



# Infor CloudSuite Distribution Enterprise Solution Overview

Release 11.x

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## About this guide

This document provides conceptual information for Infor CloudSuite Distribution Enterprise and a summary of the products that are included in this CloudSuite.

## Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://conciierge.infor.com/> and create a support incident.

The latest documentation is available from [docs.infor.com](https://docs.infor.com) or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).

## Chapter 1: CloudSuite overview

This CloudSuite is a solution that contains multiple components, including core components, and common add-ons.

Common add-ons are solutions that are tested in a specific industry flow and may also include specific content as described in the CloudSuite documentation. There are two types of common add-ons:

- Industry add-ons - additional components frequently requested by customers within the industry.
- Horizontal add-ons - non-industry specific components that delivers great value for customers within the industry.

There are also additional add-ons and Infor OS add-ons that can be added to the CloudSuite solution.

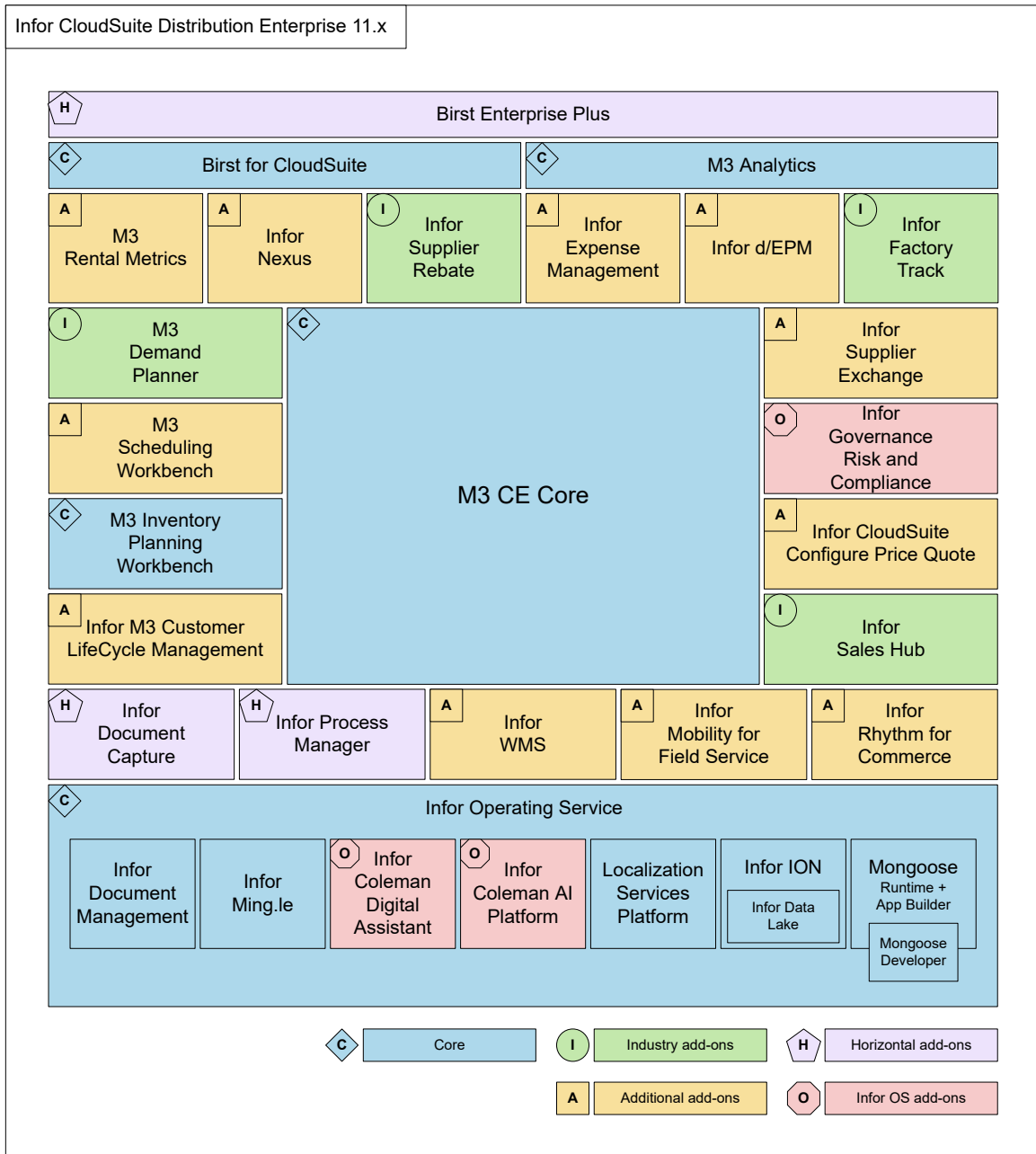
This CloudSuite is a multi-tenant solution, which is available through a subscription-based (SaaS) delivery model from Amazon Web Services (AWS).

## Online Compatibility Matrix

The Online Compatibility Matrix, available on the Infor Support Portal, will provide a summary of all compatibility for this release after General Availability.

See [Online Compatibility Matrix](#).

# Product overview





## Chapter 2: Infor M3 CE Core

Infor M3 CE Core is a modern cloud based ERP solution that delivers industry-leading functionality for the distribution, equipment, fashion, food & beverage, chemical and manufacturing industries.

Infor M3 CE Core provides a digital backbone Enterprise Resource Planning (ERP) solution that offers a broad set of functionality to support the core business processes and functions across the organization.

Infor M3 CE Core offers ultimate flexibility in operations, technology, and scale built on leading cloud technology. As an international multi-site, multi-country, and multi-company solution that supports multi-language and multi-currency, M3 CE empowers your organization to adapt to your ever-changing business needs. It provides flexibility in managing mixed-mode and complex manufacturing and supply chains, with the agility to make quick configuration adjustments at any time as your business changes and grows. Infor M3 CE Core includes modules for finance, sales, equipment sales, service and rental, planning, manufacturing, and procurement in addition to several industry-specific add-on modules.

### M3 Business Engine

### Financial Management

#### M3 Financial Controlling

Infor M3 Financial Controlling application is a complete set of tools for efficient internal financial controlling. Each module enables you to analyze and plan, as well as display detailed management views of an organization's key business processes.

Modules in Financial Controlling include:

- Budgeting
- Cash Flow Management
- Cost Accounting
- Product Costing
- Multiple Unit Coordination

- Risk Management
- Time Accounting
- Financial Agreement Controlling (FAC)

## M3 Financial Accounting

The Infor M3 Financial Accounting application enables customers to access and utilize the crucial information that drives business decisions. Customers are able to capture, analyze, and simulate critical trends based on their unique business goals and requirements. Financial Accounting helps customers save costs, eliminate redundancies, streamline activities, and allow redeployment of assets to more profitable activities. Its highly configurable structure can be tailored to meet local, regional, national, and global business models.

Modules within Financial Accounting include:

- Automatic Recording Bank Statements
- Accounts Payable
- Accounts Receivable
- Current Assets
- Fixed Assets
- General Ledger
- Group Consolidation
- Report Generator
- Tax Management
- Financial Audit and Accounting
- Environmental Tax Management
- Equipment Profitability Portal

## M3 Manufacturing Operations

Infor M3 Manufacturing Operations suite is designed to assist in reducing operational over-heads and supporting operational efficiencies in discrete, process, and mixed-mode manufacturing environments. Both simple and complex manufacturing environments can be planned, managed, and monitored with particular focus on increasingly complex regulatory control (such as traceability and shelf life).

Manufacturing Operations enables organizations to centrally manage product definition for the Infor M3 Enterprise System. In doing so, it manages complex, configured and attribute-controlled products and directly supports costing, planning, and execution. Further advanced functions support best practices such as Lean Manufacturing without sacrificing regulatory control or product complexities.

Applications within Manufacturing Operations include:

- Product Data Management
- Manufacturing Execution

## M3 Product Data Management

Infor M3 Product Data Management (PDM) enables you to maintain, store and use all types of product-related data across the administrative processes in your organization.

Product Data management includes:

- Engineering Change Management
- Product Data
- Technical Document Management

## Infor M3 Manufacturing Execution

The Infor M3 Manufacturing Execution capabilities includes scheduling, execution reporting and follow-up of manufacturing orders. It also support processes for quality assurance, both in-process control and quality control of finish goods.

These modules are included in Manufacturing Execution:

- Manufacturing Order Processing
- Operations reporting
- Laboratory and Inspection Control
- Quality Management System
- Capacity Requirement Planning
- Production Statistics
- Time and Attendance

## Enterprise Asset Management

### M3 Maintenance Management

The Infor M3 Maintenance Management module enables planned maintenance to be controlled in an integrated way with the production planning and execution activities. Equipment and plant maintenance can then ensure that maintenance will occur at the right time, maintaining an optimum level of production efficiency required. Maintenance Management includes:

- Diagnostics Management
- Maintenance Performance and Costing

- Work Order Processing
- Equipment and Component Control
- Preventive Maintenance
- Capability Management
- Maintenance Scheduling Board

## M3 Supply Chain Management

### Infor M3 Supply Chain Execution

Infor M3 Supply Chain Execution supports the fulfilment process for both simple and complex distribution networks and includes warehouse and transport management, lot-allocation and traceability, distribution orders, statistics and more.

The warehousing module supports full lot-management and traceability with expiry dates, last sales dates and harvest date handling. Attributes can be assigned to lots and balance IDs and tracked through the supply chain. Pallets and cases can be represented and transacted upon using the container and package management concept with support for license plates and SSCC-identifications.

Freight cost management allows you to calculate expected carrier-costs and assign to deliveries and shipments for later self-billing or matching against supplier or carrier invoices.

These modules are included in Supply Chain Execution:

- Distribution Order Processing
- Inventory Statistics
- Lot and Allocation Control
- Warehouse Management
- Transport Management
- Item Interface
- Warehouse Management Interfaces
- Transportation Planning Interfaces
- Freight Cost Management

### Infor M3 Supply Chain Planning

The core Supply Chain Planning capabilities includes forecasting, material and distribution planning, supply-chain-orders and global capable-to-promise functionality. The material and distribution-planning engine plans down to the hour and minute level to facilitate tight scheduling of manufacturing and sourcing to meet deadlines for same or next day shipments to customers. The shelf life of individual lots is integrated into the material planning engine and allows you to activate alerts for stock projected to become obsolete before consumed by any demand like forecast or sales orders.

These modules are included in Supply Chain Planning:

- Forecasting
- Material Planning
- Master Production Scheduling
- Rough Cut Capacity Planning
- Distribution Requirements Planning
- Global Capable to Promise
- Supply Chain Connected Orders

## M3 Procurement

Infor M3 Procurement efficiently supports the aspects of procurement and sourcing including supplier selection and evaluation, creation and renewal of supplier agreements, requisitioning, purchase order processing and monitoring milestones, receiving and quality control, claims, invoice control and statistics. Different categories of orders processed in Procurement are available from the same data source.

The components within Procurement streamline and efficiently support the aspects of your procurement process.

M3 Procurement includes:

- Purchase Order Processing
- Purchase Delivery Schedules
- Request for Quotations
- Supplier Evaluation and Statistics

## Customer Sales and Service

### M3 Sales Management

Infor M3 Sales Management serves as the hub for customer and pricing information. It helps to maximize sales with satisfied customers and sales organization through highly sophisticated sales order management support.

It brings a common view to your commercial and logistical activities by connecting your planning, pricing, promotions, bonus and commission, statistics and follow up to your fulfillment processes.

Customer Order Processing is highly scalable to manage EDI orders as well as intense order volumes in tele-sales environments. Standing order templates, buying patterns, assortment control and advanced global capable-to-promise ensures rapid and faultless order entry. FEFO and attribute based allocation rules, strict rotation and the definition of customer unique shelf-life requirements ensures the shipment

of exactly what the customer is expecting. The Proof-of-Delivery process allows you to capture a confirmation that the customer has received the goods before releasing for invoicing.

The advanced pricing module supports multiple parallel discounts with or without bracketing levels on item, group, order or invoice totals. Promotions can be defined and followed up. Bonuses and Commissions allow for post-invoice rebates to customers, salesmen and agents.

Sales Management includes:

- Customer Order Processing
- Pricing & Conditions
- Sales Quotations
- Bonus & Commissions
- Sales Statistics & Performance
- Bulk Orders
- Cash Desk Sales
- Point of Sales Integration
- Customer Delivery Schedules
- Customer Service Desk
- Core Entitlement

## M3 Maintenance Order Management

Infor M3 Maintenance Order Management application is specifically designed for Original Equipment Manufacturers, distributors, rental companies, and third-party maintenance providers who require a flexible system capable of managing different customers' after sales service needs.

It provides the flexibility needed to support the additional dimension of owner and an extensive use of maintenance agreements to help build up a quick and effective sales process. Agreements can be created for general use or specifically for each customer. Different charging methods can be defined as, for example, based on a customer's operations (meter based). By using agreements for quotations, orders and invoicing, two fundamental requirements are satisfied: Efficiency and quality.

Maintenance Order Management includes:

- Maintenance Agreements
- Maintenance Quotations
- Maintenance Customer Order Processing
- Warranty Claim Management

### Warranty Claim Management

Infor M3 Warranty Claim Management portal is normally used in conjunction with the warranty management system. It provides a range of options to manage your customers' warranty claims against

you, and those of your suppliers. From receiving the initial claim, updating the claim, through to claim agreement and final closure, our system has you covered.

### Warranty Management

Warranty management is a solution that allows you to set up the basic data that is used within the warranty and claim flows. Each warranty record can contains details on how long the warranty is valid for (calendar and meters), details of goodwill periods and if charges apply. You can then connected to each warranty the details of what types of transactions are covered by the warranty and can include labor, materials, subcontract charges and expenses.

The solution supports both standard and extended warranty types together with specialized warranty types that can be automatically built by the system after completing a service job (so that the warranty only covers the work that has been carried out.)

## M3 Rental Management

Automate critical rental management transactions, including rental orders, packages and kits, consumable sales, and equipment sales, as well as rent-to-buy, up-rent, and re-rent.

M3 Rental Management includes:

- Long-term rental agreements
- Short-term rental agreements
- Rental Equipment Planning Board
- Rental Logistics Toolbox
- M3 Rental Counter

## M3 Project Management

Infor M3 Project Management is a comprehensive project management application with functionality specifically designed to solve the challenges faced by today's project-oriented companies in various industries. The processes of entering and maintaining projects have been streamlined, providing continuously updated project information, project status, schedules and cost control. Project Management offers highly configurable functionality suitable for small as well as large projects.

Project management includes:

- Project Processing
- Project Quotations
- Project Control Board
- Project Portal

## Project Portal

Infor M3 Project Portal provides a single entry point to access detailed project information either by project number or by projects associated with customers. The project portal displays general project information, project quotations, the project breakdown structure, financial information and invoices.

# Common Components

## M3 Transaction Archive Management

Infor M3 Transaction Archive Management is a module within the Application Foundation of the Infor M3 Business Engine that helps you to centrally manage all Infor M3 archiving functions. With the module you will be able to establish and support your own archiving policies, processes and verification rules.

Transaction Archive Management helps you to centrally manage all M3 archiving functions which minimizes the risk of incorrect archiving.

# Infor M3 Core Infrastructure and Technology

Infor M3 Core Infrastructure and Technology consists of different software components that are mandatory for all M3 installations regardless of industry. This product provides the runtime platform for M3 Business Engine and tooling for administration, maintenance, and monitoring.

This CloudSuite uses these components:

- M3 Foundation (M3 Business Engine administration tools)
- M3 Cloud File Transfer Client (including Infor ION Grid)
- M3 Function Search
- M3 H5
- M3 BOD Processor
- Event Analytics
- Event Hub
- Data Lake Publisher
- Infor Enterprise Collaborator
- Business Document Mapper
- M3 Metadata Publisher



## Infor Implementation Accelerator

Infor Implementation Accelerator is a streamlined implementation methodology, managed by Infor Consulting Services (ICS), that includes a solution to integrate all of your core processes.

The Implementation Accelerator can be the first step in an ongoing process improvement and accelerate the initial implementation, reducing costs and risks in the configuration of business processes. As your business changes and grows, the scale and scope can be extended and other applications can be integrated.

Implementation Accelerator packages best practices in a repeatable, directive implementation approach to get you up and running on the core solution, with predictable costs and defined scope.

Implementation Accelerator includes a preconfigured company structure, which is the foundation for the implementation of the CloudSuite and is duplicated to fulfill training, migration, and production environments. The company structure is loaded with predefined business processes, which provide you with a graphical view of the business flow across the company.

These steps summarize the implementation process with Implementation Accelerator:

- 1 Start with the preconfigured company structure.
- 2 Confirm that the predefined and preconfigured business processes work for you.
- 3 Load your legacy data.
- 4 Start testing and validating the business processes.
- 5 Extend data sharing between companies as required.

## Implementation Accelerator M3 Distribution

Implementation Accelerator for M3 Distribution is a preconfigured solution targeted at small to medium-sized distribution companies. This Implementation Accelerator solution provides a foundation covering a company's core needs and processes, but is also the basis for future growth and improvements.

Implementation Accelerator helps to reduce and streamline the steps required for a system implementation. It helps you to save time and money, and takes the guesswork out of deploying the Infor M3 Enterprise Management solution for distribution companies. The result is an affordable solution that can meet your immediate needs today and affords you potential for tomorrow. It also provides the possibility for a faster ROI and time-to-benefit measured in weeks instead of months or years.

These processes for business transactions are included:

- Customer Order Processing
- Counter Sales
- Cash Desk
- Buy to Order
- Purchase Order Processing
- Assembly

- Supply Chain Orders
- Distribution Orders

These processes with supporting functionality are included:

- Master Data Management
- Sales Pricing and Agreements
- Customer Order Supporting Processes
- Demand and Planning
- Warehouse Management
- Package Management
- After Sales
- Finance

## Infor M3 Inventory Planning Workbench

Infor M3 Inventory Planning Workbench is an online-configurable spreadsheet grid that displays, simulates, and processes inventory, demand, and supply across multiple variable time buckets.

Filtering items and coding cells by color helps the user to focus on exceptions such as low stock availability, short coverage times, orders vs. forecast deviations, expiring stocks and much more. Configurable columns allow the user to add information about the percentage of forecasted fulfillment, dynamic coverage time, planned reclassifications, and other measures and key performance indicators.

## Industry add-ons

### Infor Sales Hub

Infor Sales Hub is a thin client application with an intuitive user experience, targeting over-the-counter sales of professional trades. It enables efficient face-to-face customer service interactions in the showrooms and branches of wholesale distributors and equipment spare parts dealers.

The solution is built around powerful search capabilities, including facet searches for common suggestions, customer and product search, configurable filters, and in-line images for instant product identification. The item search is augmented with sales intelligence, enabling display of recommendations for up-sell and other complimentary products.

The intuitive user experience and powerful search, combined with a streamlined order entry process, simplifies user training needs, enabling sales representatives to focus on serving customers.

A mobile application for registering materials that are loaded into vehicles is also included. The application is accessed through the Infor Go platform on iOS and Android.

## Infor M3 SWB - Scheduling Workbench

Infor M3 SWB - Scheduling Workbench is a powerful decision support tool for production planning and the scheduling of manufacturing orders.

It takes into consideration finite capacity constraints and material flow from raw materials to finished products. M3 SWB - Scheduling Workbench can handle single or multi-facility/plant distribution and production planning and then synchronizes resource utilization and material flow through the internal supply chain. The capabilities in M3 SWB - Scheduling Workbench include, among others:

- Decision support with customizable workflow menus to help planners executing their daily planning tasks.
- Processes and decisions tightly integrated with M3 Business Engine.
- Performance Scoreboard with delivery performance, shortages and resource utilization.
- Support for MTO and MTS production with visibility of customer orders versus forecast driven demands when prioritizing your plans.
- Critical constraints handling based on Goldratt's Theory of Constraints
- Dynamic network interdependencies and synchronization between orders, materials, routings and capacity
- Rules based sequence optimization engine to squeeze out nonproductive time.
- Interactive Scheduling Board that shows the operations scheduled for one or multiple resources.
- Interactive workbenches for capacity planning focusing on utilization and load of work-centers, and material planning focusing on stock situations, coverage times etc.

## Infor M3 Demand Planner

Infor M3 Demand Planner supports a collaborative workflow for reviewing sales forecasts and capturing market intelligence.

The built-in forecast engine supports several automatic forecast methods. Competitive forecasting helps customers find the best fit among methods.

Exception-based and configurable scoreboards allow you to highlight and focus on unusual events and problems. Outliers such as exceptional demands, inaccurate forecasts compared to actuals, and new demand trends, and more can be detected and acted upon promptly.

Dynamic grouping and data aggregation enable customers to analyze and manipulate demand and forecast on various dimensions and levels. Tracking of promotional activity allows planners to see details of all promotions, to monitor progress and adjust forecasted demand if required.

Favorites and exception management provide filters and settings to guide users to their preferred information view. M3 Demand Planner supports the generation of more accurate, one-number consensus

forecasts to improve delivery performance, help reduce finished goods inventory, and avoid product obsolescence.

## Infor Supplier Rebate

Infor Supplier Rebate provides the purchasing team with an efficient and accurate way to monitor and claim rebates that result from off-invoice discounts.

Inputs to the process are master data and transactional data in the form of purchase orders and goods receipt transactions. This functionality is available:

- Specification of agreements based on the rebate contracts that are required between a distributor and its suppliers
- Automatic calculation of rebate entitlements based on the purchase transactions received
- Creation of supplier rebate claim invoice data as output
- Automated email notifications that include the status of an agreement and support the timely claiming of rebates
- Rebate analysis that leverages the reporting capabilities available for accruals and claims

Infor Supplier Rebate is integrated with Infor M3, utilizing the ERP's purchase transactions and master data through BODs that are processed in Infor ION. Suppliers can manage multiple active agreements in parallel and apply multiple incentive options to each of their agreements. This allows the user to monitor how much of the incentive has been claimed in advance and how much of it remains to be claimed at the end of the period.

## Infor Factory Track

Infor Factory Track is a purpose-built warehouse and manufacturing automation solution for M3. Factory Track allows you to mobilize your operators and track translations in real time via a barcode scanner interface. Key features include:

- Online extension of M3's inventory management with the same terminology as the ERP
- HTML5 browser-based UI for broader device support (zero footprint on the device)
- Highly configurable
- Cloud or on premises
- Built on the Infor Mongoose framework for ease of personalization

## Additional add-ons

### Infor M3 Customer LifeCycle Management

Infor M3 Customer Lifecycle Management is a comprehensive customer relationship management solution designed to work in conjunction with the Infor M3 ERP solution.

Using M3 CLM you can:

- Manage client and prospect information including contacts, notes and addresses
- Manage sales budgets
- Create pre-sales activities
- Keep track of your competitors
- Set and save appointments to your calendar
- Create opportunities and use these to trigger quotations into Infor M3 ERP
- Manage major projects
- Create checklists to manage activities that can span your entire business to make sure sales contracts are prepared and completed efficiently and on-time

Using M3 CLM, your sales department can organize and synchronize work and become more efficient. M3 CLM can help you to manage the whole process from receiving a lead to creating an order. Implementing M3 CLM ensures that you have a single, comprehensive view of all your customer contacts. M3 CLM will help build a strong corporate memory for each customer relationship.

Because the cost of sales is high, automating sales department processes can result in cost savings and revenue increases. Use M3 CLM to help automate your sales process from the moment you receive a lead and to support you throughout the opportunity management phase through the quotation process to order entry.

Salespersons can organize their scheduled day-to-day activities in a to-do list. They can view the to-do list according to various time scales such as today, this week, or this month. It is easy for sales people to see these scheduled activities in their calendar because M3 CLM can be interfaced with email and calendar systems.

Using the M3 CLM mobile application, your sales teams can continue to manage their customer activities whilst on the road and event when working off-line.

### Infor Mobility for Field Service

Infor Mobility for Field Service (MFS) is a mobility product designed to support the service technician whilst working out in the field.

The solution is available on phone and tablet devices that run the following operating systems: Android, Windows, and iOS.

MFS can operate both online and in disconnected mode. MFS is built on the same core technology framework as M3 Customer Lifecycle Management, but the customer can choose to use MFS

stand-alone or combined with M3 Customer Lifecycle Management. MFS and M3 Customer Lifecycle Management share common data such as customers, contacts, and equipment. MFS also has two-way integration to Infor Document Management. This integration displays documents in M3 that are linked to the record in Infor M3, such as work orders, items, and services. Likewise, electronic media such as photos and videos, taken with the mobile app, are sent back to M3 and automatically indexed against the M3 records. The MFS solution also uses apps on the mobile device, including access to maps to display the location of the service assignment, and the device's phone to quickly call customers and contacts. MFS is available for M3 customers who run the work order process.

MFS provides these capabilities:

- Offline capabilities to allow the technician to continue working while disconnected from the network
- Checklists and inspections with predefined drop-down values
- New work orders, work requests and assignments can be created on the device
- Reports, such as the service visit report, can be emailed directly to the customer contact
- Assignment details
- Customer and contact information
- Equipment information including equipment details, service history, attributes, as-build structure and warranty information
- Options to issue parts that were either predefined in M3 or allocated directly from the technician's van stock
- The ability for the technician to confirm the receipt of parts that have been shipped to them
- Update of equipment meter values
- Assigning miscellaneous costs to the assignment, such as hotel costs or local purchases
- Adding labor and travel time
- Creation of a service error report, detailing issues, causes, and repairs
- Ability to record both the customer's and the technician's signature on the device and then store these back in Infor Document Management
- Support for a wide variety of statuses including Accept assignment, Start travel, Arrived, Start work, Stop work, Delayed work, Completed, etc.
- A variety of search and sort options to help technicians quickly find the information they need
- Supports identifying equipment and spare parts by bar coding
- Allows you to customize the appearance of the MFS application to include their corporate colors and logo
- Multiple assignments can be selected for the Group action, in which an end customer can, for example, sign once for multiple assignments

## Infor M3 SWB - Scheduling Workbench

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- Interactive workbenches for capacity planning focusing on utilization and load of work-centers, and material planning focusing on stock situations, coverage times etc.

## Infor M3 Rental Metrics

Infor M3 Rental Metrics, powered by Birst, helps managers to understand the performance of their fleets and units.

Adopting an industry-recognized metrics approach to analytics offers organizations a unique opportunity. It allows them to become more competitive, improve their business performance, and build trust with external financial institutions. These benefits come from an alignment across organizations that allows for critical measurements against their peers.

## Infor CloudSuite Configure Price Quote

Infor CloudSuite Configure Price Quote (CloudSuite CPQ) enables the handling of configured products or services and supports most types of user or application.

CloudSuite CPQ includes these features:

- A product, sales, pricing, and process configurator that integrates with your web, mobile, enterprise, desktop, and laptop systems. You can capture and share all the knowledge about your customizable products on any device.
- Product modeling, which makes selection and configuration of complex products intuitive and error-free. The rules, constraints, and associated data in product models are processed based on inputs from the user interface or other applications.
- Deployment of the configurator for a specific function or across all available applications and computing platforms.
- Selection, configuration, and pricing of products by your sales people and customers, while ensuring that only valid combinations of features, options, and dimensions are created, quoted, and ordered.
- Visual selection and configuration provides dynamic, real-time, 3D experience for any user to visualize their selection.
- CPQ Enterprise Quoting provides a comprehensive quoting and ordering system.

- Data-driven decision support, enabled by Infor CPQ Analytics. Infor CPQ Analytics is powered by Infor Birst, an integrated networked business intelligence platform for data-driven analysis.

## Infor Expense Management

Infor Expense Management is a flexible and easily configurable solution that offers unique and insightful capabilities such as spending control, reporting, and analysis.

Customers can actively manage employee-initiated expenses, owing to the mobile capabilities and cloud deployment, thereby reducing the costs without impeding the business. Infor Expense Management can automate expense-related business processes with social collaboration tools, enforce policy compliance, cut administrative costs, and reduce the risk of accidental errors and intentional fraud.

You can use Infor Expense Management to manage:

- Expense Reports (ER)
- Travel Plans (TP)
- Payment Requests (PR)  
**Note:** The M3 CE integration for Expense Management does not leverage the Payment Requests capability as approved employee expenses are reimbursed through M3 Accounts Payable processes.
- Timesheets (TS)

## Infor WMS

Infor WMS is an advanced warehouse management system.

The solution combines core warehouse functionality with labor management, task management, wave management, and 3PL management on one highly configurable, scalable database. The contemporary user interface, combined with an open API framework, enables advanced features such as Web RF, 3D visual warehousing, WMS Analytics powered by birst\_short, and voice processing, allowing you to manage multiple channels (B2B/B2C) from a single warehouse.

The benefits of WMS include reduced operating expenses, enhanced inventory visibility, just-in-time inventory, inbound and outbound optimization, efficient labor utilization, enhanced security, and improved customer and supplier relationships.

## Infor Nexus

Infor Nexus Commerce Network is a cloud-based collaboration platform that connects financial and physical supply chains, automating supply chain processes on a global scale and across trading communities. This enables buyers and sellers as well as financial institutions and logistics service providers to work together on a common platform with a single, consistent, and up-to-date source of information, that supports multiple supply chain functions.



Infor Nexus solutions improve service quality while reducing service costs by providing end-to-end connectivity, visibility, and collaboration with suppliers, customers, and other supply chain partners.

## Infor Rhythm for Commerce

Infor Rhythm for Commerce is an engagement platform that provides the tools you need to create a customer-facing commerce website.

Your website is tightly integrated with the products in Rhythm for Commerce and your ERP. Using APIs and web services, information that is displayed on your website is read directly from your databases. When your customer places an order, the order is sent from your website to your ERP for fulfillment in real time.

Infor Rhythm for Commerce contains these applications:

- Infor Rhythm for Commerce Business Center. Use this application to arrange products into catalogs, create campaigns and promotions, and manage the customers who access your website. You also use Business Center to manage search settings, such as boosting rules, to use with Elasticsearch.
- Product Information Management. Use this application to enrich information about the products that you sell on your website. You can use Product Information Management to upload digital assets such as manuals, sell sheets, and specifications and automatically enrich product content on your sites. You also use this application to specify the product attributes that your customers can use to locate products.
- Infor Rhythm Portal. Rhythm Portal is a website portal and a content management system. Use Rhythm Portal to create website pages, configure the Rhythm for Commerce and Rhythm Portal widgets that are used on the pages, and manage your website's static content.
- Elasticsearch. This is the search engine of your website. When your customers search your website, Elasticsearch returns results that are based on settings that you specify in Business Center.

Optionally, you can use these products:

- CPQ Enterprise Configurator. Use this product to set up configurable products to sell on your website.
- CenPOS: Use this product to process credit card transactions.

In addition, these components of Infor OS are used in the suite:

- Infor Ming.le. This product is used to manage single sign on for the products in the suite.
- Infor ION. This product is used to connect your ERP system to Rhythm for Commerce.
- Infor Document Management. This product is used to store key business documents, such as order acknowledgments, invoices, and delivery notes. When your customers visit your website, they can download the documents that are associated with their orders.

## Infor Supplier Exchange

Infor Supplier Exchange is a complete solution for streamlining two-way communication of procurement and performance information between your organization and your suppliers.

Infor Supplier Exchange is an advanced, web-enabled supply chain management solution that supports effective collaboration with your suppliers and efficient execution. It helps you to reduce supply chain costs and inventory, and to increase operational efficiency. Infor Supplier Exchange provides visibility over your supply chain, streamlines your communications with partners, and creates powerful, real-time data connections.

## Infor Dynamic Enterprise Performance Management

Infor Dynamic Enterprise Performance Management (Infor d/EPM) is a suite of financial applications that run on the Infor d/EPM Platform. It includes applications that address requirements for budgeting and planning, reporting and analytics.

The Infor d/EPM business application is Infor Budgeting & Planning with the Workforce Budgeting module.

## Chapter 3: Analytics

### Birst for CloudSuites

Birst for CloudSuites is a cloud-based business intelligence platform.

With Birst for CloudSuites, organizations can achieve a new level of insight and decision making by connecting centralized and decentralized teams and applications. As part of CloudSuite applications, Infor provides business users a business intelligence experience.

### Infor M3 Analytics

Infor M3 Analytics for Infor M3 Cloud and relevant industry CloudSuites embeds cloud-based, industry-aligned analytical content at the core of the CloudSuite. This enables customers to gain business-critical insights across the CloudSuite.

The key performance indicators (KPIs) provide key strategic and tactical information to senior executives and business managers.

#### Analytics Domains

Each of the M3 Analytics domains provides rich data models containing many metrics and attributes, accessible via the Birst subject areas. M3 Analytics also provides example dashboards and reports derived from the rich subject area of each domain, to either be used directly or copied, depending on customers' specific requirements. These are the M3 Analytics domains:

- Sales (Open Customer Orders, Sales Analysis, and Delivery Performance)
- Finance (Financial Key Ratios, General Ledger, AP Operational Metrics and Stock Valuation)
- Procurement (Open Purchase Orders and Procurement Analysis)
- Production (Work Center Utilization, Operational Analysis with OEE, and Order Costing)
- Rental (Rental Utilization)
- Equipment (Technician Performance and Labor Resource Analysis)
- Warehouse (Stock Statistics and Stock transaction details)

## Horizontal add-ons

### Birst Enterprise Plus

Infor recommends Birst Enterprise Plus with networked business intelligence for CloudSuites.

Birst Enterprise Plus includes these additional capabilities:

- Visual data discovery to easily discover new insights in your data
- Self-service data prep to go from raw data to trusted business analytics
- Automated data refinement to model all your enterprise data
- Open client interface to work with the analytics tools such as R, Tableau, and Excel

## Chapter 4: Technology

### Infor OS

Infor OS is a technology platform that supports fully integrated, industry-specific solution suites with mobile-first design, a consumer-inspired user experience, and science-driven analytics. It leverages the convergence of information, analytics, cloud computing, mobility, and social business.

This platform includes these products:

- Infor Ming.le
- Infor ION
- Infor ION Grid
- Infor Document Management
- Infor Data Lake
- Analytics
- Infor Localization Services

### Infor Ming.le

Infor Ming.le is a web-based application framework that provides a common user interface for Infor applications, third-party applications, and in-house developed applications integrated through Infor ION. It is a centralized platform for social collaboration, business process improvement, and contextual analytics.

Infor Ming.le provides drill-back capability so that users can navigate across the applications to track transactions, the transfer of data, and report updates. Additionally, Infor Ming.le provides an infrastructure for sharing content with context applications.

Infor Ming.le uses homepages, configurable by users to organize information and activities at a high level to focus on critical areas of concern.

Within Infor Ming.le, you can use ION API, a managed API layer across all applicable Infor and non-Infor APIs, allowing existing APIs to be presented in a standardized, managed, and controllable way.

Infor Ming.le uses Infor Federation Services for centralized authentication.

Infor Ming.le is available as a mobile app, supported by iOS, Android™ operating systems.

## Infor ION

Infor ION is a business process management platform that integrates applications, people, and business processes.

The Infor ION platform converts data into the common language of standardized XML to enable disparate business systems such as Infor products, third-party applications, and in-house developed applications to share information.

Infor ION simplifies the connectivity and data sharing across the connected applications. It enables users to configure a routed infrastructure, set up workflows, and design and activate business event monitors and manage tasks and alerts.

## Infor ION Grid

Infor ION Grid is a Java-based application server that provides a distributed runtime environment for other applications.

Those other applications may, at any time, be added (deployed) or removed (undeployed) from a grid. The distributed nature of a grid means that an instance of the Infor ION Grid may span multiple server machines.

## Infor Document Management

Infor Document Management is an integration platform that enables you to take advantage of document solutions already in use within your organization.

Document Management is used to integrate your documents with your business processes and to provide a central repository for them. Soft links are used, based on document metadata, to provide integration between your documents and your Infor ERP solution. You can view a document from within the context of your application or click a document link to retrieve the document from the central repository.

Document Management supports the entire lifecycle of your business documents, from input through storage, retrieval, and sharing.

## Infor Localization Services

Infor Localization Services offers a set of services and functions that run on a single platform with Infor OS. These services extend the footprint of the core ERP, so that a global localization platform is offered that is updated in response to change.

The set of functions can be classified into these types of proprietary format:

- Electronic submissions, which are processed in Infor Localization Services Platform (LSP)
- Electronic messages (GEMS), which are processed in ION

## Infor Localization Services Platform

Infor Localization Services Platform (LSP) helps customers meet the local regulatory, statutory, and cultural requirements of a country. It is connected to ERPs through standard Infor BODs and uses business knowledge to create submissions. Depending on the type of function, the data can be automatically transformed to proprietary format or prepared for reporting within the service, allowing the user to check and confirm what is sent to the external agency prior to submission. The submission is then tracked and logged for audit purposes, with all responses required by the ERP returned as required.

The functions in LSP can be categorized into these types of files:

- e-Auditing provides a set of electronic submissions that allow auditing information to be collated, checked, and sent to the requesting government or accounting organization
- e-Invoicing provides a set of electronic submissions that are used to create electronic sales invoices that can be sent directly to customers.
- Tax reports
- Electronic transportation documents
- Statutory reports

## Infor Localization Services GEMS

Infor Localization Services GEMS (Global Electronic Messaging Services) is an electronic messaging solution that helps customers meet the local regulatory, statutory, and cultural requirements of a country. It is a black box solution within Infor ION that automatically transforms BOD data into a proprietary message without going through the logic of Infor Localization Services Platform.

GEMS messages can be categorized into these file types:

- Banking includes a set of electronic messages that enables supplier payments and direct debits to be created for banks and other financial institutions, such as clearing houses, according to the standard of an organization, government, or financial institution. Bank statements sent by the bank can also be consumed by the ERP for payment matching and reconciliation.
- Trade statistics provides a set of electronic messages for regulatory reporting of commerce and goods movements across country borders, such as Intrastat and EU Sales Listing for Europe.
- Supplier Invoices
- Tax Reports

## Homepage Widgets

A widget is a single-purpose application that provides quick, at-a-glance information or quick access to simple interactive functions. Widgets are simpler and faster to access than full applications. Because APIs are used for all communication, the business logic within the target applications are adhered to. Widgets are added to and used from an Infor OS homepage.

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## M3 Specific Widgets

These widgets are part of M3 CE Core and available within all CloudSuites:

- M3 Application Messages Widget – displays your latest messages received in M3.
- M3 Create Widget – a widget that can be used to create new data.
- M3 Editor Widget – a widget that can be used to edit existing data.
- M3 Environment Widget – displays information about the current M3 environment and user.
- M3 Information Monitor Widget – collects multiple M3 Information Viewers into a single window.
- M3 Information Viewer Widget – displays an overview of relevant information in M3.
- M3 Menu Widget – enables you to locate and launch M3 programs, forms, tools, jobs, and reports.
- M3 Product Updates Widget – gives an overview of the latest updates per product. It also displays the current status of the review process of features. When the user clicks a link, an M3 program is launched, displaying a list of the features.

All widgets but the M3 Menu Widget are enabled for use with the mobile application and portal Infor Go.

## Infor Go

Infor Go is a mobile application that provides customers with a synchronized mobile experience.

Customers can use Infor Go as a mobile portal for access to all Infor applications.

In common with the rest of Infor OS, Infor Go uses Infor Federation Services for centralized authentication, giving the same level of access from both web and mobile perspectives.

From Infor Go, customers can navigate across applications and their favorite screens, and review their Infor Ming.le profiles.

Users can choose to receive push notifications to keep up-to-date with tasks, alerts, and notifications.

Infor Go is available only for multi-tenant customers and is supported by iOS and Android devices.

## Infor Data Lake

The Infor Data Lake is a data repository that provides high-volume, scalable object storage for real-time data from across your enterprise systems, disparate applications, people and IoT infrastructure.

Using ION to connect your data sources, Infor applications move content into the Data Lake and use other consuming applications to query and navigate the Data Lake for content related to specific business cases.



## Infor Mongoose

Infor Mongoose is an innovative technology platform that lets you easily design and deploy applications. You can also use Mongoose to enhance and extend your core enterprise solution.

Mongoose requires no knowledge of complex source codes or programming languages. You can create enhancements and extensions for Mongoose-based applications in a fraction of the time and with far less effort than is required with traditional development approaches.

With Infor OS technology, Mongoose also delivers exciting new functionality, including:

- **Packaged integrations:** Flexible connections to Infor solutions using Infor ION.
- **Device readiness:** Automatic delivery for both browser and mobile interfaces.
- **Deployment flexibility:** Cloud-based and hybrid deployments, as well as on-premises installation and use.

## Infor App Builder

Infor App Builder is an application design tool that is incorporated with and can be run from within Infor Mongoose.

As part of the Infor Technology Suite, it can also run within Infor Ming.le™ and in the cloud as part of a multi-tenant offering. App Builder apps can also be used as Mongoose forms, so that if you want to move beyond the capabilities of apps you have in App Builder, you can open them in Mongoose Design Mode and continue to develop them as Mongoose forms.

App Builder is designed to build basic apps using an intuitive WYSIWYG user interface. App Builder offers drag-and-drop of UI components, a data service layer to connect with APIs, and an interaction wizard to set up how the components of your app interact with each other.

The App Hub is a repository where all published and activated App Builder apps are stored and can be viewed or used.

## Horizontal add-ons

### Infor Document Capture

Infor Document Capture enables you to convert a high volume of unstructured document data from multiple formats into structured information by using machine learning and analytics.

The automated conversion of document data categorizes each document by type and captures and stores relevant data for each document, providing greater efficiency, productivity, and a more detailed analysis of your business processes within Infor enterprise resource planning (ERP) solutions.

## Infor Process Manager

Infor Process Manager is a cloud-based business process management (BPM) solution designed to capture and design unique operational processes that can improve business efficiency. Process models can be standardized and manual calculations and decisions can be automated.

These are some of the key features:

- Creation of processes and decision models.
- One-click sharing functionality for creation of up-to-date process model libraries.
- Visualization of customers' interactions with your business from an outside-in perspective.
- Optimization of processes enabling faster implementation of changes.
- Efficient management of day-to-day process operations across all processes, departments, and systems.
- Capability for continuous monitoring and response to individual cases, including zoom out functionality for investigation of your organization's overall process health.

## Infor OS add-ons

### Infor Coleman Digital Assistant

Infor Coleman Digital Assistant is a natural language AI tool that you can use to extend your enterprise software. You can interact with Coleman Digital Assistant through speech and text commands to find information, make requests, and execute tasks. Additionally, Coleman Digital Assistant redefines user experience patterns in enterprise software, providing users with a software experience that is both web-free and hands-free.

Coleman Digital Assistant has these features:

- Persistent chat user for topic-based discussions that persist over a longer period of time
- Tap-to-talk option within the Infor OS portal
- Self-service options for users to leverage Coleman Digital Assistant's capabilities in their own apps
- Build, test, and publish options for managing your skills
- Security integration through IFS and the ION API Gateway

### Infor Coleman AI Platform

Infor Coleman AI Platform allows enterprises to build company-specific machine learning models, using the enterprise data and use cases. These models can be used to build enterprise-wide machine learning and deep learning projects for predictive and preventative tasks.

## Infor Governance Risk and Compliance

Infor Governance Risk and Compliance is a native cloud multi-tenant solution that helps organizations to automate audit, risk, and compliance for better governance. It automatically identifies exceptions and controls failures in key application systems. By locating and highlighting issues immediately, organizations can reduce potential business risks and increase operational efficiency.

## Chapter 5: Third-party products

### M3 Credit Card Interface

Use the Credit Card Interface to accept credit card payments for M3 Customer Orders.

M3 CE supports integration with CenPOS only. CenPOS provides an online payment system and offers a “Payment-as-a-Service” model. The M3 integration supports both the “Collect Payment at Order entry” and “Authorize at Order Entry and collect at Invoicing” models. Communication between the M3 interface and CenPOS is PCI-compliant. CenPOS then communicates with the relevant credit card processing company.

It is possible, as a Services engagement, to utilize another online payment provider for the “Collect Payment at Order entry” model, provided they offer a similar “Payment-as-a-Service” model. This is not possible for the “Authorize at Order Entry and collect at Invoicing” model.

### Supported external sales tax services

#### Vertex O-Series

The M3 integration to Vertex O-Series is used to manage the requirements of US and Canadian sales tax. It sends and receives specific business information to and from various Infor M3 applications so that a sales tax decision can be made. The required tax calculations are performed within Vertex O-Series and the result of these calculations is both stored within Vertex O-Series and returned to the Infor M3 applications to complete the quotation or invoicing process.

#### AvaTax

The M3 integration to AvaTax is used to manage the requirements of US and Canadian sales tax. It sends and receives specific business information to and from various Infor M3 applications so that a sales tax decision can be made. The required tax calculations are performed within AvaTax and the

result of these calculations is both stored within AvaTax and returned to the Infor M3 applications to complete the quotation or invoicing process.

## OpenText Exstream

OpenText Exstream is a third-party output management product that enables multiple distribution channels for data. It transforms configurable XML output data from M3 Business Engine into predefined documents or report layouts. The configurable XML files are transferred to consumers using the Cloud File Transfer (CFT) capabilities of M3 CE Core. M3 StoryTeller templates can then be used to produce documents and reports in different formats.

## Chapter 6: Extending the CloudSuite solution

Customers can extend their CloudSuite solution by using extensibility options. These options can be used to add or modify core application functionality. Without direct access to the application database, source code, underlying system objects, or servers hosting the application, extensibility options can be used to change user interfaces, data models, business logic, reports, analytics, and integration points. These extensibility options use a shared set of computing resources and provide full upgradability, manageability, and isolation throughout the application lifecycle.

This table shows the types of extensibility options that are available for this CloudSuite:

Type	Description	Examples
Personalize	Modify the look, feel, and flow of an application.	Labels, titles, navigation, accessibility, links, conditional styles etc.
Tailor	Tailor elements in an application.	Configure behavior and information lists, print-outs, properties, default values
Extend	Add new application functionality, including new logic and data. Includes both UI scripting and M3 extensions.	New UI elements and new non-UI elements, including tables and business objects
Integrate	Connect to external logic and screens from an external application.	Manufacturing execution systems, web sales portals, maps, and widgets

For additional information about the extensibility of M3 CE Core, deployed as a multi-tenant cloud environment, see the M3 CE extensibility white paper at [KB #1858460](#)