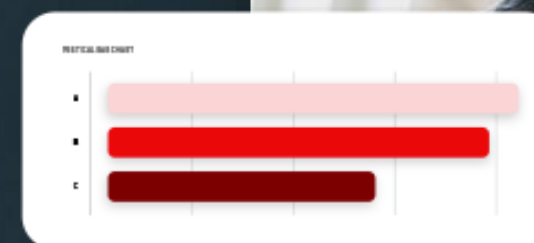
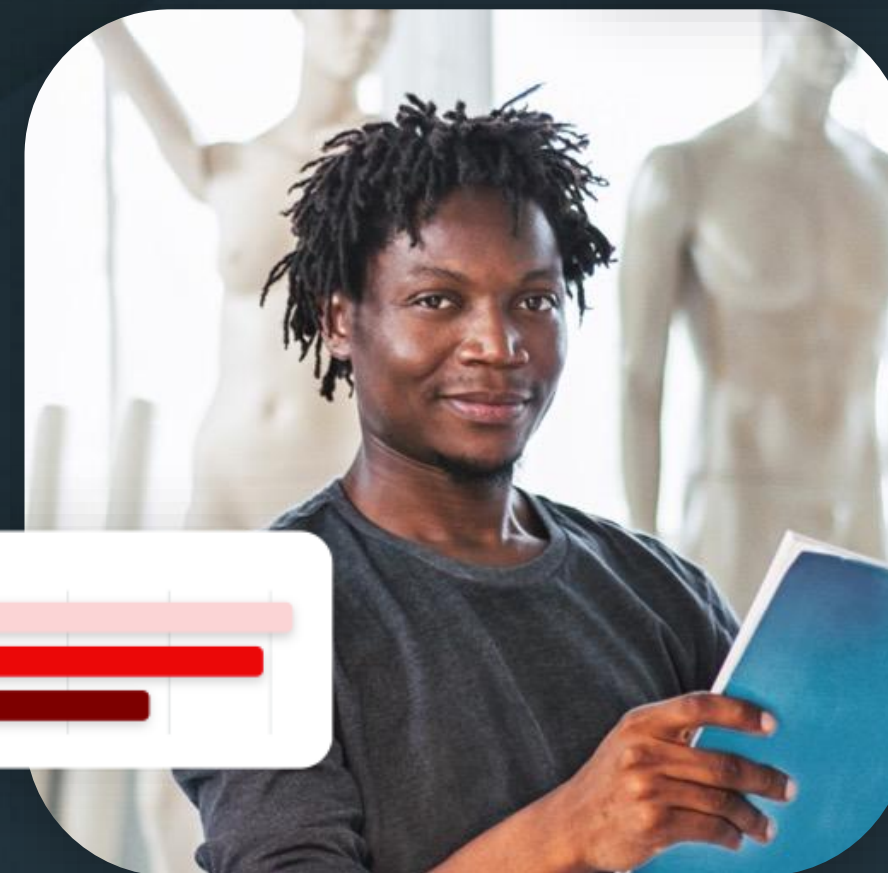
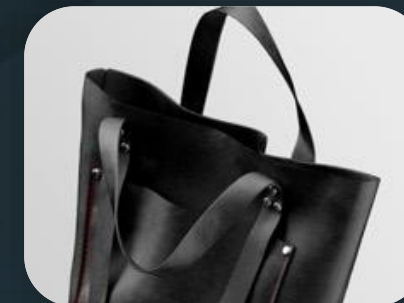




Infoteamdagene 2025

# Skap verdi med teknologi

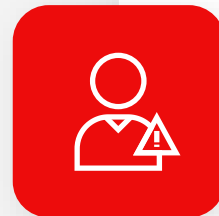
Joakim Mattsson  
Mathias Andersson  
Infor



TECHNOLOGY

*I denne spennende sesjonen vil dere få et unikt innblikk i hvordan man kan bruke den nyeste teknologien i Infor Cloud Suite for å oppnå fantastiske resultater!*

# Disclaimer



This presentation reflects the direction Infor may take with regard to the products or services described herein, all of which is subject to change without notice. This presentation is not a commitment to you in any way and you should not rely on any content herein in making any decision.

Infor is not committing to develop or deliver any specified enhancement, upgrade, product, service or functionality, even if such is described herein. Many factors can affect Infor's product development plans and the nature, content and timing of future product releases, all of which remain in the sole discretion of Infor. This presentation, in whole or in part, may not be incorporated into any agreement. Infor expressly disclaims any liability with respect to this presentation.

Capabilities covered in this presentation may require additional licensing.

# Infor CloudSuite

Purpose-built solutions

## Industry-specific applications

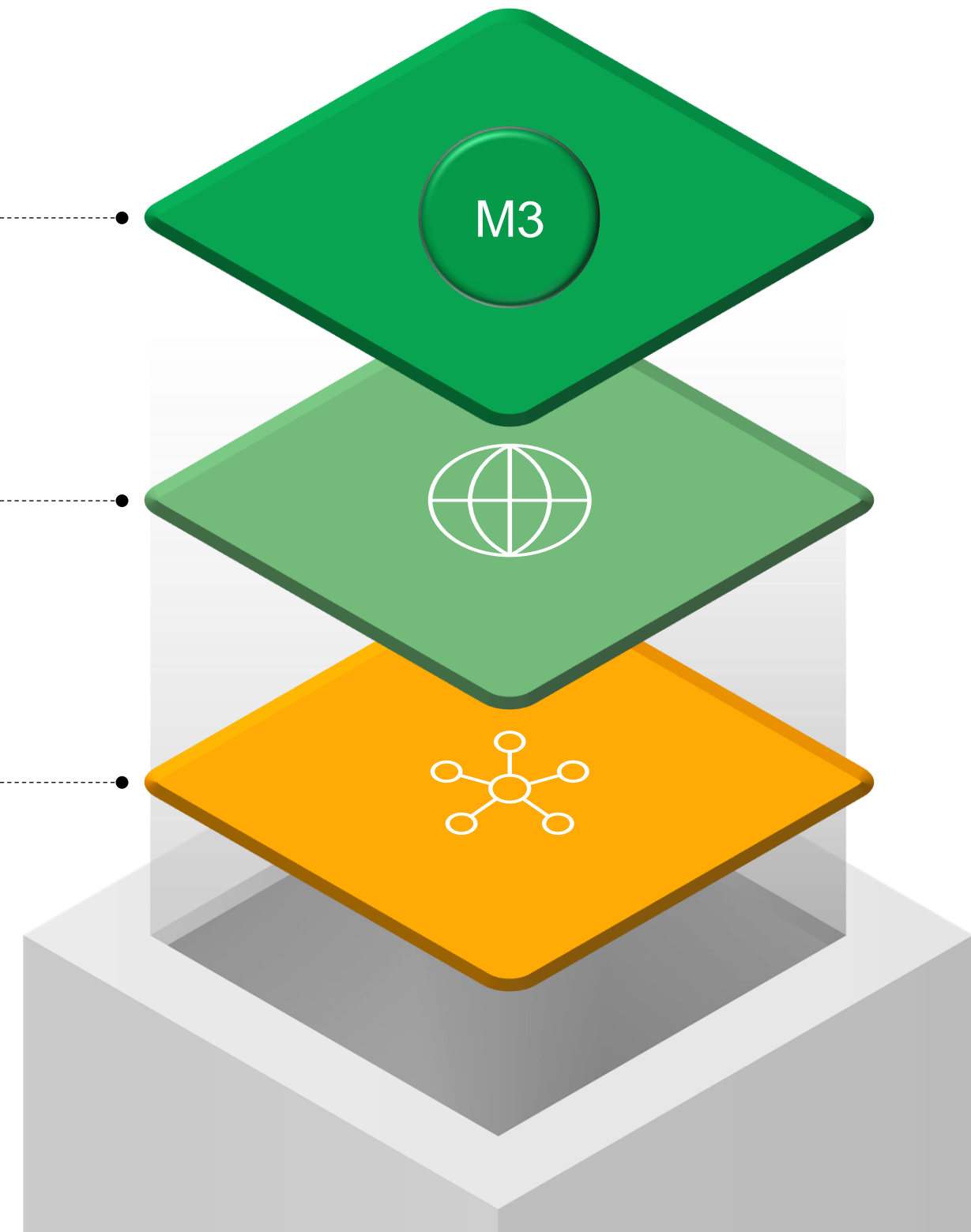
- Fully integrated core ERP suite
- Supporting edge applications i.e. PLM, WMS, CPQ, HCM etc
- Consumer-grade user experience

## Digital business platform

- Integration and interoperability
- Common data fabric
- Visualization of data and insights
- Business process automation
- Extensibility for new applications

## Multi-tenant cloud infrastructure

- Partnership with AWS global network
- Resilient and scalable architecture
- Secure and compliant protection
- Evergreen innovation and improvement



# Infor Digital Transformation for Business

Infrastructure, platform and business applications, all integrated into a single solution



Business Innovation

Predictive Insights

Process Automation

Workforce productivity

Industry Cloud Platform



M3

Industry ERP/Apps

Cloud infrastructure



### My Day

Thursday, March 23, 2024



Good morning, John.

Here is the latest insights digest customized for you.

### Employee of 2024- time for nominations!

It's that time of the year. Take a few minutes of your time to nominate a colleague for this award.

[Get the details >](#)



[View all](#) [View snooze list](#)

### On Your Radar

For the week of May 17 - 23

15

Requests missing information

21

Purchase order confirmations

14

Orders past due

27

Purchase order mismatches

- 5 Request lines are missing item information**  
1041 - Masrani Corp., WH28 - Main warehouse  
Requestor: Bob Smith [Update](#)
- 1 Request line is missing price information**  
1041 - Masrani Corp., WH28 - Main warehouse  
Requestor: Bob Smith [Update](#)
- 9 Request lines are missing supplier information**  
1041 - Masrani Corp., WH28 - Main warehouse  
Requestor: Bob Smith [Approve](#)

### Order Status Healthy

[Analytics Dashboard \(Birst\)](#)

#### Upcoming Orders

Next 2 weeks

Date	Exceptions	Review
Mon, Apr 17	5/250	<a href="#">Review</a>
Tue, Apr 18	34/465	<a href="#">Review</a>
Wed, Apr 19	31/25	<a href="#">Review</a>

**On time delivery** this week is **low** with **98%** on track this week vs next.

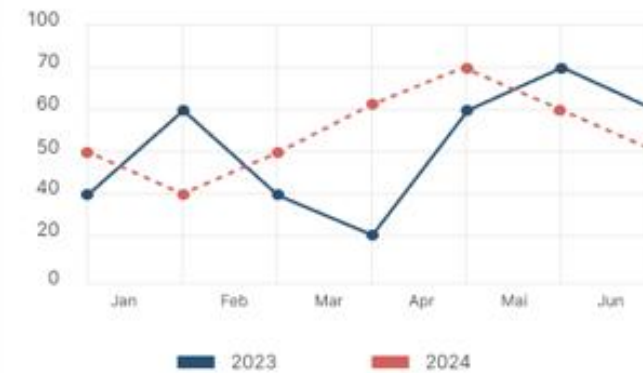
Report generated by Coleman AI

- +4.5%**  
15 Requests Missing Info
- On track**  
98% Purchase Orders Fulfilled
- HIGH**  
8 Past due orders

[Unapproved Purchase Orders](#)

[Late Receipts](#)

### Cycle Time (days)

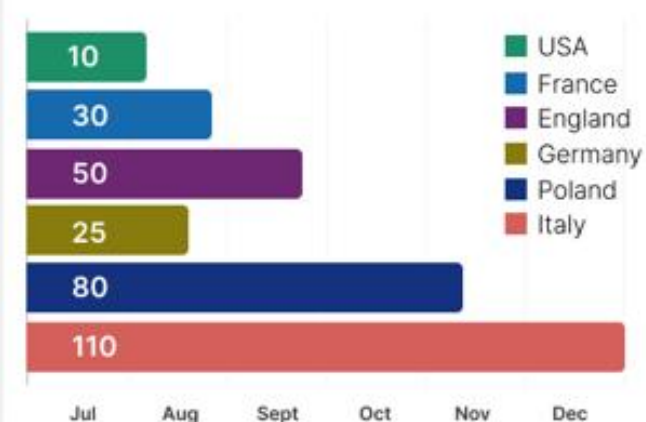


### Processes

[See what they're doing right](#)

Due to improved execution of their business process **USA location** has **shorter cycle time** compared to other locations.

### Procure to Pay Cycle Time by Location



Inbox 200

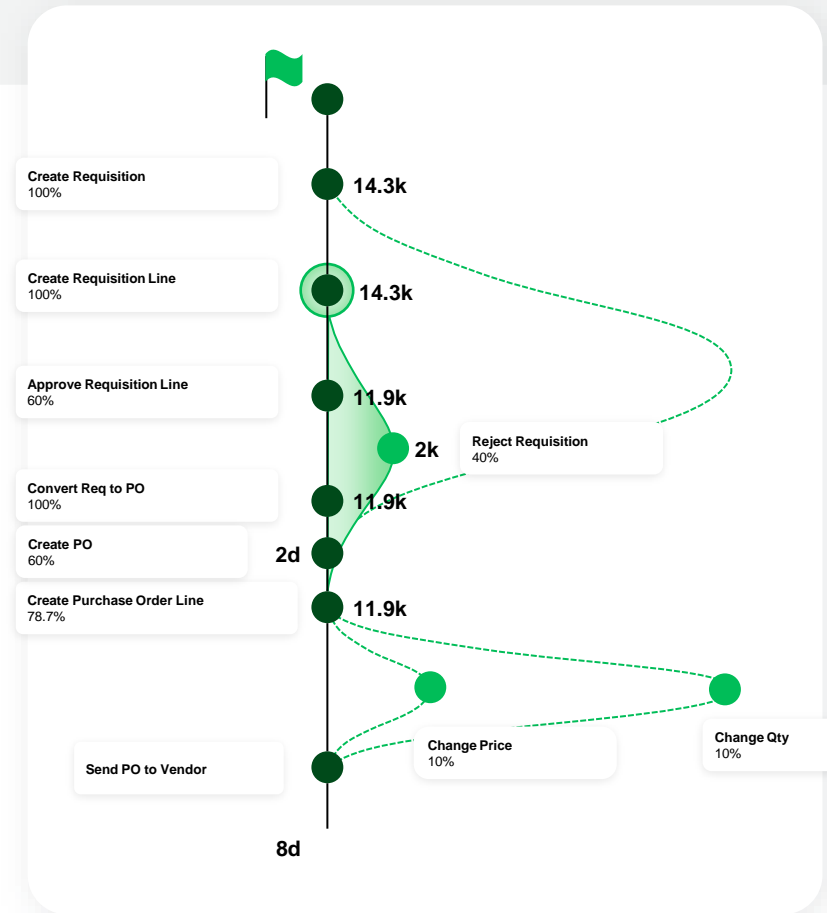
Search

Today

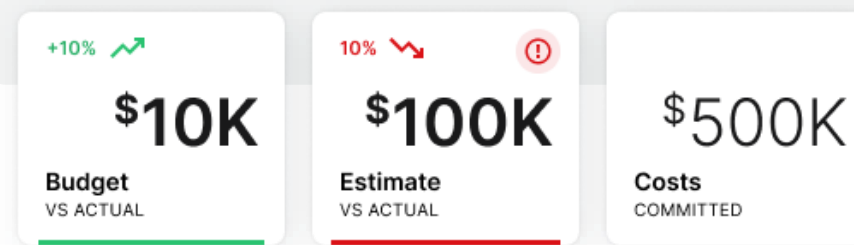
- Open Enrollment is here! Visit the Benefits Enrollment site for mor... 5:32 PM
- PDF Report 1241 ready to view 5:05 PM
- Review Nick Sim's Timesheet. 4:47 PM
- Review Discount for Order 1235 **Due 3 days ago** 4:10 PM
- Requisition 1665 from Paul French of 1,000.00 USD **Due in 5 days** 3:15 PM
- PTO has been approved 2:20 PM

# AI, BI, and PI: Connected intelligence

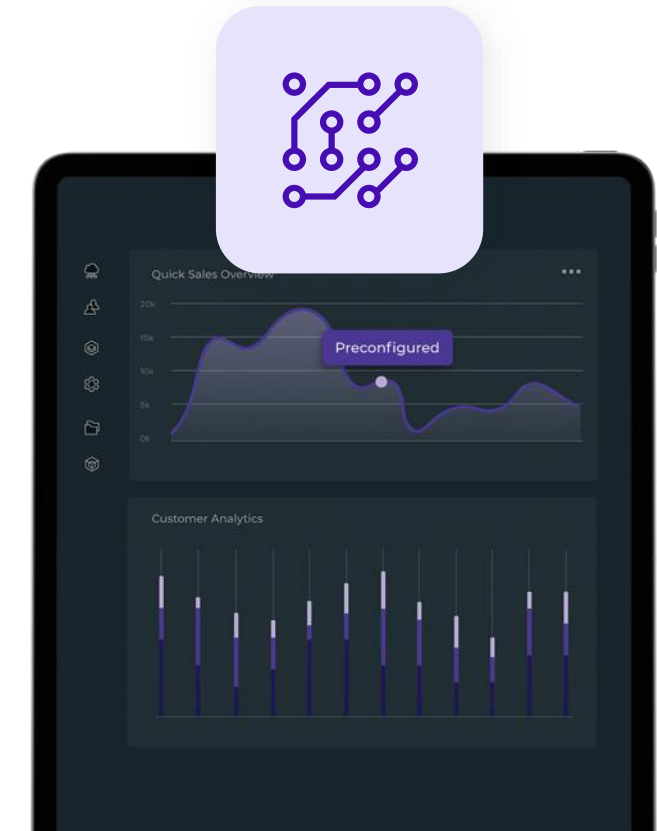
## Process Mining



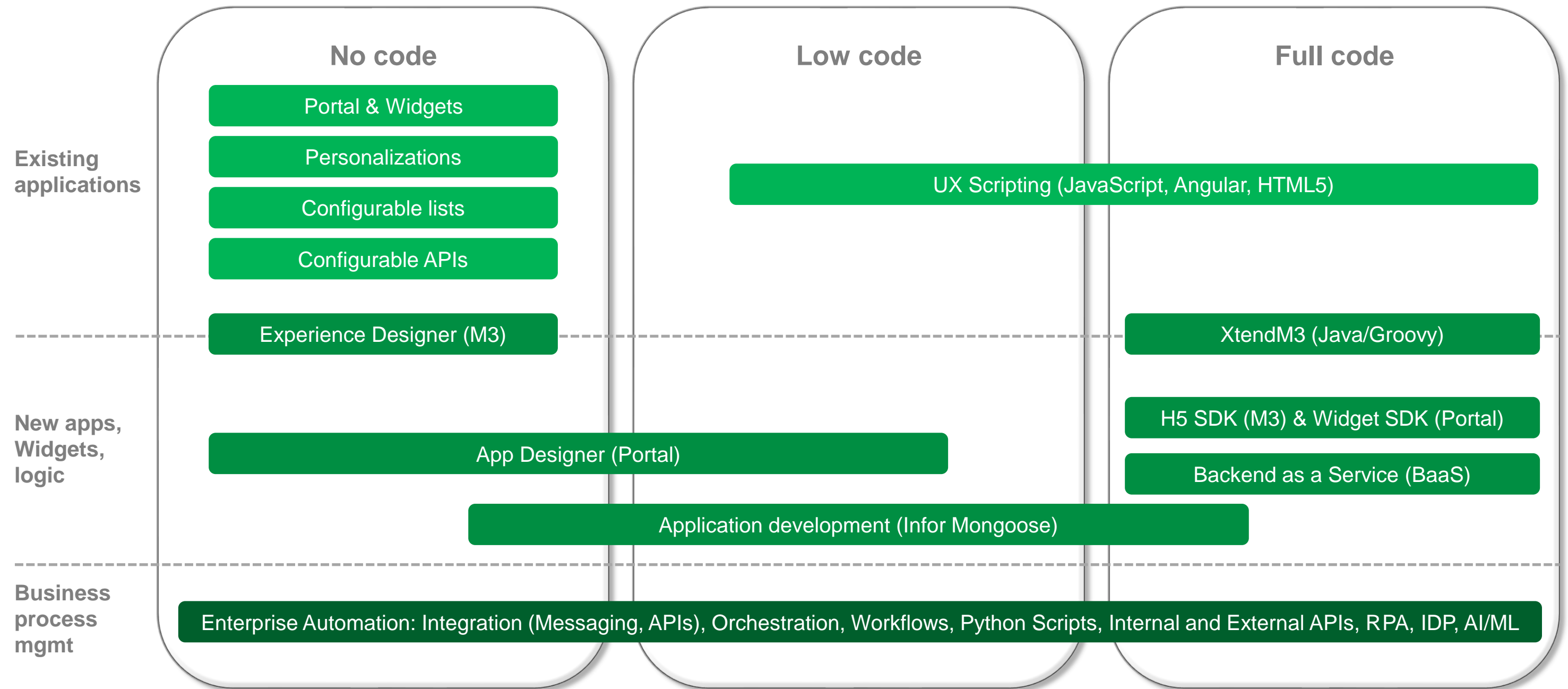
## Analytics



## (Gen) AI

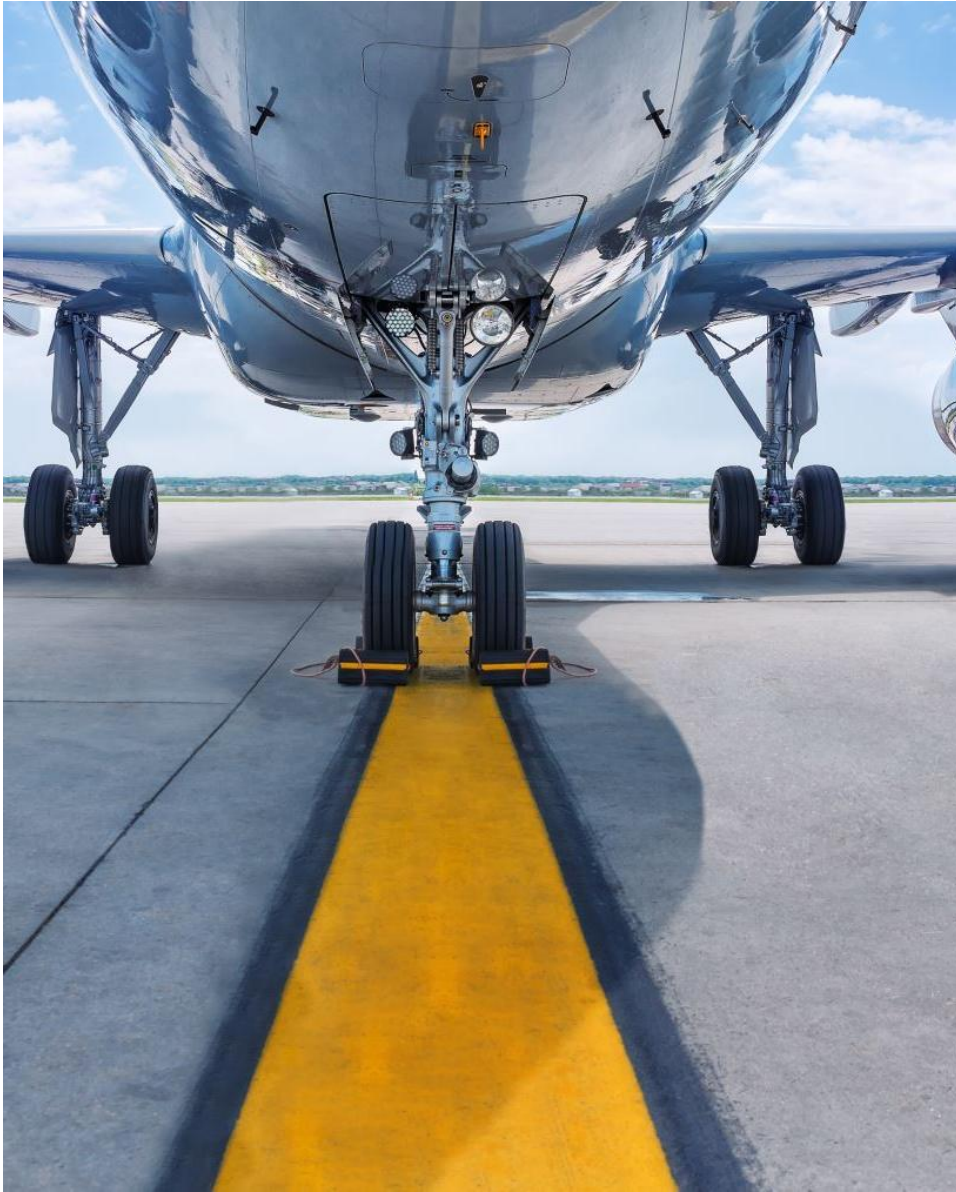


# CloudSuite Extensibility Tools

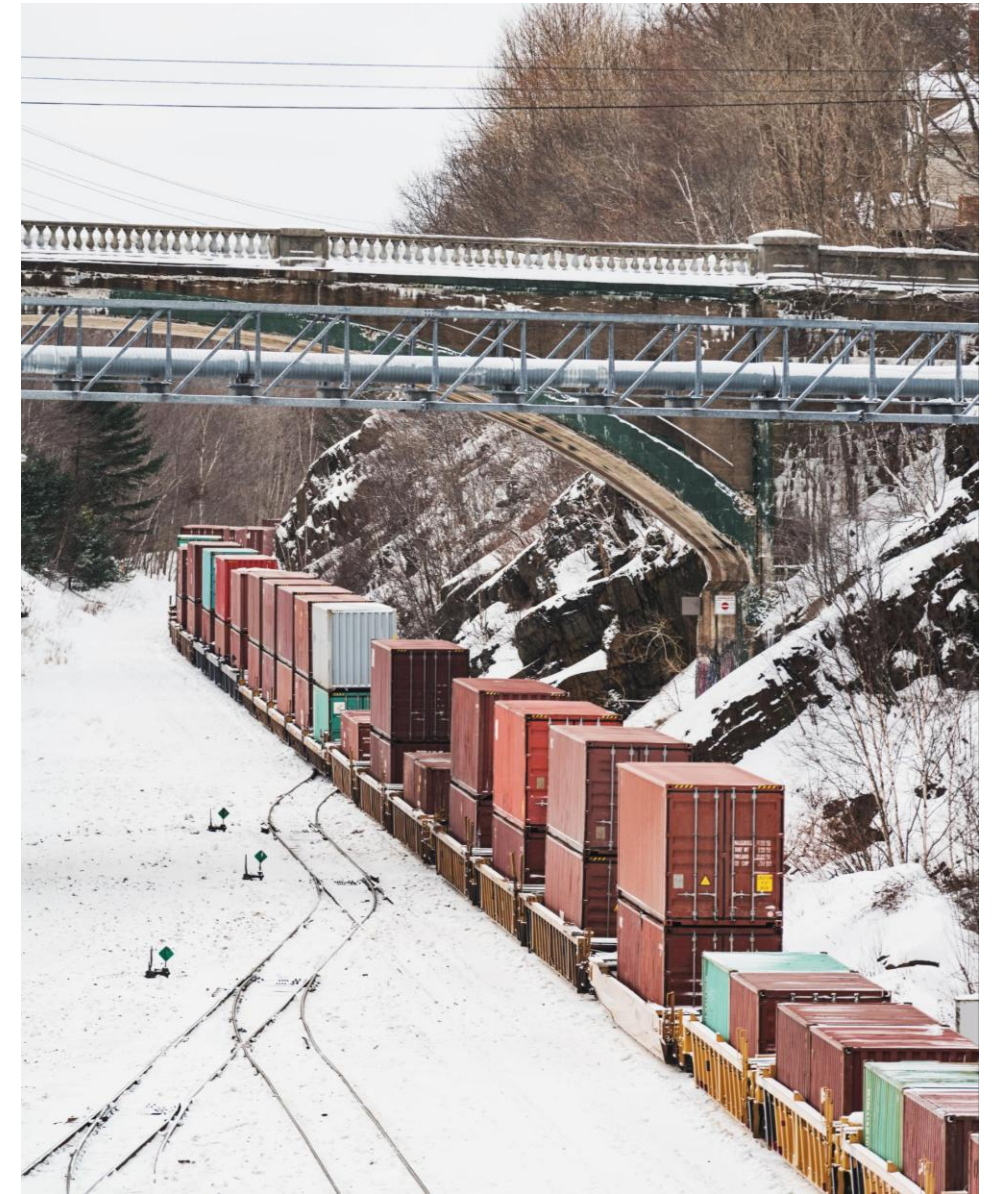
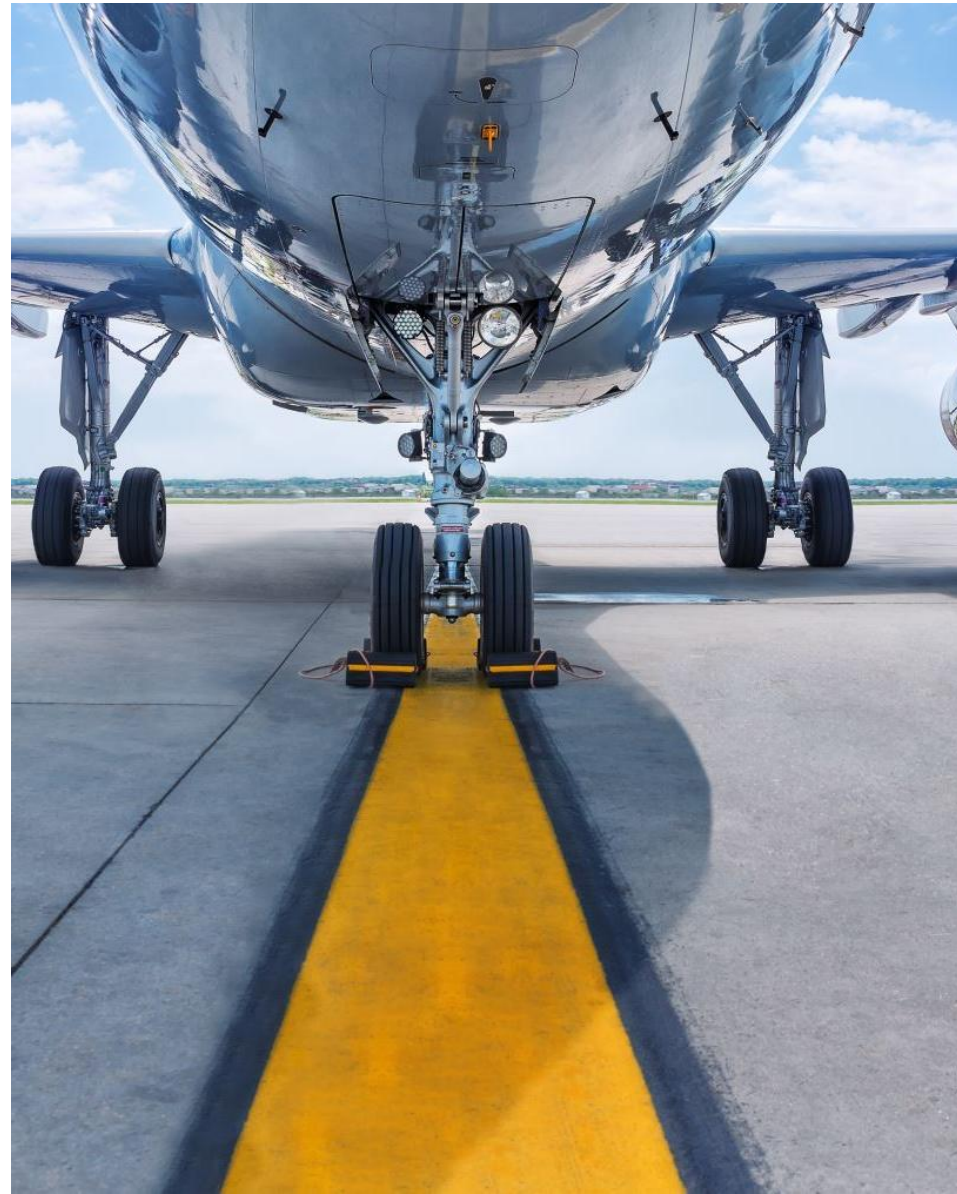




# Transport Efficacy



# Transport Inefficiency



# Road Freight Utilization Rates

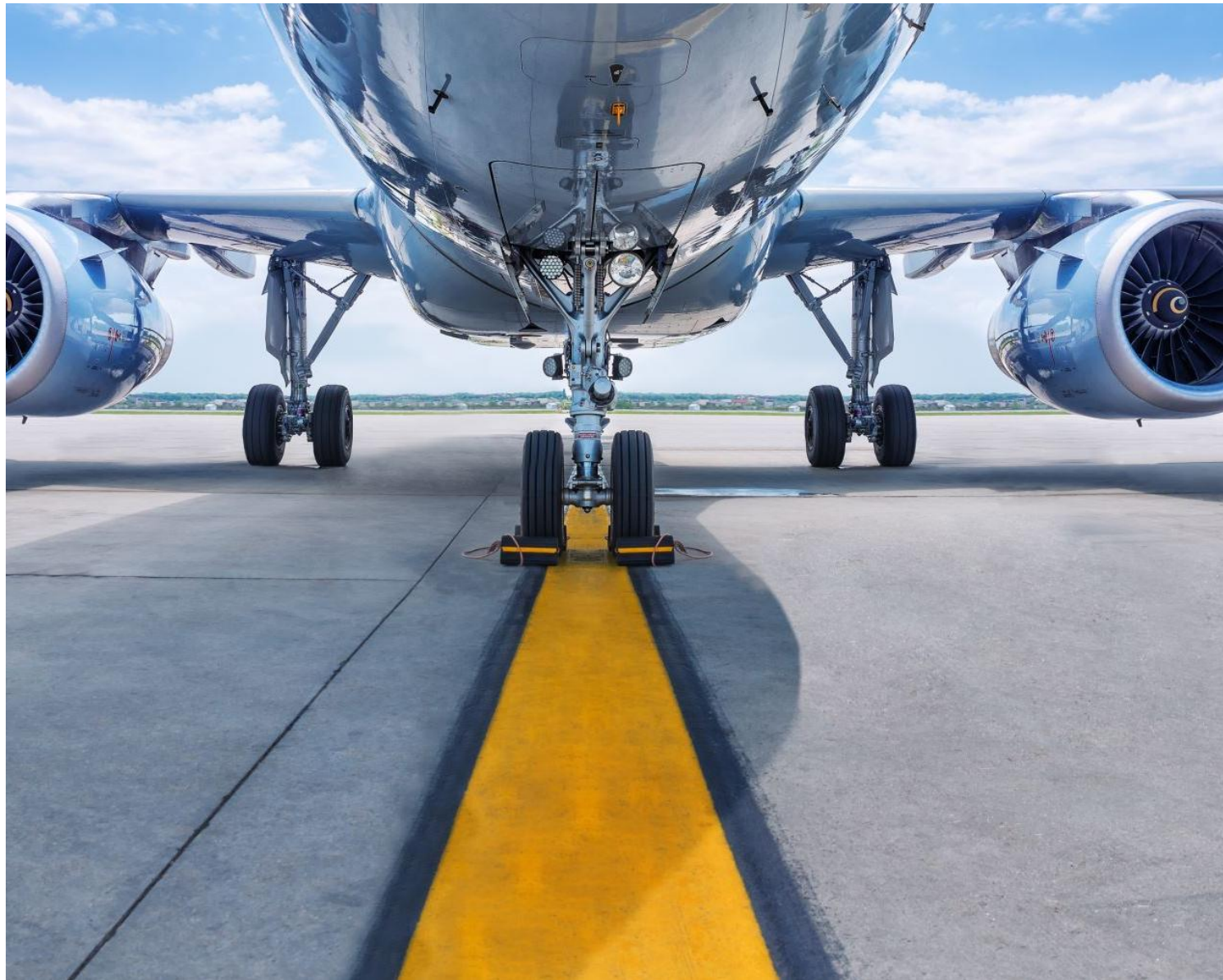
Road freight typically sees load utilization between 70% and 90%.

Empty return trips contribute to 15% to 30% of total distance traveled.

Addressing load utilization and empty trips can enhance overall efficiency in road transportation.



# Air Freight Load Factors



Air freight typically operates with load factors between 50% to 70%.

Volume restrictions often limit the use of available space. This can hinder overall transportation efficiency.

Understanding load factors is key to evaluating the efficiency of air transportation systems.

# Rail Freight Load Performance

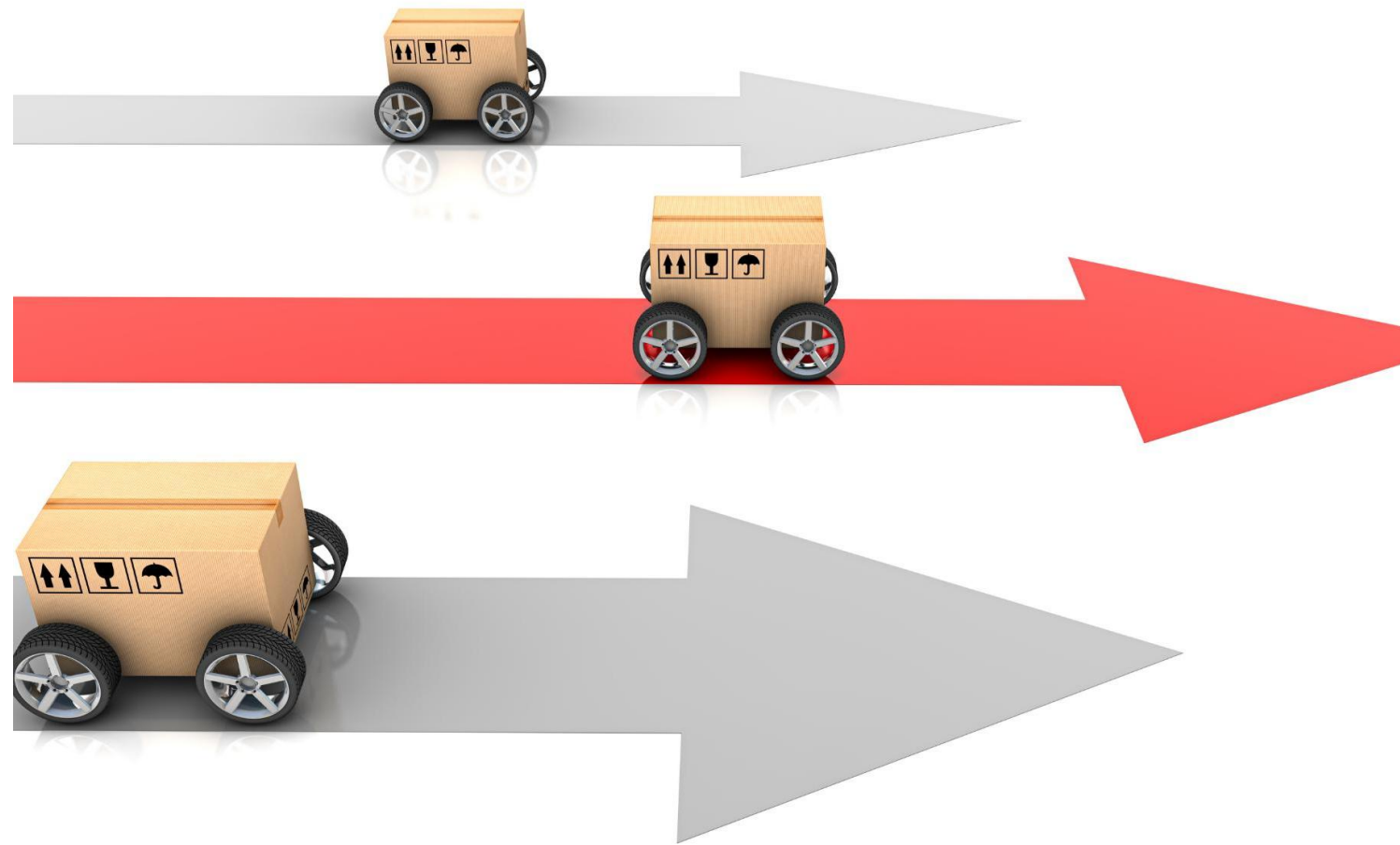
Rail freight load factors range from 50% to 80%.

Understanding load metrics is crucial for optimizing rail transport.

Rail transport is vital in logistics, influencing overall supply chain efficiency.



# Estimating Inefficiencies



Load utilization rates between 70% to 80% indicate effective use of capacity.

**Companies should aim for higher utilization to minimize waste.**

Estimating that 25% to 35% of transportation capacity is underutilized highlights areas for improvement.

**Companies can strategize accordingly.**

# Delivery Admin Workbench

## Executive summary

An SDK application for space optimization of deliveries / shipments.

### Problem

To identify if a delivery is fully utilized in terms of space is a cumbersome process in standard M3.

### Solution

An SDK solution where the user can review deliveries using filters

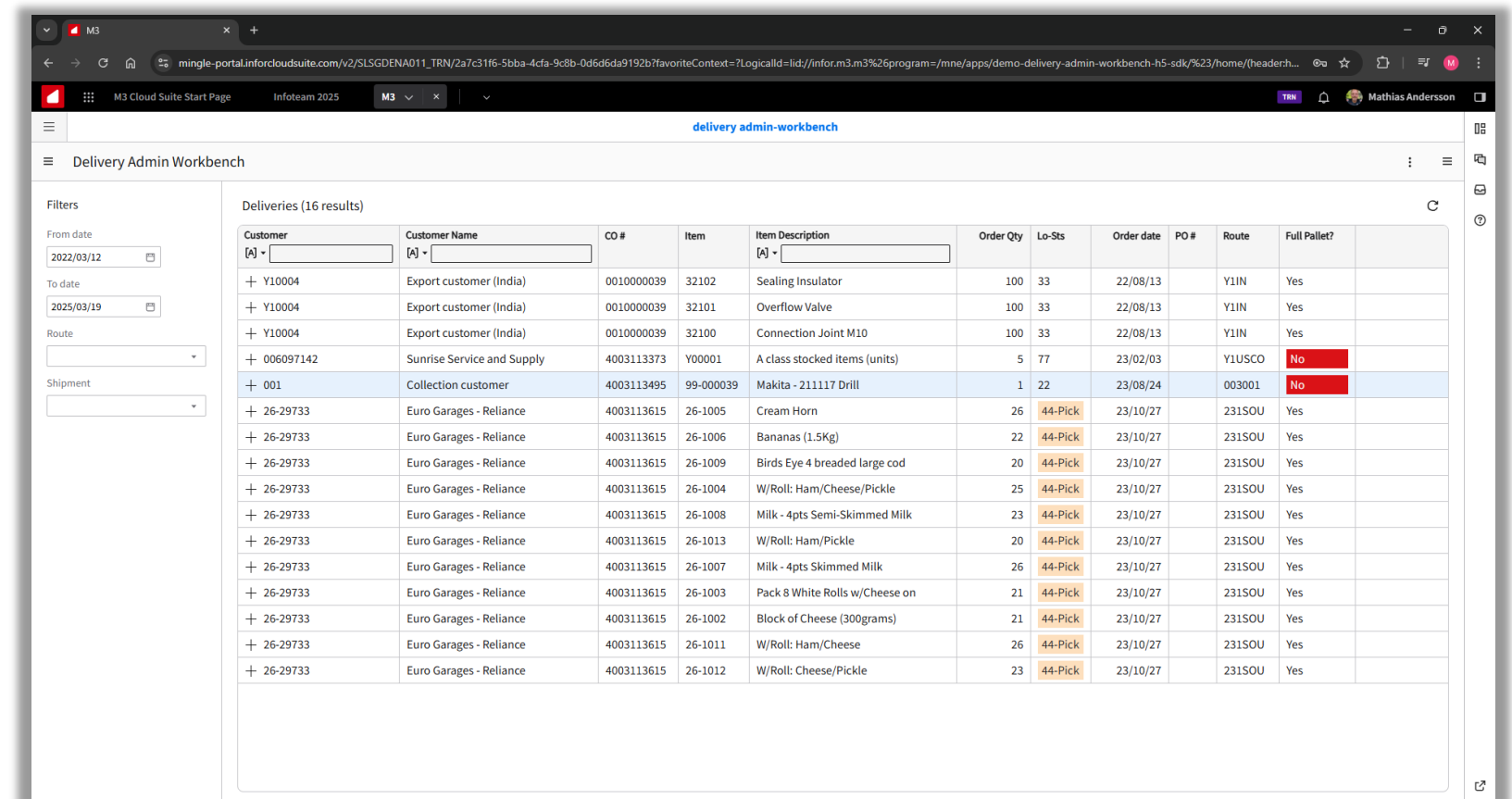
- From / to date
- Route
- Shipment number

The deliveries are displayed in a datagrid. A calculation is done to see if the delivery is a full pallet. This data is shown in a column in the datagrid and is also visualized graphically (load / volume / weight).

The main objective is to ensure that we fill the pallets and fill the truck to obtain logistical efficiency.

### Benefits

A timesaving application for the warehouse logistical planner.



The screenshot displays the 'Delivery Admin Workbench' application. On the left, there are filter controls for 'From date' (2022/03/12), 'To date' (2025/03/19), 'Route', and 'Shipment'. The main area shows a datagrid with 16 results. The datagrid columns are: Customer, Customer Name, CO #, Item, Item Description, Order Qty, Lo-Sts, Order date, PO #, Route, and Full Pallet?. The 'Full Pallet?' column contains 'Yes' or 'No' values, with 'No' highlighted in red. The 'Lo-Sts' column contains numerical values or '44-Pick'.

Customer	Customer Name	CO #	Item	Item Description	Order Qty	Lo-Sts	Order date	PO #	Route	Full Pallet?
+ Y10004	Export customer (India)	0010000039	32102	Sealing Insulator	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32101	Overflow Valve	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32100	Connection Joint M10	100	33	22/08/13		Y1IN	Yes
+ 006097142	Sunrise Service and Supply	4003113373	Y00001	A class stocked items (units)	5	77	23/02/03		Y1USCO	No
+ 001	Collection customer	4003113495	99-000039	Makita - 211117 Drill	1	22	23/08/24		003001	No
+ 26-29733	Euro Garages - Reliance	4003113615	26-1005	Cream Horn	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1006	Bananas (1.5Kg)	22	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1009	Birds Eye 4 breaded large cod	20	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1004	W/Roll: Ham/Cheese/Pickle	25	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1008	Milk - 4pts Semi-Skimmed Milk	23	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1013	W/Roll: Ham/Pickle	20	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1007	Milk - 4pts Skimmed Milk	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1003	Pack 8 White Rolls w/Cheese on	21	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1002	Block of Cheese (300grams)	21	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1011	W/Roll: Ham/Cheese	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1012	W/Roll: Cheese/Pickle	23	44-Pick	23/10/27		231SOU	Yes

delivery admin-workbench

Delivery Admin Workbench

Deliveries (16 results)

**Filters**

From date  
2022/03/12

To date  
2025/03/19

Route  
[Dropdown]

Shipment  
[Dropdown]

Customer	Customer Name	CO #	Item	Item Description	Order Qty	Lo-Sts	Order date	PO #	Route	Full Pallet?
+ Y10004	Export customer (India)	0010000039	32102	Sealing Insulator	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32101	Overflow Valve	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32100	Connection Joint M10	100	33	22/08/13		Y1IN	Yes
+ 006097142	Sunrise Service and Supply	4003113373	Y00001	A class stocked items (units)	5	77	23/02/03		Y1USCO	No
+ 001	Collection customer	4003113495	99-000039	Makita - 211117 Drill	1	22	23/08/24		003001	No
+ 26-29733	Euro Garages - Reliance	4003113615	26-1005	Cream Horn	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1006	Bananas (1.5Kg)	22	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1009	Birds Eye 4 breaded large cod	20	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1004	W/Roll: Ham/Cheese/Pickle	25	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1008	Milk - 4pts Semi-Skimmed Milk	23	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1013	W/Roll: Ham/Pickle	20	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1007	Milk - 4pts Skimmed Milk	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1003	Pack 8 White Rolls w/Cheese on	21	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1002	Block of Cheese (300grams)	21	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1011	W/Roll: Ham/Cheese	26	44-Pick	23/10/27		231SOU	Yes
+ 26-29733	Euro Garages - Reliance	4003113615	26-1012	W/Roll: Cheese/Pickle	23	44-Pick	23/10/27		231SOU	Yes



delivery admin-workbench

Delivery Admin Workbench

**Filters**

From date: 2022/03/12

To date: 2025/03/19

Route: [Dropdown]

Shipment: [Dropdown]

Deliveries (16 results)

Customer	Customer Name	CO #	Item	Item Description	Order Qty	Lo-Sts	Order date	PO #	Route	Full Pallet?
+ Y10004	Export customer (India)	0010000039	32102	Sealing Insulator	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32101	Overflow Valve	100	33	22/08/13		Y1IN	Yes
+ Y10004	Export customer (India)	0010000039	32100	Connection Joint M10	100	33	22/08/13		Y1IN	Yes
+ 006097142	Sunrise Service and Supply	4003113373	Y00001	A class stocked items (units)	5	77	23/02/03		Y1USCO	No
- 001	Collection customer	4003113495	99-000039	Makita - 211117 Drill	1	22	23/08/24		003001	No
+ 26-29733	Euro Garages - Reliance	4003113615	26-1005	Cream Horn	26	44-Pick	23/10/27		231SOU	Yes

**Action**  
 This is NOT a full Pallet, Call Customer and increase qty to make a it full pallet

Packaging Limits

Type: SSCC / Pallet w/ SSCC

Load

Total Pct: 0.00  
 Load: 0.67  
 Max Load: 0.00

Volume

Total Pct: 66  
 Volume: 1.00  
 Max Volume: 1.50

Weight

Total Pct: 0.00  
 Weight: 0.00  
 Max Weight: 2,200.00

# Dock Planning

## Executive summary

An application for planning and allocation of time at the loading docks for your warehouse. Supports both inbound and outbound shipments.

### Problem

There is no dock planning solution in M3 currently.

### Solution

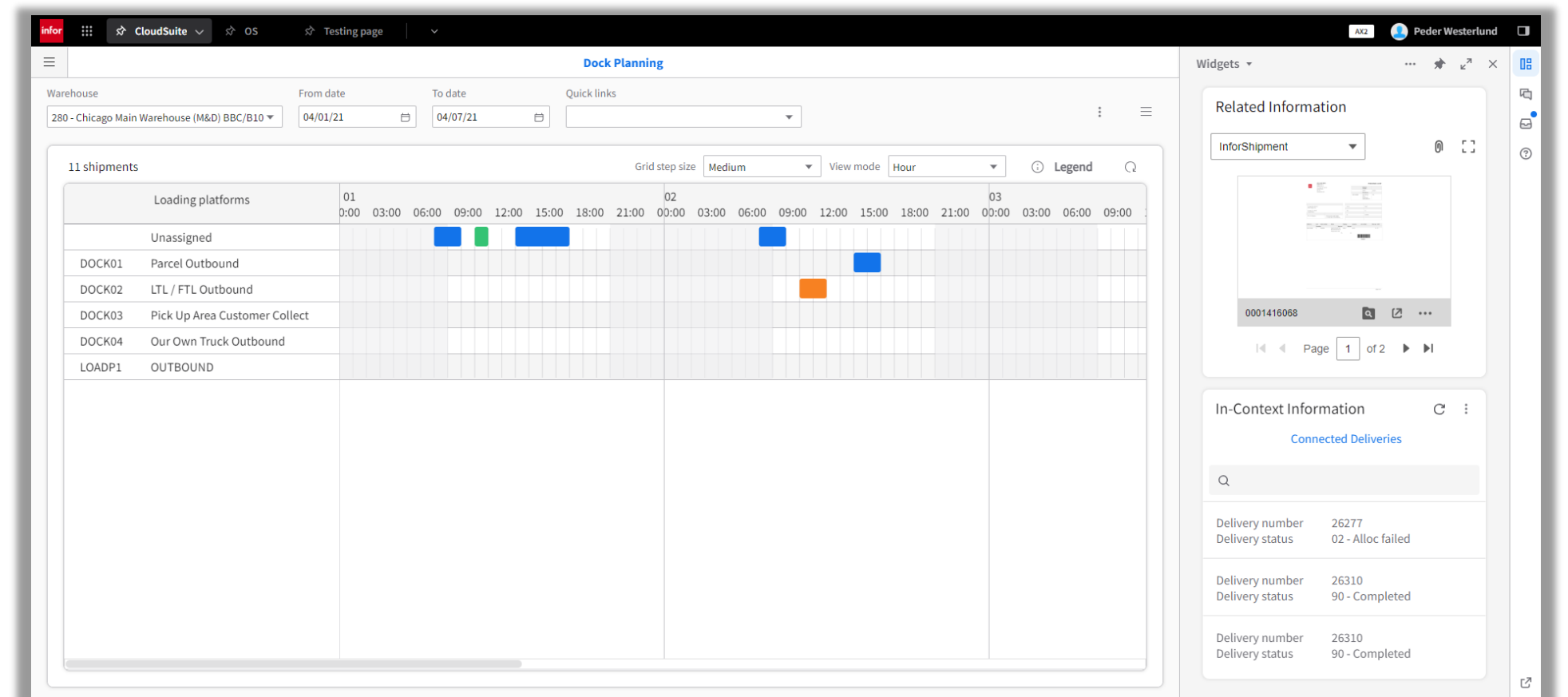
An H5 SDK application displaying the loading docks for a specific warehouse and time period, and the shipments that are available for scheduling.

Quick links and filtering allow you to narrow down the shipments displayed. Drag and drop of shipments allow you to reschedule your shipment as well as change load platform.

Outbound shipments, inbound supplier delivery notes and inbound shipments are supported.

### Benefits

The application renders a great visualization of the warehouse shipments and allows the user to easily plan and allocate load platform time.



## Dock Planning

Warehouse

280 - Chicago Main Warehouse (M&amp;D) BBC/B10

From date

04/01/21

To date

04/07/21

Quick links

11 shipments

Grid step size

Medium

View mode

Hour

Legend

- Outbound shipment
- Inbound shipment
- Inbound supplier delivery

Loading platforms		01					02										
		0:00	03:00	06:00	09:00	12:00	15:00	18:00	21:00	00:00	03:00	06:00	09:00	12:00	15:00	18:00	21:00
	Unassigned																
DOCK01	Parcel Outbound																
DOCK02	LTL / FTL Outbound																
DOCK03	Pick Up Area Customer Collect																
DOCK04	Our Own Truck Outbound																
LOADP1	OUTBOUND																

## Reschedule

Shipment  
3228413Loading platform  
DOCK01

Start date

04/25/24



Start time

17:00



End date

04/25/24



End time

19:00



Cancel

Reschedule

# Freight Rate Shopping

## Executive summary

An application for retrieval of real-time shipping options and freight rates from multiple carriers, allowing the user to select the most suitable combination of delivery method and freight cost for a customer order. Find the best shipping rates from USPS, UPS, FEDEX, DHL and 100+ carriers, using EasyPost (3:rd party service).

### Problem

Currently there is no way to retrieve up-to-date carrier freight costs in M3

### Solution

A new H5 SDK app that is displayed in a modal dialog on the OIS100 I-panel.

The from- and to-address is retrieved from the CO as well as the total weight of all items on the order. Next, a call is done to the EasyPost API (via ION API) and the freight rates for the different carriers are returned. Additionally, the addresses on the order are validated.

A cross-reference table is used to map the EasyPost delivery method to the M3 delivery method / route, which are returned to the M3 panel when the dialog closes.

### Benefits

A solution that allows for real-time shipping options / freight rates which is a must-have in today's just-in-time world

The screenshot shows the 'Rate Shopper' application interface. It includes a 'Filters' section with 'Earliest delivery date' (01/05/24) and 'Carrier' (USPS). The 'Order' section displays 'Order Number: 0011117514', 'Customer name: RICK'S APPLIANCE COMP', 'Customer number: 0000271', and 'Shipment total weight: 1 LB'. The 'From Address' is '6501 WEST 65TH STREET, CHICAGO, IL 60638-4900'. The 'To Address' is '641 6TH AVE FL 4, NEW YORK, NY 10011-2038'. A table of shipping rates is shown below, with the 'Priority' service selected. The table has columns for Carrier, Service, Rate, List Rate, Retail Rate, Est. delivery days, and Del. Date Guaranteed. The 'Priority' service has a Rate of 7.96, List Rate of 8.47, and Retail Rate of 10.65. Below the table, there are fields for 'Delivery Method' (US3 - USPS Priority), 'Route' (280US3 - US: USPS Piori), 'Internal Charge' (\$7.96), and 'External charge' (\$10.65). A 'Submit' button is located at the bottom right.

Carrier	Service	Rate	List Rate	Retail Rate	Est. delivery days	Del. Date Guaranteed
USPS	Express	36.10	36.10	42.40		⚠ No
USPS	Priority	7.96	8.47	10.65	2	⚠ No
USPS	GroundAdvantage	6.09	7.10	8.15	3	⚠ No
USPS	First	6.09	7.10	8.15	3	⚠ No
USPS	ParcelSelect	6.09	7.10	8.15	3	⚠ No

Filters

Earliest delivery date

01/05/24

Carrier

USPS

Order

Order Number

**0011117514**

Customer name

**RICK'S APPLIANCE COMP**

Customer number

**0000271**

Shipment total weight

**1 LB**

From Address

Address

**6501 W 65TH ST  
6501 WEST 65TH STREET**

City

**CHICAGO**

Postal code

**60638-4900**

To Address

Address

**641 6TH AVE FL 4**

City

**NEW YORK**

Postal code

**10011-2038**

Carrier	Service	Rate	List Rate	Retail Rate	Est. delivery days	Del. Date Guaranteed
USPS	Express	36.10	36.10	42.40		⚠ No
USPS	Priority	7.96	8.47	10.65	2	⚠ No
USPS	GroundAdvantage	6.09	7.10	8.15	3	⚠ No
USPS	First	6.09	7.10	8.15	3	⚠ No
USPS	ParcelSelect	6.09	7.10	8.15	3	⚠ No

Delivery Method

**US3 - USPS Priority**

Route

**280US3 - US: USPS  
Prior**

Internal Charge

**\$7.96**

FRTITM - Freight Charge (Internal)

External charge

**\$10.65**

FRTEXM - Freight Charge (External)

Submit

# Minimize Risks

Avoid doing things in vain.  
ERP has all your data.

# Minimize Risks

Avoid doing things in vain.

ERP has all your data.

**Challenge is to be informed!**

Filter Options ^

Sorting order: 1-C.Order no View: D01A-Quantities

New order

Facility

Delayed lines

Status  -  [Apply](#)

CO no	Line	Sf	Customer	Name	Whs	Pl dt	Hi	Item number	Name	Order	Remai	Alloc	Invqt
001000002	1		Y10003CA	Large Retailer	003	100406	77	Y00004	C class stocked item	10			10
001000002	2		Y10003CA	Large Retailer	003	100406	66	100002119	12 in. Tongue and Gr	1			
001000002	3		Y10003CA	Large Retailer	003	100406	99	1000001222	Plasterboard 12.5mm	1			
001000002	4		Y10003CA	Large Retailer	003	100406	99	1000001333	Plasterboard 12.5mm	2			
001000002	5		Y10003CA	Large Retailer	003	100406	33	100000500	Plasterboard 9.5mm 1	3		3	
001000002	6		Y10003CA	Large Retailer	003	100406	33	100000501	Plasterboard 9.5mm 1	4		4	
001000002	7		Y10003CA	Large Retailer	003	100406	33	100000502	Plasterboard 12.5mm	5		5	
001000003	1		Y10003CA	Large Retailer	003	100406	77	Y00030	Assembled item - SC	15			15
001000003	2		Y10003CA	Large Retailer	003	100406	99	32100	Connection Joint M10	100			
001000004	1		Y10003IL	Large Retailer	001	100407	77	Y00008	Assembled/manufactur	10			10
001000005	1		Y10005	BTO Trade accou	001	100420	77	Y00006	Order initiated item	10			10
001000005	4		Y10005	BTO Trade accou	001	220826	22	32100	Connection Joint M10	101	101		

[Display](#)

OIS301/B Distribution Industry Master Demo Infor M3 Distribution (400/AAA)

# Minimize Risks

Avoid doing things in vain.

ERP has all your data.

**Challenge is to be informed!**

The screenshot displays the Infor ERP interface for a customer order. The main window is titled "OIS301 Customer Order. Open Line Toolbox". It features a navigation bar with "Actions", "Options", "Related", and "Tools". A search bar and filter options are visible. The table below shows order lines with columns for CO no, Line, Sf, Customer, Name, Whs, Pl dt, Hi, Item number, Name, Order, Remai, Alloc, and Invqt. A right-hand panel titled "Supply Chain Risk" provides a detailed analysis for item 16203050 (Palm Oil), including a "Generate analysis" button and a summary of risks.

CO no	Line	Sf	Customer	Name	Whs	Pl dt	Hi	Item number	Name	Order	Remai	Alloc	Invqt
001000002	1		Y10003CA	Large Retailer	003	100406	77	Y00004	C class stocked item	10			10
001000002	2		Y10003CA	Large Retailer	003	100406	66	100002119	12 in. Tongue and Gr	1			
001000002	3		Y10003CA	Large Retailer	003	100406	99	1000001222	Plasterboard 12.5mm	1			
001000002	4		Y10003CA	Large Retailer	003	100406	99	1000001333	Plasterboard 12.5mm	2			
001000002	5		Y10003CA	Large Retailer	003	100406	33	100000500	Plasterboard 9.5mm 1	3		3	
001000002	6		Y10003CA	Large Retailer	003	100406	33	100000501	Plasterboard 9.5mm 1	4		4	
001000002	7		Y10003CA	Large Retailer	003	100406	33	100000502	Plasterboard 12.5mm	5		5	
001000003	1		Y10003CA	Large Retailer	003	100406	77	Y00030	Assembled item - SC	15			15
001000003	2		Y10003CA	Large Retailer	003	100406	99	32100	Connection Joint M10	100			
001000004	1		Y10003IL	Large Retailer	001	100407	77	Y00008	Assembled/manufactur	10			10
001000005	1		Y10005	BTO Trade accou	001	100420	77	Y00006	Order initiated item	10			10
001000005	4		Y10005	BTO Trade accou	001	220826	22	32100	Connection Joint M10	101	101		

### Supply Chain Risk

16203050  
Palm Oil

Generate analysis

Generated on: November 14, 2024 at 8:47 AM

Manufactured Item 16203050 - Palm Oil has 2 major risks and 2 minor risks based on its critical component analysis. 2 critical components identified.

Minor Risk 1 (Lead Time Risk): The main supplier, Olams Ingredient Material Supplier



Avoid doing things in vain.  
 ERP has all your data.  
**Challenge is to be informed!**

15201005 - Ginger Trail Mix 3 Oz    Show risk data    ⌵ Resize    ✕ Close

Description

New text

Generated on: December 9, 2024 at 10:42 AM

Manufactured Item 15201005 - Ginger Trail Mix 3 Oz has 5 major risks and 3 minor risks based on its critical component analysis. 3 critical components identified.

Major Risk 1 (Lead Time Risk): The lead time risk for the critical component with supplier ID US00518 (El Tri AgriProducts Distribution) is 66.67%, which exceeds the 90% threshold. This indicates a high percentage of orders that are too early or late.

Major Risk 2 (Lead Time Risk): The lead time risk for the critical component with supplier ID US00420 (Lee Products) is 33.33%, which exceeds the 90% threshold. This indicates a high percentage of orders that are too early or late.

Major Risk 3 (Lead Time Risk): The lead time risk for the critical component with supplier ID US00518 (El Tri AgriProducts Distribution) is 50%, which exceeds the 90% threshold. This indicates a high percentage of orders that are too early or late.

Major Risk 4 (Lead Time Risk): The lead time risk for the critical component with supplier ID US00303 (Olams Ingredient Material Supplier) is 50%, which exceeds the 90% threshold. This indicates a high percentage of orders that are too early or late.

Major Risk 5 (Lead Time Risk): The lead time risk for the critical component with supplier ID US00322 (Ayat LLC - Egyptian Supplier) is 0%, which exceeds the 90% threshold. This indicates a high percentage of orders that are too early or late.

Minor Risk 1 (Limited Leverage): The critical component with supplier ID US00518 (El Tri AgriProducts Distribution) sources from a limited number of suppliers, which limits the buyer's leverage.

Minor Risk 2 (Contract Remaining Quantity): The remaining quantity on the contract for the critical component with supplier ID US00322 (Ayat LLC - Egyptian Supplier) is 108.75%, which exceeds the 90% threshold.

Minor Risk 3 (Over Utilized Component): The critical component with supplier ID US00322 (Ayat LLC - Egyptian Supplier) is heavily used on other products, with a utilization rate of 13%, which exceeds the 10% threshold.

**Add**

Customer Order. Open Line Toolbox

Search

Filter Options

Sorting order: 1-C.Order no    View: D01A-Quantities

Apply

number	Name	Order	Remai	Alloc	Invqt
04	C class stocked item	10			10
02119	12 in. Tongue and Gr	1			
001222	Plasterboard 12.5mm	1			
001333	Plasterboard 12.5mm	2			
00500	Plasterboard 9.5mm 1	3		3	
00501	Plasterboard 9.5mm 1	4		4	
00502	Plasterboard 12.5mm	5		5	
30	Assembled item - SC	15			15
0	Connection Joint M10	100			
08	Assembled/manufactur	10			10
06	Order initiated item	10			10
0	Connection Joint M10	101	101		

My personal

Supply Chain Risk

16203050 Palm Oil

Generate analysis

Generated on: November 14, 2024 at 8:47 AM

Manufactured Item 16203050 - Palm Oil has 2 major risks and 2 minor risks based on its critical component analysis. 2 critical components identified.

Minor Risk 1 (Lead Time Risk): The main supplier, Olams Ingredient Material Supplier


# Supply Chain Risks

Contextual widget designed to generate supply chain risk summaries for selected items using generative AI.

Risks are programmatically calculated and analyzed based on specific conditions. A Risk JSON object, along with a configurable prompt, is sent to the AI.

The AI is intended to provide a summary of the risks only. It is not recommended to ask the AI to perform its own analysis due to the high risk of hallucinations.

## Supply Chain Risk



**16203050**  
Palm Oil

[Generate analysis ++](#)

Generated on: November 14, 2024 at 8:47 AM

Manufactured Item 16203050 - Palm Oil has 2 major risks and 2 minor risks based on its critical component analysis. 2 critical components identified.

Minor Risk 1 (Lead Time Risk): The main supplier, Olams Ingredient Material Supplier

# Project Executive Summary

## Executive summary

A contextual widget that takes a snapshot of a project and uses Infor GenAI to generate a summary of its status / progress.

### Problem

Getting an overview of a project and how it is progressing requires the user to navigate multiple M3 programs / panels to find the information.

### Solution

A widget that retrieves relevant project data from different M3 tables and sends the information to Infor GenAI, which then reviews and summarizes the data and returns it in a format that is easy to view and understand for the end user, highlighting possible issues and bottlenecks.

The summary is added to a PDF that is uploaded to IDM and connected to the project.

### Benefits

Provides the user with a quick overview of the project status, providing insights and highlighting potential problems.

The screenshot displays the Infor CloudSuite interface for a project named 'Project: Open'. The main table lists project elements with columns for Proj Element, Level, Description, Pin Str Dt, Pin Fin Dt, Low Sts, High Sts, Status, Pos no, Proj elmt type, Subpr mgr, and Name. The table shows various project activities such as 'Dakota Bar and Grill', 'JOB REPORTING LEVEL', 'ORIGINAL JOB', 'JOB EXPENSES', 'Plumbing Plan', 'Electrical Plan', 'Building Work', 'Plan Details', 'Plan Revisions', 'Preliminary Meeting', 'Designer (T&M)', 'Project Management', 'JOB ORDER EXECUTION', 'Equipment & Install', 'Racking', 'Racking Installation', 'Other Equipment', and 'Equipment Installation'. The status of these activities is indicated by colored cells (Open, Completed, Started, Not Open).

On the right side, there is a 'Project Executive Summary' widget. It includes a 'Refresh summary for P70198' button and a 'Project Overview' section. The overview text states: 'The Dakota Bar and Grill project (Project ID: P70198) commenced with various activities planned to achieve the project's objectives. The project includes tasks such as Plumbing Plan, Electrical Plan, Building Work, Plan Details, and Equipment Installation, among others. The project's execution is ongoing, with several activities yet to start or finish.' Below this, there is a 'Status' section: 'As of the current date, several key activities have started but are not yet completed. These include Plumbing Plan (J100), Electrical Plan (J110), Building Work (J120), and Equipment & Install (R11). Notably, the Equipment Installation (R112S) and Final Invoice Activity (920) have not commenced, indicating potential delays in these areas.' A 'Performance' section follows: 'The project's performance can be assessed by examining the progress of individual activities. For instance, the Building Work (J120) has a remaining amount of \$6,000, suggesting that it'.

Proj Element	Level	*	Description	Pln Str Dt	Pln Fin Dt	Low Sts	High Sts	Status	*	Pos no	Proj elmt type	Subpr mgr	Name
0	1	*	Dakota Bar and Grill	040722	100323	Open	Completed	Started		10000	Main Project	MARORE0	Orest Ma
00	2		JOB REPORTING LEVEL	040722	100323	Open	Started	Started		20000	Subproject	MARORE0	Orest Ma
000	3		ORIGINAL JOB	040722	100323	Open	Started	Started		30000	Subproject	MARORE0	Orest Ma
JEXP	4		JOB EXPENSES									MARORE0	Orest Ma
J100	5		==Plumbing Plan									MARORE0	Orest Ma
J110	5		==Electrical Plan									MARORE0	Orest Ma
J120	5		==Building Work									MARORE0	Orest Ma
J200	5		==Plan Details									LARLOR0	Lori Lars
J210	5		==Plan Revisions									LARLOR0	Lori Lars
J215	5		==Preliminary Meeting									MARORE0	Orest Ma
J300	5		==Designer (T&M)									FORMIK0	Mikael F
J800	5		==Project Management	040722	100323	Not Open	Not Open	Started		120000	Other Activity	MARORE0	Orest Ma
JO	4		JOB ORDER EXECUTION	220722	171122	Open	Started	Started		130000	Subproject	MARORE0	Orest Ma
R11	5		Equipment & Install	220722	171122	Open	Started	Started		140000	Subproject	MARORE0	Orest Ma
R111	6		==Racking	290722	290922	Not Open	Not Open	Started		150000	Customer Order	MARORE0	Orest Ma
R111S	6		==Racking Installation	090922	140922	Not Open	Not Open	Started		160000	Serv/Mtnce Acti	MARORE0	Orest Ma
R112	6		==Other Equipment	090922	131022	Not Open	Not Open	Started		170000	Customer Order	MARORE0	Orest Ma
R112S	6		==Equipment Installation	230922	131022	Not Open	Not Open	Open		180000	Serv/Mtnce Acti	MARORE0	Orest Ma

- Avoid doing things in vain.
- ERP has all your data.
- Challenge is to be informed!

### Project Executive Summary

[Refresh summary for P70198](#)

(SUMMARY REQUEST CAN TAKE UP TO A MINUTE)  
LAST UPDATED ON APR 25, 2024 @ 09:16

Project Executive Summary

Project Overview:  
The Dakota Bar and Grill project (Project ID: P70198) commenced with various activities planned to achieve the project's objectives. The project includes tasks such as Plumbing Plan, Electrical Plan, Building Work, Plan Details, and Equipment Installation, among others. The project's execution is ongoing, with several activities yet to start or finish.

Status:  
As of the current date, several key activities have started but are not yet completed. These include Plumbing Plan (J100), Electrical Plan (J110), Building Work (J120), and Equipment & Install (R11). Notably, the Equipment Installation (R112S) and Final Invoice Activity (920) have not commenced, indicating potential delays in these areas.

Performance:  
The project's performance can be assessed by examining the progress of individual activities. For instance, the Building Work (J120) has a remaining amount of \$6,000, suggesting that it

# Project Performance Data

## Executive summary

A contextual widget for displaying various KPIs for a project.

### Problem

Project KPIs are not easily identifiable / visible in M3, requiring the user to navigate through many different M3 programs / panels to find the information.

### Solution

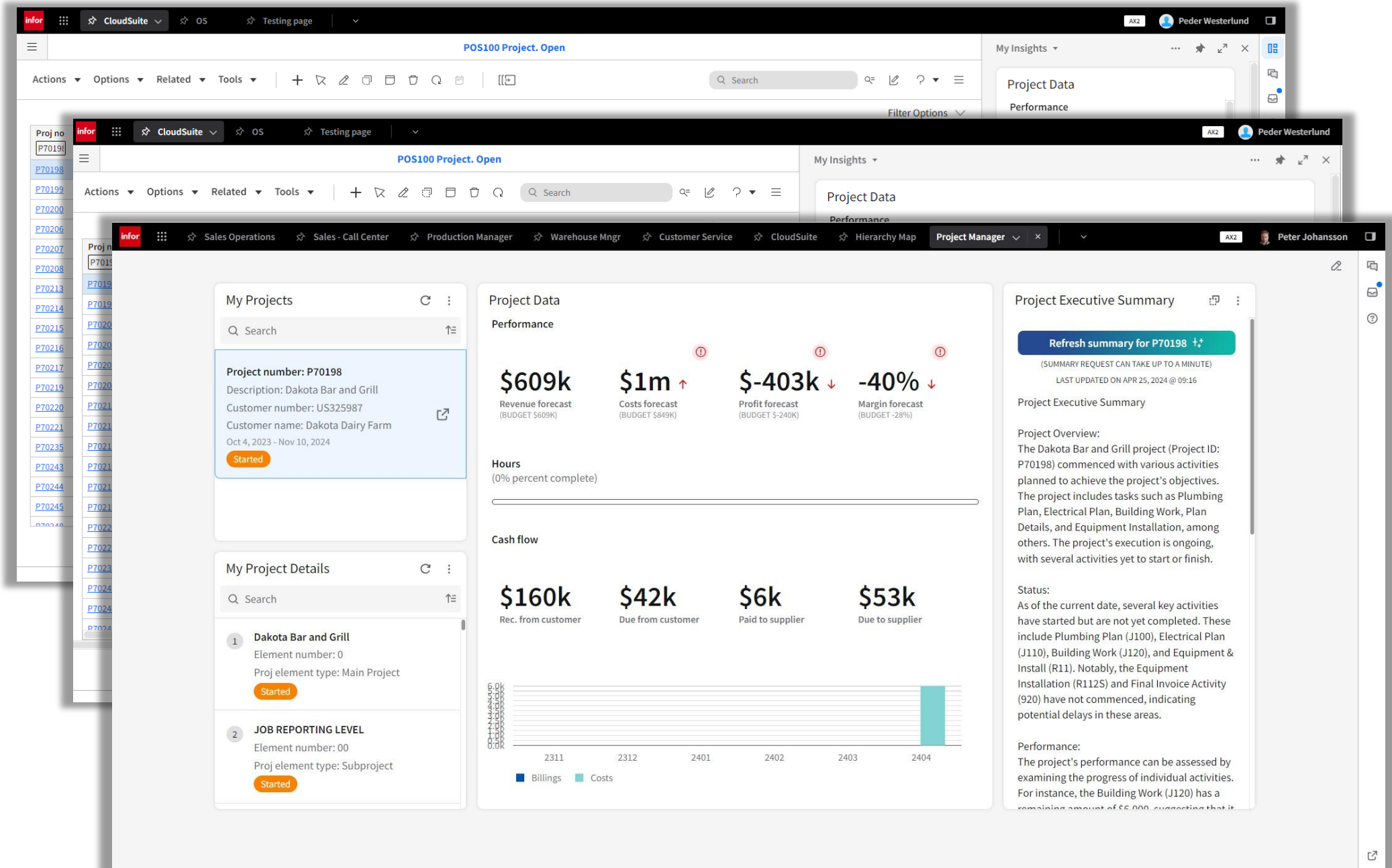
A widget displaying project KPIs. Specifically, the following indicators are supported:

- Revenue
- Actual vs budget
- Cost. Actual vs budget
- Profit
- Margin
- Cash flow. Revenue and cost.

### Benefits

KPIs allows the user to make better decisions and take action when and where needed.

For more information, visit [Demo Showroom](#) or [Infor Oxford](#)



### My Projects

Search

**Project number: P70198**  
Description: Dakota Bar and Grill  
Customer number: US325987  
Customer name: Dakota Dairy Farm  
Oct 4, 2023 - Nov 10, 2024  
**Started**

### Project Data

#### Performance

<b>\$609k</b> Revenue forecast (BUDGET \$609K)	<b>\$1m</b> ↑ Costs forecast (BUDGET \$849K)	<b>-\$403k</b> ↓ Profit forecast (BUDGET \$-240K)	<b>-40%</b> ↓ Margin forecast (BUDGET -28%)
--	--	---	---

### Project Executive Summary

**Refresh summary for P70198** ↕

(SUMMARY REQUEST CAN TAKE UP TO A MINUTE)  
LAST UPDATED ON APR 25, 2024 @ 09:16

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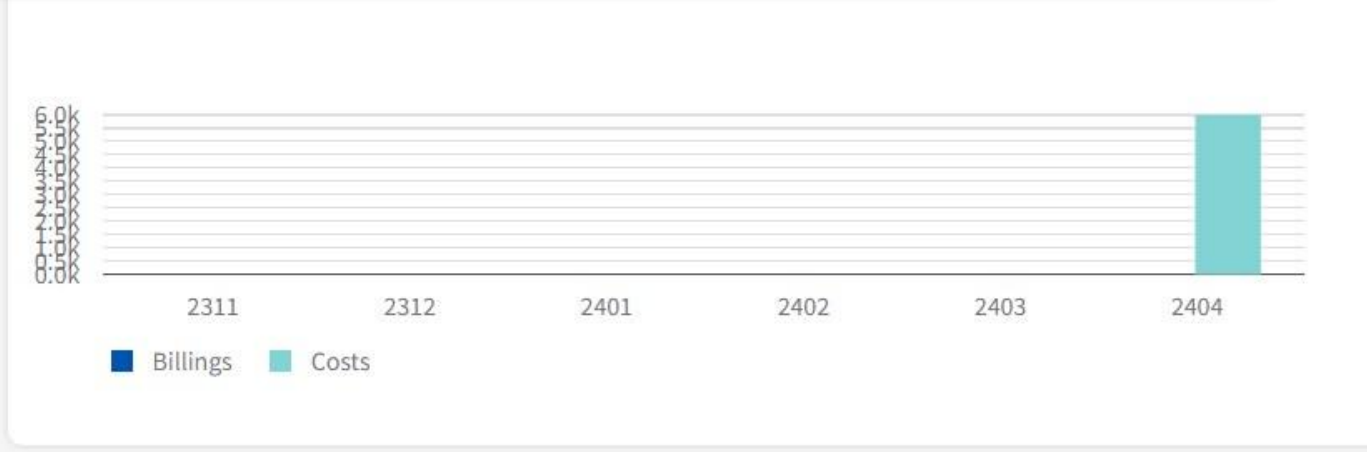
**Performance:**  
The project's performance can be assessed by examining the progress of individual activities. For instance, the Building Work (J120) has a remaining amount of \$6,000, suggesting that it

**KPIs allows the user to make better decisions and take action when and where needed.**

### My Project Details

Search

- Dakota Bar and Grill**  
Element number: 0  
Proj element type: Main Project  
**Started**
- JOB REPORTING LEVEL**  
Element number: 00  
Proj element type: Subproject  
**Started**



### My Projects

Search

**Project number: P70198**  
Description: Dakota Bar and Grill  
Customer number: US325987  
Customer name: Dakota Dairy Farm  
Oct 4, 2023 - Nov 10, 2024  
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**Can you show  
more cool AI  
use cases?**





# Remittance from PDF

## Executive summary

An ION script / H5 script / widget combo, allowing for easy entry of AR payments.

### Problem

Adding payments received manually takes time, is “boring” and it is easy to make mistakes.

### Solution

A contextual widget that uses Infor GenAI to extract remittance amount information from a PDF and add them as payments received in program ARS112.

Functionality wise it is similar to the Items From PDF solution in that it consumes a PDF document, extracts the necessary information and then adds them to an M3 entry panel.

### Benefits

Using automation reduces risk of human errors and is much quicker. This solution will be especially useful in the US market where a lot of payments are still manually processed.

The screenshot displays the ARS112 Payment Received Record interface. The main window shows a 'Payment Details' section with fields for Account (11110), Received (1,000.00), Payer (US75000 Southern Wholesale), and Accdt (20/01/25). Below this is a table with columns: Invoice no, Div, CD/Coll, Inv dt, Curr, Inv amount - local, Received amount, and Outstanding. Two rows are highlighted with a red box:

Invoice no	Div	CD/Coll	Inv dt	Curr	Inv amount - local	Received amount	Outstanding
202500001	200		020125	USD	1,003.27	1,003.27	
25001	200		150125	USD	1,000.00	1,000.00	

Below the table is an entry panel with fields for Invoice no (1), Year (2025), Inv amount - local, and Cash disc - for. To the right, a 'Remittance from PDF' widget is shown, containing a list of 'Invoice amounts (2)'. A 'Save' button is visible. A red arrow points from the 'Save' button to the 'Received amount' column of the table. Another red arrow points from the 'Save' button to the 'Invoice 202500001' entry in the widget, which shows a value of 1003.27. A third red arrow points from the 'Save' button to the 'Invoice 25001' entry in the widget, which shows a value of 1000.

# Remi

Executive sum  
An ION script.

## Problem

Adding paymen  
it is easy to ma

## Solution

A contextual wi  
remittance am  
payments rece

Functionality w  
in that it consu  
information and

## Benefits

Using automati  
much quicker. T  
the US market  
manually proce



### ARS112 Payment Received. Record

Actions ▾ Options ▾ Related ▾ Tools ▾ | + ✕ ✎ 📄 🗑️ ✎ ? ▾ ☰

Payment Details Filter Options ^

Account: 11110 USD Bank account    Accdt: 20/01/25    Check: 1226  
Received: 1,000.00    Curr: USD    Rtetp: 1    Costs  
Left to distrib:    Curr: USD    Rate: 1.000000    Acc option:    Amount  
Payer: US75000 Southern Wholesale  
Reconc no:   

Invoice no	Div	CD/Coll	Inv dt	Curr	Inv amount - local	Received amount	Outstanding
202500001	200		020125	USD	1,003.27	1,003.27-	
25001	200		150125	USD	1,000.00	1,000.00-	

Invoice no    Year    Inv amount - local    Cash disc - for

1    2025         

### Remittance from PDF

Invoice amounts (2)

Filter

Invoice 202500001  Partial  
1003.27

Invoice 25001  Partial  
1000

# Remittance from PDF

## Executive summary

An ION script / H5 script / widget combo, allowi

### Problem

Adding payments received manually takes time  
it is easy to make mistakes.

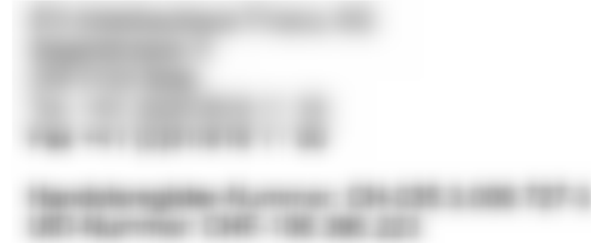
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manually processed.



Bei Rückfragen wenden Sie sich bitte an:
Deutschland

## Zahlungs-AVIS vom 10.06.2021

Rg.-Datum	Rg.-Nummer	Rg.-Typ	Brutto-Betrag	MWST %	Skonto %	Skonto-Betrag	Netto-Betrag
06.05.2021	105710005159	MG	-13.15	19.0	0.0	0.00	-13.15
28.04.2021	105940009913	MG	-100.32	19.0	0.0	0.00	-100.32
05.05.2021	106230005168	MG	-59.19	19.0	0.0	0.00	-59.19
05.05.2021	106310007152	MG	-21.60	19.0	0.0	0.00	-21.60
10.05.2021	106660001743	MG	-52.60	19.0	0.0	0.00	-52.60
06.05.2021	108700001375	MG	-21.60	19.0	0.0	0.00	-21.60
28.05.2021	206225020433	MG	-125.20	19.0	0.0	0.00	-125.20
29.03.2021	3003533199	MG	163.87	19.0	3.0	0.00	163.87
29.03.2021	3003533200	MG	171.29	19.0	3.0	0.00	171.29
29.03.2021	3003533200	HR	-1'438.12	19.0	3.0	-43.14	-1'394.98



# The Call Center show

# Call Center & CLM Integration

## Executive summary

This widget has been around for a while. In this latest version, we have added a real-time integration to CRM/CLM. As the Customer Service Representative (CSR) ends the call, they can now add information about the call and have this added to the Customer Notebook in CLM.

SC Champion: Mikael Forsman

### Problem

It can be a challenge for Customer Service Representatives (CSR) to navigate several applications screens while being on the phone with a customer.

### Solution

This solution provides easy access to all related customer information and can now also add Notes in to CLM directly from the widget.

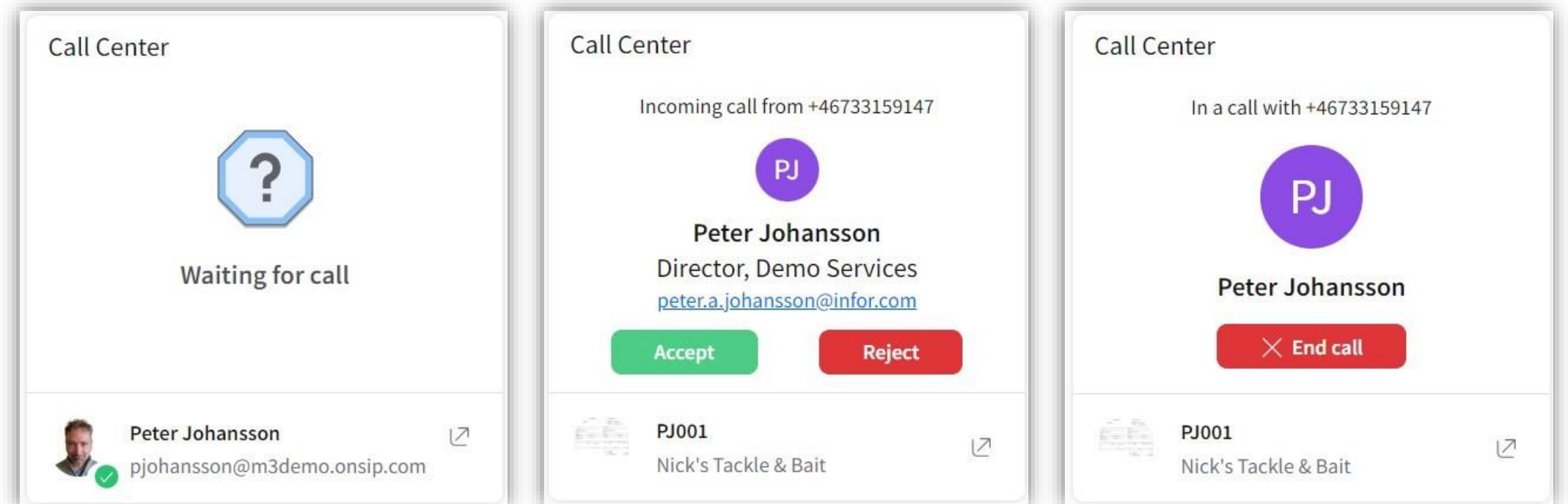
### Benefits

Not only will this streamline customer service, by being able to be proactive with customer. But also, in a single step be able to record what that call was about!

### Limitations

This solutions is interfacing to a 3<sup>rd</sup> party VoIP provider called OnSip. To use this widget, an OnSip account must be available to use.

For more information, visit the [Demo Showroom](#).



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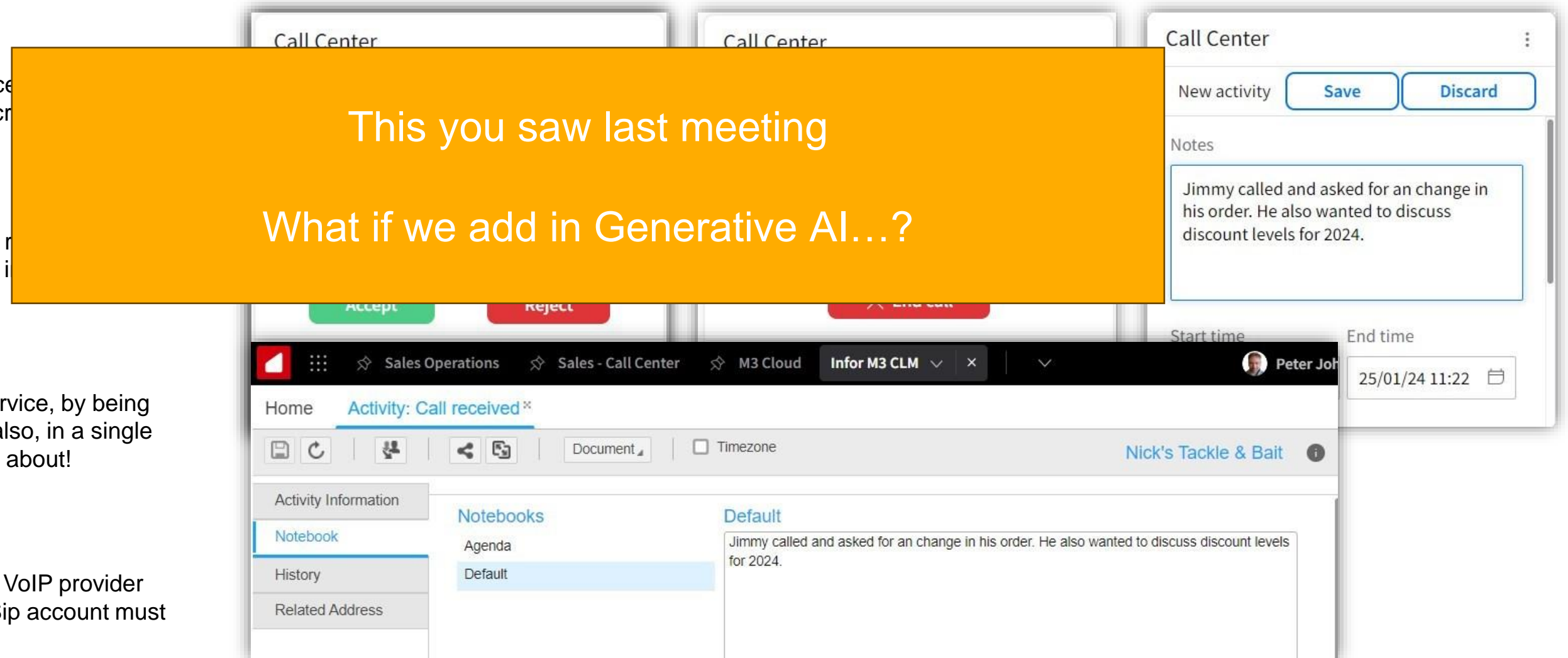
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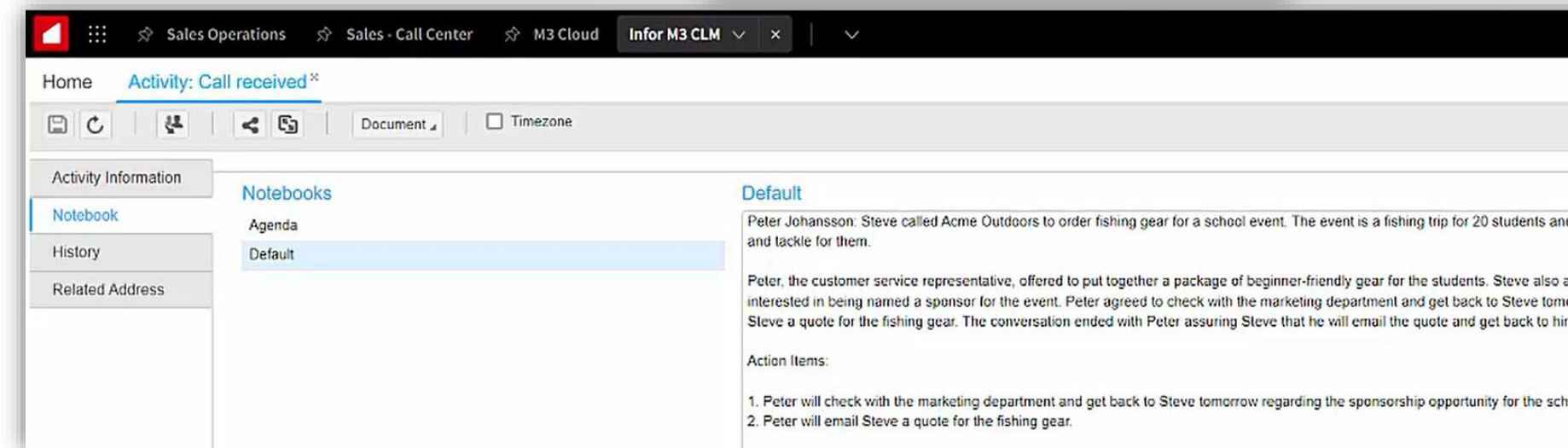
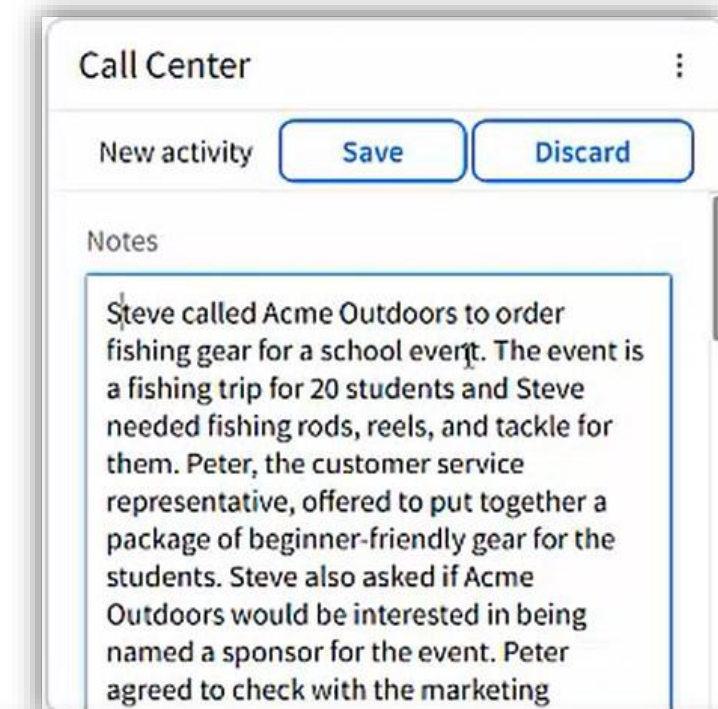
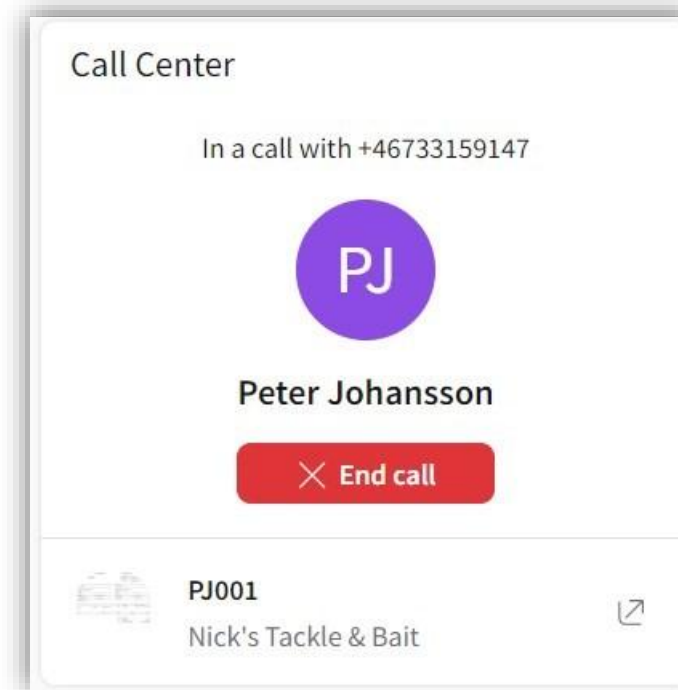
# Enhancement: Call Center, CLM Integration & GenAI (POC)

## What if we add some Generative AI?:

- The conversation, between customer and CSR, is recorded.
- When the call ends, the recording is sent to OpenAI for transcription. The entire conversation (word by word) is returned to the widget.
- The widget sends full transcription to OpenAI asking for a summary.
- The summary is presented to CSR so they can check and adjust as needed.
- When SAVE is clicked, the summary gets created as an Activity in CLM
- The CSR can now open CLM and make further adjustments as needed.

### Note:

The recording is not saved. The transcript is not saved. Only the summary of transcript is saved. That said, there are legal and policy implications to consider, but at this point, we are simply evaluating the technology to see what can be done.





**infor**

# The Arabic show

# PDF to Sales order lines

**Notes and Attachments :**

**Header Notes :**

No Notes

This Purchase Order has 0 Attachments

# Item SKU	Product Desc.	Pack/ Size	Qty UOM	Price Extension	
<b>Department: 4300-Staff Cafeteria</b>					
BRICK029	Cumin Powder	1/	2.00 KG	Dh19.0000	Dh38.00 <a href="#">Edit Line</a>
Unknown	زيت زيتون خمسة لتر		1.00 EA	Dh34.2	Dh34.2 <a href="#">Edit</a> <a href="#">Alloc</a>
100100627	3 VEG MIX NOWACO/ BELGIUM 4x2.5 kg	1/	8.00 EA	Dh11.2500	Dh90.00 <a href="#">Edit Line</a> <a href="#">Edit</a> <a href="#">Alloc</a>
100100628	labneh 5 kg bucket PINAR/ TURKEY 2.75 kg	1/	2.00 EA	Dh40.0000	Dh80.00 <a href="#">Edit Line</a> <a href="#">Edit</a> <a href="#">Alloc</a>
100100629	Processed Cheese Yasmine / saudi 8x2.27 kg ( cheddar cheese slice sos )	1/	1.00 CRT	Dh390.0000	Dh390.00 <a href="#">Edit Line</a> <a href="#">Edit</a> <a href="#">Alloc</a>
Unknown	Olive Oil 10L		4.0EA	Dh40	Dh160

Items from PDF

Items (4) ⚠️ 📄 🔄

Filter

**Ketchup ROFNI Std 20 Oz x16** ✎

U11020

Unit price: 58.23 USD

- 12 +

**Ketchup ROFNI Std 38 Oz x12** ✎

U11021

Unit price: 66.29 USD

- 6 +

**Ketchup ROFNI Less Sugar 20Oz x16** ✎

U11220

Unit price: 62.70 USD

- 6 +

⚠️ **Ketchup ROFNI Organic x16** ✎

U1112A

Unit price: 52.70 USD

PDF Viewer



NY, Oct. 3rd, 2024

**Subject** - Our New Order for ROFNI products - ref - PO11200

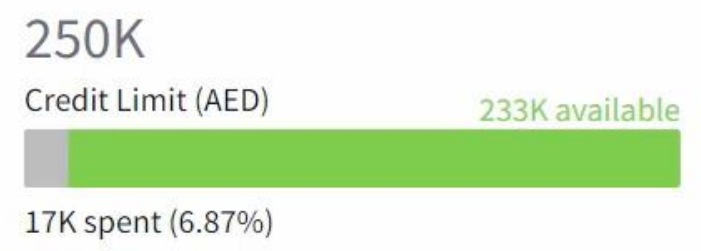
Dear Sir/Madam,  
Please find below our Customer Order for delivery on October 28, 2024.

Customer **Woolfoods Edina Market (U1121)**

Line	Item code	Name	Qty Unit	Price/Un
1	U11020	Ketchup ROFNI Std 20 Oz x16	12 CAS	58,23 USD/CAS
2	U11021	Ketchup ROFNI Std 38 Oz x12	6 CAS	66,29 USD/CAS
3	U11220	Ketchup ROFNI Less Sugar 20Oz x16	6 CAS	62,70 USD/CAS
4	U1112A	Ketchup ROFNI Organic x16	6 CAS	52,70 USD/CAS

Please confirm us this Sales Order and ETA..  
Best Regards,

Available To Spend



**BL** [Bandit Industries Duba...](#) 🔗

CSD0000021

Credit Limit:	AED250,000.00
Spent:	AED17,182.70
Available:	<b>AED232,817.30</b>

Customer Address

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- 🚚 [ST1 - St Paul Depot](#) ✎ 🗑️  
 Address Line 1  
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 St Paul MN ZIP
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 Address Line 1  
 Address Line 2  
 Minneapolis MN ZIP

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