

# Tips&Trix

Vi startar kl. 11:02



## WORKING TOGETHER CONFERENCE

20 - 22 maj 2025

Linköping Konsert & Kongress



## WORKING TOGETHER MAGAZINE

Läs det senaste numret av  
vår medlemstidning



## AKTUELLA AKTIVITETER

Här hittar du information om våra kommande aktiviteter

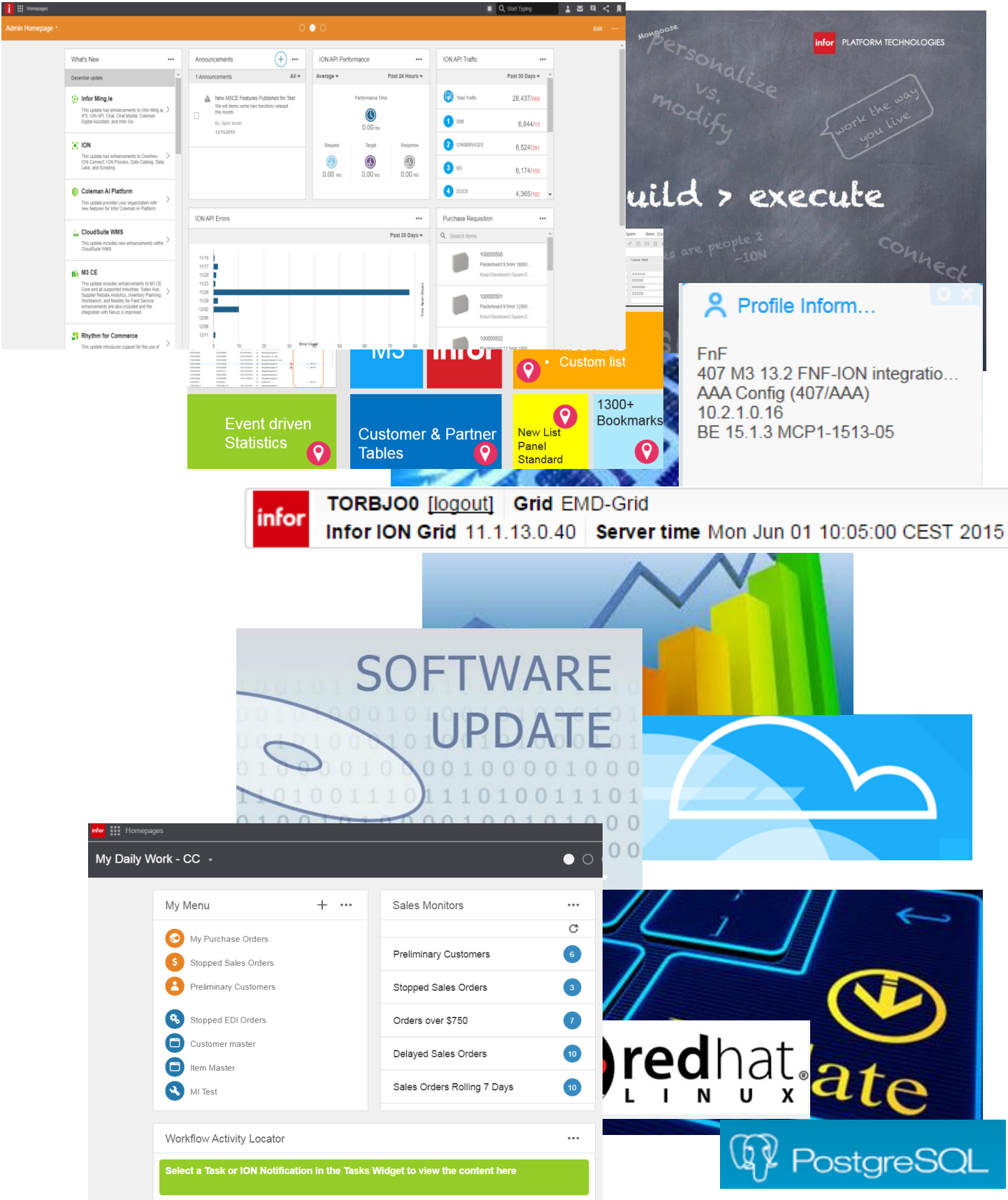


## KONTAKT

Hör av er till oss om ni har frågor kring föreningen och vår verksamhet

Spaning på 2025.10

Digital Assistant & Agents



# Disclaimer



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# October 2025 release

- 488 enhancements released across all modules
- 100+ enhancements driven by customer Enhancement Requests through the ER system
- Release Highlight presentation Sept 2<sup>nd</sup>
- Knowledge Transfer sessions published on Infor U – on September 5<sup>th</sup>
- All material will be consolidated in Concierge
  - Release Center

Release material in Release Center in Concierge

Ole Steen Rasmussen

Home

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How-To Videos

Infor Communities

Infor Concierge Widgets

Incidents

Notifications

Products and Subscriptions

Knowledge Base Articles

Enhancements

Education

Important Documents

Release Center

My Release Information

Cloud Maintenance Calendar

Industry Roadmaps

My Release Information

Overview

Here are the material(s) available to help you prepare for MT releases:  
Release Report provides details on enhancements and defect resolution in a single report and is available the first Thursday of the month prior to each release.

- Visit [KB 2287007](#) - Infor Release Report Overview.

Next Maintenance Period

9 Mar

Start Time: 12:01 AM EDT or EST

Release Highlights is a presentation that provides an overview of key enhancements.

- [Register](#) for Infor U to access Release Training

Release Training highlights new features that enhance productivity and efficiency.

Product Documentation provides technical details about Infor applications and Infor CloudSuites. This is available the first Friday of the release month.

Access the global Multi-Tenant Release Deployment Calendar for region-specific schedules.

View calendar

Release Resources

Access the latest release assets and see resource availability dates.  
For Release Center assistance or any general questions, open a Customer Care general request [incident](#). (Product Line = Infor Concierge).

Product Line	Release Report	Release Highlights	Release Training (RT)	Product Documentation
Automotive Exchange	<a href="#">KB 2131274 - Release Updates</a>	<a href="#">AutomotiveExchangeMT_Relea...</a>	<a href="#">Infor U-Automotive Exchange - RT</a>	<a href="#">Automotive Exchange Documen...</a>
Birst	<a href="#">KB 2054710 - Release Updates</a>	<a href="#">Birst_Release_Highlights.pdf</a>	<a href="#">Infor U-Birst-RT</a>	<a href="#">Birst Documentation</a>
Clinical Bridge	<a href="#">KB 2186393 - Release Updates</a>	<a href="#">ClinicalBridge_Release_Hyghig...</a>	<a href="#">Infor U-Clinical Bridge - RT</a>	<a href="#">Clinical Bridge Documentation</a>
CloudSuite A&D	Refer to product-specific KB Article	<a href="#">CloudSuite Aerospace and De...</a>	Refer to product-specific Releas...	<a href="#">CloudSuite A&amp;D Documentation</a>
CloudSuite Automotive	Refer to product-specific KB Article	<a href="#">CloudSuite Automotive Releas...</a>	Refer to product-specific Releas...	<a href="#">CloudSuite Automotive Docum...</a>
CloudSuite Chemicals	Refer to product-specific KB Article	<a href="#">CloudSuite_Chemicals_Release...</a>	Refer to product-specific Releas...	<a href="#">CloudSuite Chemicals Docume...</a>
CloudSuite Distribution	<a href="#">KB 1960491 - Release Updates</a>	<a href="#">CloudSuite_Distribution_Relea...</a>	<a href="#">Infor U-CloudSuite Distribution...</a>	<a href="#">CloudSuite Distribution Docum...</a>

Release training session at Infor U Campus

Infor U Campus

Home

My Learning Progress

Course Catalog

Public Schedule

Learning Paths

Certifications

Release Training

Onboarding

FAQs

USD

Ole Steen Rasmussen

Welcome back, Ole!

New Enhanced Learning Paths - NOW LIVE!

These enhanced Learning Paths have been designed to provide a more streamlined prescriptive and persona-based learning experience.

Click Here

Welcome to Infor U Campus

Welcome to Infor U Campus – designed for you!

With an improved user experience and superior personalized content, Infor U Campus provides an integrated learning solution to our employees, customers, and partners. A few benefits of Infor U Campus include

- Simplified navigation and searchability
- Structured content by industry and learning paths
- Optimal and engaging user experiences

- Flexible, intuitive, and prescriptive feature functionalityccc
- Instant access to remotely report technical problems
- On-the-go learning with tablet and mobile responsiveness

Tutorial Videos

Navigation Videos



# October 2025 Highlights



## Value+ and Industry Content

- 13 new Value+ solutions
- GenAI Assistant with M3 agents
- Image Consumption
- EU Omnibus Directive
- Milk Class Reporting



## Experience

- 14 new Experience Designer Apps in core
- Experience Designer tool enhancements
- New Widgets
- C-Suite workspaces



## Environmental, Social and Governance (ESG)

- ESG Strategy Planning module
  - Strategy
  - Activity
  - Data
  - Analysis

LA



## Planning, Manufacturing, Procurement

- Demand Forecasting – Attribute fcst and Product Supersession
- Infor MES – support for catch weight and by-products
- Grower Contract – large models
- Supplier rebate in M3 BE

LA



## Infor OS

- GenAI Assistant
- Merging Document Flow with Data Lake Flow
- Data Reconciliation for Streaming Ingestion

LA



## Finance

- E-reporting of Supplier Invoices
- Approval flow and AP improvements
- Withholding taxes on advance payments
- Localization - e-invoicing, dual VAT, etc.



## Integrations

- Supply side EDI with SPS Commerce
- PLM for Fashion into M3 product structure substitution
- M3 TMS interface (Shipwell)
- Qbuild for discrete PLM



## Sales, Service & Logistics

- Trade Promotion Mngt (TPM)
- Business chains for rental agreements
- Integration - M3 CLM/MFS and M3 Issue Management

LA

# Infor Industry Cloud Platform highlights

Major feature upgrades/improvements

## 2025.10 Release

### Horizontal

- Configuration Management Global Packages (GA)\*\*

### Data Fabric

- Data Ledger notifications
- Stream Pipelines Transformation
- Data Catalog move
- Advanced Connectivity - Power BI Connector and ODBC Driver (LA)
- Source Data Access direct query (LA)

### Birst

- Drag and Drop Transforms
- GenAI Visualization Editor
- GenAI Dashlet Insights

### UX

#### OS Portal

- New Workspace Smart Stack
- Six Column Workspace
- Smart Panel Collapsible Widgets

#### Mongoose

- Birst Chart Integration Enhancements
- Widget Enablement (RBWS) Enhancements

#### Infor GO

- IDM App Enh (auto document type selection)

#### Security

- Assign FSR while adding new Users
- Update Captcha to AWS WAF Captcha

### GenAI \*

- LLM Pass-though Improvements
- Assistant – Central Chatbot (LA)
- Agents and Tools Factory (LA)
- Private and Public Knowledge Hub (LA)

### AI Platform

- Realtime Optimization Fast-track deployment
- Model Context Protocol (MCP) integration for AI model invocations through the GenAI Assistant (LA)

### RPA\*

- Review Center
- Agentless (LA)
- Concurrent processing

### GRC\*

- Review and act on Violations using GenAI Assistant (LA)
- Certification Reviews using Machine Learning Score
- EU AI Act Insight
- Studio Support for Process Insights

### EPM\*

- CFO C-Suite introduction
- Continuous Infor GenAI adoption for Financial Reporting and Financial Consolidation
- User calculations in Ad-hoc reports
- OLAP Modeling Security Roles management
- APIs for Staging Database management

### iPaaS

#### ION

- Merging flow types: Document and Data Lake flows will be unified as a single type: Data Flow
- Viewing archived OneView events in the UI
- Link existing IDM docs to ION Workflow activities
- New use cases for Health Service
- Sending ION Workflow data to Data Fabric

#### Gateway

- OAS 3.1 support
- Client Credentials support
- Gen AI. Policy definition generation

#### BaaS

- Gen AI: BaaS SDK.
- BaaS Admin UI Modernization

### IDM

- First In First Out Print Queues
- Gen AI – Embedded Experience Integration (LA)
- Native Email Service Integration
- Native Virus Scanning Capability for Documents
- DocuSign MFA Support

### Infor Doc Processor\*

- Performance Improvements using LLM
- Support Multiple Documents in a Single File
- Model Versions in DPF's

### Process Intelligence\*

- Interactive Process Advisor powered by GenAI
- Chart Quick Filters
- Copy for Page & Widgets

# Merging Document Flow with Data Lake Flow

Merging Data Lake Flow type and Document Flow type into one type: Data Flow.

Change Delivery	Available for Cloud Suite(s)	Potential Business / Tech. Impact
Automatic	All M3 CloudSuites	Minor / Moderate
Additional Info	Decision maker	Release Training
KB2105703	Integration Administrator	Infor ION: Introducing one modeler for ION Data flows

**Problem**



- Limited functionality of flows:
  - Data Lake Flow:**
    - No Workflows
    - No Content Routing
  - Document Flow:**
    - No Data Lake data retrieval
    - No Data Lake data ingestion

**Solution**

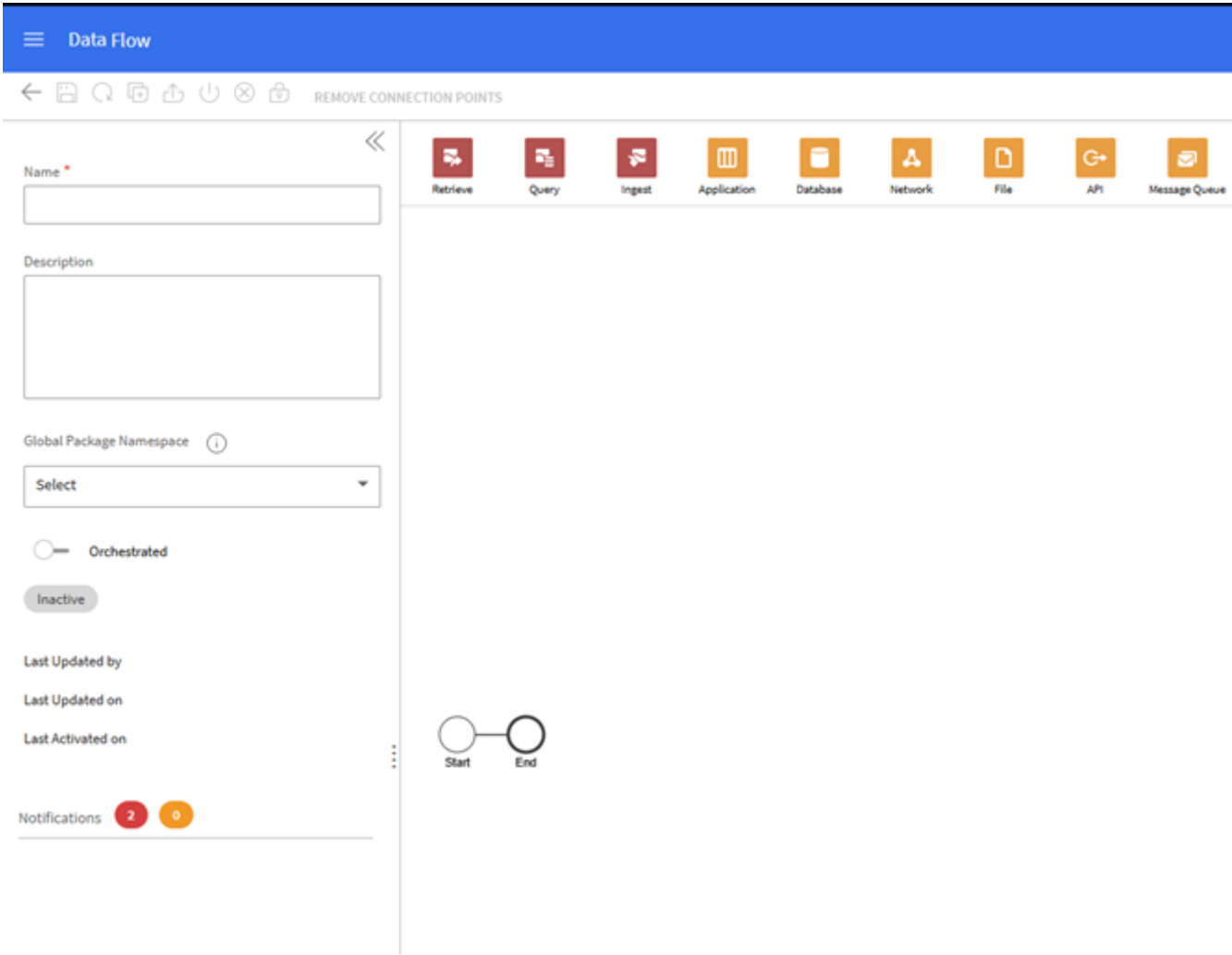


- Merging Data Lake Flow type and Document Flow type into one type: Data Flow.
- A single flow modeler in which all activities from both types are available.
- All functionality and APIs will continue to work the same way.

**Benefits**



- Combining the capabilities of Document Flow and Data Lake Flow into a single Data Flow can enhance the functionality available to users. They can leverage a more comprehensive set of tools and features to handle complex integration scenarios.
- A unified Data Flow simplifies the architecture by providing a single framework for data movement and management. By merging different modelers or integration functionalities, ION can provide a more consistent user experience. Users can handle various integration tasks within a single interface, reducing complexity and enhancing productivity.



# Data Catalog application migrated from ION to Data Fabric

## Problem

- Data Fabric admins wanted to access Data Catalog directly from the Data Fabric application, without needing access to ION Desk.

## Solution

- Data Catalog pages and APIs moved from ION to Data Fabric
- Pages will remain in ION for 1 year, after which it will only exist in Data Fabric.
- ION based Data Catalog APIs (/IONSERVICES/datacatalog) deprecated
  - Existing integrations should switch to the Data Fabric APIs.
  - To be determined API removal date (2-3 years)
- IFS Role permissions migrated, so existing ION Data Catalog roles will have access to Data Catalog in Data Fabric.

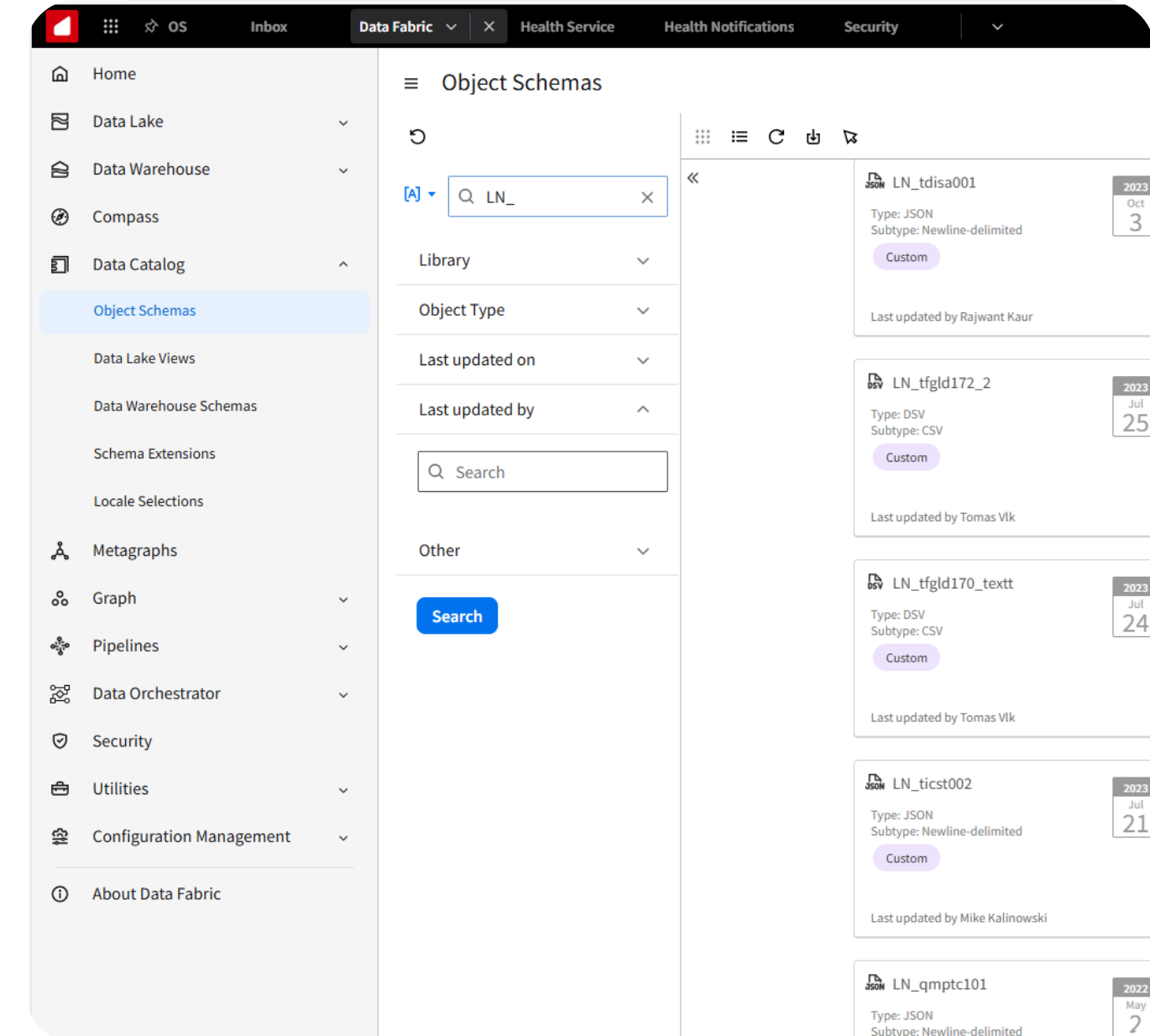
## Benefit

- This tighter integration enhances metadata and data platform capabilities, offering better tools for exploration and analysis.

100288

Data Fabric Data Ledger

KB2105703





# Restoring purged data objects

## Problem

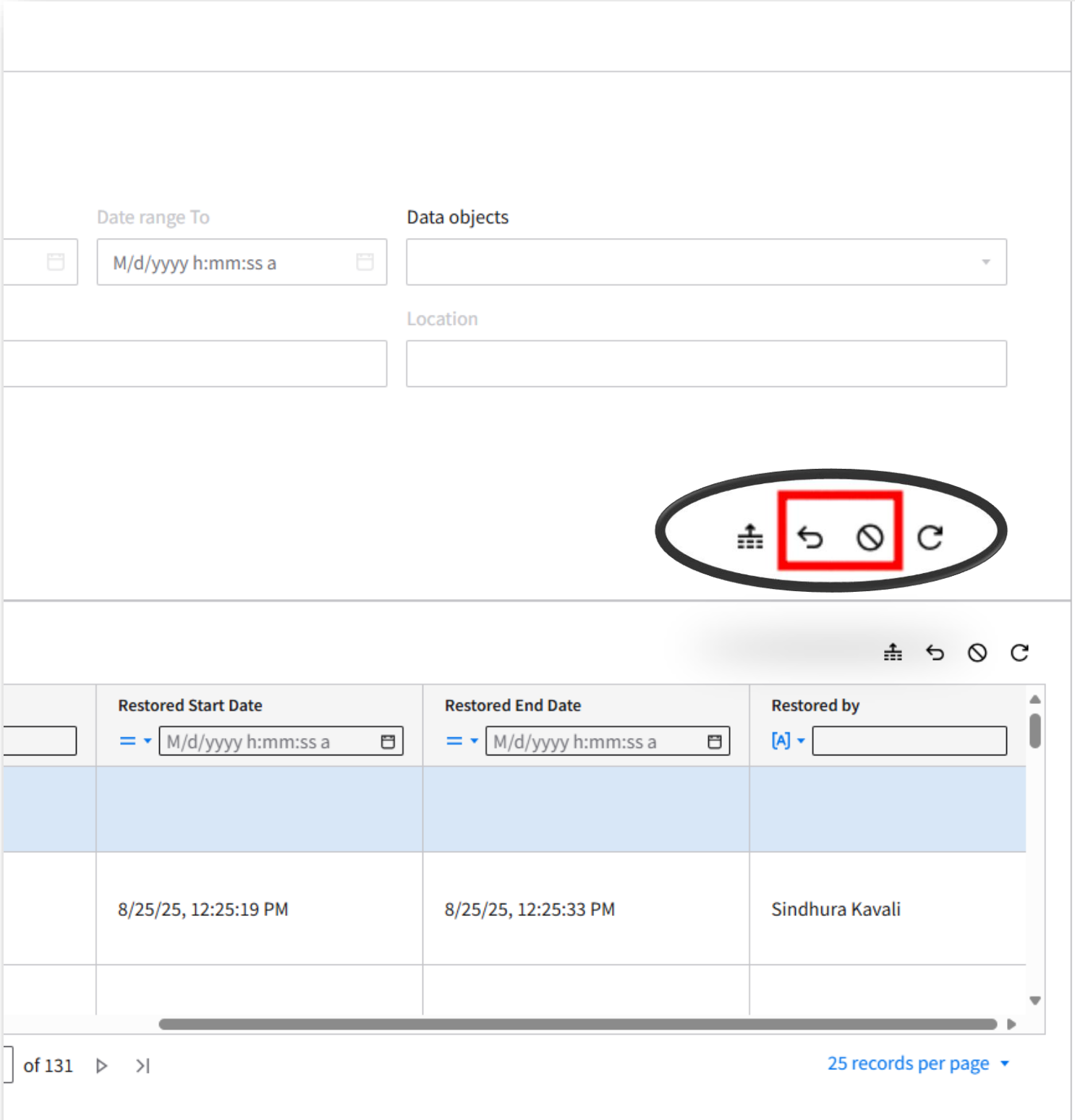
- Data Lake objects are permanently purged, and there is no option to reverse this action if it occurs accidentally or due to malicious intent.

## Solution

- On a purge event in the logs you can now restore its deleted data objects.
- New status: 'Restoring', 'Restored'
- Restore process may take time depending on the number of objects.
- Restoring process cannot be stopped or reverted.
- Restored event is logged under the same purge event. Includes information about who restored and when.
- Compass cache data is auto-cleared to re-cache the restored objects in the next query execution
- Purge events older than 90 days cannot be restored.

## Benefit

- Safety net against accidental deletions or malicious activities
- Minimizing potential disruptions to business operations and ensuring that valuable data assets are not permanently lost



The screenshot displays the Infor Data Lake interface for restoring purged data objects. At the top, there are input fields for 'Date range To' (with a date format 'M/d/yyyy h:mm:ss a') and 'Data objects' (a dropdown menu). Below these is a 'Location' field. A red box highlights the 'Data objects' dropdown menu. Below the input fields, there is a table with the following columns: 'Restored Start Date', 'Restored End Date', and 'Restored by'. The table contains one row of data: '8/25/25, 12:25:19 PM', '8/25/25, 12:25:33 PM', and 'Sindhura Kavali'. The table is part of a larger list, with 'of 131' and '25 records per page' visible at the bottom.

Restored Start Date	Restored End Date	Restored by
8/25/25, 12:25:19 PM	8/25/25, 12:25:33 PM	Sindhura Kavali

# Compass /result/ API support for Accept-Encoding: gzip

## Problem

- Not supporting gzip compression can make integration harder for systems that prefer it over Deflate. Various tools and APIs use gzip by default, so lack of support may lead to extra configuration, reduced compatibility, and slower performance.

## Solution

- GET /DATAFABRIC/compass/v2/jobs/{queryId}/result/** now Accept-Encoding supports returning content in **gzip** compression

## Benefit

- Supporting gzip compression improves compatibility with tools and APIs that use it by default or have challenges using deflate, reducing need for custom solutions

The screenshot shows the API Gateway interface for the endpoint `GET /DATAFABRIC/compass/v2/jobs/{queryId}/result/`. The interface includes a header with tabs for Health Notifications, Security, and API Gateway. The main content area displays the endpoint description: "Get the result for a queryId that was provided from a Compass job." Below this, there are input fields for "queryId", "Offset" (row offset, 0-based), and "Limit" (maximum number of rows, up to 100,000). A dropdown menu for "Content-Encoding" is open, showing options: "--", "gzip", "deflate", and "identity". The "gzip" option is selected. An "Execute" button is visible on the right side of the form.

# User Experience

# Workspaces

## Summary

Workspaces improve user productivity and offer a high starting point for a customized experience

### Problem

- M3 users expect a modern, intuitive and streamlined experience when managing their day-to-day activities without the need to dive into detailed M3 functions



### Solution

Deliver multiple new and improved Workspaces including:

**Enhanced Workspaces:**

- Purchase Manager
- Customer Services Rep.
- AR Controller
- Warehouse Manager
- GL Controller

**New C-suite Workspaces:**

- VP Sales
- VP Production
- VP Supply Chain

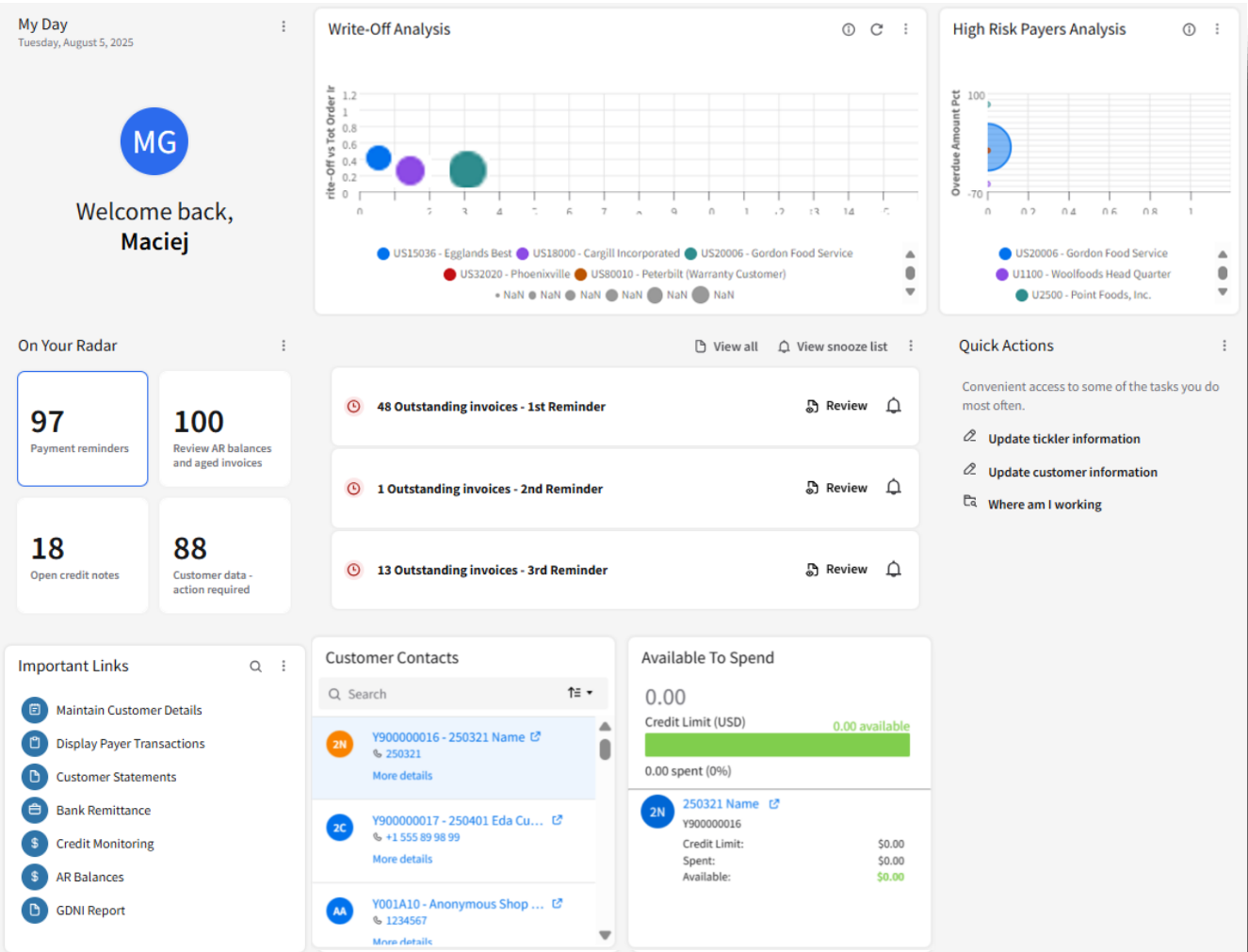


### Benefits

- More streamlined and role-specific Workspace solutions
- Access to the M3 Analytics Widget for several existing Workspaces



Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Feature Toggle	All M3 CloudSuites	Moderate / Low
Additional Info	Decision maker	Release Training
2025.10	Multiple	TBC





# Six Column Workspace Layout

Introducing a six-column layout option in OS Portal to better utilize screen space, especially on larger monitors. Users will be able to choose between a 4 or 6 column layout or rely on the system to adjust automatically based on screen size.

**Problem**

- Workspaces only allow for 4 columns today.
- This does not fill the available space on large monitors which creates large empty spaces.

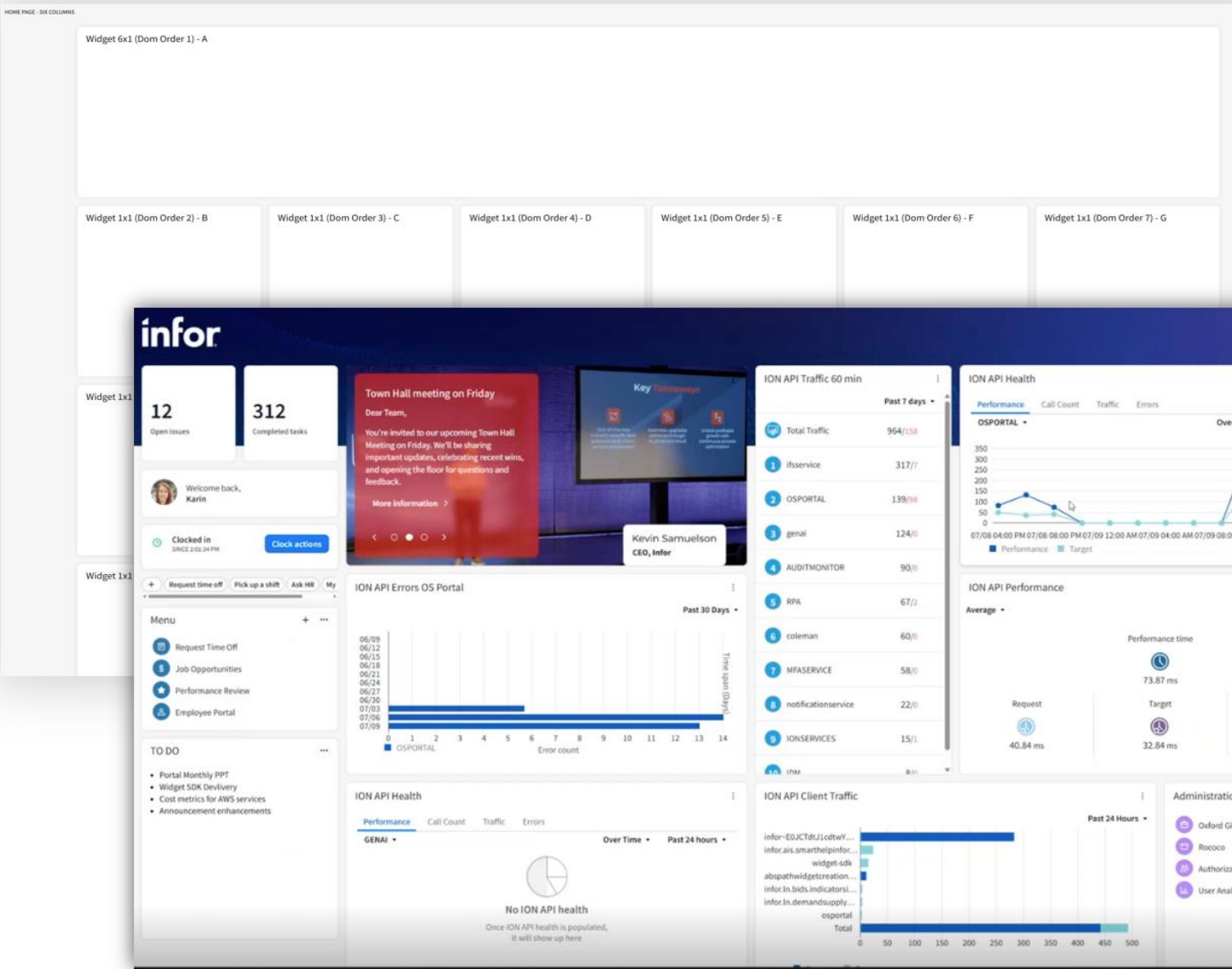
**Solution**

- Allow users to display more columns as a preference.
- Options would be for a 4 column or 6 column layout.
- Provide an option to set the number of columns in a published workspace.

**Benefits**

- Improved usability and visibility by enabling more widgets on a page.

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Automatic Change	All M3 CloudSuites	Moderate/Low
Additional Info	Decision maker	Release Training
KB2105703	Workspace Admin, End User	Infor OS: Introducing New Enhancements in OS Portal



# Experience Designer

## Core tool capabilities

Experience Designer is a no-code tool for creating composite M3 process applications. We are continuously delivering new capabilities increase the user experience and make the end users more efficient.

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Automatic Change	ALL M3	Moderate / Low
Additional Info	Decision maker	Release Training
See below KBs	App Developer	

### Problem



- Experience Designer needs to continuously deliver new, enhanced capabilities to meet new requirements from our customers and to cover a broader set of use cases from our Industry solutions.

### Solution

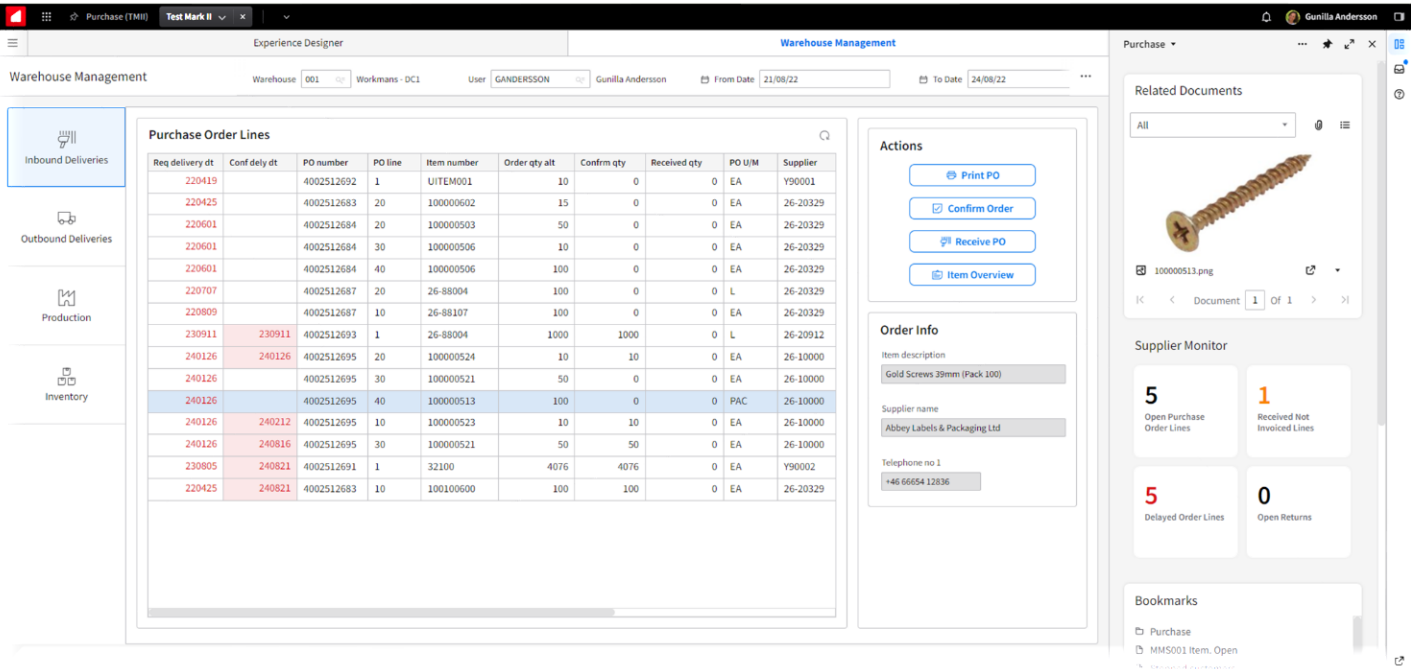


- Tree component,
- Export to Excel
- Text Component
- Choose button size (for touch screens)
- Hide vertical tabs
- Multi select in dropdowns
- Etc.

### Benefits



- More use-cases can be handled using Experience Designer
- More applications patterns can be handled by this no-code framework
- Customers can benefit from fast development and easy maintenance compared to other tools available
- Multiple KB articles 3612518, 3617509, 3617916, 3614810, 3603107, 3602777, 3567466, 3566505, 3567930, 3566506, 3553976, 3561245



## Application Summary

Experience Designer Applications improve user productivity and offer a high starting point for a customized experience

## Adding 14 new Experience Designer Applications in core

## Problem

- M3 users expect a modern, intuitive and streamlined experience when managing their day-to-day activities



## Solution

Deliver multiple new and improved Experience Designer applications **in core** including:

- Supplier Overview (new)
- Style Overview (new)
- Style & SKU Creation (new)
- Purchase Order Hub (new)
- Planned PO Hub (new)
- Rental Counter (enhanced)
- Manufacturing Reporting (New)
- Item Overview (new)
- EQM Manager (new)
- Customer Order Hub (new)
- Customer Support Center (new)
- Customer Overview (new)
- Customer Credit Overview (new)
- Warehouse Mngmnt. Desk (new)
- Srv.Agr.Workbench (enhanced)

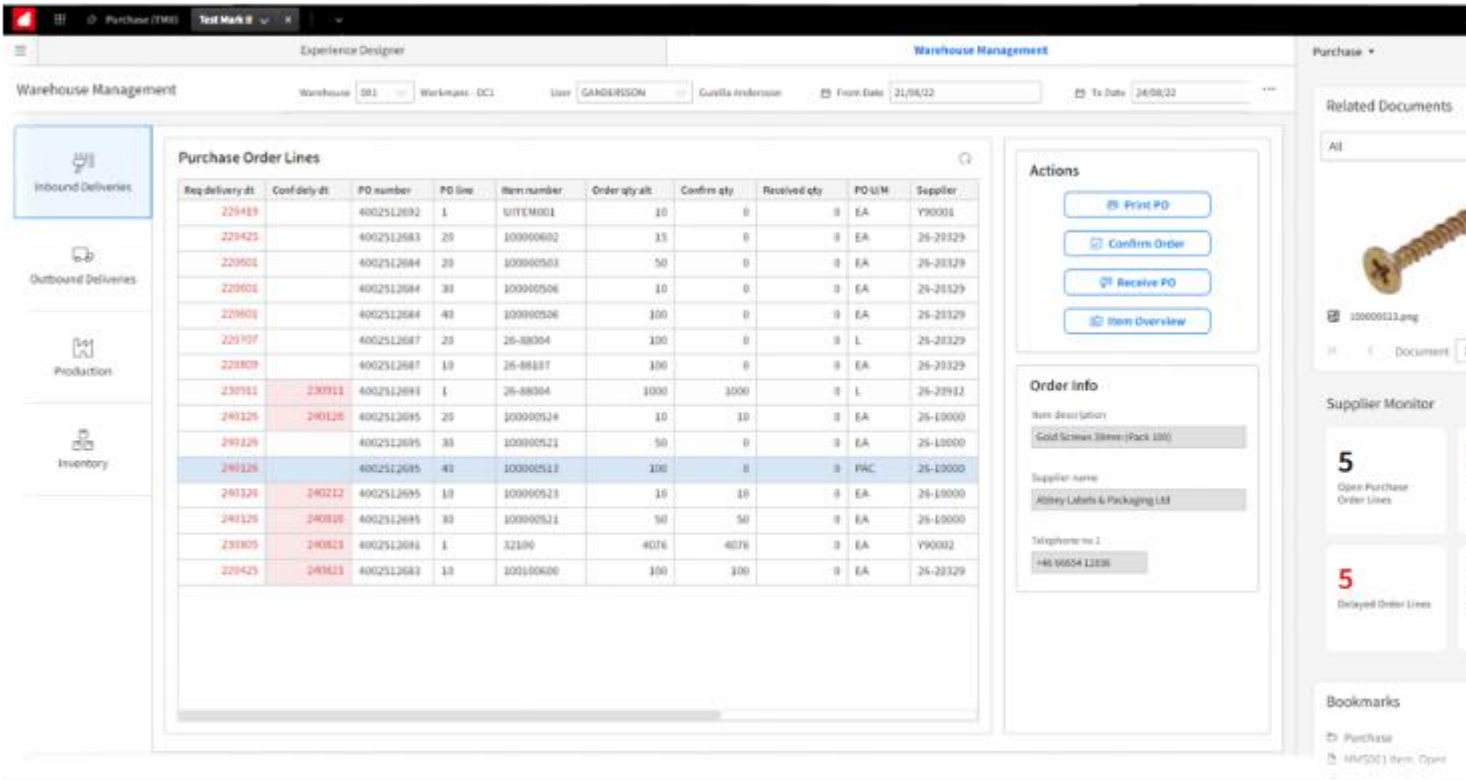


## Benefits

- More streamlined and role-specific solutions
- Higher productivity
- Fully configurable standard user experience



<b>Change Delivery</b>	<b>Available for CloudSuite(s)</b>	<b>Potential Business / Tech. Impact</b>
Feature Toggle	All M3	Moderate / Low
<b>Additional Info</b>	<b>Decision maker</b>	<b>Release Training</b>
2025.10	Multiple	M3 Introducing New Enhancements - Industry Content Experience Designer apps



# Image Digitization; utilizing Infor GenAI

A configurable widget supporting a number of use-cases where an external pdf document can be digitized and absorbed to the ERP screen

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Configuration option	All M3 CloudSuites	High / Low
Additional Info	Decision maker	Release Training
KB3534776	All Subject Matter Experts	No

## Problem

- Manual conversion of pdf documents is time consuming and often inaccurate.



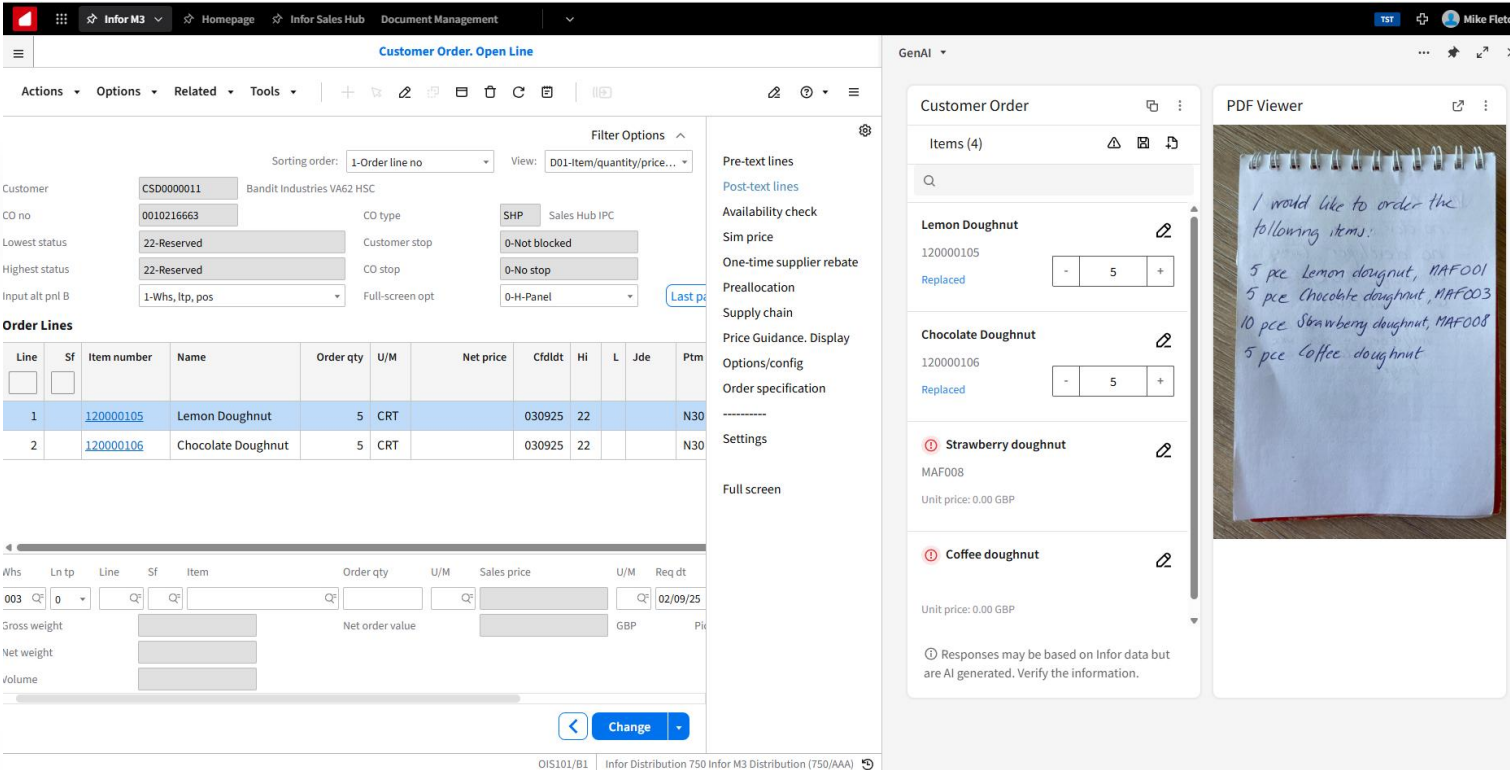
## Solution

A configurable Infor GenAI-based widget that allows the user to digitize the pdf and then interact with the digital contents before uploading as lines to the ERP screen. Initially covering Customer Order lines; this configurable widget will support additional use cases over future releases.



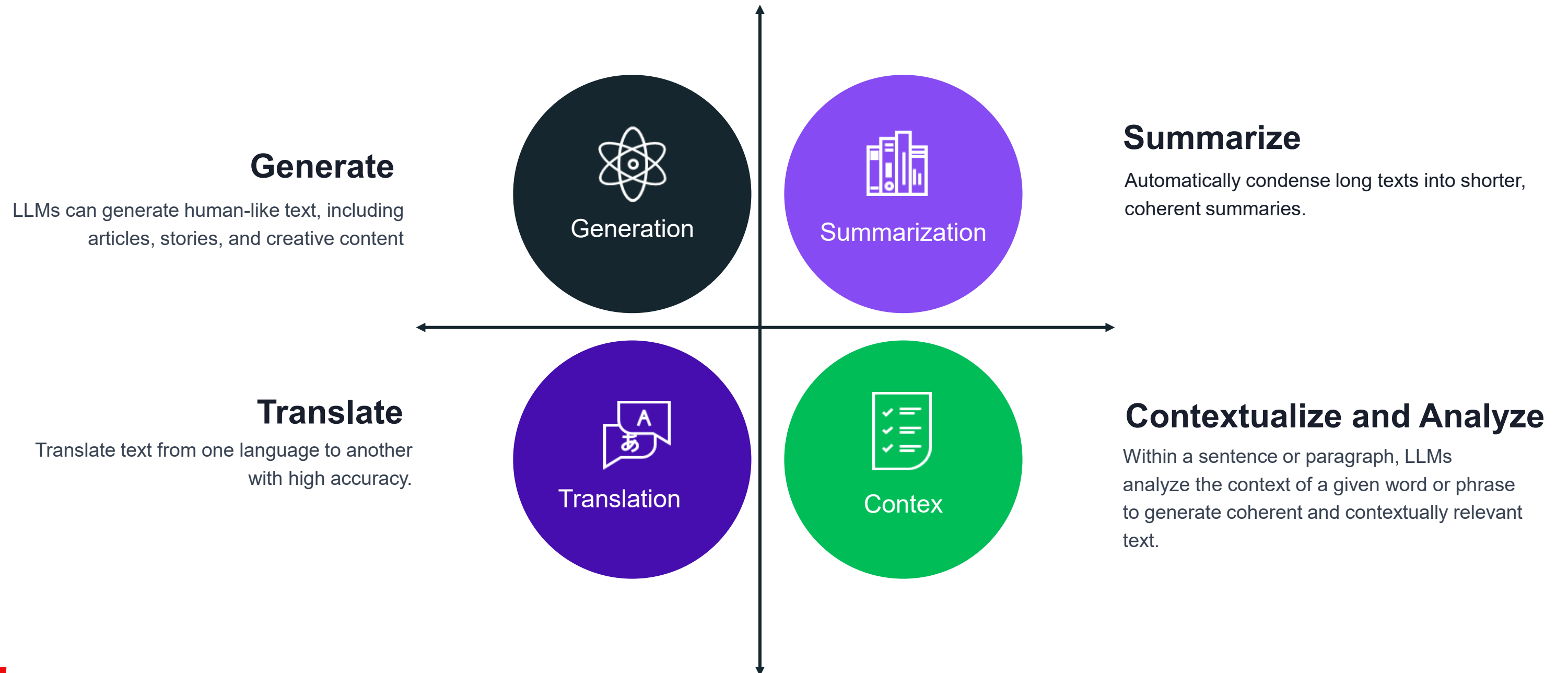
## Benefits

- Improved accuracy in text formation; with accurate conversion of text to digital format
- Reduced Cost, quicker time to generate information
- Note: for images, it should be an image file type not pdf



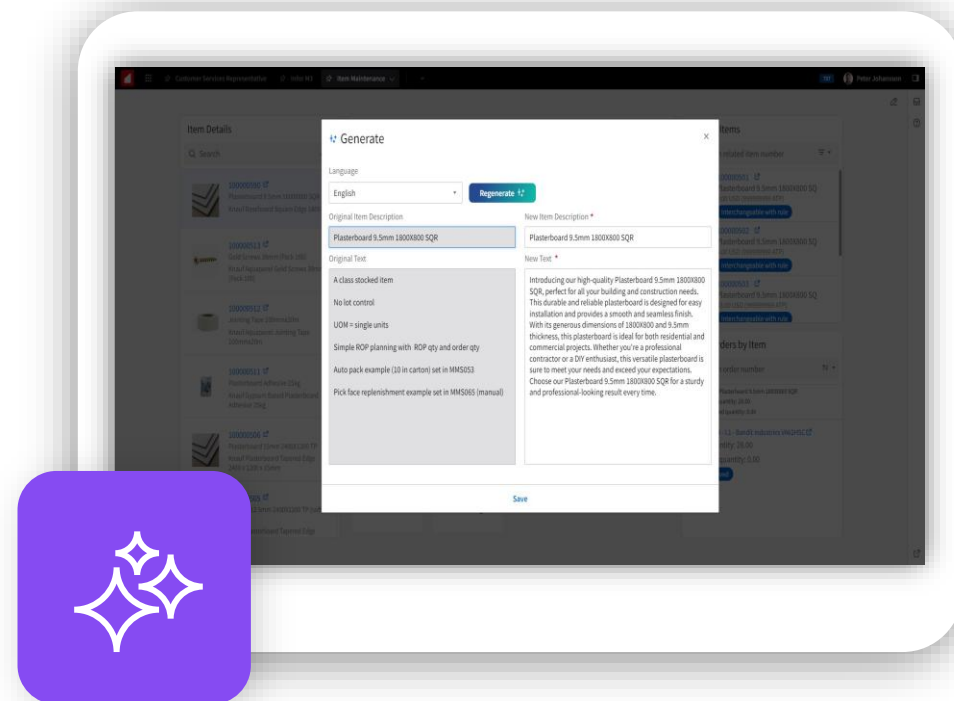


# Gen AI – Large Language Model



# Infor GenAI Experience

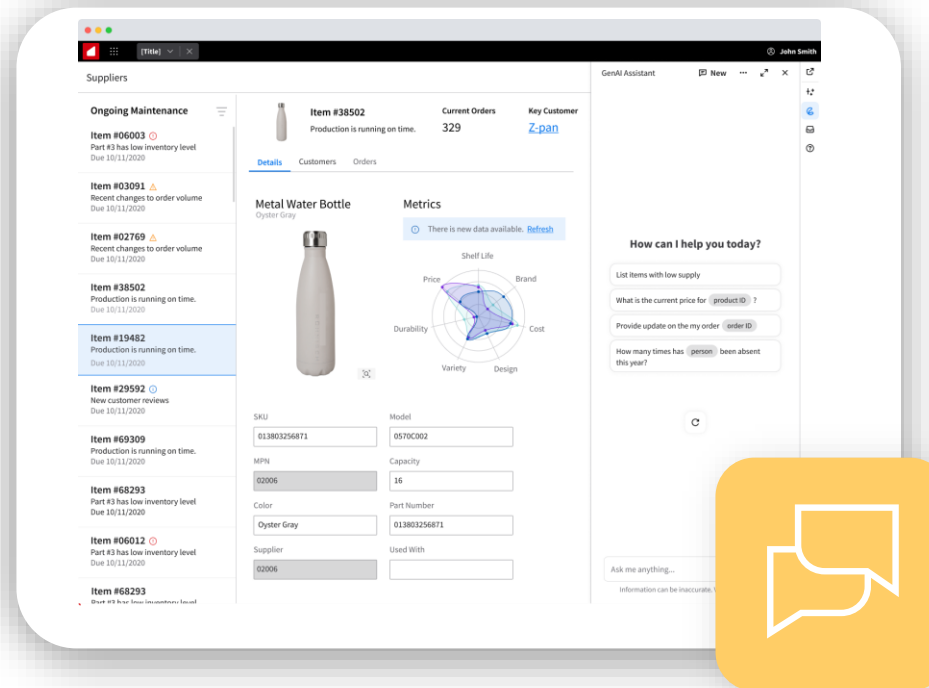
Available from 2024.10



## Embedded Experience

Hyper-productivity built directly into Infor CloudSuites. Quick Report and Description Generation enhance with translation capabilities.

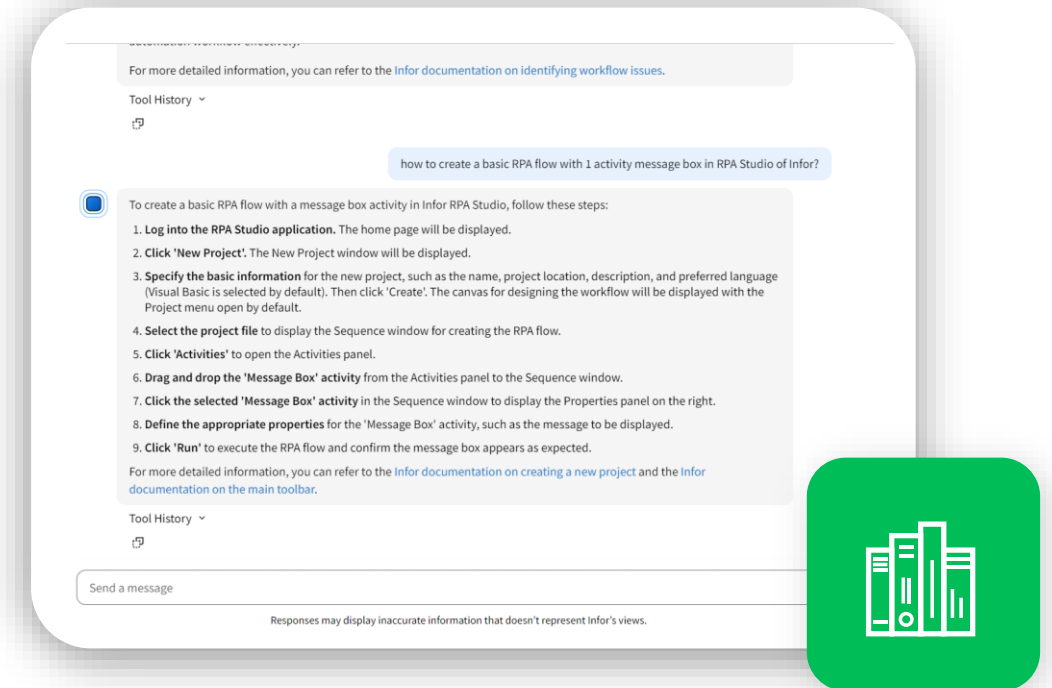
Limited Available 2025.04



## Infor GenAI Assistant

Conversational interface using natural language processing powered by Large Language Model. Allowing retrieval of information from Infor CloudSuites.

Limited Available 2025.04



## GenAI Knowledge Hub

Retrieval of Knowledge from different document types using Natural Language through conversational UX.

# Infor M3 GenAI Embedded Experiences

Examples

Generate

Language

English

French

English

Italian

Japanese

Norwegian

Español (SC)

Swedish

English (US)

Chinese (ZH)

Regenerate

New item name

McVitie's Hobnobs Milk Chocolate

New text

Indulge in the delightful combination of crunchy oat-based Hobnobs and rich, creamy milk chocolate with McVitie's Hobnobs Milk Chocolate. These biscuits are the perfect balance of sweet and savory, making them a delightful treat for any time of the day. Crafted with high-quality ingredients, these Hobnobs are sure to satisfy your cravings and leave you craving more. Whether you enjoy them as a mid-afternoon snack or alongside your favorite hot beverage, these biscuits are a true delight for the senses. Treat yourself or share with loved ones – either way, McVitie's Hobnobs Milk Chocolate will become a new favorite in your snack repertoire.

Save

Project. Open

GenAI

Tailored Service Guidelines

385C MH - 385C MH EXCAVATOR  
ADHOC SERVICE MH - ADHOC SERVICE MH

Generate

Based on the troubleshooting guidelines provided, here are the key steps to address the "E4321 Engine Oil Pressure

Low" error on the 385C MH Excavator:

Possible Causes:

1. C4321 Engine oil level out of range

- Low engine oil level

- Incorrect engine oil viscosity

Troubleshooting Actions:

1. AC430 Replacing oil filter

- Replace the clogged oil filter with a new one

- Conduct an oil pressure test to ensure proper lubrication

2. AC431 Filling up the oil

Issue. Open

JC Insights - 2025.02.00

Project Executive Summary

Refresh summary for M3WJC3

(SUMMARY REQUEST CAN TAKE UP TO A MINUTE)

LAST UPDATED ON FEB 07, 2025 @ 11:54

Project Executive Summary

Project Overview

- Project ID: M3WJC3

- Project Title: M3WJC2 schedule & budgeting

- Project Manager: Johanne Kristine Cotaco

- Sub-Project Managers: Madelene Hansson

- Project Start Date: 2025-01-09

- Current Status: Started

Status

The project has started but is experiencing delays in several activities. Some activities are still in the planning phase, while others have moved to execution. Close monitoring is required to address the delays and ensure the project stays on track.

Performance

Started:

- M3WJC2 schedule & budgeting (Z0001)

- EXECUTION (Z0202)

- INVOICING (Z0203)

Responses may be based on Infor data but AI-generated. Verify the information.

Equipment/Serialized Item. Open

Issue Overview

Refresh summary for 0000000002

(SUMMARY REQUEST CAN TAKE UP TO A MINUTE)

LAST UPDATED ON FEB 10, 2025 @ 12:39

Customer Claim Issue

This issue, with the number 0000000002, was raised on January 20, 2022, and has a priority of 5, which indicates a high-priority customer claim. The issue consists of 38 lines, with the lowest status being "New" and the highest status being "Open".

Actions Completed:

None. All actions related to this issue are currently in the "Open" status.

Actions Required:

Based on the information provided, the following actions are required to address this customer claim:

- Customer return

- Replacement item, additional quantity

- Addressing transport damage and bad quality issues across multiple line items

The issue requires prompt attention to

Responses may be based on Infor data but AI-generated. Verify the information.

Insights

Equipment Health Check

385C MH - 385C MH EXCAVATOR

385C MH EXCAVATOR

Generate

Equipment Information: The equipment in question is a 385C MH EXCAVATOR, identified by customer number 000000004 and origin identity 10000279. It belongs to equipment group 100 and category 00.

Health Status: The current status of the equipment is "Serviceable" (status code 20), indicating that the excavator is in good working condition and ready for operation.

Equipment Run Time: According to the meter readings, the excavator has logged 1 hour of operation since new. However, this seems inconsistent with the actual meter values recorded during recent services, which show significantly higher usage. The most recent service record indicates 4,630.42 hours of operation, suggesting that the meter readings may not be up to date.

Services Performed: The excavator has

Responses may be based on Infor data but AI-generated. Verify the information.

Text Authoring for Item Descriptions

Tailored Service Guidelines

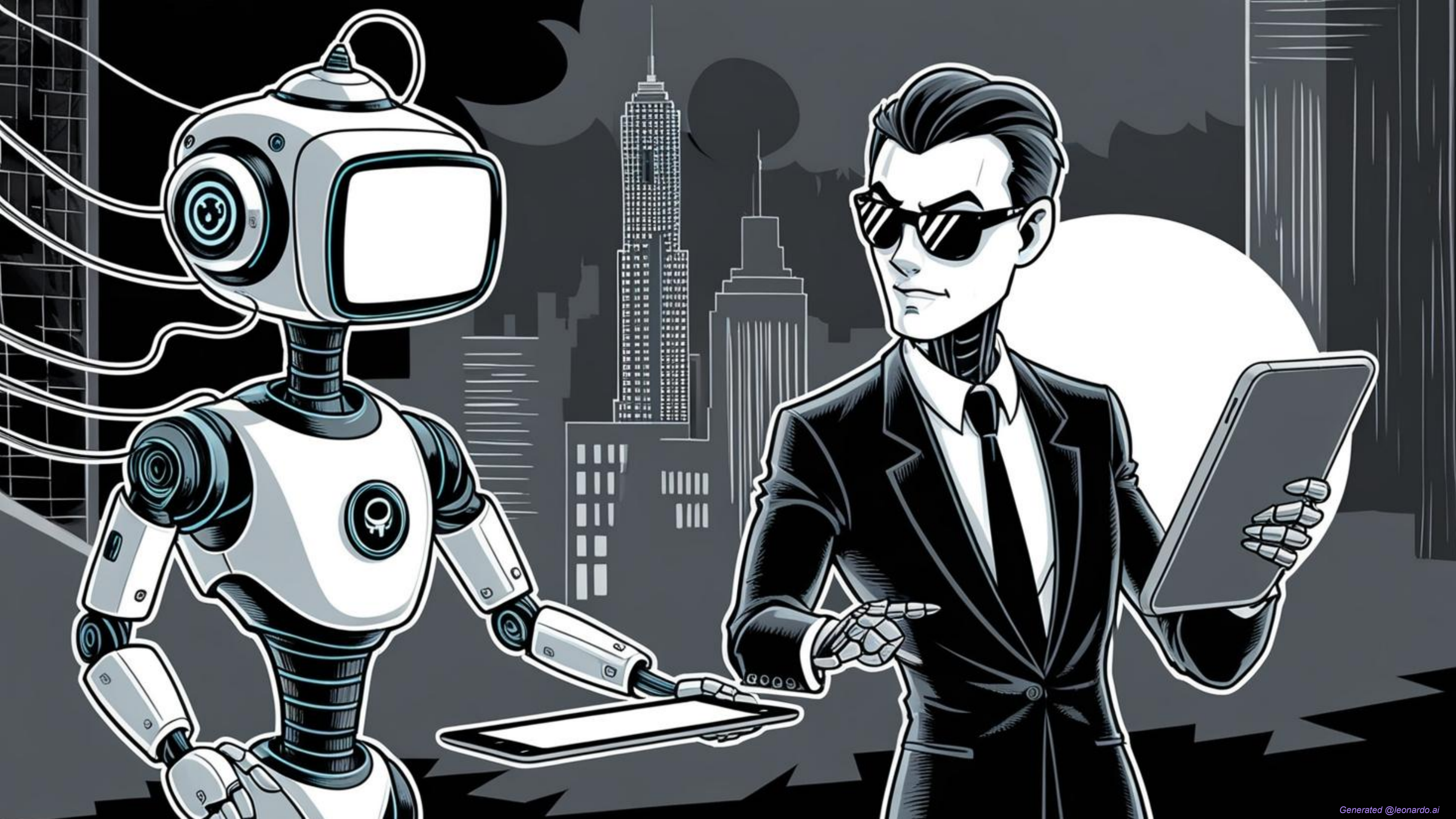
Project Executive Summary

Issue Management

Equipment Health Checks









SLSGDENA011\_TRN\_New - MEC/M3EDI\_M3EDISalesOrder\_Load\_In\_2\_13\_0/M3EDI\_M3EDISalesOrder\_Load\_In\_2\_13\_0.map - Infor Business Document Mapper

File Edit View Navigate Search Project Run Window Help

Mapping Explorer

Package Explorer

MEC

- M3BE14\_COC\_Out\_MBM\_CustomerOrder\_Confirm\_1
- M3BOD\_AccountingEntity\_Sync\_Out\_2\_15\_0
- M3BOD\_CustomerPartyMaster\_Process\_In\_2\_11\_0
- M3BOD\_CustomerPartyMaster\_Sync\_Out\_2\_12\_1
- M3BOD\_InventoryAdjustment\_Process\_In\_2\_12\_1
- M3BOD\_ItemMaster\_Process\_In\_2\_14\_7
- M3BOD\_ItemMaster\_Sync\_Out\_2\_14\_6
- M3BOD\_Requisition\_Process\_In\_2\_12\_1
- M3BOD\_Requisition\_Sync\_Out\_2\_12\_1
- M3BOD\_SalesOrder\_Sync\_Out\_2\_13\_5
- M3EDI\_M3EDISalesOrder\_Load\_In\_2\_13\_0
- SalesOrderIn
- zJMSalesOrderInV2

Palette

Select

Marquee

Link

Core Function:

- Loop
- If
- Boolean
- Java
- Repository
- Assign
- Collector
- Restructure
- Note

M3 Functions

<ProcessSalesOrder xmlns="http://schema.infor.com/InforOAGIS/2" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://schema.infor.com/2.13.x/InforOAGIS/BODs/ProcessSalesOrder.xsd" releaseID="9.2" versionID="2.13.5" systemID="1" >

<ApplicationArea>

<Sender>

<LogicalID schemeVersionID="16.0.0.060">lid://infor.m3.m3</LogicalID>

<ComponentID schemeVersionID="16.0.0.20220920173922">M3BE</ComponentID>

<ConfirmationCode>OnError</ConfirmationCode>

</Sender>

<CreationDateTime>2022-12-06T06:16:44.639Z</CreationDateTime>

<BODID>1ebb9c95-4ad6-4f65-89c2-92ca29ade549</BODID>

</ApplicationArea>

<DataArea>

<Infor OS / API Flow / AddSalesOrderExt

POST https://mingle-ionapi.inforcloudsuite.com/SLSGDENA011\_TRN/APIFLOWS/AddSalesOrderExt/AddSalesOrderExt

Params Authorization Headers (12) Body Scripts Settings

none form-data x-www-form-urlencoded raw binary GraphQL JSON

```
1 {
2   "Header": {
3     "CustomerNumber": "75-JMSE01",
4     "ExternalOrderID": "HKSynk01",
5     "Facility": "A01",
6     "RequestedDeliveryDate": "20251212",
7     "Address": {
8       "Type": "1",
9       "ID": "LOC002"
10    },
11    "Charge": {
12      "Type": "HEAD",
13      "Amount": "12"
14    },
15    "Text": {
16      "LocationType": "1",
17      "Value": "TESTING",
18      "DocClass": "C001"
19    }
20  },
21  "Lines": [
22    {
23      "ItemNumber": "75-JM001",
24      "Warehouse": "001",
25      "Quantity": 1,
26      "Price": 5.0
27    },
28    {
29      "ItemNumber": "75-JM002",
30      "Warehouse": "001",
31      "Quantity": 2,
32      "Price": 10.0
33    },
34    {
35      "ItemNumber": "75-JM003",
36      "Warehouse": "001",
37      "Quantity": 3,
38      "Price": 15.0
39    }
40  ]
41 }
```

API Flow zJMSalesOrderExt

API Parallel Decision

Start AddOrderHead

Outline

GetCustomerPurchaseOrderDate

GetCustomerParty

CnvPtrAliasCUNO

TranslateCUNO

CRS610MI.GetOrderInfo

GetShipToParty

CnvPtrAliasADID

ShipFromPartyLocationLoop

GetShipFromPartyID

HeadContractRef

GetBillToParty

CnvPtrAliasINRC

GetPayFromParty

CnvPtrAliasPYNO

SetDefaultPYNO

GetTransportationTerm

GetTransportationMethodCode

GetPaymentTerm

GetEarliestDeliveryDateTime

GetRequiredDeliveryDateTime

GetLatestDeliveryDateTime

GetPaymentMethodCode

UserAreaPropertyLoopHeader

GetSalesPersonReference

AuthorizationResponse

GetOrderTypeCode

GetCurrencyCode

GetShipToLocationLoop

GetYref

Mapping Console - M3EDI\_M

Variables and Constants

Moog

Search (\* = any string):

Index	Name	Type	Data Type	Value	Description
1.	AGNO	Variable [VID91]	String	""	Please describe me
2.	WHLOHead	Variable [VID89]	String	""	Warehouse, size is 3, type is Alpha
3.	FACIHead	Variable [VID88]	String	""	Facility, size is 3, type is Alpha
4.	DocumentID	Variable [VID87]	String	""	Please describe me
5.	DWHZ	Variable [VID86]	String	""	Requested delivery time, size is 4, type is Alpha

INRC

PYNO

PYNO

PYNO

TEDL

MODL

TEPY

FDDE

RLHZ

LDDE

PYCD

OIS300 Customer Order. Open Toolbox

Inform F&B Demo Inform M3 F&B EMEA (400/DDD)

Maximum hits reached. Show

customer	Payer	Name	Whs	Req dt	Rdytm	Order Type	Lo-Sts	Hi-Sts	Cmt	Open Net	Total Net	Custo
60001	260001											EXT P
7220	U7220								Y03		365027,10	
7200	U7200								Y03		266900,32	
60002	260001								Y01	4144,85	4144,85	
7210	U7210								Y03		169722,00	
88011	688011										57,67	
60005	260001								d	104,40	104,40	EDI-T
80005	680005										499,20	
7210	U7210								Y03		636395,31	
CDCE1	YICDE1										222,72	20067
62001	262001								Y01		2176,10	
62002	262002								Y01		1088,05	
62002	262002								Y01		10162,34	
62002	262002								Y01		5081,17	
62002	262002								Y01	428,17	428,17	
8210	U8200								Y03		2899,23	
V0007	UV2002								Y03		030013,30	
7210	U7210									1931,65	1931,65	
010020	YD10020								Y03			
7220	U7220								Y03			
8210	U8200								Y03			
7210	U7210								Y03			
S200312	US200312								Y03			
7220	U7220	Walter Foodservice - IT	991	250212		ZAU			Invoiced	--		Y03
8210	U8200	Market Plus Rennes Store #210 - SA	991	250212		ZAU			Invoiced	--		Y03
RLP1010	FRLP1010	Leclerc SCARMOR - Epicerie	F10	250213		Via DC Delivery			Invoiced	--		Y01
RLP1010	FRLP1010	Leclerc SCARMOR - Epicerie	F10	250214		PTL			Cancelled	×		Y01

ActionsOptionsRelatedTools

Enter Customer Order

CO no

Customer

Payer

Bl agreement no

CO type

Panel sequence

Req delivery dt

Facility

Deliv customer

Address no

Mapping ExplorerPackage ExplorerM3EDI\_M3EDISalesOrder\_Load\_In\_2\_13\_0.map

MEC

M3BE14\_COC\_Out\_MBM\_CustomerOrder\_Confirm\_1

M3BOD\_AccountingEntity\_Sync\_Out\_2\_15\_0

M3BOD\_CustomerPartyMaster\_Process\_In\_2\_11\_0

M3BOD\_CustomerPartyMaster\_Sync\_Out\_2\_12\_1

M3BOD\_InventoryAdjustment\_Process\_In\_2\_12\_1

M3BOD\_ItemMaster\_Process\_In\_2\_14\_7

M3BOD\_ItemMaster\_Sync\_Out\_2\_14\_6

M3BOD\_Requisition\_Process\_In\_2\_12\_1

M3BOD\_Requisition\_Sync\_Out\_2\_12\_1

M3BOD\_SalesOrder\_Sync\_Out\_2\_13\_5

M3EDI\_M3EDISalesOrder\_Load\_In\_2\_13\_0

SalesOrderIn

zJMSalesOrderInV2

Outline

GetCustomerPurchaseOrderDate

GetCustomerParty

CnvPtrAliasCUNO

TranslateCUNO

CRS610MI.GetOrderInfo

GetShipToParty

CnvPtrAliasADID

ShipFromPartyLocationLoop

GetShipFromPartyID

HeadContractRef

GetBillToParty

CnvPtrAliasINRC

GetPayFromParty

ProcessSalesOrder

xmlns="http://schema.infor.com/InforOAGIS/2" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" http://schema.infor.com/2.13.x/InforOAGIS/BODs/ProcessSalesOrder.xsd releaseID="9.2" versionID="2.13.5" systemE

ApplicationArea

Sender

LogicalID schemeVersionID="16.0.0.060">lid://infor.m3.m3/LogicalID

ComponentID schemeVersionID="16.0.0.20220920173922">M3BE/ComponentID

ConfirmationCodeOnError/ConfirmationCode

Sender

CreationDateTime>2022-12-06T06:16:44.639Z/CreationDateTime

BODID>1ebb9c95-4ad6-4f65-89c2-92ca29ade549/BODID

ApplicationArea

DataArea

Process

AccountingEntityID>400\_AAA/AccountingEntityID

LocationID>003/LocationID

ActionCriteria

ActionExpression actionCode="Add"/>

ActionCriteria

Process

SalesOrder

SalesOrderHeader

DocumentID

ID accountingEntity="400\_AAA" location="401" variationID="310313" lid="lid://infor.m3.m3">TH01/ID

DocumentID

AlternateDocumentID

ID schemeName="customer">TH01/ID

AlternateDocumentID

DisplayID>TH01/DisplayID

LastModificationDateTime>2022-12-06T06:16:44.261Z/LastModificationDateTime

LastModificationPerson

IDs

ID accountingEntity="400\_AAA">MATJOA0/ID

IDs

Name>Joakim Mattsson/Name

LastModificationPerson

Status

Code>Approved/Code

EffectiveDateTime>2022-12-06/EffectiveDateTime

ArchiveIndicator>false/ArchiveIndicator

Status

POSThttps://mingle-ionapi.inforcloudsuite.com/SLSGDENA011\_TRN/APIFLOWS/AddSalesOrderExt/AddSalesOrderExt

ParamsAuthorizationHeadersBodyScriptsSettings

noneform-datax-www-form-urlencodedrawbinaryGraphQLJSON

1{

2Header: {

3CustomerNumber: "75-JMSE01",

4ExternalOrderID: "HKSynk01",

5Facility: "A01",

6RequestedDeliveryDate: "20251212",

7Address: {

8Type: "1",

9ID: "LOC002"

10},

11Charge: {

12Type: "HEAD",

13Amount: "12"

14},

15Text: {

16LocationType: "1",

17Value: "TESTING",

18DocClass: "C001"

19},

20},

21Lines: [

22{

23ItemNumber: "75-JM001",

24Warehouse: "001",

25Quantity: 1,

26Price: 5.0

27},

28{

29ItemNumber: "75-JM002",

30Warehouse: "001",

31Quantity: 2,

32Price: 10.0

33},

34},

35}

APIParallel


StartAddOrderEnd



*Create a sales order for customer 75-JMSE01 on facility A01 and with customer order number (CUOR) set to Demo001.  
Then I would like to add one order line on warehouse 001 for item 75-JM001 with quantity 1 and sales price 10.*


# GenAI Assistant (LA)

The conversational chatbot experience which allows retrieving information from different CloudSuites using natural language. The action users can take using the chat interface is called a Tool. It utilizes API interactions to retrieve industrial data and the LLM to produce a response back to the user in a conversational manner.




### Problem

- Traditional ERP systems are complex and not user-friendly, requiring users to navigate multiple menus and modules to complete tasks.
- Users struggle to quickly access insights and data, delaying critical business decisions and reducing productivity.



### Solution

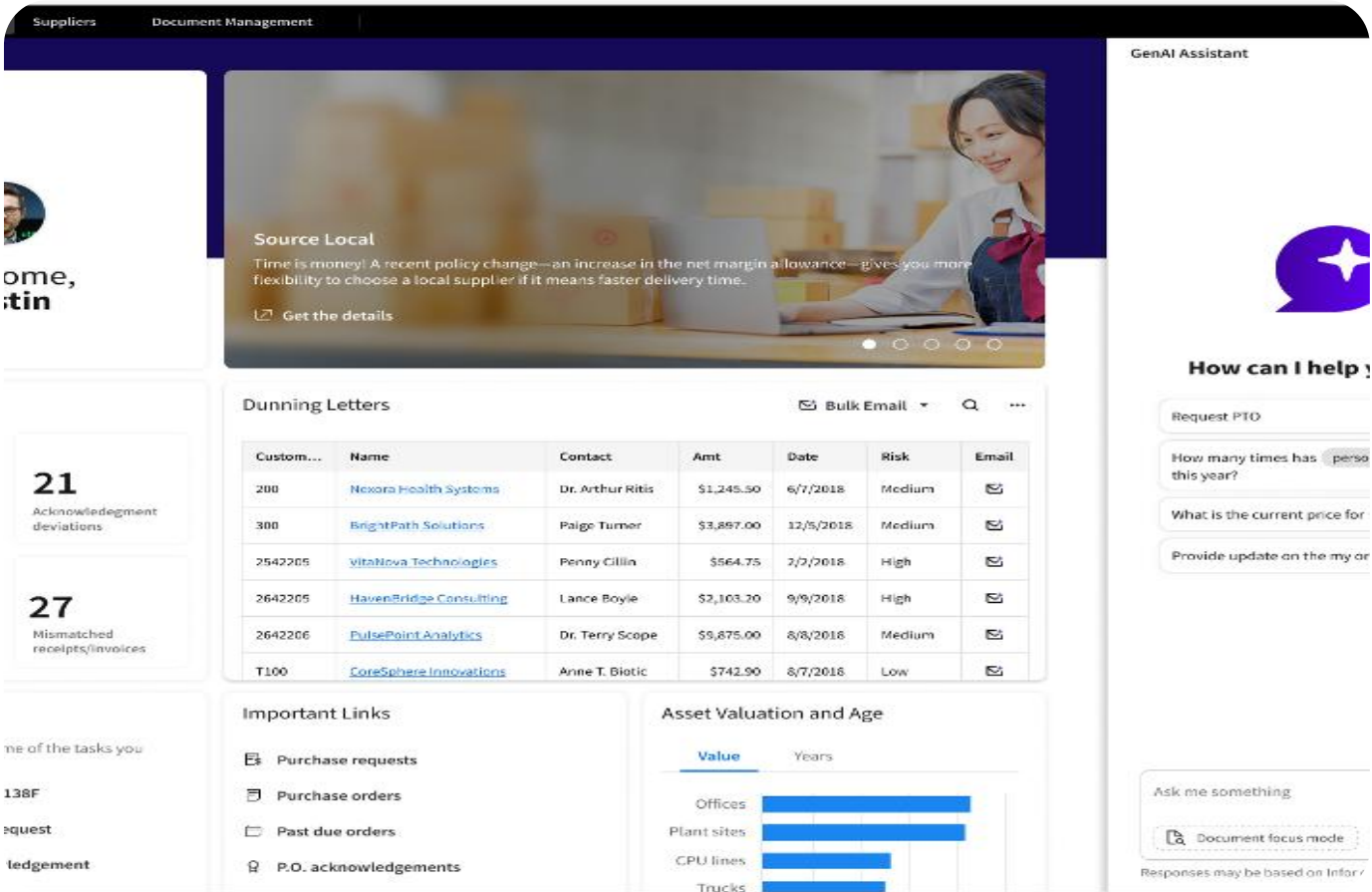
- Conversational chatbot that understands complex user prompts and orchestrating events to retrieve the correct information from a CloudSuite using pre-defined Tools.



### Benefits

- Fast and efficient information retrieval
- In-context, human-like conversational experience
- Personal assistant for quick and easy queries

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Feature Flag	All M3 CloudSuites	Major / Minor
Additional Info	Decision maker	Release Training
<a href="#">KB3548379</a>	Business Users	Introducing & Using





# M3 Agents for GenAI Assistant

The M3 GenAI Agents are AI-powered assistants embedded within M3 to support users with real-time summaries and recommendations across various operational areas. These Agents analyze key business data and provide structured insights, enabling users to make informed decisions faster and with greater confidence.

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Configuration Option	All M3 CloudSuites	High Potential / Low
Additional Info	Decision maker	Release Training
2025.10	All Subject Matter Experts	TBC

### Caution



- While these AI-driven insights can significantly enhance decision-making, it is important to note that this version of the Agents will evolve in coming releases. The output from these initial Agents should be used as decision support rather than absolute truth, with users applying their expertise to validate recommendations.

### Solution

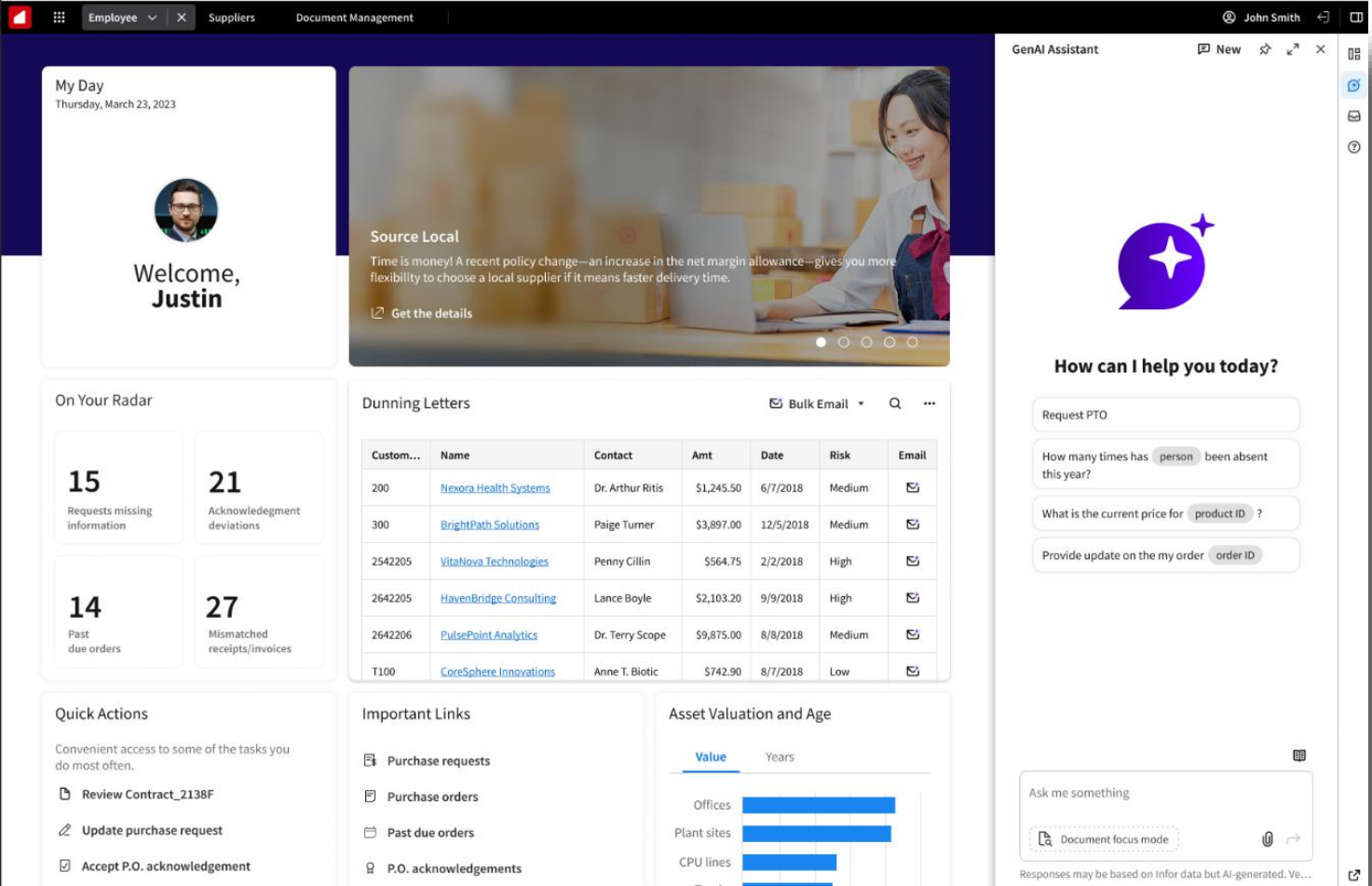


- 10 M3 specific Agents
- The initial GenAI Agents will focus on summarizing different types of orders, including customer orders, purchase orders, rental orders, distribution orders, project orders, work orders, and maintenance customer orders.
- Additionally, there will be an Agent for accounts receivable and others for core business data.

### Benefits



- Faster decision-making – AI-driven summaries present relevant information instantly, reducing time spent on manual analysis.
- Improved accuracy – Structured insights minimize human errors and inconsistencies in data interpretation.
- Enhanced efficiency – Users can access critical details at a glance without navigating complex reports.
- Scalability – AI capabilities will expand to additional areas over time, providing broader support across ERP functions.



# M3 Agents for GenAI Assistant

The M3 GenAI Agents are AI-powered assistants embedded within M3 to support users with real-time summaries and recommendations across various operational areas. These Agents analyze key business data and provide structured insights, enabling users to make informed decisions faster and with greater confidence.

## Available Agents

- M3\_Supplier\_Agent
- M3\_Purchase\_Order\_Line\_Search\_Agent
- M3\_Workorder\_Summary\_Agent
- M3\_Account\_Receivable\_Summary\_Agent
- M3\_Project\_Agent
- M3\_Distribution\_Order\_Summary\_Agent
- M3\_Rental\_Agreement\_Summary\_Agent
- M3\_Customer\_Order\_Information\_Agent
- M3\_Customer\_Order\_Summary\_Agent
- M3\_Item\_Agent
- M3\_Customer\_Agent
- M3\_Purchase\_Order\_Summary\_Agent

Change Delivery	Available for CloudSuite(s)	Potential Business / Tech. Impact
Configuration Option	All M3 CloudSuites	High Potential / Low
Additional Info	Decision maker	Release Training
2025.10	All Subject Matter Experts	TBC

Employee

Suppliers

Document Management

My Day

Thursday, March 23, 2023

Welcome, Justin

Source Local

Time is money! A recent policy change—an increase in the net margin allowance—gives you more flexibility to choose a local supplier if it means faster delivery time.

Get the details

On Your Radar

15

Requests missing information

21

Acknowledgment deviations

14

Past due orders

27

Mismatched receipts/invoices

Quick Actions

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

Review Contract\_2138F

Update purchase request

Accept P.O. acknowledgement

Dunning Letters

Bulk Email

Custom...	Name	Contact	Amt	Date	Risk	Email
200	Nexora Health Systems	Dr. Arthur Ritis	\$1,245.50	6/7/2018	Medium	
300	BrightPath Solutions	Paige Turner	\$3,897.00	12/5/2018	Medium	
2542205	VitaNova Technologies	Penny Cillin	\$564.75	2/2/2018	High	
2642205	HavenBridge Consulting	Lance Boyle	\$2,103.20	9/9/2018	High	
2642206	PulsePoint Analytics	Dr. Terry Scope	\$9,875.00	8/8/2018	Medium	
T100	CoreSphere Innovations	Anne T. Biotic	\$742.90	8/7/2018	Low	

Important Links

Purchase requests

Purchase orders

Past due orders

P.O. acknowledgements

Asset Valuation and Age

Value

Years

Offices

Plant sites

CPU lines

GenAI Assistant

New

John Smith

How can I help you today?

Request PTO

How many times has person been absent this year?

What is the current price for product ID ?

Provide update on the my order order ID

Ask me something

Document focus mode

Responses may be based on Infor data but AI-generated. Ve...

infor

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# The End