M3 Equipment Quotation Management Release Notes

Release 15.4.0

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Contacting Infor

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

The latest documentation is available from 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.

Chapter 1: Where to look for information

Where to look for information

Throughout this release notes, references to specific documents and Knowledge Base articles may be provided to help you locate more detailed information.

Product documentation is available on the Infor Support Portal.

- You can find documentation posted to the product records on the Download Products page. Look here first for installation guides and release notes.
- You can browse or search for product documentation on the Documentation page.

For questions or feedback, email documentation@infor.com.

Documentation updates

The following documents are published with this release:

Document Name	Description
M3 Equipment Quotation Management Release Notes	This document
M3 Equipment Quotation Management Installation Guide	Updated for this release.
M3 Equipment Quotation Management User Guide	Updated for this release.
Net Change Reports	The reference 'See additional documentation in NCR record', indicates that more information is available. To find more information on these NCRs, you can search in the Documentation page on Infor Xtreme, using the NCR number. **Note:** Additional documentation is only produced for major NCRs.

Chapter 2: General Information

Scope of this Release

M3 Equipment Quotation Management 15.4.0 is a minor release including new features and corrections.

Restrictions

Note: M3 EQM 15.4.0 will not be able to support IDM 12 from Xi Tech Stack 12 until a fix has been applied to IDM. Refer to KB article KB 1707177 for latest updates regarding Xi Platform 12.0 certification for M3 products

Upgrade Paths

The release is a full installation and can update any previous M3 Equipment Quotation Management installation.

Chapter 3: Availability Overview

Language Availability

Online help and documents are all in US English. Languages below only refer to software integrated text on panels. For contracting details on languages, please refer to license agreement.

Available Languages	Comments
English (US)	Default language

This product does not contain any language dependent components. Panels are generated from the products interacting with M3 Equipment Quotation Management. Screens in M3 Equipment Quotation Management display translated field headings from M3 Business Engine and M3 CLM, however the M3 EQM component is not translated.

Chapter 4: Compatibility

Supported platforms

Operating system and database support - Server

Operating system	OS version	Database	Version
Microsoft Windows Server	2016 2019 2022	Microsoft SQL Server	2014, Standard or Enterprise Edition, 64-bit 2016, Standard or Enterprise Edition 2017, Standard or Enterprise Edition 2019, Standard or Enterprise Edition

Operating system and browser support - client

Operating system and browser	OS version
Windows	11
Chrome	Current stable version
Edge	Chromium Edition
Safari OXS/iOS only	14.x, 15.x, 16.x

Required / related software components

Required Software Components

Software Component	Supported Versions	Comments
M3 Business Engine	15.1.4	
M3 Core Infrastructure and Technology	13.4.0	

Related Software Components

Software Component	Supported Versions	Comments
Infor Enterprise Search for M3	11.0	
Infor Ming.le	12.0	
Infor Mobility for Field Service	15.6.2	
Infor Smart Office	10.2.1	
M3 Customer Lifecycle Management	15.6.5	

Chapter 5: Feature Changes

Auto create MMS002 records in EQM

	Auto create MMS002 records in EQM
Description	Background: Currently, if an item is entered when creating a quotation that does not exist in the warehouse, then an error message is displayed: 'Item XXX does not exist in the warehouse" (XIT0102). EQM should work in a similar way to other flows within M3, therefore, if the item does not exist in the warehouse (MTBAL record) then a warehouse record should be created automatically and can then be viewed in `'Item. Connect Warehouse' (MMS002).` Solution: Using function program MADDBAL, EQM can generate a MITBAL-record in (QUS901) to create item record in 'Item. Connect Warehouse' (MMS002) for items entered during a quotation that previously didn't exist in a specific warehouse. The solution is also valid for items included in the configuration. To be able to use MADDBAL, the following settings are necessary: • Inventory accounting code (STCD) should be set to 0 or 1 • Configuration code (CHCD) should be set to 1 or 2 in (MITMAS) • Automatic add permitted (AUAD) should be selected in the Warehouse file (MITWHL) This functionality is also added to 'Quotation. Open Lines' (QUS101), and to the attribute configuration in EQM, in QURTVPRI and CRSPCIMI.
Net Change ID	8297

Add MCO order type in (QUS114) and (QUS104)

	Add MCO order type in (QUS114) and (QUS104)

Description	There is a need to be able to manually select the maintenance customer order type (MCO type) when creating a quotation rather than automatically retrieving it from the maintenance agreement (COS410).
	Background:
	There is a need to be able to manually select the maintenance customer order type (MCO type) when creating a quotation rather than automatically retrieving it from the maintenance agreement (COS410). By bringing the order type for the MCO from EQM instead of getting a default MCO type from (COS410), it is possible to affect the MCO that is created already when creating the quotation in EQM.
	Solution:
	By bringing the order type for the MCO from EQM instead of getting a default MCOtype from (COS410), it is possible to affect the MCO that is created already when creating the quotation in EQM.
	To achieve this, the following programs and tables are updated
	• The field AOTY (MCO order type) is added to
	  • QUCSER (Service) and QUSERV (Quotation line service)
	  • 'Quotation. Add Services' (QUS114), panel E.
	  • 'Quotation. Open Services' (QUS104), panel E.
	  When quotation service lines are created in 'Quotation. Open' (QUS100), the deafult value in AOTY is retrieved from (QUS114).
	• Handling of AOTY (MCO order type) is added to QUS114MI.
	• In 'Quotation. Open Lines' (QUS101), when adding services to the quotation (creating table QUSERV), the deafult value in AOTY in (QUS104) is retrieved from (QUS114).
	• In 'Quotation. Open' (QUS100), when creating the MCO from (COS906), AOTY from (QUS104) are added, and the MCO is created based on that order type. Services with the same AOTY are added to the same MCO, services with different AOTY create a new MCO.
	• When creating quotation services automatically in QUMNGQUO, AOTY from QUS114 is retrieved from (QUS104).

Net Change ID	8293

New fields to quotation line to store alias number and replacement

	New fields to quotation line to store alias number and replacement

Description	There is a need to store alias number and replacement item on quotation line level, similarly to the functionality on customer order. When creating a customer order line from the quotation, the alias number and the replacement item should be transferred from the quotation line to the customer order line.
	Background:
	The handling of alias and replacement needs to be similar to the way it is handled for customer order management. Alias number is to be stored in field POPN, replacement item to be stored in field REPI on the quotation line file QULINE. ITNO needs to be replaced with correct item number.
	Solution:
	When a quotation is created and an alias is entered in 'Quotation. Create' (QUS090) or in 'Quotation. Open Lines'(QUS101), the handling is similar as the one in customer order. An alias is picked and stored in field QUPOPN in table QULINE (Quotation line) and the item number stored in QUITNO in table QULINE. For replacement item, information on the item which is replaced is stored in field QUREPI in table QULINE, and the item replacing it is stored in QUITNO in table QULINE.
	When creating a customer order from the quotation, the customer order line is created similarly as to creating a customer order line in 'Customer Order. Open Lines' (OIS101). The alias information from the quotation line triggers an update to OBPOPN in table OOLINE (Customer order line) and OBITNO in table OOLINE is updated with the item number. OBREPI in table OOLINE is updated with the replaced item, and OBITNO in table OOLINE is updated with replacing item. '
	To support the required solution, the following enhancements are implemented:
	• A new field REPI is added to QULINE (Quotation line) table and to data structure QUS200DS.
	• In QUS100MI, POPN and REPI are added to the following transactions:
	  • AddQuote
	  • LstQuoteLine
	  • GetQuoteLine
	• The handling of alias and replacement is added to 'Quotation. Create'(QUS090) and to related function QUS091. When a quotation line is created containing alias and/or replacement, the fields POPN and REPI are created on the quotation line table QULINE. When creating an alias or replacement line in 'Quotation. Open Lines' (QUS101), the fields POPN and REPI are created on the quotation line table QULINE.
	• In 'Quotation. Open' (QUS100), using related option 14-'Create order' you can create a customer order from the quotation. The fields ALWQ, POPN, ALWT and REPI are generated in the batch order line file OXLINE with values from the quotation line file QULINE. The fields for POPN and REPI in the created customer order line OOLINE are generated from the quotation line.

	New fields to quotation line to store alias number and replacement
Net Change ID	8342

Customer order entry message displayed from 'Quotation. Create' (QUS090)

	Customer order entry message displayed upon quotation creation from 'Quotation. Create' (QUS090)
Description	Customer order entry message can be setup via (OIS165) and will be displayed upon quotation creation from 'Quotation. Create' (QUS090). Solution: Customer order entry message can be setup via (OIS165) for quotation management and will be displayed when quotation is created from 'Quotation. Create' (QUS090). The text is set in 'CO Entry Message. Open' (OIS165). The field 'Used by' can be set as '0- Customer order' or '5 – All application' to be valid for quotations management. **Note:** Know limitations: Only qualifier one can be used in 'CO Entry Message. Open' (OIS165) for messages to show in 'Quotation. Create' (QUS090).
Net Change ID	8316

Default charges connected to an item to QUS108

	Default charges connected to an item to QUS108
Description	Charges connected to an item should be defaulted to 'Quotation. Open Miscellaneous Costs' (QUS108) and 'Quotation. Open Lines' (QUS101) upon entering an item in (QUS101). Solution: Charges connected to an item should default to 'Quotation. Open Lines' (QUS101) or 'Quotation. Open Miscellaneous Costs' (QUS108) when entering an item in (QUS101) which has charge connected via a line charge model. The default charges are transferred to the customer order when the quotation is confirmed as a firm order. **Limitations:** If a tax based model is connected to the charge on the E-panel for 'Order line charge. Open' (CRS275), the charge won't default to 'Quotation. Open Lines' (QUS101) or 'Quotation. Open Miscellaneous Costs' (QUS108). Charges connected to a tax based model are default during firm order creation from (QUS100).
Net Change ID	8294

Enable project and element field on quotation line level

	Enable project and element field on quotation line level

Description	Today it is only possible to enter project number and project element on the quotation header, which is not sufficient. It should be possible to enter project number and project element on the quotation line level as well.
	Solution:
	When a quotation is created, project and element are entered on the quotation header default to the quotation line, where you can change project and/or element. When creating a customer order from the quotation, the customer order header needs to have project and element from the quotation header, and the customer order line has to have project and element from the quotation line.
	To support this, the new PROJ and ELNO fields are added to the following tables and programs:
	• QULINE (Quotation line) table
	• data structure - QUS200DS
	• 'Quotation. Create' (QUS090); the added new fields are user controlled via settings on the P-panel.
	• In 'Quotation. Open Lines' (QUS101) - the new fields (user controlled) are added on panel E
	• In (QUS091), when quotation line is created, PROJ and ELNO are created on the line (QULINE) from the quotation header.
	• In 'Quotation. Open' (QUS100) when taking related option 14-'Create order', the new fields, PROJ and ELNO are updated on file OXLINE. The values are taken from QULINE, that is the created customer order line gets PROJ and ELNO values from the quotation line.
	• In QUS100MI, the following transactions are updated with the fields PROJ and ELNO:
	  • AddQuote
	  • AddQuoteHead
	  • AddQuoteLine
	  • LstQuoteLine
	  • UpdQuoteHead
	  The handling of PROJ and ELNO is included in the transactions.

Net Change ID	8267

Enhanced parts ordering process through EQM product support

Enhanced parts ordering process through EQM product support
Description

Enhanced parts ordering process through EQM product support

Aftermarket parts and service sales are supported by the Product support mashup in EQM. To achieve a smoother sale process, several enhancements are added to 'EQM product support' .

Background:

EQM product support is a mashup within the product 'M3 Equipment Quotation Management' (EQM). The purpose of 'EQM product support' is to handle aftermarket sale of parts and services.

Solution:

EQM product support is a mashup within the product 'M3 Equipment Quotation Management' (EQM). The enhancements made for EQM product support are described in detail in the user guide for EQM. Here is a short description over the added enhancements:

- Item search (QUS210)

  This is a new BE program used by 'EQM product support'. The purpose of 'Item search' (QUS210) is to search and find available and non-avaliable items using a number of filter fields.

- Quotation category

  A new flag 'Quotation category' is added to separate an 'Equipment quotation' from an 'Aftermarket quotation' The mashup 'EQM product support' will only display quotations with the quotation category set to '1 - Aftermarket quotation'. (Example for 'Equipment quotation' is when a machine is sold; an 'Aftermarket quotation' is when parts or services are sold to an already sold machine).

- Quick entry of quotation lines

  A new flag 'Entry option' is added to the program 'Quotation type' (QUS020). If entry option is set to '2 - Quick entry' the quotation detail panel QUS101/E will not be displayed when adding a quotation line in 'EQM product support'.

- Open sub-file for adding parts

  A new feature within 'EQM product support' allows to add several quotation lines for parts at the same time.

- Shopping basket

  A shopping basket displaying quotation lines (with sales price) which is automatically updated when a part or service is added to the quotation.

- Enable all service definitions

  Earlier it was only possible to add pre-defined service definitions that were set in /(QUS114). Now it is also possible to select any service defined in (MOS300).

- MCO quick entry

  A quick way to create an MCO without defining a quotation is added to 'EQM Product Support'. Just select customer and/or equipment and navigate to (COS130).

- Add material to WO

  Find an existing work order operation, create a quotation, and then add parts. Once the quotation is released, the selected parts are added as material lines on the work order.

	Enhanced parts ordering process through EQM product support
Net Change ID	8490

Fetch price from MMS250 for Trade-in serial numbers in QUS110/E

	Fetch price from MMS250 for Trade-in serial numbers in QUS110/E
Description	Price is retrieved from MMS250 for Trade-ins in QUS110/E. Solution: When performing a trade-in from program 'Quotation. Open Trade-in' (QUS110/E) a specific serial number can be selected during quotation creation. If that serial number has a valid price record in 'Serial Number Based Pricing. Open' (MMS250) than price and meter value will be be fetched for QUS110/E (for fields 'Trade in value', 'Evaluation value' and meter values). The records in MMS250 are validated via valid from and to date for the quotation. If the quotation is valid for a full month but the price in MMS250 is not valid for that full month, than the price will not be fetched from MMS250. Price is only retrieved if the price is valid for the full quotation period. If several records exists for the same serial number in MMS250 and for the overlapping date range, the newest record is retrieved.
Net Change ID	8184

Manage quantity on attribute value ("kit-in-kit")

	Manage quantity on attribute value ("kit-in-kit")
Description	Background: In M3, an attribute model is used to handle the configuration of equipment, both in the purchase order and the sales order process. It is also possible to configure equipment in the quotation stage, through EQM. The configured equipment is in M3 a kit that contains the main product (kit-header) with its selected components (kit-lines). Both the main product and the components are setup in M3 as items in the program 'Item. Open' (MMS001), however it is only the main product that will exist in stock. The components will be included in the main product. The components will on the other hand be used to build up the purchase and sales price for the equipment. During configuration of equipment each selected attribute value is equal to a component (item number). Since quantity does not exists in the attribute model the quantity of the selected value is always set to one, but there has to be a way to handle a quantity larger than one on an attribute value, and also, to handle attribute values that can contain several items with different quantity. Solution: The use of "kit-in-kit" is introduced to EQM. This means that if a selected attribute value exists as a kit itself in 'Product structure. Open' (PDS001), the attribute value will be replaced by the item numbers and quantity setup in 'Product. Connect Materials/Operations'(PDS002). The replacement will be done on the customer order line and purchase order line. The attribute value for the kit has to be added to the attribute model for the equipment in ATS050/ATS051.
Related Documents	See additional documentation in NCR record.
Net Change ID	8075

New field in QUHEAD to seperate if quotation is a equipment or aftermarket quotation

	New field in QUHEAD to seperate if quotation is a equipment or aftermarket quotation
Description	To distinguish Equipment quotations from other quotations, a new field has been added to the quotation header (QUHEAD). Background: Since the same quotation programs are used in several mashups in M3, it is important to be able to separate the different type of quotations. The new field will make it possible to seperate by different types. Solution: A new field 'QCAT' – Quotation category is added to QUHEAD to be able to distinguish Equipment quotations from other quotations. You can set the field manually in 'Quotation. Create' (QUS090/E) during quotation creation (set value '0 – Equipment quotation' or '1 – Other quotation'). When set manually, the values will not be modified by the different line types added to the quote. If the field 'QCAT' is left Blank during quotation creation, the field is automatically updated based on the lines added to the quote. If the quote contains any line with Line type '0 – Product' the field will be set to '0 – Equipment quotation'. If no such line are added, the field will be set to '1 –Other quotation'. The 'QCAT field can be used in mashups to separate different quotation types from each other. To identify the different quotation categories, see field information on 'Quotation. Open' (QUS100).
Net Change ID	8313

New MI added for QUS160 - Target Margin

	New MI added for QUS160 - Target Margin
Description	A new API QUS160MI is created to handle target margin. Background: QUS160 is a function where target margin is set up and connected to product number, product group, customer and/or customer group. Solution: The new QUS160MI is providing the same functionality as QUS160. The following MI-transactions are implemented: • AddTargetMargin – Add a new record to QUTAMA. • ChgTargetMargin – Change an existing record in QUTAMA. • DltTargetMargin – Delete an existing record in QUTAMA. • GetTargetMargin – Get one record by product number, product group, customer and/or customer group. • LstTargetMargin – List records by product number, product group, customer and/or customer group. **Note:** Known limitation: Not possible to create free-, pre- or posttext.
Net Change ID	8340

Quick entry option for quotation order line in 'Quotation. Open Lines' (QUS101)

	Quick entry option for quotation order line in 'Quotation. Open Lines' (QUS101)
Description	A new parameter is added to the E-panel in 'Quotation Type. Open' (QUS020) to select entry option. Solution: A new field 'Entry option' is added to E-panel in 'Quotation Type. Open' (QUS020). The available options are • 1 – Detail panel By selecting option 1, detail panels are displayed for each quotation order line. • 2 - Quick entry. When selecting option 2, detail panels are not displayed during quotation order line entry, except when a panel is displayed due to an error in that panel. **Note:** You cannot create order lines from 'Quotation. Open Lines' (QUS101) without information on E-panel, however you can still use the Quick entry option via Mashup.
Net Change ID	8312

Support additional calculation methods for charges in EQM

	Support additional calculation methods for charges in EQM
Description	Support additional calculation methods on charges connected to a quotation in 'Quotation. Add Miscellaneous Costs' (QUS118). Solution: Two new calculation methods are now supported for charges connected on E-panel, in 'Quotation. Add Miscellaneous Costs' (QUS118). The charges are based on net price or gross price multiplied by a factor and setup in 'Order Line Charge. Open' (CRS275) (with `'Calc method' - 'Fct * gross prc' - 1` or `'Fct * net prc' - 2`). When the quotation is activated and a firm order is created in 'Customer Order. Open' (OIS100), the charges 'Calc method' is changed to a fixed amount charge and 'Calc method' is changed to 'Fixed amount' – 0. To recalculate the two new charge types, a related option is added in 'Quotation. Open Lines' (QUS101) (Related option 42 – 'Recalculate charges').
Net Change ID	8275