



Nyheter og Roadmap

Smart fakturabehandling med Experience Designer

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**What is
Supplier invoice
processing in
M3**

2

**Why we invest
in Supplier
invoice
processing**

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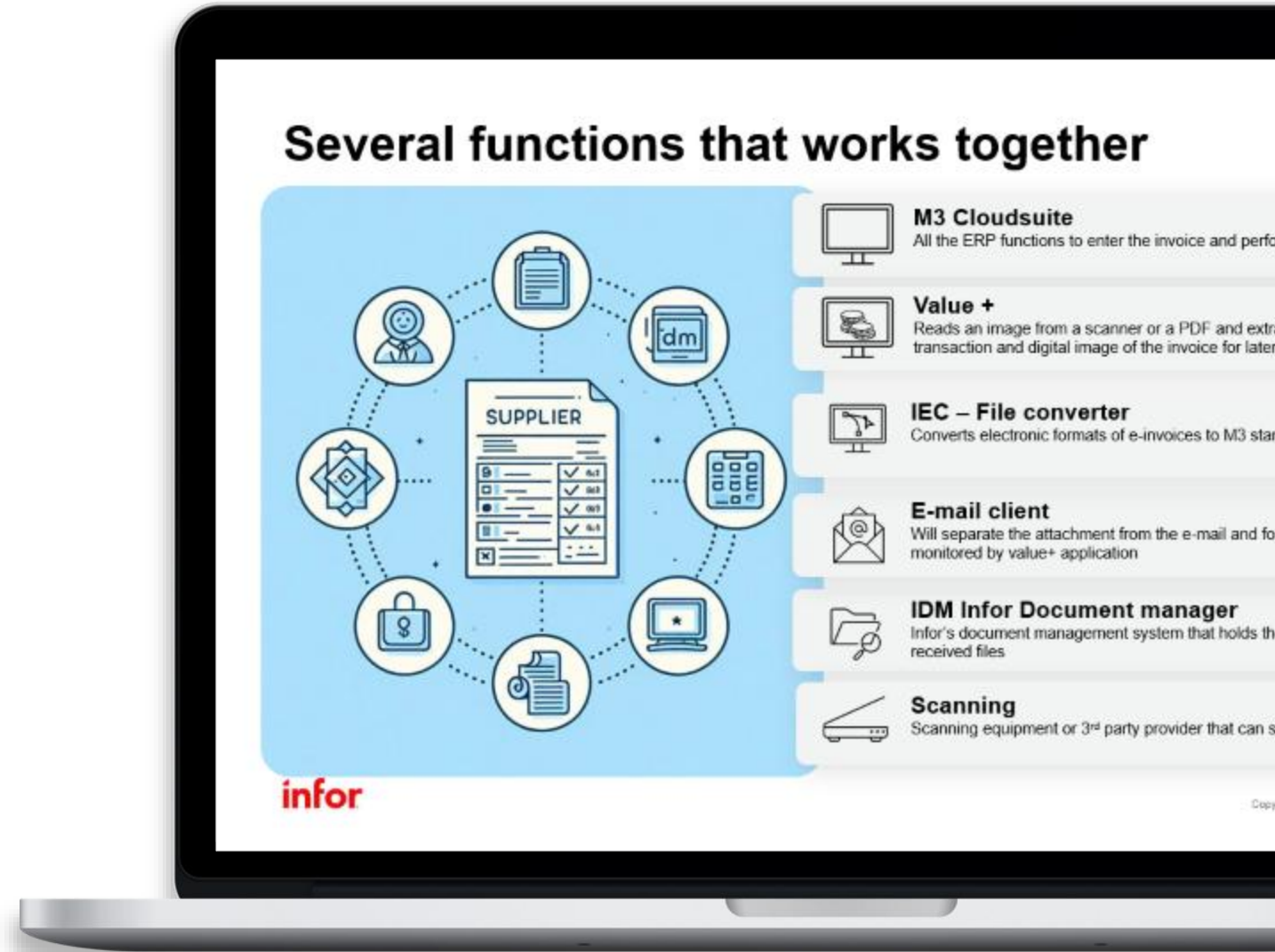
Roadmap

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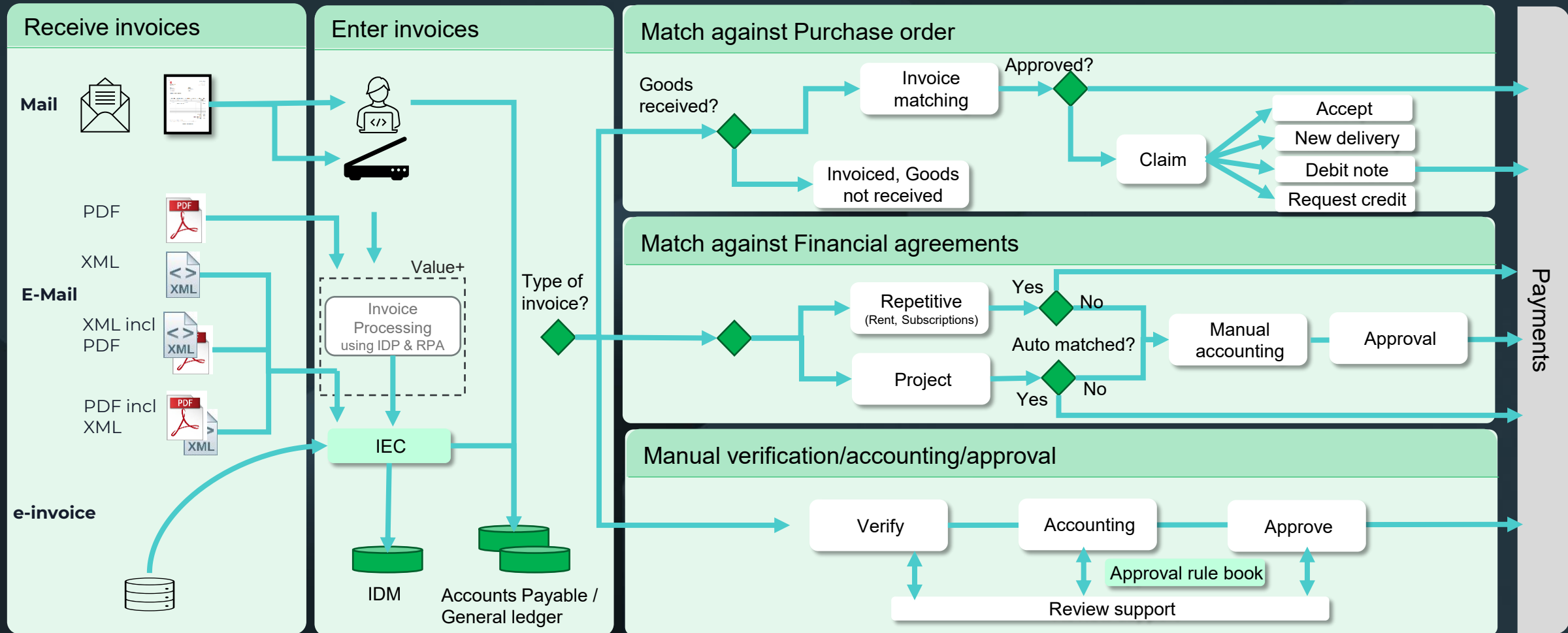
Q&A

Invoice Processing in M3

Mix of CloudSuite and M3 Business Enginge Capabilites

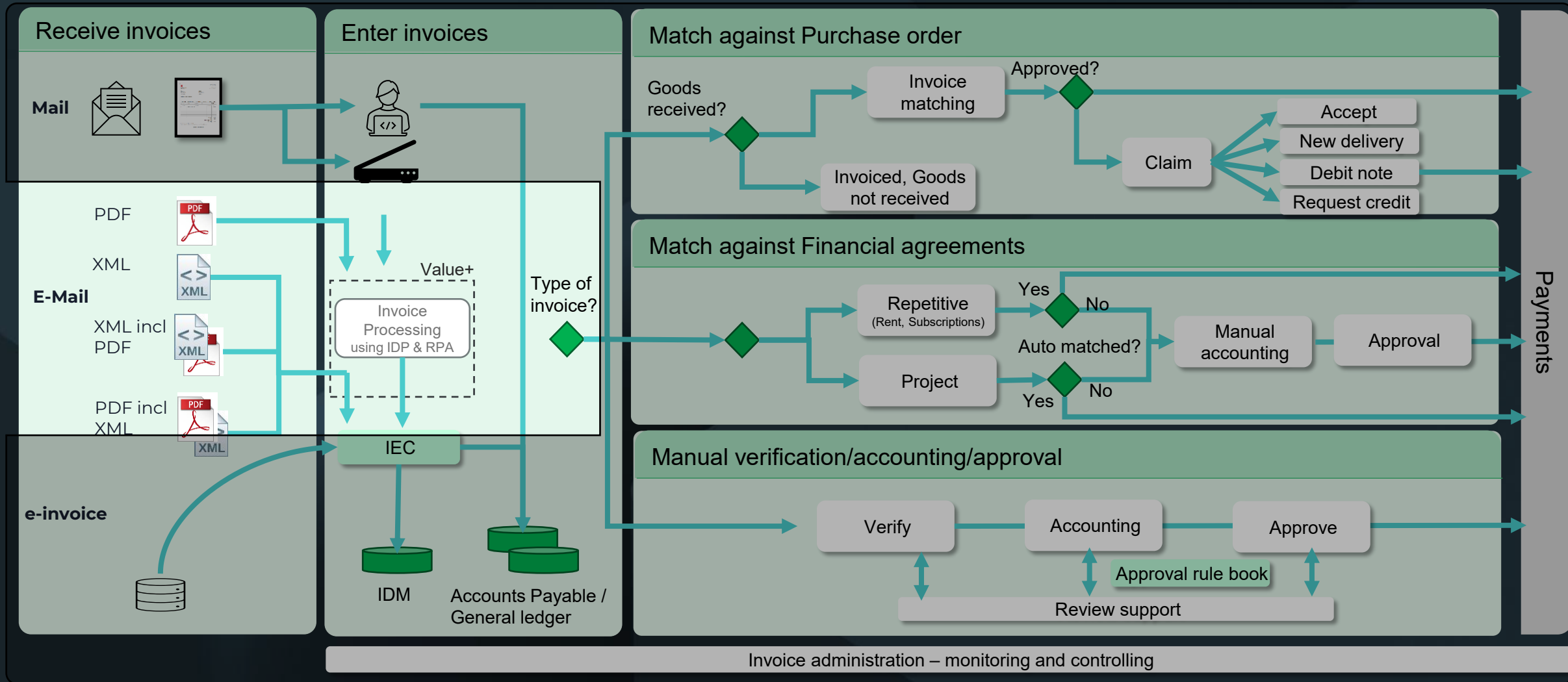


Supplier invoice processing in M3



Invoice administration – monitoring and controlling

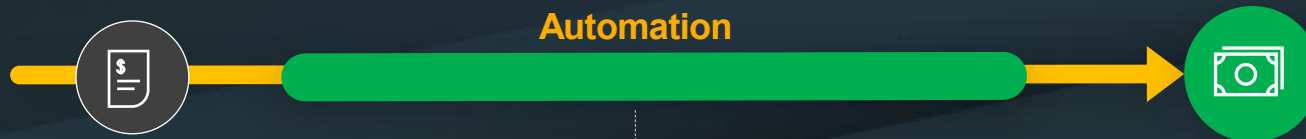
Supplier invoice processing in M3



Velocity - Finance & procurement



M3 Invoice Processing



Receive Invoice from Supplier

Process Invoice and Make Payment



RPA

Take Incoming Email and Excel/PDF attachments



GenAI

Extract Invoice details using Infor Document Processor with Gen AI



IDM

Store Invoice in IDM with correct tags



AI

Identify Vendor Information compare charge descriptions



API

Validate invoice information



Exceptions

When necessary, handle missing invoice information in Review Center



BOD

Load Supplier Invoice BOD import and Validate Invoice in M3



Alert

Notify user about Batch processing



Infor OS

Review Center

New application for complementing invoices in three categories

- Missing information

Required invoice details could not be interpreted by IDP.

- Validation errors

Invoice information could not be verified against M3.
(i.e. PO number does not exist in M3)

- Needs review

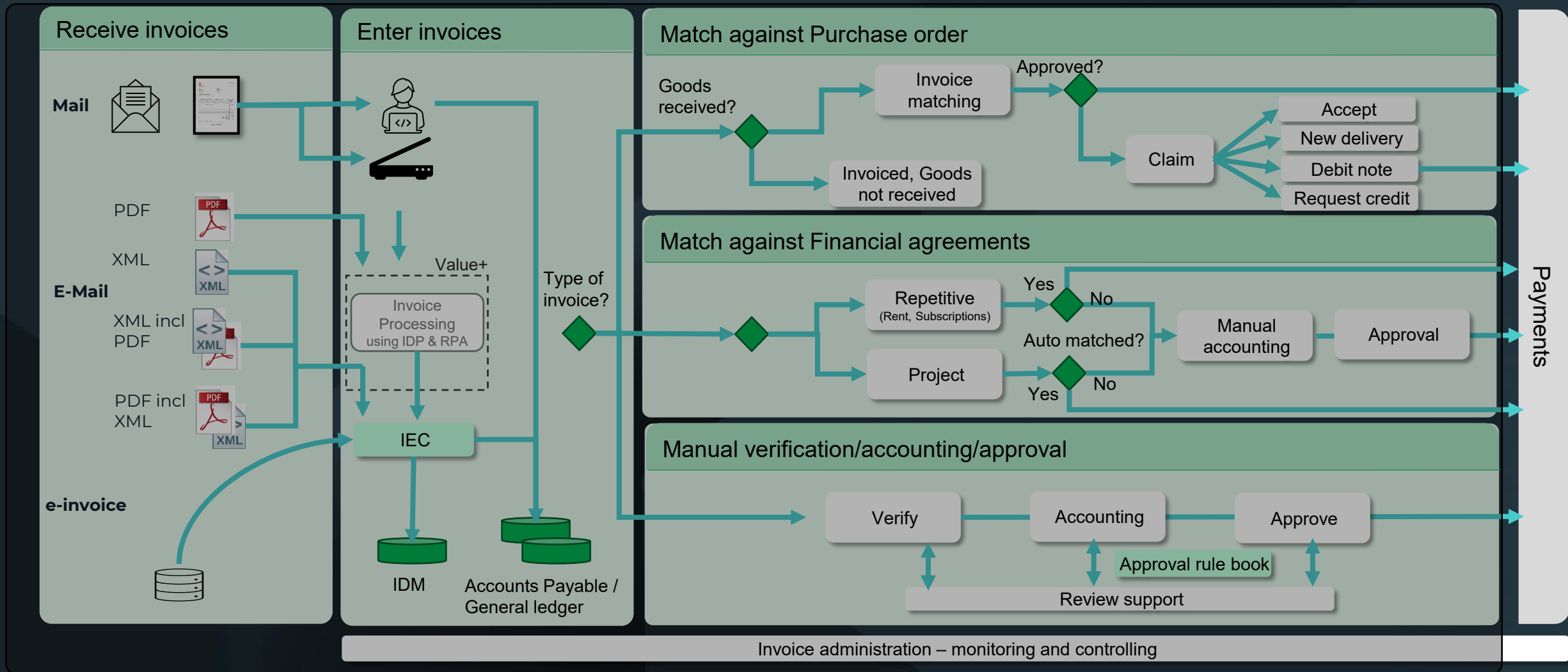
documents that was not classified as invoices by IDP.

The screenshot displays the 'Review Center' application interface. At the top, there is a navigation bar with a menu icon and the text 'Review Center'. Below this, there is a sub-header 'SupplierInvoiceDocumentCapture3' with a dropdown arrow. The main content area is divided into three sections: 'Missing Information (0)', 'Validation Errors (3)', and 'Needs Review (0)'. The 'Validation Errors (3)' section is active, showing a list of three invoices. The first invoice is highlighted, showing details: Invoice Number: INV2900000062, Invoice Type: PO Invoice - Lines, Supplier Name: Virgo & Co. KGF, Invoice Date: 2025-06-10, and For curr amt: 474.3. To the right of the list is a preview of the invoice document, titled 'Document Name: INV2900000062.pdf'. The document is an 'INVOICE' from Virgo & Co. KGF, with details including Invoice Number, Date, PO No., Due Date, Name, Bill From Address, and Bill to Address. To the right of the document preview is a form for entering invoice details, with tabs for 'Error Details', 'Headers', 'Order Charges', 'VAT/Tax', 'Line Items', and 'Line Charges'. The 'Headers' tab is active, showing fields for Accounting Entity, Supplier invoice number, Supplier Name, PO number, Foreign currency amount, and Currency.

Proper database backend

UI fields aligned with M3 Terminology

Supplier invoice processing in M3



Credit Note Matching for Payment Proposals

Match automatically credit notes and other "negative" records in AP to invoices in a payment proposal avoiding negative payment transactions in electronic supplier payment files

Problem



- When creating a supplier payment proposal an option exists to match invoices with credit notes automatically.
- However, this is limited to
 - grouping method 1
 - Invoices without CD terms

Solution



- New options for supplier payment proposal to match invoices with credit notes automatically:
- **Option 1:** Connect credit notes (or other negative items) to the original invoices immediately if the connection is given.
 - **Option 2:** Connect credit notes to any invoice if there is no connection to the original invoice.
 - **Option 3:** both of the before, first match directly linked credit notes, secondly not directly linked credit notes to any invoice.

Benefits



- Avoid negative payment records in a payment proposal.
- More automated handling of negative items.
- In cases of negative items directly connected to the original invoice the matching can be done independently from the due date and payment method.

CloudSuite(s) All M3 CloudSuites	Potential Business /Tech.Impact Major / low
Decision maker ERP Manager / Finance Department	Architecture MT
	2026.04

APS631 Suppl Payment Proposal. Update Details

Actions Options Related Tools + -

Infor M3 Finance/R&S Infor M3 MNB 136 - Div GGG - Germany

Details of Confirmation of Payment Proposal

Payment method: SE1 SEPA CT, GR=1, Currency: EUR EURO
 Bank account ID: BANK MDE German Bank, FAM function: 1 Electronic transfers APS130, Account: 1940 Bank account EUR 1940 (CRS630)

Division: GGG, Payment prop: 17197, Payment order: 1

Payee	Docno	Supplier invoice no	Due dt	Pmt dt	Pst	Invoice am...	Pmt amount ...	Cash disc -for	Acctn	Trm	Dsc dt	isc
MHSC-DE	1	CREDIT NOTE 01	021025	021025	3 - Blocked	119,00-	119,00-	0,00	BANK			0,00
Total						0,00	0,00	0,00				
MHSC-DE	2	INVOICE 01	291025	291025		1.190,00	1.190,00	0,00	BANK			0,00
Total						1.190,00	1.190,00	0,00				
Total						1.190,00	1.190,00	0,00				
Total						1.190,00	1.190,00	0,00				

APS631 Suppl Payment Proposal. Update Details

Actions Options Related Tools + -

Infor M3 Finance/R&S Infor M3 MNB 136 - Div GGG - Germany

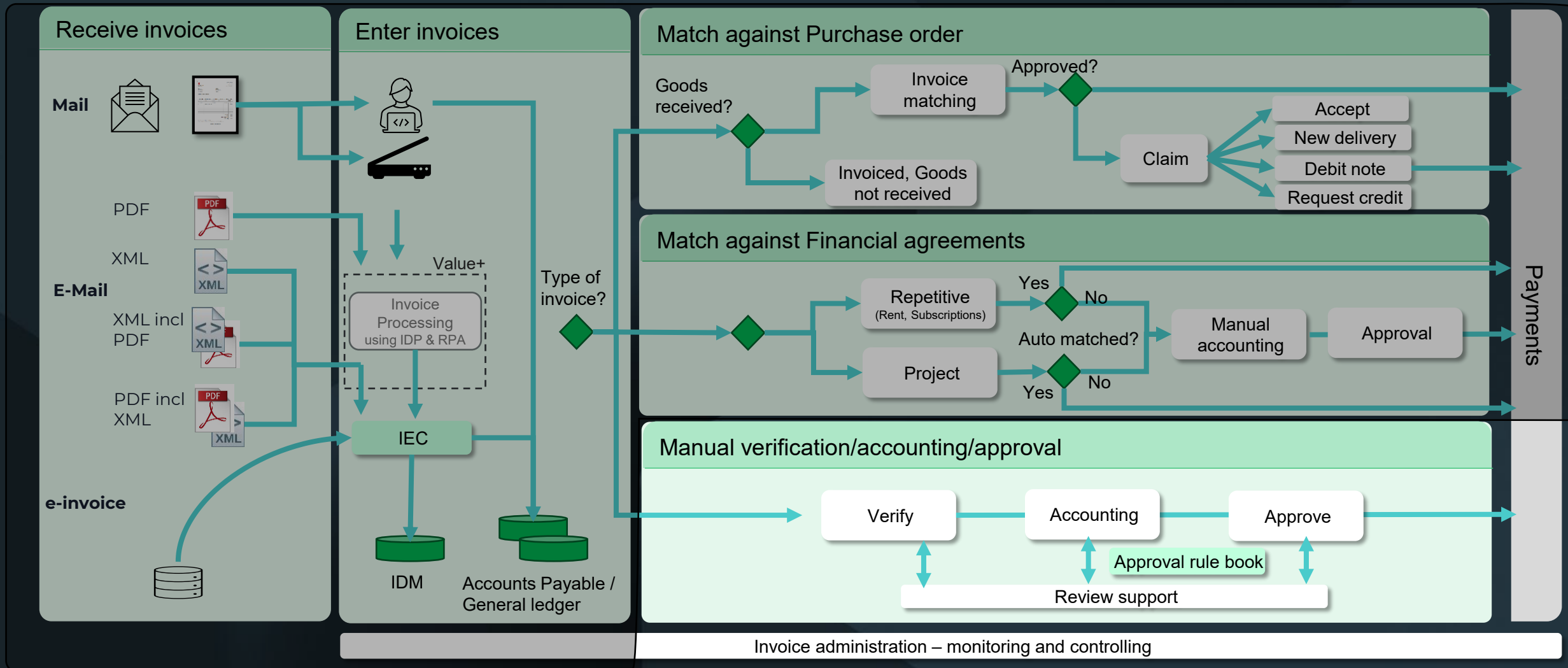
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Division: GGG, Payment prop: 17198, Payment order: 1

Payee	Docno	Supplier invoice no	Due dt	Pmt dt	Pst	Invoice am...	Pmt amount ...	Cash disc -for	Acctn	Trm	Dsc dt	isc
MHSC-DE	3	CREDIT NOTE 01	021025	291025		119,00-	119,00-	0,00	BANK			0,00
MHSC-DE	3	INVOICE 01	291025	291025		1.190,00	1.190,00	0,00	BANK			0,00
Total						1.071,00	1.071,00	0,00				
Total						1.071,00	1.071,00	0,00				
Total						1.071,00	1.071,00	0,00				

Supplier invoice processing in M3



Authorize Supplier Invoices

New Experience Designer Application to work with the supplier invoice approval processs in M3.

Change Delivery Functional Setting	Available for CloudSuite(s) All M3 CloudSuites	Potential Business / Tech. Impact High / Low
Additional Info KB3617665	Decision maker Accounts Payable Controller	Release Training TBD

Problem



- I need to see all open tasks that I have related when approving expesen supplier invoices in M3.
- I need to be able to approce, change user of the task, and up

Solution



- The app display the related accounting lines. The app has one tab for each dedicated task in the approval process. You can see both active and completed tasks
- When you select an invoice you can see all the options that are available for the task
- When you authorize the accounting

Benefits



- A simplified user expereicen that focus on the signed in user. It shows your open tasks and the different options you can use.

Supplier Invoice Hub

New Experience Designer Application to monitor the expense invoice approval process

Change Delivery Functional Setting	Available for CloudSuite(s) All M3 CloudSuites	Potential Business / Tech. Impact High / Low
Additional Info KB3618071	Decision maker Accounts Payable Controller	Release Training TBD

Problem



- As an Invoice Administrator I would like to have a list of all invoices that need my support. When I select the invoice I need to see all the related tasks and accounting of the invoice.

Solution



- The application is based on the approval process for expense invoices
- Filtered on invoices that requires attention from the invoice administrator.
- Options to change user for the tasks and add new tasks to the invoice.

Benefits



- A focused view to support the invoice approval process.

The screenshot displays the 'Supplier Invoice Hub' interface. At the top, it shows the user 'ABARKARO' and the status 'Invoice administrator'. Below this is a table of 'Assigned Invoices' with columns for Supplier inv no, Status, Reason code, Comment, For curr amt, Currency, Start date, Invoice date, Due date, and Supplier name. One invoice is listed: INV-250925-002, Status: 7 - Invoice administrator, Reason code: 10 - Approval route group not found, For curr amt: 1000,00, Currency: CAD, Start date: 250925, Invoice date: 250925, Due date: 251024, Supplier name: *ANY.

Below the invoice table is the 'Invoice Approval Actions' section, which includes a table with columns for Approval type, Name, Status, Approval code, Description, Reason code, Comment, and Start date. The actions listed are:

Approval type	Name	Status	Approval code	Description	Reason code	Comment	Start date
2 - Authorized user	Gunilla Anders	10 - Incomplete	EXPENSE	default expense invoice	1 - Authorized user		
3 - Invoice administrator	Andreas Barkaro	2 - Active					
3 - Invoice administrator	Andreas Barkaro	7 - Invoice administrator action needed	EXPENSE	default expense invoice	10 - Approval route group not found		
4 - Verifier	Gunilla Anders	2 - Active					
5 - Accounting responsible	Gunilla Anders	1 - Pending					

On the right side of the interface, there are buttons for 'Update Approval Settings', 'Authorization selections', 'Authorized users', and 'Approval codes'.

Recent Developments in Accounts Payable and Cost Accounting

Area	Feature
Receive invoices	Velocity Suite - Invoice Processing (new invoice capture solution)
Enter invoices	API transactions to Reset Invoice and Update/Delete Invoices lines in APS451.
	Dynamic Selection of payment details at invoice entry.
	Reconciliation Reference available in Line type 8
	Update invoice to AP transaction in APS455MI
	Select Payee or Supplier code in Accounting rules
View and update invoice data	Supplier invoice Header table in M3 (APS260)
	Additional input fields in APS201MI-UpdInvDetails
Process expense invoices	New Supplier invoice approval process for expense invoices
Process PO invoices	API support for APS370
	New inventory method – FIFO cost
Process Payments	Supplier payment proposal enabled for configurable views and API

Why we're investing in supplier invoice processing in M3

1. Automate more
2. Improve user experience
3. Lower TCO - expensive 3rd-party solutions



How we're investing in supplier invoice processing in M3

- API, API, API
- Velocity Suite
- Experience Designer
- New functionality

Where AI can contribute



Receive invoices - "Reading" invoices

Replace traditional OCR based recognition with AI translations based on LLM's
In progress in Velocity suite



Match charges - Allocate freight/customs charges

An invoice for freight and customs must in some cases be allocated to many orders in one shipment.



Create accounting vouchers

Based on the line-information on an invoice – use AI to learn how these invoices is accounted, based on previous manual accounting, when good enough, let AI create the voucher.



Monitor abnormal behavior

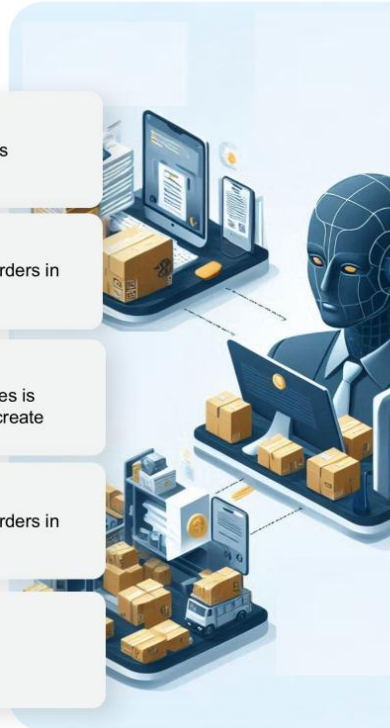
An invoice for freight and customs must in some cases be allocated to many orders in one shipment.



Reconcile Goods receipts not invoices

Support reconciliation at period end for selected accounts.

infor



Roadmap

Business Engine

Application Messages for approval process

- **Openness** in Accounts Payable

- Approval of variances in Invoice Matching

- *Improve matching of charges in M3.*

- Recode and Invoice match from **EXD applications**.

- Updated **Claim Routine**

2027

October

April

October

Future

Velocity

- Process for XML invoices
- Credit Note Reference
- Financial Agreements
- Analytics.

- New workspace for invoice processing

- *Propose cost accounting for Expense invoices*
- *AI Agents*

Openness in Accounts Payable

It need to be easy to access information related to the Invoice and to complete the

Change Delivery	CloudSuite(s) All M3 Cloud suites	Potential Business / Tech. Impact
Additional Info In Development Planned release: 2027.04	Decision maker	Release Training 2027.04

Problem



To get an Supplier invoice ready for payment can be a time-consuming task, involving many different people in an organisation. Especially for unstructured expense invoices or when PO invoices is not with the defined tolerances.

Solution



APIs that allows you to work with the invoice is essential to provide a good user experience and extensibility in the future.

New Stateless API support when working with supplier invoices in M3.

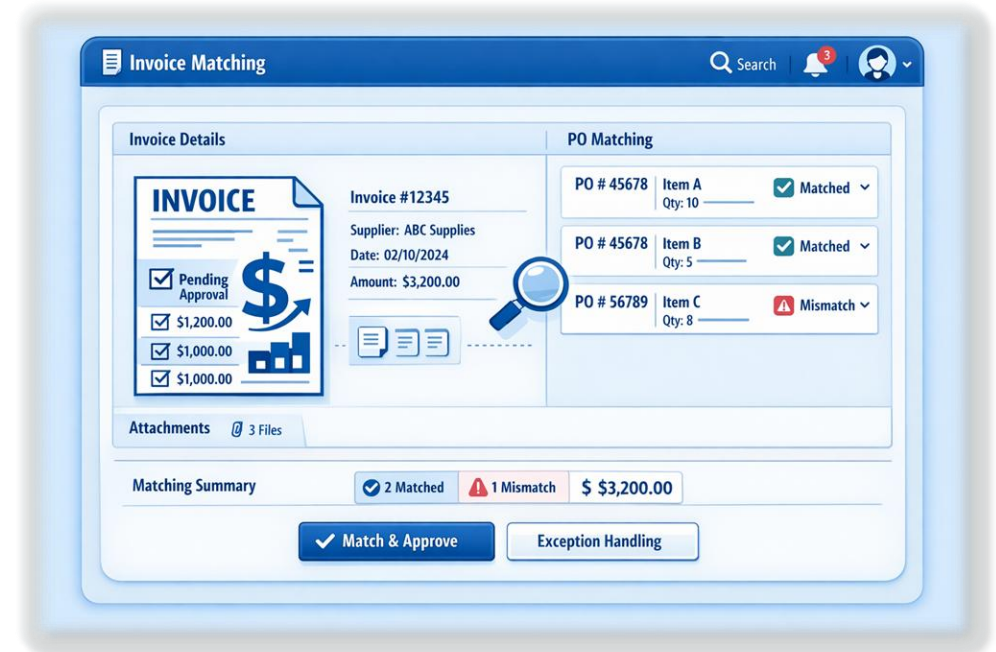
- API enable Invoice Recode Functions in M3. (APS110)
- API enable Invoice Matching Functions in M3 (APS360 etc)

Benefits



By introducing these new features our customers will

- New User Experience, Manage Invoice Recoding and Invoice Matching from EXD Applications
- One voucher for each recoding of the invoice.
- Work in parallel with invoice matching
- New Extensibility possibilities. With for example Gen AI.



Updated Claim Routine for Supplier invoices

The key to success for invoice processing is to be able to take fast decision when there are deviations on the invoice and communicate it to the supplier.

Problem



Current claim routine is based on item quantity and price deviations in the invoice matching. There is a need to be able to create a Debit Note or Credit Request for other deviations on the supplier invoice.

Solution



Things that we will do to create this solution:

- a) Enable Claim Routine for Expense invoices
- b) Enable Claim Routine for any line or remaining amount for PO invoices.
- c) Possibility to save external notes related to the supplier invoice, to track communications

Benefits



By introducing these new features our customers will

- One process for any dispute on the invoice.
- Keep track of open questions on open invoices.

Change Delivery	CloudSuite(s) All M3 Cloud suites	Potential Business / Tech. Impact
Additional Info	Decision maker	Release Training 2027.04



Invoices – approval of variances in Invoice matching

The key to success for invoice matching is good quality on the delivery documents. But there can be variances between the planned purchase price and the invoice price.

Problem



Today almost all companies have approval rules based on the invoice amount. But it is more appropriate to approve the variance between an approved purchase order and the invoice

Solution



There are two things that we will do to create this solution:

- a) Changes in M3 so approval of variances will be an alternative instead of the invoice amount
- b) Leverage the new approval rule book.

Benefits



By introducing these new features our customers will

- Have an option to approve invoice amount or the variance
- Use the same framework for approvals as for expense invoices

Change Delivery	CloudSuite(s) All M3 Cloud suites	Potential Business / Tech. Impact
Additional Info	Decision maker	Release Training 20207.10



Q&A