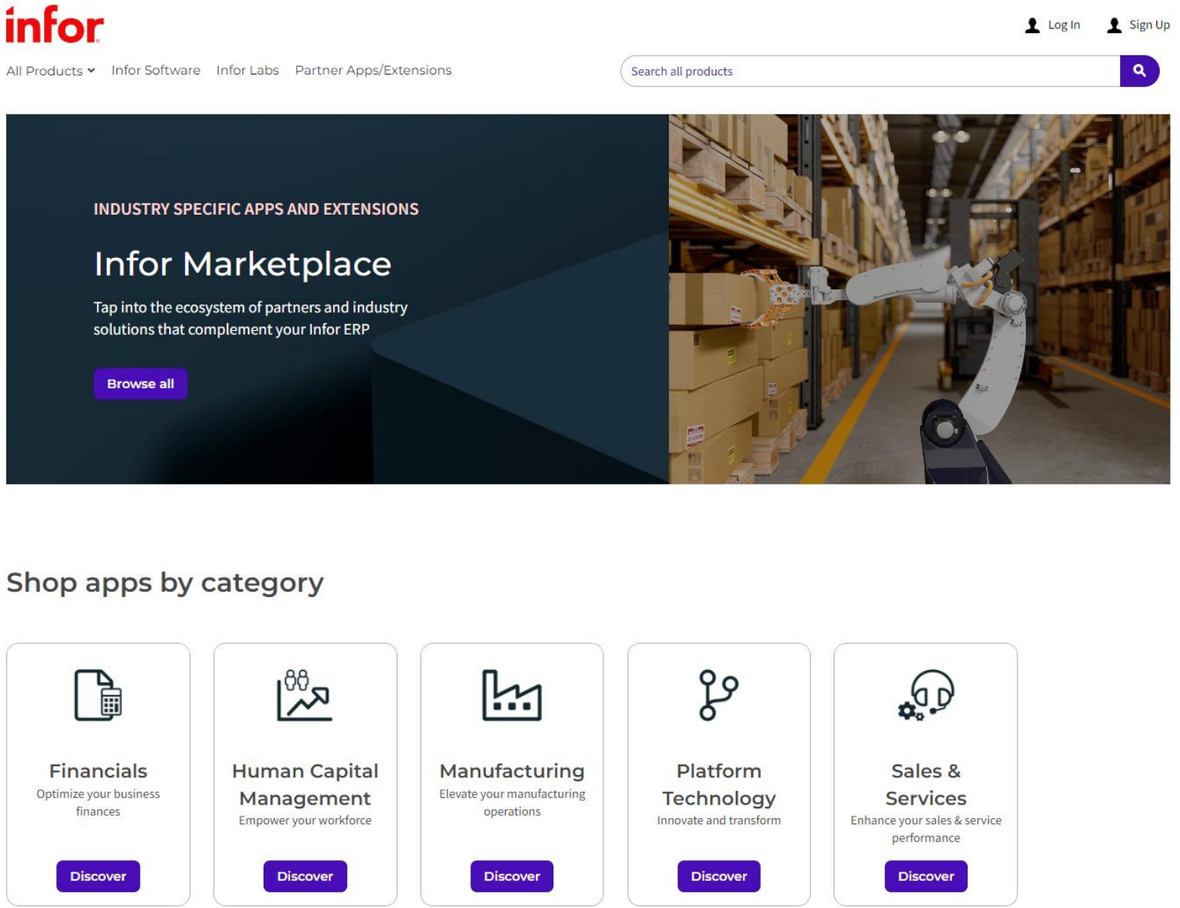
What is Marketplace And How To Use

Infor Marketplace offers an enterprise software ecosystem aimed to make it simple for customers to discover and deploy industry and micro vertical solutions that integrate with Infor's portfolio of business software

Partner Apps/Extensions: Partner developed applications and content that meet certain niche industry requirements.

Infor Labs: Examples, samples, templates, and other content that does not belong in standard product but is strategically important to offer publicly. The content is unsupported and offered as educational / promotional material

Infor Software: Solutions that does belong in the standard product but have components that can't be automatically deployed into the Infor eco system. This type of solution is supported and must as such go through full company readiness certification prior posting.



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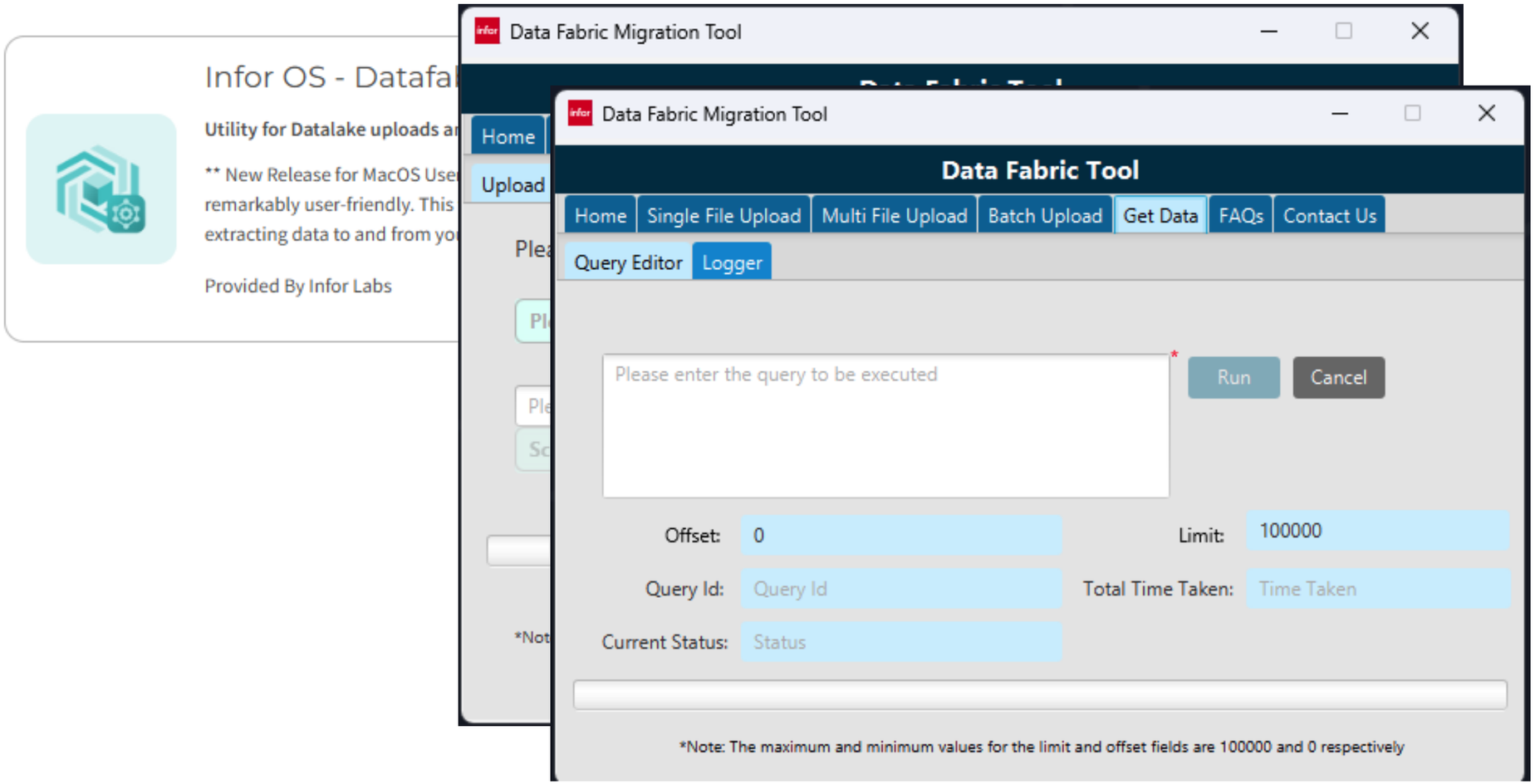
Infor Labs on Marketplace



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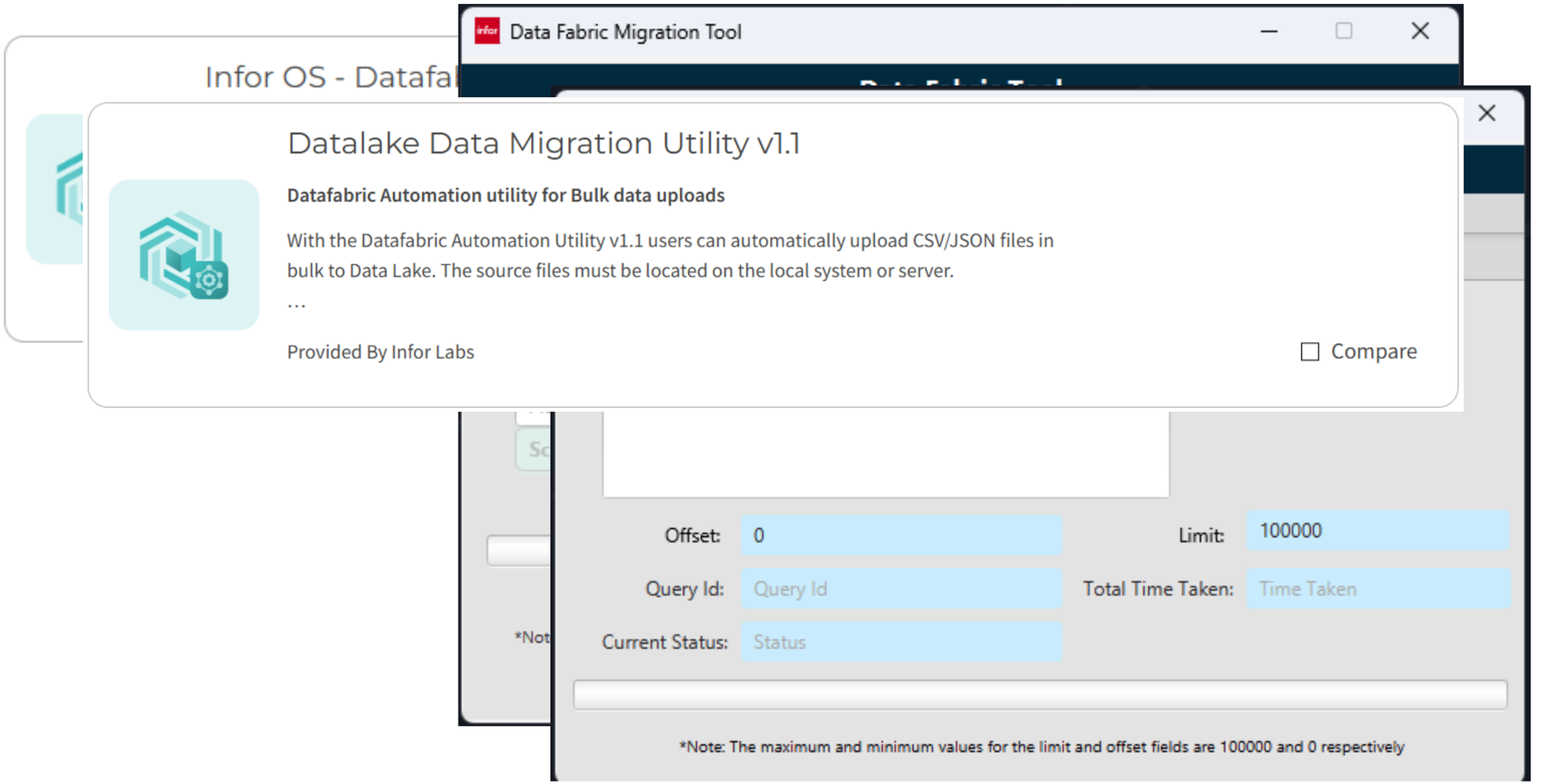

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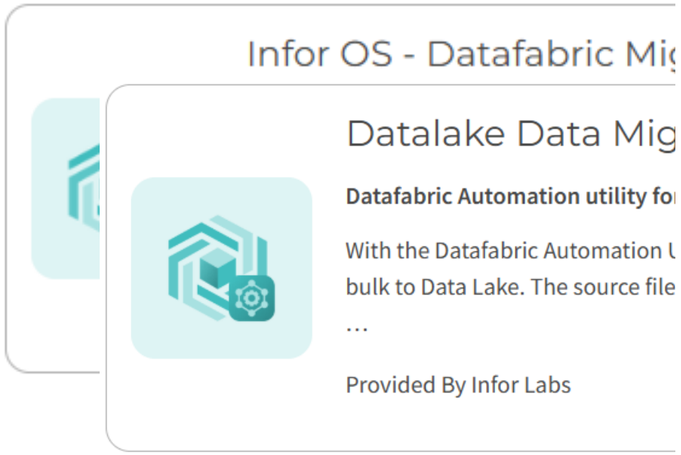

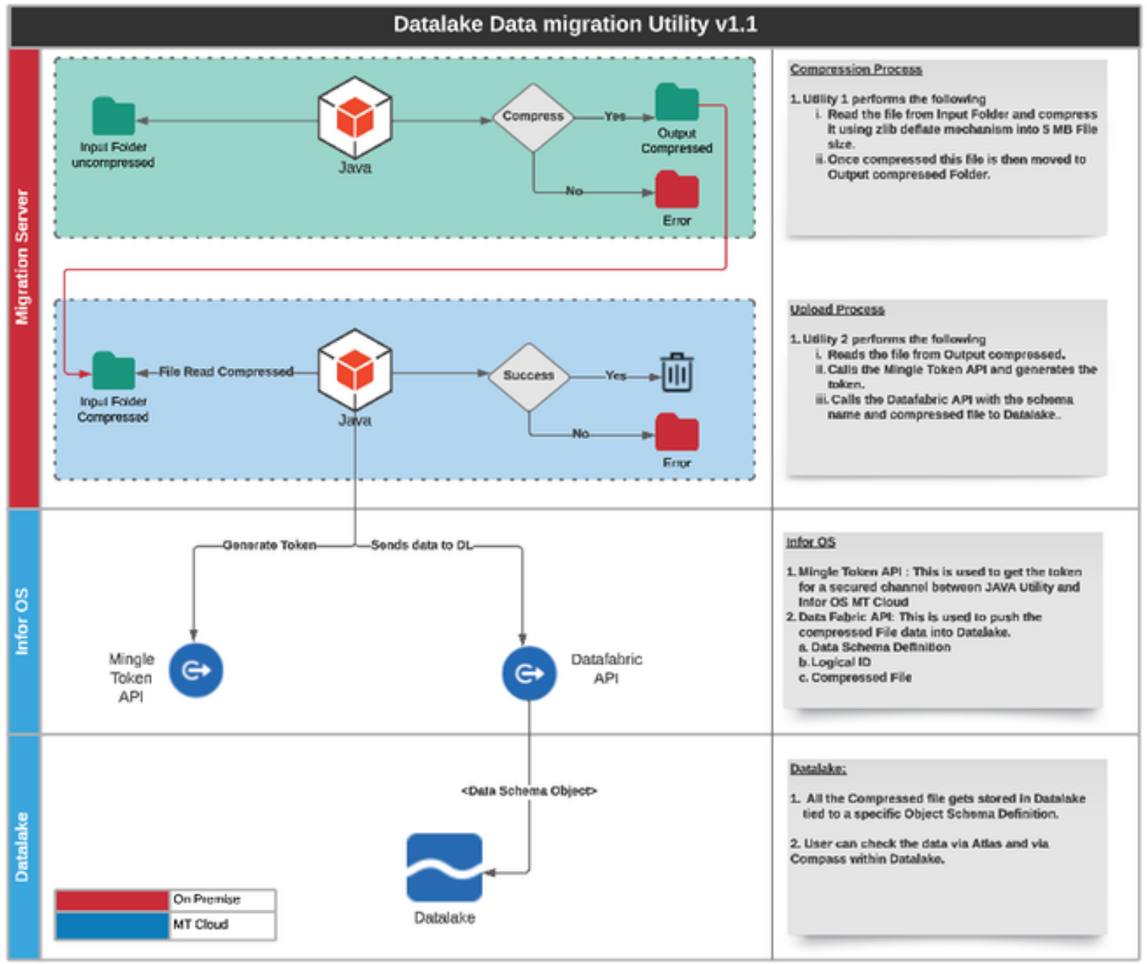

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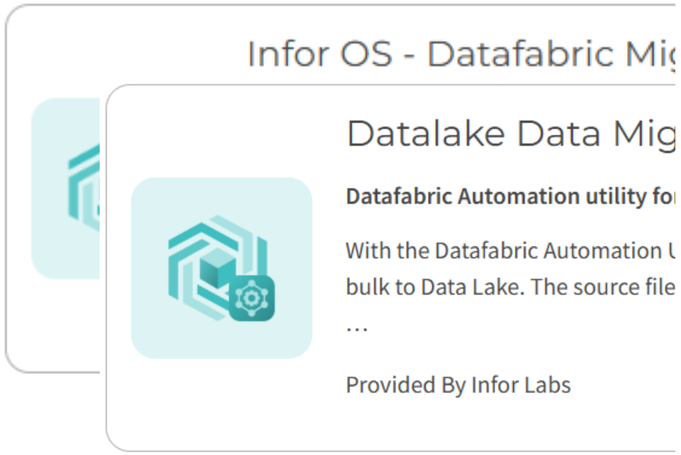

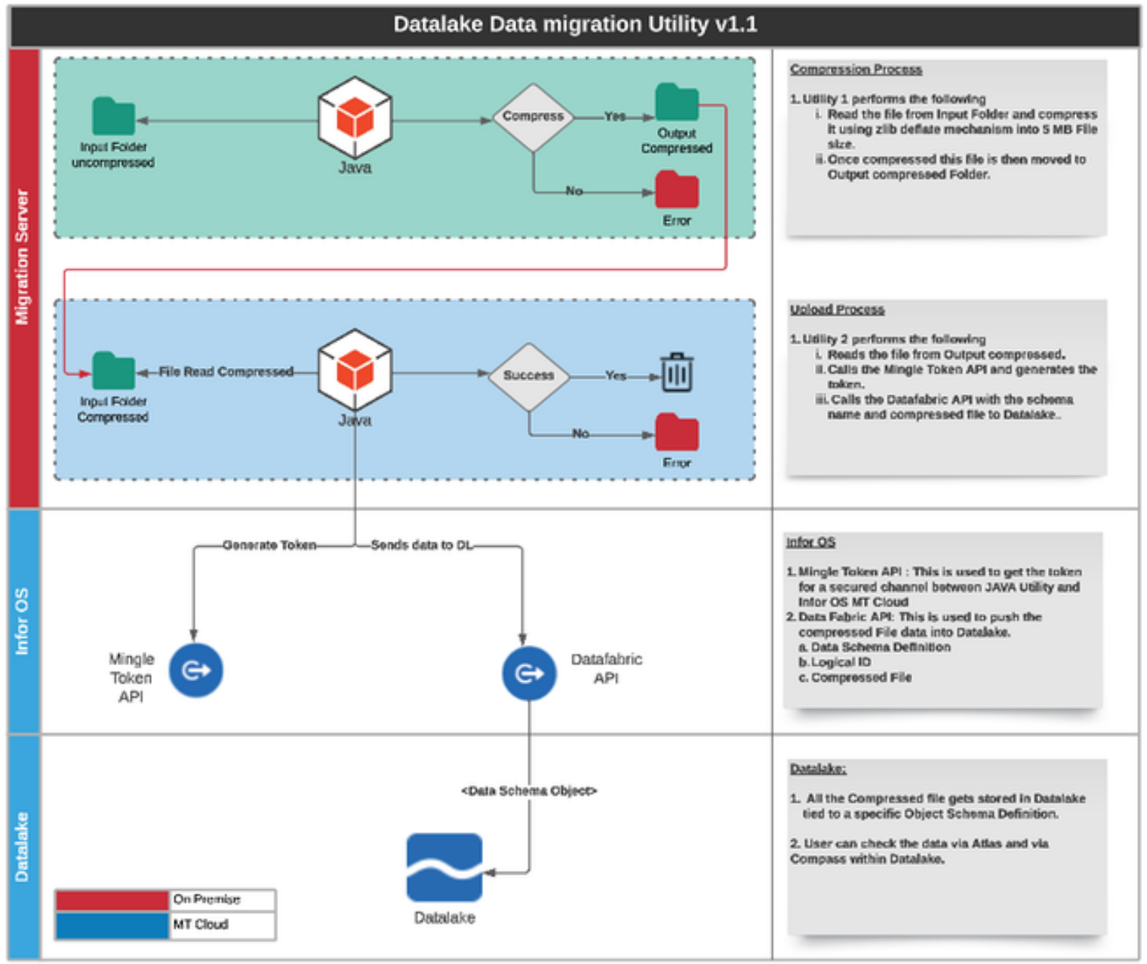

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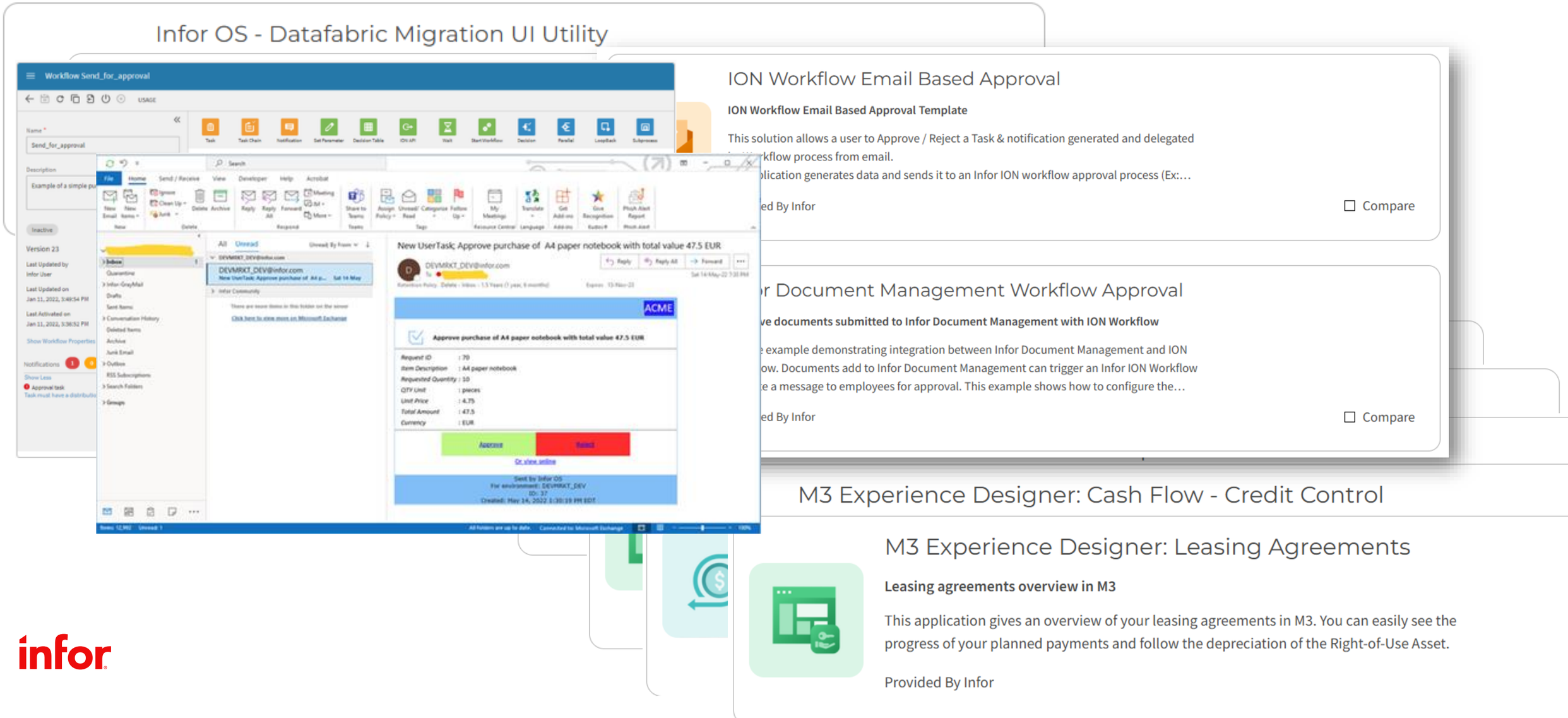

Workflow

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Workflow

- How to build
- Examples

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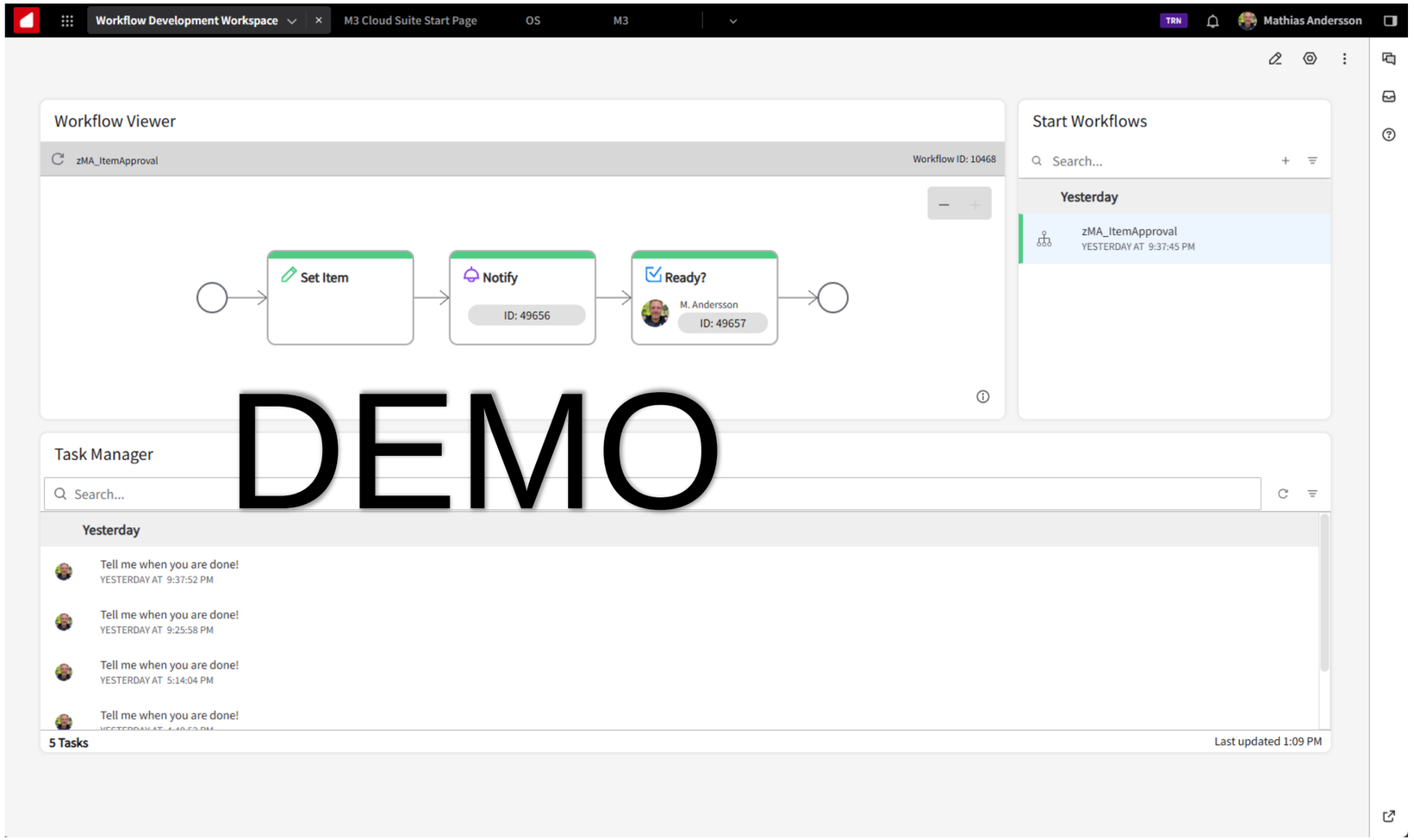
Set Up Your Development Workspace

- Workflow Viewer
- Task Manager
- Start Workflows



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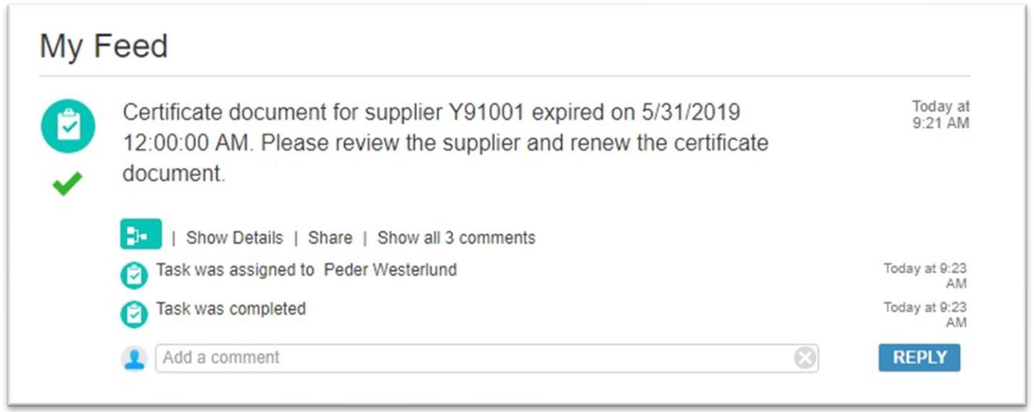
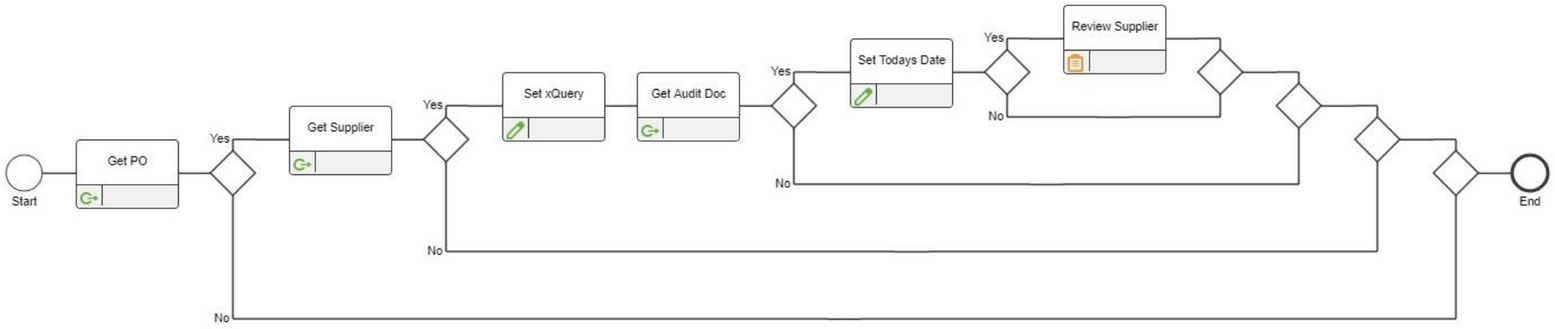
Supplier Audit Check

An ION Workflow that, at PO creation time, checks if the Supplier has a valid Audit / Certificate document in IDM. If the expiration date has passed a task is sent to the users on the distribution list, asking to review the Supplier and renew the Audit / Certificate document.





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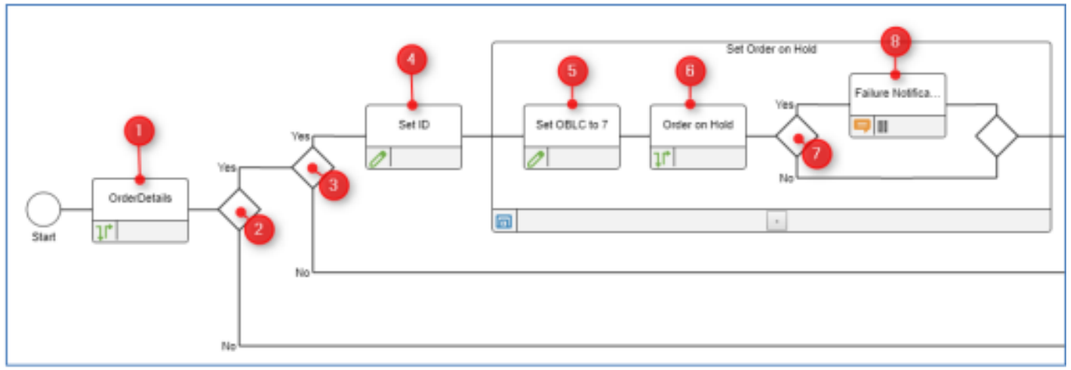
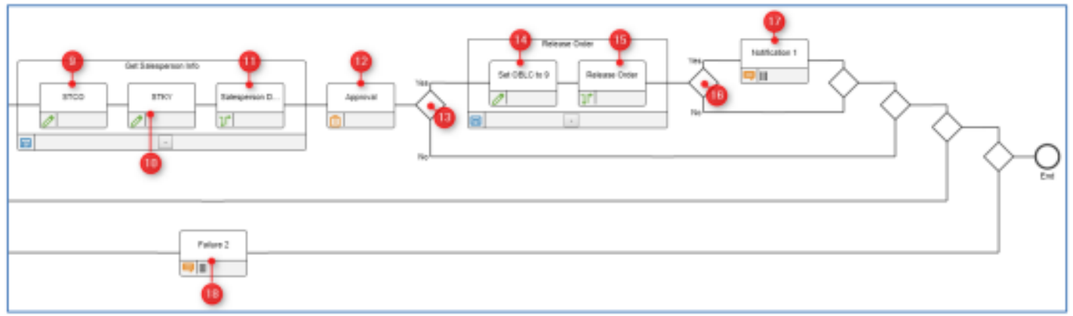
Low Margin Approval

An ION workflow for putting a customer order on hold when the margin is too low, as well as releasing it based on user input.



1. Call OIS100MI.GetHead to get the customer order header details
2. Did the transaction succeed?
3. Is the order already on hold?
4. Set the value of parameter “ID” to value of parameter “M3BEAE”
5. Set the value of parameter “OBLC” to “7”
6. Call OIS120MI/UpdCOStop to set the order on hold
7. Did the transactions fail?
8. Distribute failure notification



9. Set the value of parameter CTSTCO to the value of parameter SMCD
10. Set the value of parameter CTSTKY to the value of parameter SMCD
11. Call the transaction CRS100MI/Get
12. Distribute approval task to order responsible
13. Was the order approved?
14. Set parameter OBLC to “9”
15. Call OIS120MI/UpdCOStop to release order
16. Did the transaction fail?
17. Distribute failure notification
18. Distribute failure notification

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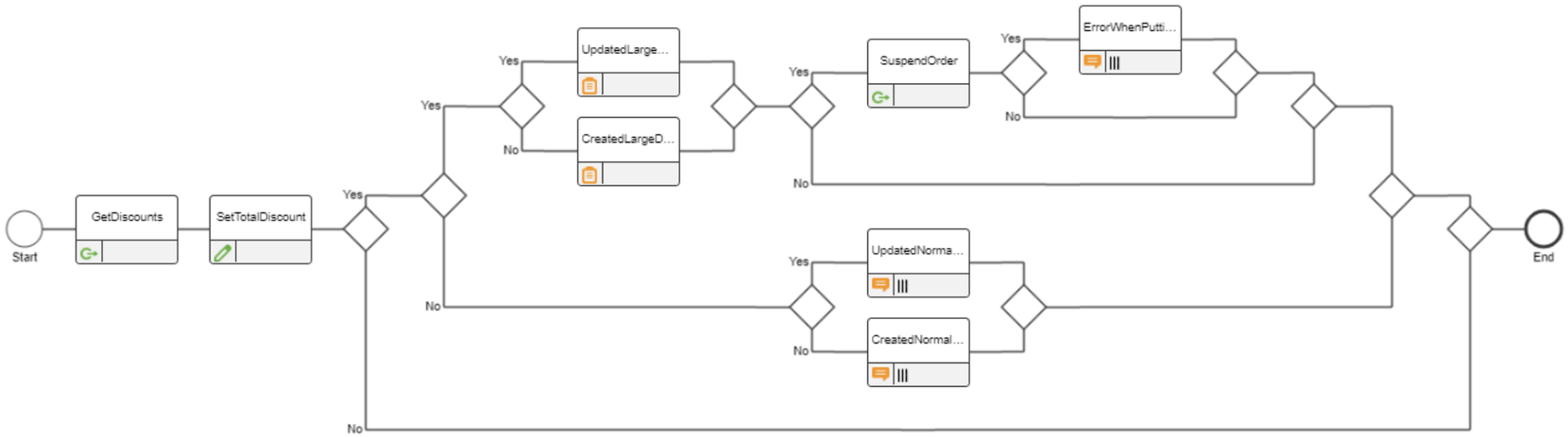
New Sales Order Line With Discount

If the discount exceeds a certain percent limit (10% as default), a task will be distributed with options to approve discount or suspend order.



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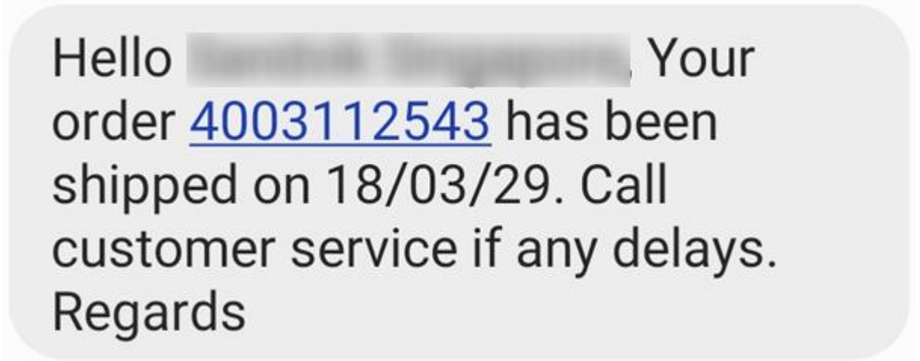
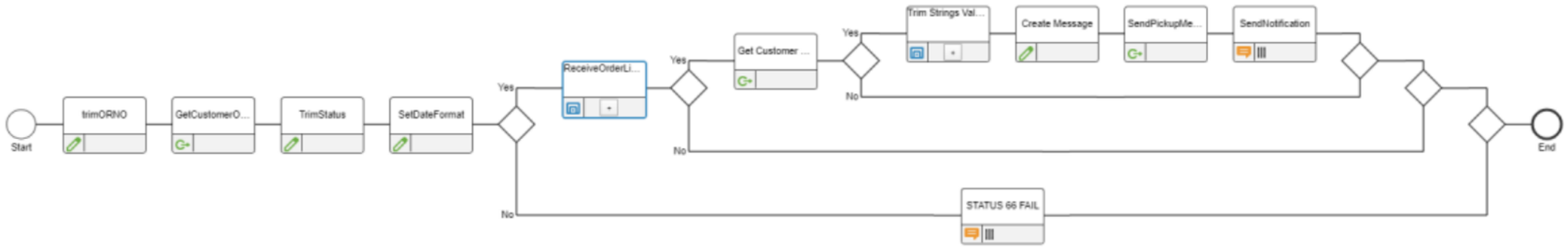
Customer Order Shipped SMS

An ION workflow that will send SMS to customer when customer order has been shipped. Notification will also be distributed.





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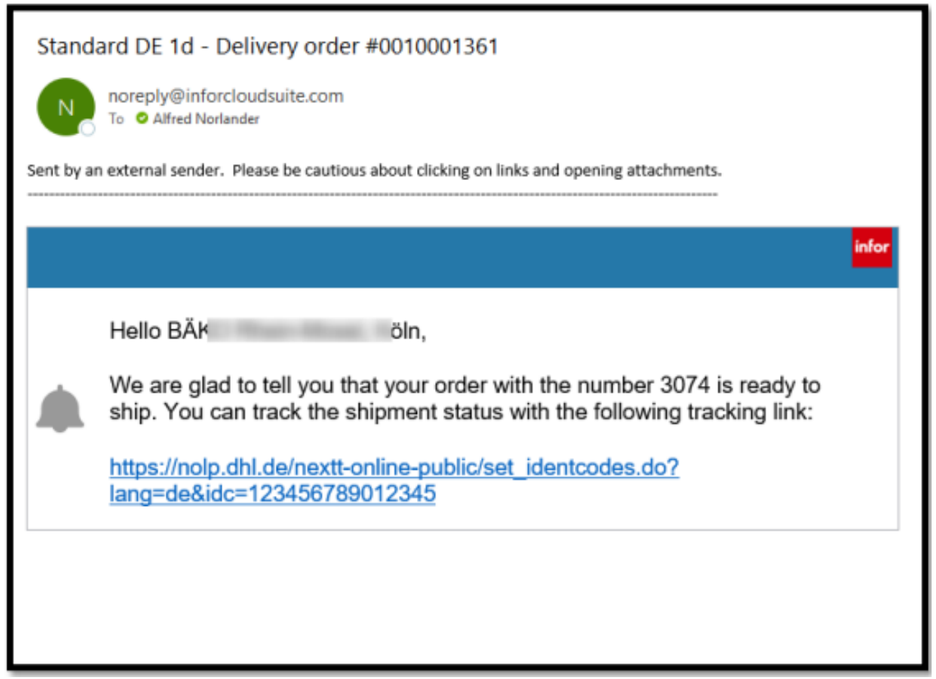
Send Tracking Email

Workflow that sends email to customer with tracking link. The tracking link is created with general carrier URL and delivery ID.

1. *Get delivery data (customer, order number, route, external tracking ID)*
2. *Get customer name*
3. *Check if route*
4. *Get route name*
5. *Get tracking URL for carrier*
6. *Check if URL*
7. *Build the URL: base URL + tracking ID*
8. *Add order number to email message*
9. *Add customer name to email message*
10. *Add URL to the email message*
11. *Set email subject*
12. *Get contact by customer (consignee from delivery)*
13. *Get email address for contact*
14. *Check if email address*
15. *Send email*



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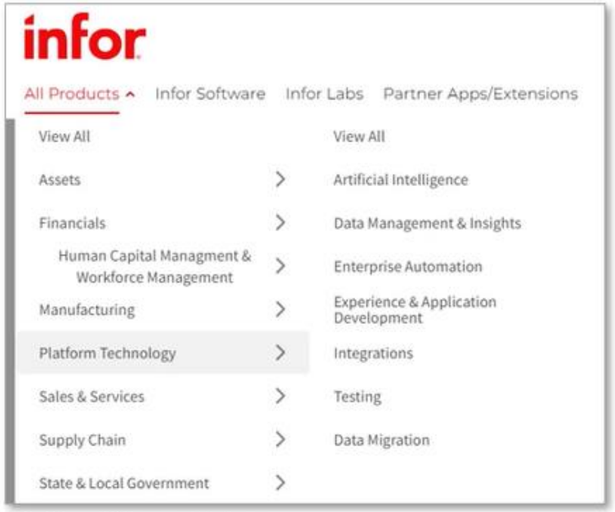
Resources



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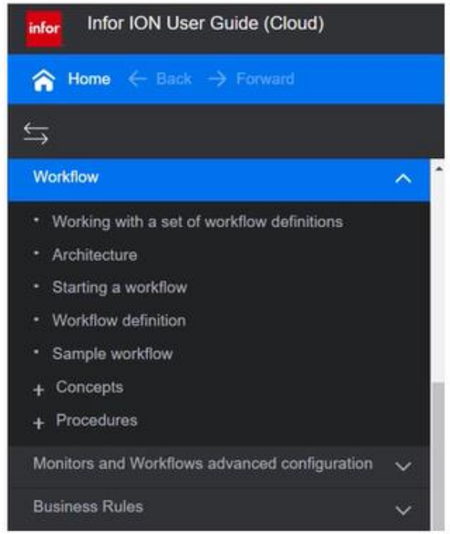

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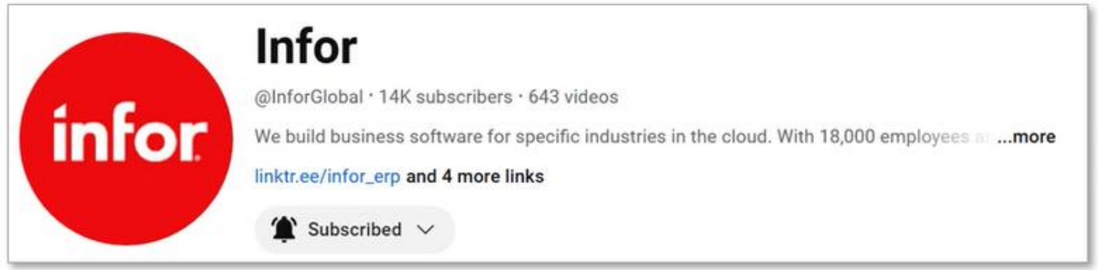

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