

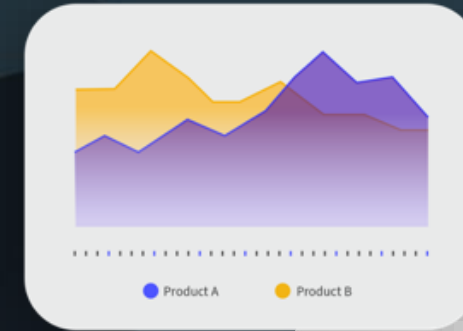


M3 Financials

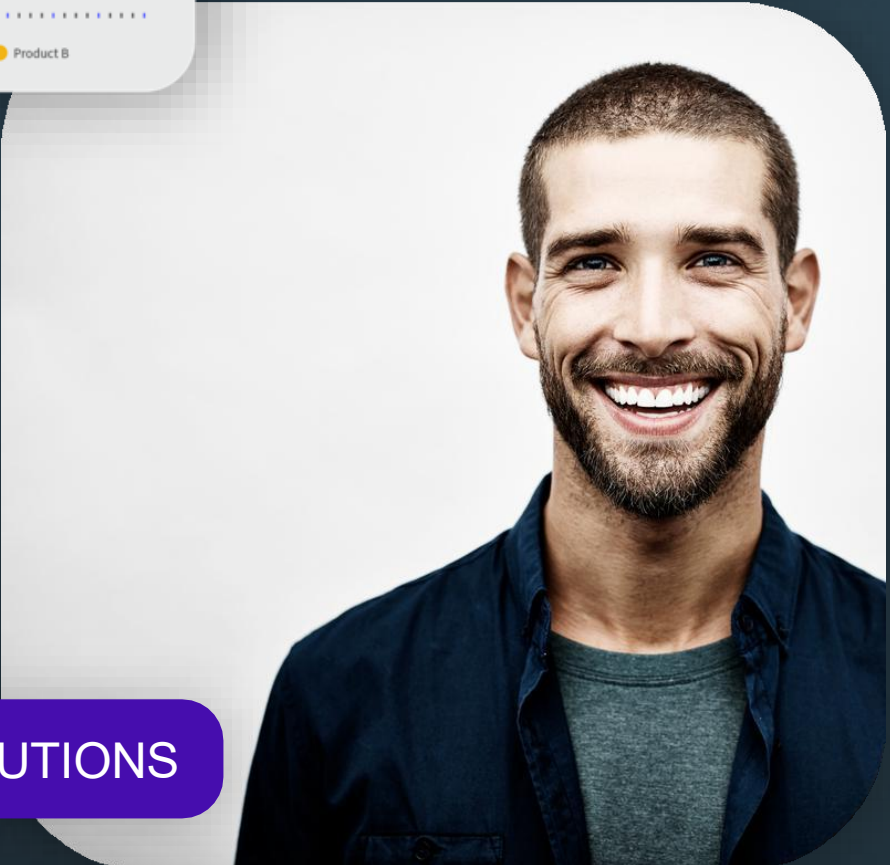
# Kundeoppfølging med Experience Designer...

Magne Skamfer  
Markus Lohk

Date 18.03.2026



INDUSTRY SPECIFIC



CLOUDSUITE SOLUTIONS

# Agenda

01

- Workspaces

02

- Enhanced Classic Accounts Receivable

03

- Experience Designer

04

## Misc

- Varslinger/Oppgaver
- Purring

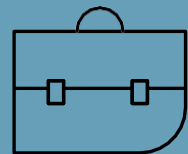
GenAI – AI Agenter

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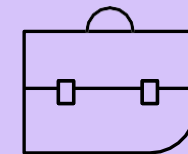
# Verktøykassen

M3 Cloudsuites tilbyr fler og fler verktøy for å tilpasse, modifisere og maksimere brukeropplevelsen og produktiviteten.



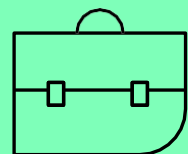
## Experience Designer

M3-spesifikt brukergrensesnitt for å tilpasse brukeropplevelsen. Bygget i M3 som et frikoblet grensesnitt. Alle tilgjengelige handlinger er mulig via API-er.



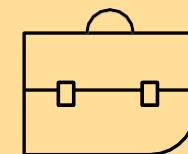
## Workspaces

M3-spesifikt brukergrensesnitt som tilpasser brukeropplevelsen. Bygget i M3 som et frikoblet grensesnitt. Alle tilgjengelige handlinger kan utføres via API-er.



## Widgets / Smart Panel

Widgets har vanligvis ett enkelt formål, men blir stadig mer avanserte og løser nå flere behov samtidig. De kan kjøres parallelt med applikasjonene gjennom Smart Panel.



## Scripts

M3 tilbyr i dag en rekke standardiserte scripts som en del av 'Industry Content'. Dette kan ha stor betydning for hvordan brukeren opplever hvor intuitiv og brukervennlig applikasjonen er.

# GenAI Assistant / AI Agent

- **GenAI** genererer innsikt, tekst og løsninger basert på store datamengder og språkforståelse.
- **AI-agenter** bruker denne intelligensen til å hente data, ta beslutninger og utføre oppgaver autonomt.
- Sammen gir de et system som både forstår, foreslår og handler på dine vegne.

## Eksempler på spørsmål å stille AI Agenten

- ✓ Vis meg en oppsummering av alle åpne og forfalte poster for kundenummer 1012890
- ✓ Er det noen forfalte fakturaer for kunden 1012833 som ikke er fulgt opp eller purret?
- ✓ Vil kundenummer 1012710 overstige kredittgrensen sin basert på kommende forfall og betalingshistorikk?

GenAI Assistant

Hi, I'm your GenAI Assistant.

**A few things to know...**

I am an AI service here to answer your questions and assist you with a range of business tasks.

I cannot identify the screen you are currently on, so I am unable to answer questions directly related to it at this time. I'm working on developing this capability soon.

For more information, check out the [User Guide](https://docs.infor.com/inforos/2024.x/en-us/useradminlib_cloud/default.html?helpcontent=genaiug/cover.html).

**Disclaimer**

Responses generated by AI may not always be accurate or reliable. Verify the information and use responsibly. See [Transparency Note for GenAI Service](#) to learn more.

Ask me anything...

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

# M3 User Experience for kundeoppfølging

The screenshot displays a comprehensive M3 user interface for customer follow-up. It is divided into several key sections:

- My Day:** Shows the current date (Thursday, January 16, 2025) and a personalized welcome message for Gunilla.
- My Open PO:s per Supplier:** A donut chart showing the distribution of open purchase orders by supplier: Atatalis (23%) and Fruit Vegetable & Flowers Supplier (77%). The total line amount is 8768.
- On my Radar:** Two key metrics: 24 My Open Order Lines and 24 My Delayed Order Lines.
- Search Supplier:** A search bar with 'fruit' entered, showing a list of suppliers including 'Fruit Vegetable & Flowers Supplier 3' and others.
- Items Ordered Past 12 Months:** A horizontal bar chart showing the quantity of items ordered, such as Lemon Doughnut, Chocolate Doughnut, and Sliced Bread.
- Open Orders (selected suppl...):** A search bar for open orders.
- Order Lines (selected order):** A search bar for specific order lines.
- Materialpl...:** A section for material planning.
- Demo Cash Flow Credit Control:** A detailed financial overview including:
  - Year and Periods:** A table showing the current period (2025) and opening/first periods.
  - Division Information:** A table with details like Company name (Infor M3 Distribution), Division (AAA), Name (Infor M3 Distri), Country (US), Local currency (USD), Facility (A01), and Warehouse (001).
  - Key Values & Charts and Trends:**
    - Invoice Amount - Per Period:** A line chart showing invoice amounts over time.
    - Incoming Payments - Per Period:** A line chart showing incoming payments over time.
    - Overdue Amount - Per Period:** A bar chart showing overdue amounts over time.
    - Days Sales Outstanding - Trend:** A line chart showing the trend of days sales outstanding over time.
- Financial Insights:** A sidebar with various metrics:
  - Invoice Monitors:** 0 Invoices Overdue (Max 30 days old), 16 High Risk Invoices (Older than 30 Days), 0 Open Credit Notes, and 4 Nr of Invoices exceeding 10k.
  - Available To Spend:** 10M Credit Limit (USD), 10M available, and 419K spent (4.19%).
  - Customer Contacts:** Details for Northman INC. (11337), including contact information and a 'More details' link.

# M3 Workspace – AR Controller

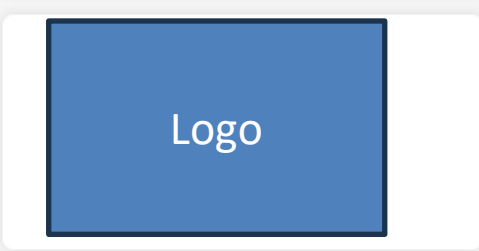
Oppgradering av viktige M3 Workspaces til den nye Infor-standarden gir bedre synlighet og oppdateringer uten å måtte gå inn i detaljerte transaksjonsdata.

The old workspace is titled "AR & CM Monitors". It features several sections: "Invoices sent last 30 Days" (3), "Invoices Overdue (Max 30 days old)" (2), "Doubtful Open Invoices (30 to 90 days old)" (6), "High Risk Invoices (Older than 90 Days)" (100), "Open Credit Notes" (43), and "Payment reminder stopped invoices" (100). It includes a "Top 10 - Outstanding Debt & Overdue Amount" chart, an "Order value not Invoiced" chart, "Accounts receivable monitors" (Unapproved Customers: 11, Credit blocked customers: 6, Tickler notes to action: 5, Stopped customer invoices: 100), "Alert List" (No Alerts Available), "Task List" (No Tasks Available), "My regular tasks" (Customer statements - open items, Customer statements with balance bfwd, Payment reminders, Letters of credit, Factoring bank remittance, Reconcile factoring payments, Display payer transactions), "Payment reminder monitors" (The used search query is invalid. Please c...), "Quick Edit - Customer Data" (Filter List, Name: medagoni, Status: 10, Responsible: AKANUMURI, Entry date: 02/07/2024, Country: US), "Number of overdue days" chart, and "Update Tickler notes" (Filter List, Payer: ISANDEEP!, Description: Test, Text line 1, Status: 0, Action date: 22/08/2024, User: MKOLUSU, Changed by: MKOLUSU, Payer: Y00004).

The new workspace is titled "Accounts Receivable Controller". It features a "My Day" header with the date "Sunday, September 1, 2024" and a "Welcome back, Brian" message. It includes the same "Top 10 - Outstanding Debt & Overdue Amount" and "Order value not Invoiced" charts. The "On Your Radar" section shows: "146 Payment reminders", "111 Review AR balances and aged invoices", "43 Open credit notes", and "122 Customer data - action required". The "Quick Actions" section includes: "46 Outstanding invoices - 1st Reminder", "1 Outstanding invoices - 2nd Reminder", and "14 Outstanding invoices - 3rd Reminder". The "Important Links" section includes: "Maintain Customer Details", "Display Payer Transactions", "Customer Statements", "Bank Remittance", "Credit Monitoring", "AR Balances", and "GDNI Report". The "Customer Contacts" section includes: "BD002 - General Supplies Uk...", "BD001 - Speedy Hire Limited", and "BD001 - Speedy Hire Limited". The "Available To Spend" section shows: "60K Credit Limit (GBP)", "46K available", and "14K spent (23.3%)".

- 5** Delayed COs  
Delayed last 5 days
- 6** My Late CO Lines  
Me = Salesperson
- 95** All Late Order Lines  
Delayed up to 50 days
- 2** Today's COs - Not all...  
Status 22-29
- 100+** Stopped Batch Orders  
Orders in status 15-55
- 2** DeL. ready to Invoice  
Me = Salesperson
- 99** Cust. with Creditstop  
Stopcode 1-3
- 3** My Pre.lim Customers  
Status 10

Welcome back, Pernille



Personal Notes

Today i need to remeber:

1. Check .....
2. Update....
3. Add..

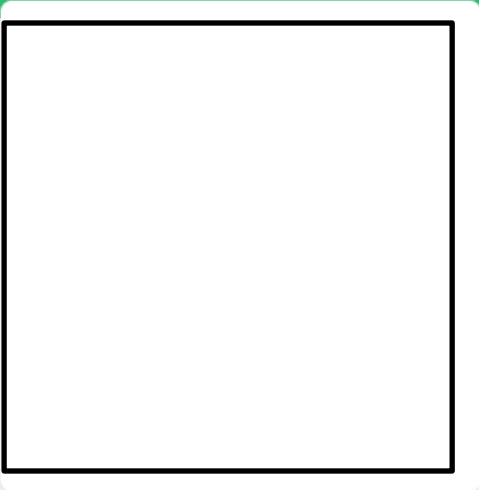
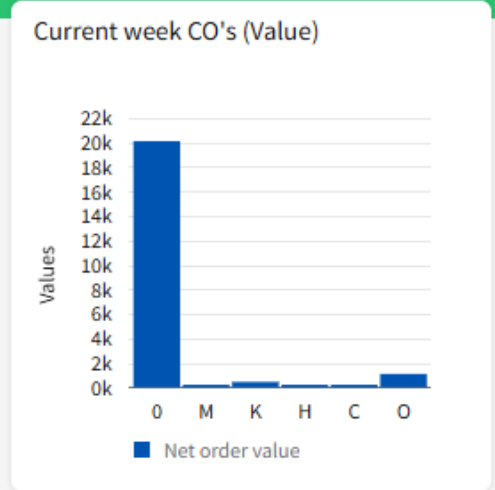
- Important Links
- Customer Order Hub - App
  - Mashup - Item Overview
  - Bring - Spor pakke
  - CRS610 - Customers
  - OIS300 - Orders
  - OIS275 - EDI/Batch orders in Error
  - OIS350 - Invoices
  - OIS390 - Customer Returns
  - MMS200 - Items

On Your Radar

- 58** All delayed order lines
- 100** All stopped orders
- 0** All delayed Pos connected to CO
- 100** EDI/Batch orders in error

58 All delayed order lines

Review



Customers

Dkre0002 (Assortment) ID: DKRE003 Telephone: 45678790 Email: More details

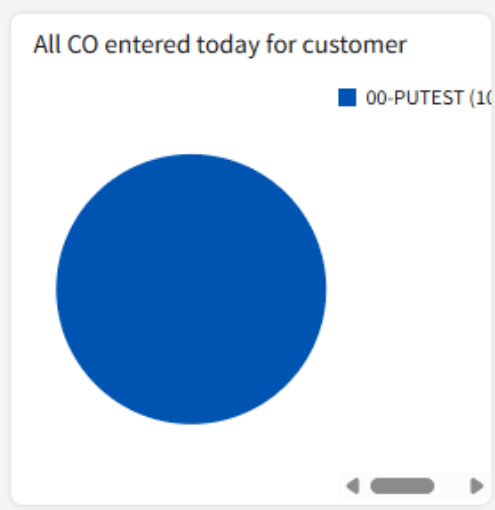
Dkre0002 (Assortment) ID: DKRE002 Telephone: 45678790 Email: More details

Available to spend: kr50,000.00

0.00 spent (0%)

Total credit limit: kr50,000.00

Spent: kr0.00



- Important Shortcuts
- CRS610 - My Customers
  - CRS610 - Not Active Customers
  - OIS275 - EDI/Batch orders in sttus 25
  - OIS300 - My Customer Orders
  - MWS410 - Deliveries departing today
  - OIS390 - Customer Return not completed

- Notification List
- Det er opprettet en ny kunde av Rebekka Stra... 21.11.2024, 12:55:52
  - Det er opprettet en ny kunde av Rebekka Stra... 21.11.2024, 12:55:52

- Task List
- Hei endre Blank 12.8.2025, 07:59:41
  - Oppdater kredittgrenser for kunde R... 21.11.2024, 13:58:08

COs with issues

- Delayed COs (Short term) 5
- CO - Delivery to Check (CUOR:10022\*) 12

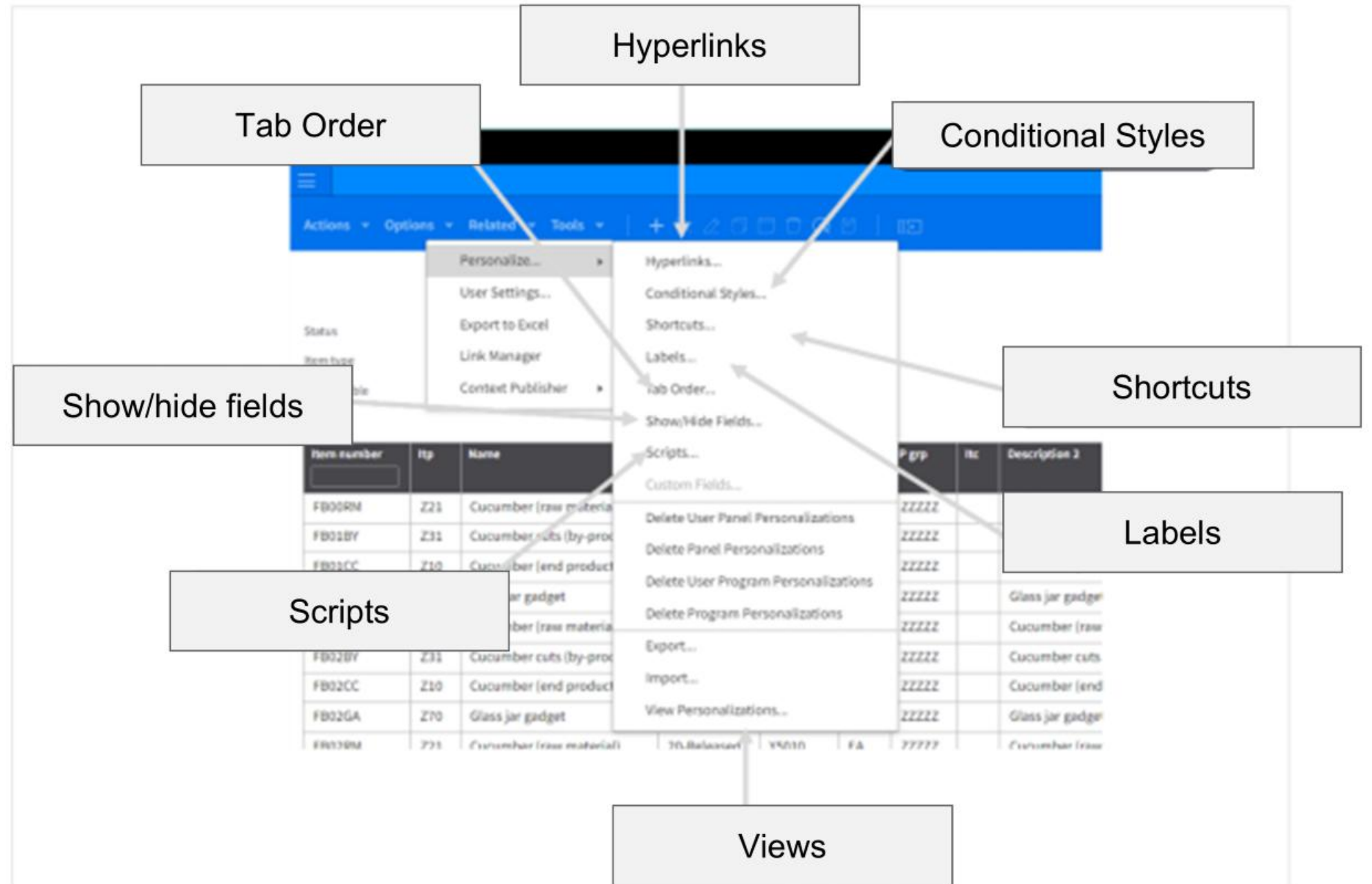
Open Cust. Overview - App

Customer group: ZZZ

00-PUTEST

# Nyttige personaliseringer i ARS200

Enkelt tilgjengelige personaliseringer kan raskt legges inn i M3 bildene og med en gang gi verdi for brukere.



# Script eksempler

## Autocomplete for raskere søk i browse felt

### Angi kundeordre

KO-nr

Kunde

Betaler

Avropsavtalenr

KO-type

Bildesekvens

Ønsket levdato

Virksomhe.enhet

Levering kunde

Adressenummer

**Leveringsadresse**

- 000-KANBC1 --- KAN Business Chain 1
- ABC123DE --- Juan Paulo Test
- C10000 --- CMAISONET
- C10002 --- CMAISONET
- C10005 --- BTO Trade account customer
- C10005A --- BTO Trade account customer
- C10005ABCD --- BTO Trade account customer
- C1001231 --- CMAISONET
- C1961 --- Miguel Angel Flores Garcia
- C1962 --- Miguel Angel Flores Garcia
- C1963 --- Angel Miguel Flores Garcia
- C1964 --- Flores Garcia Miguel Angel
- C1965 --- Flores Garcia Angel Miguel
- C1966 --- Flores Garcia Angel Miguel
- C1967 --- Flores Garcia Angel Miguel
- C1968 --- Flores Garcia Angel Miguel
- C1969 --- Flores Garcia Angel Miguel
- C1970 --- Flores Garcia Angel Miguel

\*The script works for any API transaction that has 'SQRY' as the input parameter.

## ToolbarShortcutButtons i kundebildet CRS610

Handleringer ▾ Alternativer ▾ Beslektet ▾ Verktøy ▾ +

Skriv ut Adresser Felthjelp Innstillinger Lag Kopiere Endre

**My Customers**

Status  -

Bruk

Kunde	lok	Ktp	Tid	Benevnelse	Telefon
<input type="text"/>					
Y000000		0-Normal	CA11	Domestic customer template	<a href="#">1122335</a>
Y001		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001000000		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001000001		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001000002		0-Normal	ZIP	Test Shop Customer	<a href="#">TELEPHO</a>
Y001000003		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001000010		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001000011		0-Normal	ZIP	Generic Shop Customer	<a href="#">TELEPHO</a>
Y001A10		0-Normal	81505	Anonymous Shop Customer (Branch A10)	<a href="#">TELEPHO</a>

\*Note: This script only works in the new H5 UI.

# Flere nyttige eksempler

## CallPhoneNumber

**Kontakt detaljer**

Benevnelse: Domestic customer template  
Adresse: Street/P.O. Box, Street/P.O. Box, County, St Paul MN CA11, United States  
By: St Paul, Område: , Stat: MN Minnesota, Postnummer: CA11, Land: US United States  
Telefonnummer 1: 11223355  
Telefonnummer 2: , Telefaksnr: , Kontaktperson: Deres ref 1: , Deres ref 2:

Status: 20-Definitiv  
Kundetype: 0-Normal  
EAN-kode: , SPLK-kode: , Søkeord: DOMESTIC  
Vårt lev nr: , Språk: GB English, Alt språk: GB English, Database: , 1-Papirdokument

**Ring Telefon**

\*You can use this script in any program that contains the Telephone number field.

## CreateMail

Ny ordre Markerte linjer: Send mail

Virkenhet: , Forsink:

Laveste status: , Høyeste status:

KO-nr	Kunde	Kundens ord	Lsu	L.dat	K.odt	Otp	Lv	Hi
8000000002	Y10000	28/00000194	003	141001	141010	D51	20	20
8000000001	Y10000	28/00000187	003	141001	141001	D52	20	20
6000000027	Y10003NY	SH QUOTATION2	001	220913	220912	D04	05	05
6000000026	Y900000004		001	220705	220705	D04	05	05
6000000025	Y900000002		003	220705	220705	D04	90	90
6000000024	Y001		003	211221	211221	D04	90	90
6000000023	Y900000001		001	211013	211013	D04	05	05
6000000022	Y10002CA		002	211012	211012	D04	05	05

Send Cc Subject: PPS170 Script header

Content

Buyer	Supplier	Supplier name	Whs	Item number	PO itm nme	Plan qty	Plo	Pur price
JOAFOR87	JKFTEST	Local US Supplier	001	JKFJKFJKFJ	Consumable	1	29120	1,00
JOAFOR87	JKFTEST	Local US Supplier	001	JKFJKFJKFJ	Consumable	1	29130	1001,00
JOAFOR87	JKFTEST	Local US Supplier	001	JKFJKFJKFJ	Consumable	1	29130	1001,00

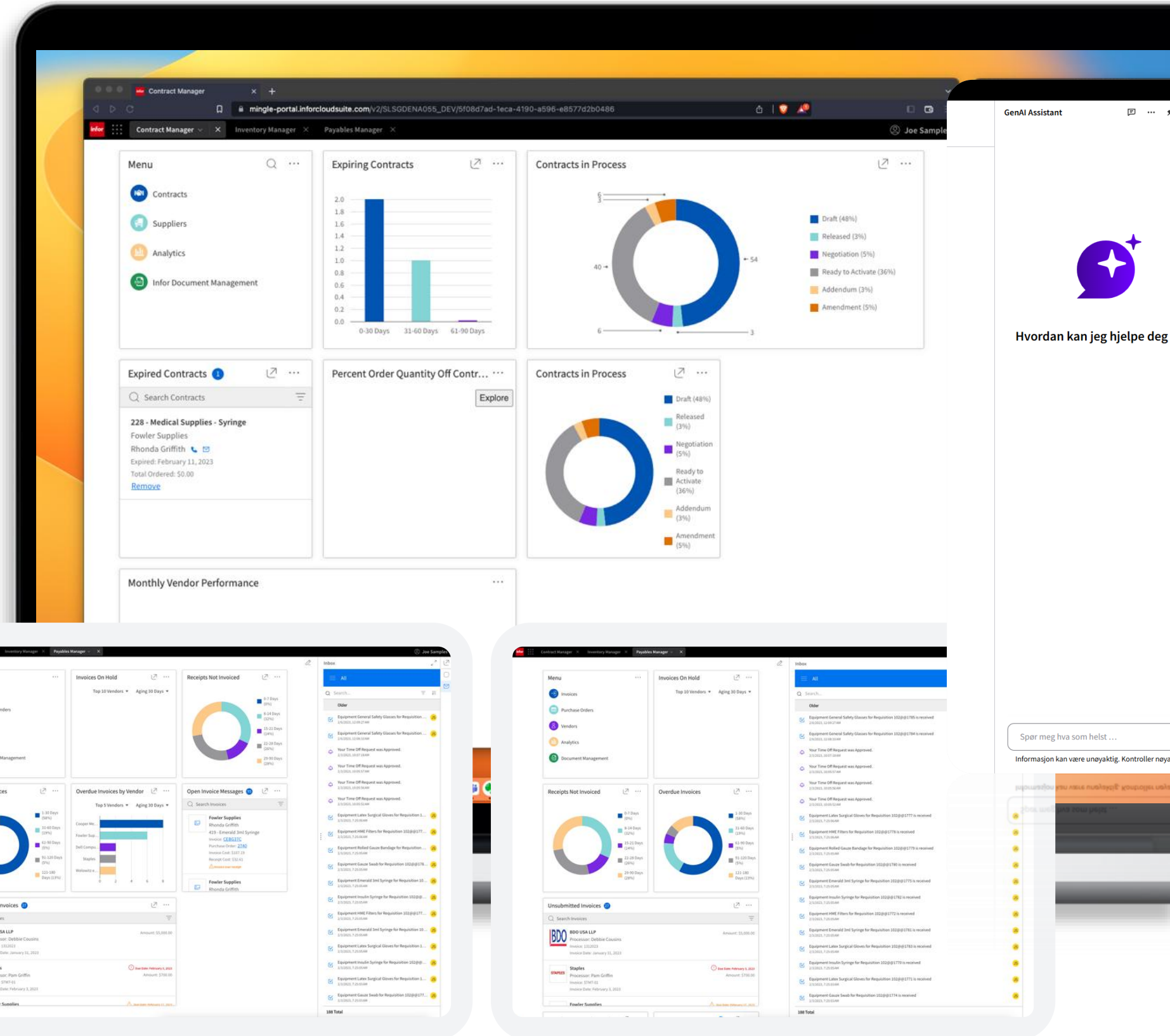
\*Note: This script only works in the new H5 UI.

# Smart Panelet i M3

## Utvidelse av datasynligheten for å forbedre brukeropplevelsen

- ✓ Innsikt, innboks og Smart hjelp samlet i én visning
- ✓ Fleksible visninger for både oversikt, detalj og handling
- ✓ Bygget for «multitasking»
- ✓ Pop-out-visninger for maksimal utnyttelse av skjermplassen

**infor**



GenAI Assistant



Hvordan kan jeg hjelpe deg ...

Spør meg hva som helst ...

Informasjon kan være uøyaktig. Kontroller nøye ...

# Related Information & IDM

- Koble til og finn ethvert dokument direkte i M3 via Smart Panel
- Last opp dokumenter fra hvilken som helst M3-skjerm ved å bruke Relatert informasjon
- Disse dokumentene vil bli lagret i Dokumentarkivet i IDM

## Slik får du tilgang til dokumentet:

Klikk på widgeten – PDF dukker opp

Klikk på «launch»-knappen på widgeten og IDM åpnes

Fra opptakslinje-relatert alternativ/snarvei kan du sette opp en dynamisk lenke til IDM

Alternativ – Åpne IDM manuelt og søk etter rekkefølge



**Infor M3 Distribution (750/AAA)**  
380 Saint Peter Street  
St Paul MN 55102  
United States  
TELEPHONE 1  
infor@infor.com

**ORDER CONFIRMATION**

Order number	Your ref 1	Your dt
0010001685	Contact 1	1/22/21
Inv recipient	Our reference	Order date
Y10003	Our reference	1/22/21

**Customer**  
Y10003CA  
Large Retailer California Branch  
Address Line 1  
Address Line 2  
Sacramento CA ZIP  
United States

**Payer**  
Y10003  
Large Retailer  
Address Line 1  
Address Line 2  
St Paul MN ZIP  
United States

Last printed	Your order no
1/22/21	
Salesperson	Quotation no
Unspecified	
Delivery terms	Delivery method
Cost Insurance and Freight (... named port of destination)	Road transport

Currency	Our sup no
USD US Dollars	
Your VAT reg no	Our VAT reg no
Payment terms	Cash disc term
30 days net	

Line	Sf	Item number	Name	Quantity	U/M	Delivery date	Spqty	Sales price	Discount amount	Amount
1		100001-VK	Test Extend M3 Shark	1	EA	1/22/21		100.00	3.76	96.24
			Business Chain					2.00		
			Prod Group Discount					1.76		

Discount	3.76
Charges	0.00
Order total	96.24
<b>Total</b>	<b>USD 96.24</b>

Actions Options Related Tools + [Icons]

Sorting order: I-C

New order

Facility [Search]

Delayed [ ]

Lowest status [Dropdown]

Highest status [Dropdown]

Apply

CO no	Customer	Customer's ord no.	Whs	Req dt	Cu dt	Otp	Lo	Hi	S	Ord gross	Fac	T	Due dt	Test
0000000001	Y10005	LJTEST 100523	001	190815	190814	D02	90	90			A01	*	000000	
0000000002	RHYTHMDE...	TEST	001	230427	230327	D02	22	33	4	8251,39	A01	*	000000	
0000000003	RHYTHMDE...		001	191116	191115	D02	66	66	9	231,00	A01	*	000000	
0000000004	RHYTHMDE...		001	191116	191115	D02	10	10	8	38007,56	A01	*	000000	
0000000005	RHYTHMDE...		001	191127	191126	D02	22	22	3	615,00	A01	*	000000	TESTJ001
0000000006	RHYTHMDE...		001	191127	220825	D02	10	10	3		A01	*	000000	
0000000007	RHYTHMDE...		001	191127	220825	D02	10	10	3		A01	*	000000	
0000000008	RHYTHMDE...		001	191127	220825	D02	10	10	8		A01	*	000000	
0000000009	RHYTHMDE...		001	221123	221122	D02	10	10	3	2302,00	A01	*	000000	
0000000010	RHYTHMDE...		001	191127	230607	D02	10	10	3	527,00	A01	*	000000	
0000000011	RHYTHMDE...		001	191116	230609	D02	10	10	3	231,00	A01	*	000000	
0000000012	RHYTHMDE...		001	191116	230609	D02	10	10	3	231,00	A01	*	000000	

Related Information

All [Dropdown]

0000000002 [PDF Icon]

Page 1 of 28

Context Viewer

inforBusinessContext JSON


```
{
  "screenId": "m3_OIS300_B",
  "entities": [
    {
      "entityType": "InforSalesOrder",
      "accountingEntity": "750_AAA",
      "visible": true,
      "id": "0000000003",
      "drillbackURL": "?LogicalId=1"
    }
  ]
}
```

PU DEMO

Context Viewer

Related Information

All



0000000002

Document 1 Of 50

Important Links

- Bring - Spor pakke
- CRS610 - Customers
- OIS300 - Orders
- OIS275 - EDI/Batch orders in Error
- OIS350 - Invoices
- OIS390 - Customer Returns
- MMS200 - Items

Available To Spend

100K

Credit Limit (INR) **1M overlimit**

2M spent (100%)

Local customer

RHYTHMDEMO

Credit Limit:	₹100,000.00
Spent:	₹1,524,982.66
Available:	-₹1,424,982.66

Customer Contacts

Search

RHYTHMDEMO - Local Custo...

TELEPHONE 1

More details


Sorting order: 1-Customer View: D01-01-01

Status: -Blank -Blank  
 Customer group: -Blank -Blank  
 Customer type: -Blank -Blank

Customer	Name	Telephone no 1	Sts	Cnt	Your ref 1	Post code	City	Resp	Payer	Inv r
CSD										
FREDO75	Frédéric Delrue		90-Blocked/expired	FR		01150	01150 - BLYES	MICPHIO		
FREDO76	Frédéric Delrue		10-Preliminary	FR		01150	01150 - BLYES	MICPHIO		
FREDO0	Frédéric Delrue		10-Preliminary			01150	01150 - BLYES	MICPHIO		
GB0105	Wellingborough Supplies Ltd	+447481898980	20-Definite	GB	Mike T Young	NN81SE	Wellingboro...	AGANACO		
GB9372440	Lofield & Sons	+4446134919190	20-Definite	GB	Steve Austin	NG7 25A	NOTTINGHAM	WARERIO		
GB9372442	Bob's Builders Ltd	+44 1836 960594	20-Definite	GB	Bob Bingham	BD24 2DN	STUDFOLD	WONHAN0		
GB9372443	McVites Carlisle	+447836516759	20-Definite	GB	Rob West	CA11 9NF	CARLISLE	WARERIO		
GB9373441	London Builders Ltd	+44 161 789 7373	20-Definite	GB	Mr. Goldsmith	NW3 5TD	LONDON	WARERIO		
GD-0001	Acme Sundries	+18479102503	20-Definite	US	Gary Buyer	12345	Chicago	DRAGAR0	GD-0001	
GILBANE	Gilbane Building Company	1 212-312-1600	20-Definite	US		10005	New York	FLEMIK0		
GILBANE-B	Gilbane Building Company (Broo...	1 718-254-8755	20-Definite	US		11201	New York	FLEMIK0	GILBANE	
GILBANE-C	Gilbane Construction	1 917-652-4917	20-Definite	US		11238	New York	FLEMIK0	GILBANE	
GILBANE-X	Gilbane Building Company (Bronx)	1 347-590-9820	20-Definite	US		10459	New York	FLEMIK0	GILBANE	
I90000001	UK1 - INTERNAL WARRANTY CUST...		20-Definite	GB		1111	London	AGANACO		
I90000002	UK1 - INTERNAL CLAIM CUSTOMER		20-Definite	GB		1111	London	AGANACO		
I90000003	UK1 - INTERNAL WAREHOUSE D01		20-Definite	DE		1111	London	BERDIR0		
IONCUST	ION Integration Customer1	TELEPHONE 1	20-Definite	GB	Contact 1	1234	Birmingham	ANDOYV0	Y10000	Y10000

### Related Information

All



CreditApplication.pdf

Page 1 of 2

### In-Context Information

Total Outstanding Amount

6 OF 6

10,801.32

Overdue inv amt

13,411.28

Outstan inv amt

### Customer Advisor by Chat...

Prompt

Current credit position

Customer

Acme Sundries

# Experience Designer standardløsninger

## Finance

Accounts Receivable Customer Overview **NEW**

Authorize Supplier Invoices **NEW**

Cash Flow and Credit Control Desk **NEW**

Customer Credit Overview

Credit Control

Fixed Assets Overview **NEW**

General Ledger Admin **NEW**

General Ledger Desk **NEW**

Leasing Agreements Hub **NEW**

Supplier Invoice Hub **NEW**

## Equipment

EQM – Equipment Quotation Management **NEW**

Equipment Service Desk **NEW**

EQM Rental **NEW**

EQM Manager

Rental Counter

Service Agreement Workbench

## Procurement

Planned Purchase Order Hub

Purchase Order Hub

Supplier Overview

## Sales Management

Customer Order Hub

Customer Support Center

Customer Overview

## Product Data Management

Attribute Model Overview **NEW**

Item Overview **ENHANCED**

## Fashion

Style and SKU Creation

Style Overview

## Manufacturing

Manufacturing Reporting

Manufacturing Workbench

## Supply Chain Execution

Route Hub **NEW**

Shipment Hub **NEW**

Warehouse Management Desk

## Other

Company Structure Overview **NEW**

M3 Security and User Settings **NEW**

Archiving Workbench

# Experience Designer – Cash Flow Credit Control

Gjør det smidigere å jobbe med kundefordringer og faktura å raskt finne og følge opp faktura- og betalingsinformasjon – uten å måtte navigere mellom flere ulike M3-programmer som man muligens gjør i dag.

Viktige funksjoner og fordeler:

- En samlet arbeidsflate for oppfølging av forfalte fakturaer og tilhørende oppgaver
- Mulighet til å søke etter kunde eller betaler
- Samlet oversikt over åpne, betalte og forfalte fakturaer
- Tydelig visning av forfalte fakturaer basert på hvor mange dager de er over forfall
- Enkel tilgang til detaljer om åpne fakturaer direkte fra oversikten
- Rask tilgang til tilhørende betalinger og regnskapsbilag

Accounts Receivable Customer Overview

Division: AAA 760 - US Sales Tax Division

All Invoices | 1 - 30 Days | 31 - 60 Days | 61 - 90 Days | Over 90 days | Credit Notes | Customer Information

Open | Paid | All

Invoice no	Customer	Currency	For curr amt	Outst cur amt	Invoice date	Due date	Payment terms	Payment mtd AR	Payer	Invoice
2023000103...	12019-US	USD	29773,00	29773,00	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	82,50	82,50	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	-231,20	-231,20	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	17,30	17,30	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	-1133,00	-1133,00	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	115,30	115,30	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	44,10	44,10	231107	231207	030	CHK	12020-US	
2023000103...	12019-US	USD	66,20	66,20	231107	231207	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	

Additional Information

AR info cat	Description	AR add info	AR info seq no.
203	CO number	3000008075	001
231	Customer order number		001

Payments

Payer	Payment date	Accounting date	Invoice no	For curr amt	Currency
No data available					

# Cash Flow and Credit Control Desk

Hjelper kredittmedarbeidere og regnskapsmedarbeidere med å se og håndtere forfalte kundefakturaer samlet på ett sted.

## Key Features and Benefits

- Full oversikt over åpne og forfalte kundefakturaer
- Topp 10 største utestående fakturaer for rask innsikt
- Liste over kunder med høyest forfalt beløp
- Forfalte fakturaer gruppert i aldersbøtter for enkel livssyklus-sporing
- Viser årsaker til betalingsforsinkelser for bedre rotårsaksanalyse
- Forenklet søk og håndtering av utestående reskontroposter

Cash Flow and Credit Control Desk

Division AAA 760 - US Sales Tax Division Local currency USD AR balances Accounts Receivable Customer Overview Refresh

Overview **Open Invoices** Tickler Notes

Overdue Invoices

Credit Notes

On-Account Payment

Payment Receipts

Overdue AR Invoices 1 - 30 Days 31 - 60 Days 61 - 90 Days 91 - 120 Days 121 - 180 Days Over 180 Days Reminder Stop Open and Not Overdue

Overdue AR Invoices Accounts Receivable Customer Overview

Invoice no Customer From Due date To Due date From For curr amt To For curr amt Currency

LHCUST LH test US 25/05/09 26/01/20

Q Search X Clear

Invoice no	Customer	Currency	For curr amt	Outst cur amt	Invoice date	Due date	Payment terms	Payer	Division
2025100003...	LHCUST	USD	2489,40	2489,40	251111	251117	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2185,30	2185,30	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2518,60	2518,60	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2489,40	2489,40	251104	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2381,90	2381,90	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2572,30	2572,30	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2381,90	2381,90	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2572,30	2572,30	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2185,30	2185,30	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2572,30	2572,30	251105	251110	N05	LHCUST	AAA
2025100003...	LHCUST	USD	2497,10	2497,10	251103	251107	N05	LHCUST	AAA
2025100002...	LHCUST	USD	279,50	279,50	251028	251103	N05	LHCUST	AAA
2025100002...	LHCUST	USD	279,50	279,50	251028	251103	N05	LHCUST	AAA
2025100002...	LHCUST	USD	53,20	53,20	251028	251103	N05	LHCUST	AAA
2025100002...	LHCUST	USD	186,30	186,30	251014	251020	N05	LHCUST	AAA
2025100002...	LHCUST	USD	279,50	279,50	250902	250908	N05	LHCUST	AAA
2025100002...	LHCUST	USD	558,90	558,90	250902	250908	N05	LHCUST	AAA
2025100001...	LHCUST	USD	279,50	279,50	250819	250825	N05	LHCUST	AAA
2025100001...	LHCUST	USD	494,50	494,50	250819	250825	N05	LHCUST	AAA

Overdue Actions

- Statement of account
- Payment reminder
- Interest invoice
- Debt collection
- Doubtful account
- Payment advice

Other Actions

- Create manual invoice
- Customer payments

# Accounts Receivable Customer Overview

Hjelper kredittmedarbeidere med raskt å finne og handle på faktura- og betalingsinformasjon – uten å måtte bytte mellom flere M3-programmer..

## Viktige funksjoner og fordeler:

- Ett samlet sted for oppfølging av forfalte fakturaer og tilhørende oppgaver
- Søk på kunde eller betaler
- Kombinert visning av åpne, betalte og forfalte fakturaer
- Tydelig forfallsstatus med kategorisering etter antall dager på etterskudd
- Direkte tilgang til fakturadetaljer fra listen
- Rask tilgang til tilhørende betalinger og bilag

Accounts Receivable Customer Overview

Division AAA 760 - US Sales Tax Division

All Invoices 1 - 30 Days 31 - 60 Days 61 - 90 Days Over 90 days Credit Notes Customer Information

Open Paid All

Invoice no	Customer	Currency	For curr amt	Outst cur amt	Invoice date	Due date	Payment terms	Payment mtd AR	Payer	Invoice
2023000103...	12019-US	USD	29773,00	29773,00	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	82,50	82,50	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	-231,20	-231,20	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	17,30	17,30	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	-1133,00	-1133,00	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	115,30	115,30	231107	240215	N30	CHK	12020-US	
2023000103...	12019-US	USD	44,10	44,10	231107	231207	030	CHK	12020-US	
2023000103...	12019-US	USD	66,20	66,20	231107	231207	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	
2023000103...	12020-US	USD	386,00	386,00	231023	231122	030	CHK	12020-US	

Additional Information

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Payments

Payer	Payment date	Accounting date	Invoice no	For curr amt	Currency
No data available					

# Varslinger/Oppgaver i M3

Det kan lages varslings/oppgaver av alle hendelser i M3

## Relevante eksempler:

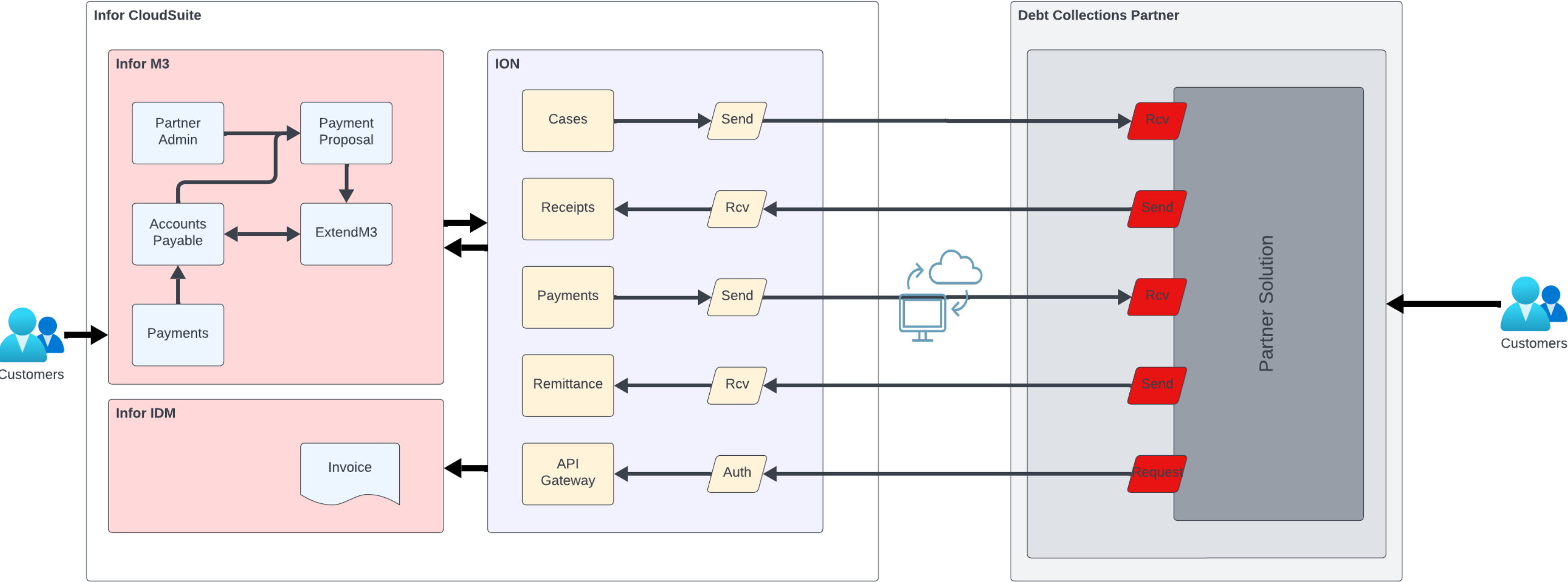
- Ny kunde opprettet – Finans må inn og godkjenne/oppdatere finans felter
- Ny kunde opprettet, men mangler utfylling av relevante felter
- Kundeordre stoppet i kredittsjekk
- Utestående fordringer har passert x % av kredittgrense

All		Unread			
!	🔔	📄	🔒	From	Subject
▼ Today					
				noreply@inforcloudsuite.com	CO Blocked
Order 0010000123 blocked with credit stop 3 <end>					

# Purringer og Innfordring i M3

- Egen produserte purringer print/pdf
- Purringer via 3 part
- Purring via innfordringspartner

# Debt Collection Service – Solution Overview



# Spørsmål?

Experience Designer

Experience Designer - GL Administrator 1 v.1

General Ledger Administrator (designing) Refresh Add new voucher

### Current Division

Division

AAA Infor M3 Distribution (400/AAA)

Company name	Country version	Org no 1	Address line 1	Local currency	VAT reg no	Division	Info line 2	Info line 3	Fac
Infor M3 Distribution (400/AAA)	US		380 Saint Peter Street	USD		AAA	Infor M3 DIS	Infor M3 Distribution (400/AAA)	A0

### Vouchers

Subledger Internal Account Entries Reverse VAT Comments

Voucher no Voucher series From Accounting date To Accounting date Voucher text Rev voucher no

Year	Voucher no	Voucher series	Accounting date	Recorded amount - Credit	Recorded amount - Debit	Voucher text
2024	30001132	003	241121	-400,00	400,00	ABS001 202411211121592024 CLOUDBERRI
2024	30001133	003	241121	-1000,00	1000,00	ABS001 202411211428392024 CLOUDBERRI
2024	30001134	003	241121	-400,00	400,00	ABS001 202411211445262024 CLOUDBERRI
2024	30001128	003	241121	-1000,00	1000,00	ABS001 202411211052042024 CLOUDBERRI
2024	30001130	003	241121	-150,00	150,00	ABS001 202411211059402024 CLOUDBERRI
2024	30001135	003	241121	-400,00	400,00	ABS001 202411211448322024 CLOUDBERRI
2024	30001131	003	241121	-250,00	250,00	ABS001 202411211100102024 CLOUDBERRI
2024	30001127	003	241121	-100,00	100,00	ABS001 202411210841482024 CLOUDBERRI
2024	30001129	003	241121	-200,00	200,00	ABS001 202411211054442024 CLOUDBERRI
2024	30001124	003	241120	-2000,00	2000,00	ABS001 202411201456242024 CLOUDBERRI
2024	30001123	003	241120	-100,00	100,00	ABS001 202411201005012024 CLOUDBERRI
2024	30001125	003	241120	-1000,00	1000,00	ABS001 202411201514012024 CLOUDBERRI
2024	30001126	003	241120	-500,00	500,00	ABS001 202411202251202024 CLOUDBERRI

Vouchers

General Ledger

Batch Uploads

Erroneous Transactions

Not Transferred to GL

**infor**<sup>®</sup>

Takk for oss!



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