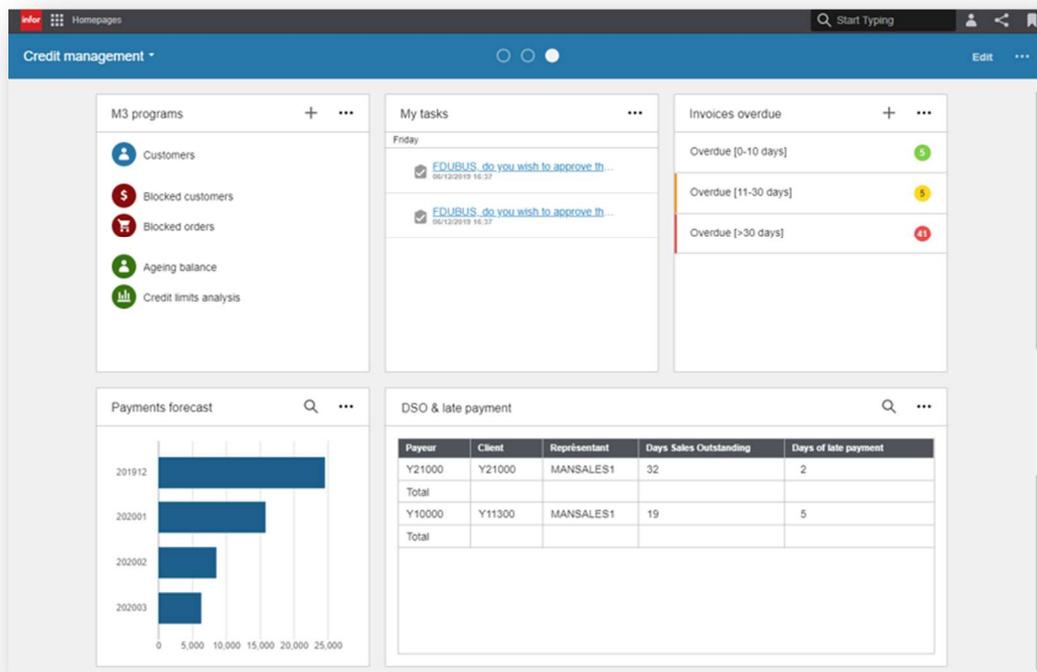




<b>How to ... ?</b>	Create a credit manager homepage in InforOS
<b>Prerequisite</b>	Knowledgments in search query with IES and API
<b>Steps</b>	<p>#01 – Create a new homepage</p> <p>#02 – Add a widget “Menu”</p> <p>#03 – Configure the widget “Menu”</p> <p>#04 – Add a widget “Tasks”</p> <p>#05 – Add a widget “M3 Information Monitor”</p> <p>#06 – Configure the widget “M3 Information Monitor”</p> <p>#07 – Add a widget “M3 Information Viewer”</p> <p>#08 – Configure the widget “M3 Information Viewer”</p>
<b>Versions</b>	M3BE 15.1.4 MCP5 Infor OS 12.0.30

This tutorial aims to help a credit manager to create his own homepage. This one will contain:

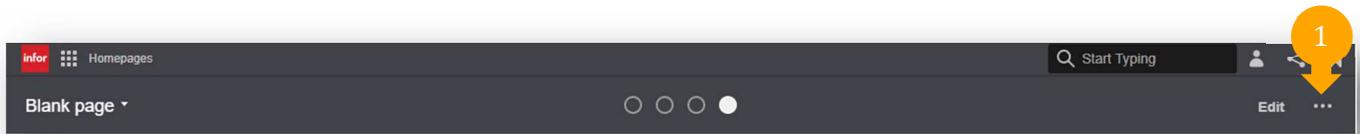
- shortcuts for accessing M3 programs,
- assigned tasks from workflows,
- indicators,
- graph...



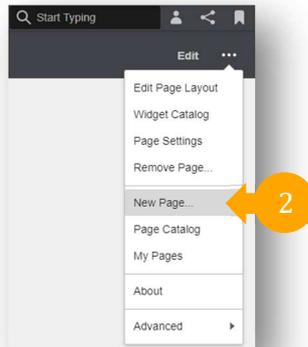
## #01 – Create a new homepage

In this section, we will create a new empty homepage. It will contain multiple widgets that we will add and configure in next steps. Note: each widget can be retitled and resized when added on the homepage.

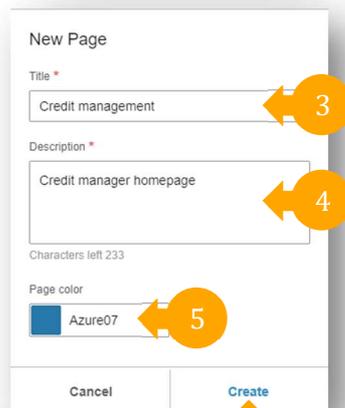
- 1 Click on the button 



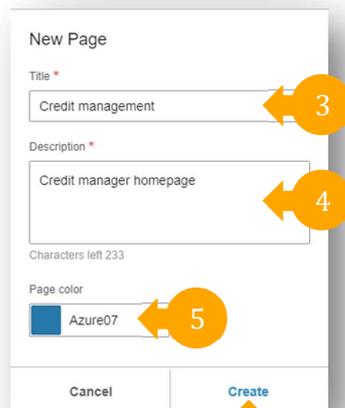
- 2 Select “New Page...”



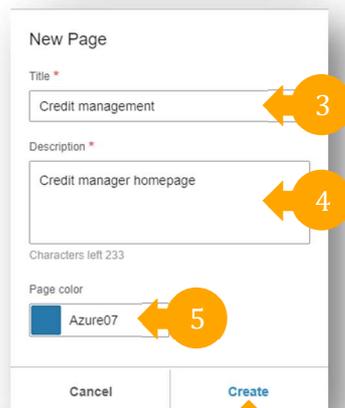
- 3 Enter a title

A screenshot of the 'New Page' dialog box. It has a title field with 'Credit management' entered, a description field with 'Credit manager homepage', and a page color dropdown set to 'Azure07'. A yellow callout bubble with the number '3' points to the title field.

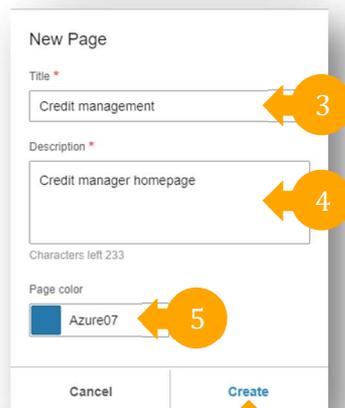
- 4 Enter a description

A screenshot of the 'New Page' dialog box. The description field contains 'Credit manager homepage'. A yellow callout bubble with the number '4' points to the description field.

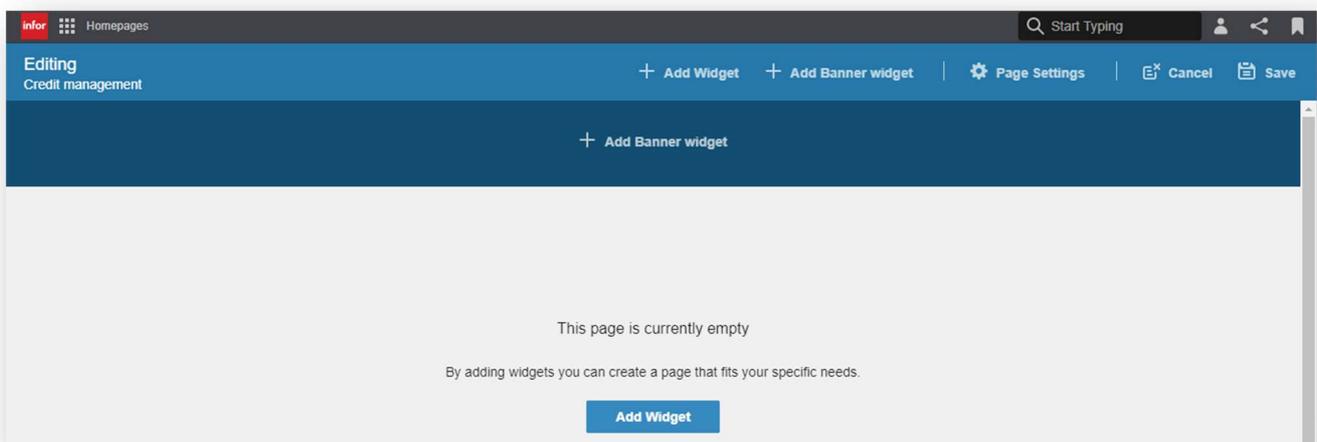
- 5 Select a page color

A screenshot of the 'New Page' dialog box. The page color dropdown is set to 'Azure07'. A yellow callout bubble with the number '5' points to the color selection area.

- 6 Click on “Create”

A screenshot of the 'New Page' dialog box. The 'Create' button is highlighted in blue. A yellow callout bubble with the number '6' points to the 'Create' button.

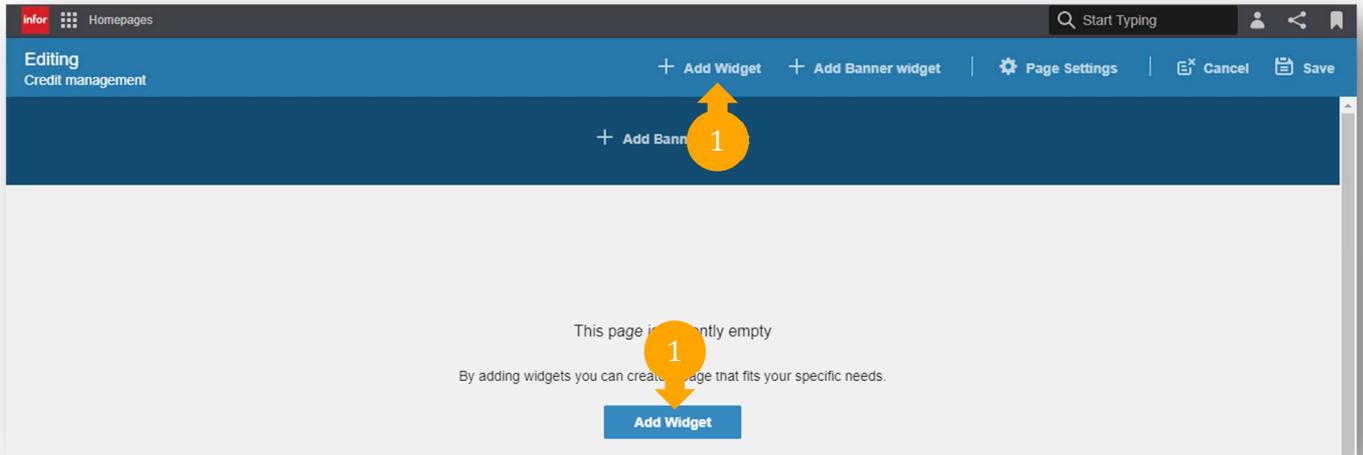
 The homepage is created



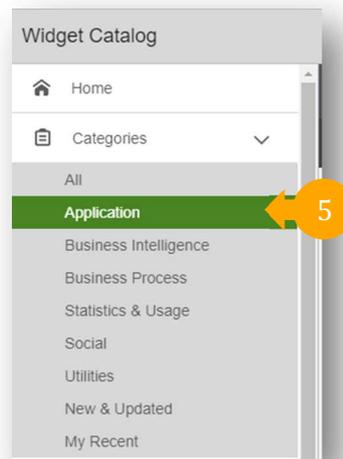
## #02 – Add a widget “Menu”

In this section, we will create a menu. It will be customized in next section by adding shortcuts.

- 1 Click on “Add widget” (two options)

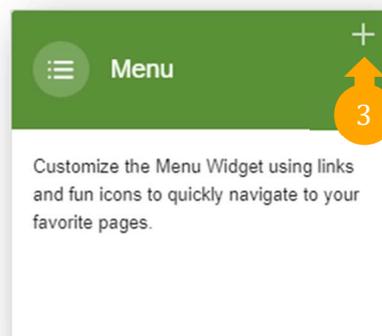
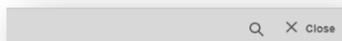


- 2 Select “Application” in the widget catalog



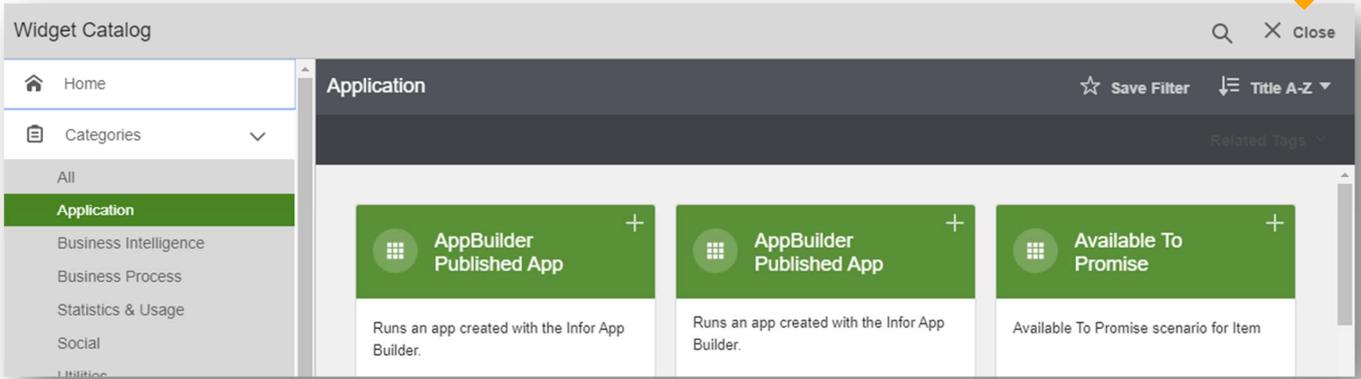
- 3 Search for “Menu” widget and click on 

Tips: you can find widget by using the search bar on left top of the widget catalog



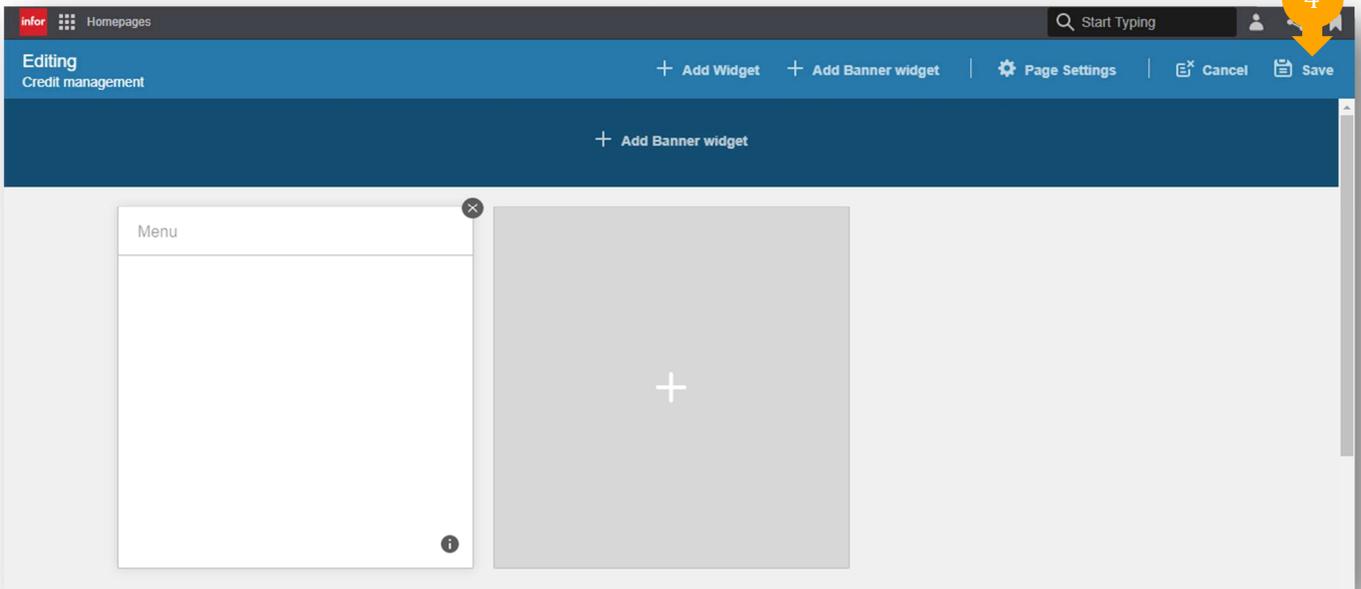
4 Click on "Close"

4

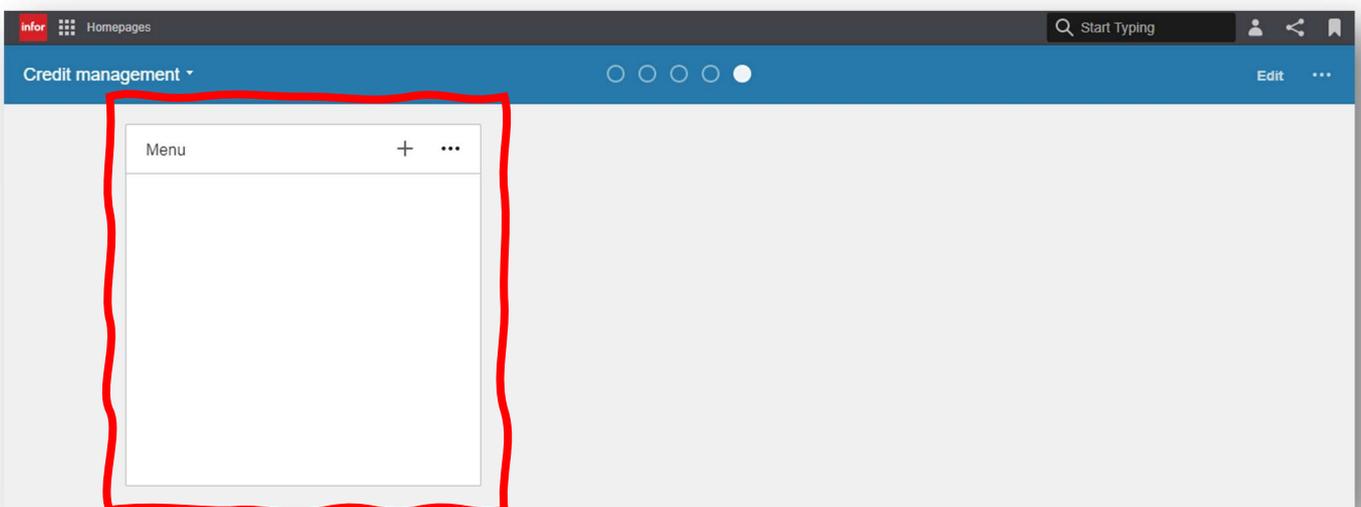


5 Click on "Save"

4



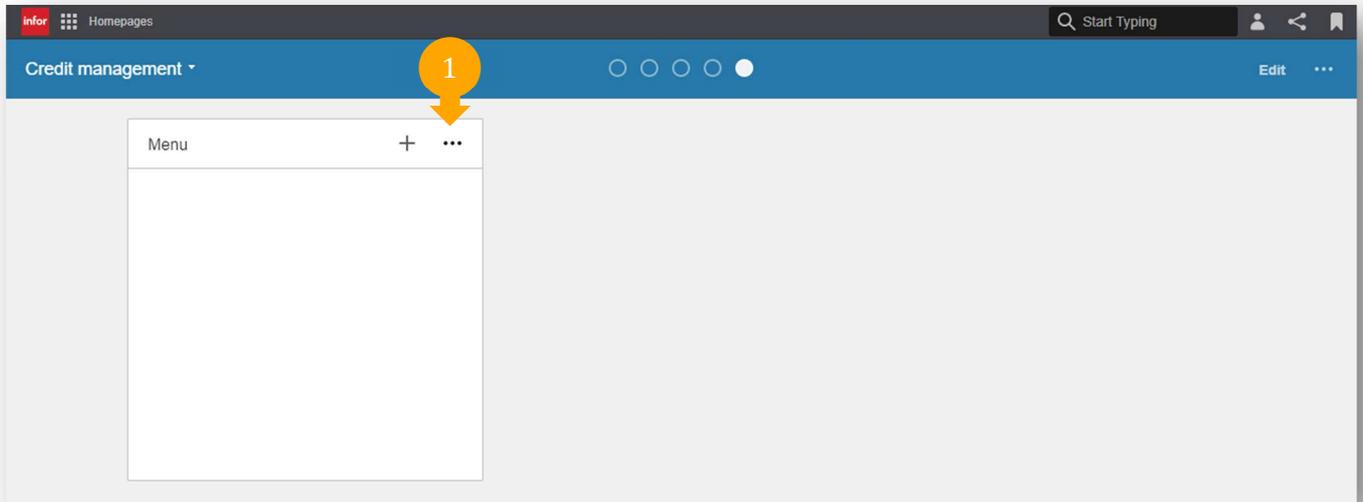
 The widget is added on the homepage



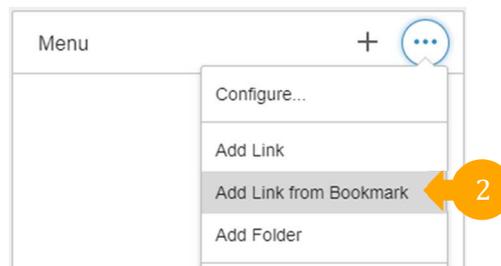
## #03 – Configure the widget “Menu”

In this section, we will add in our menu some links from bookmarks. Bookmarks have been previously created (see “Additional information” at the end of this tutorial). Note: links can be standard URLs as <http://www.authentic-grp.com/>.

- 1 Click on the button ...



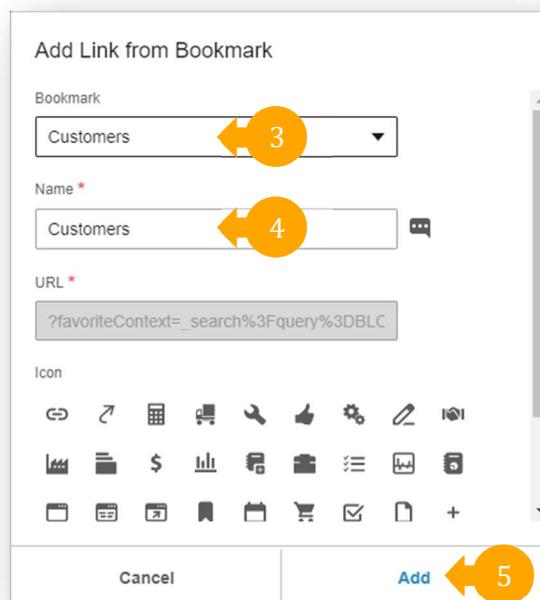
- 2 Select “Add Link from Bookmark”



- 3 Select an existing bookmark

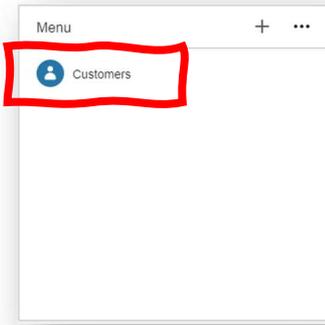
- 4 Give it a name

Tips: you can manage multiple language by using translation button



- 5 Click on “Add”

 The link is created



These steps can be reproduced for adding other links from existing bookmarks.

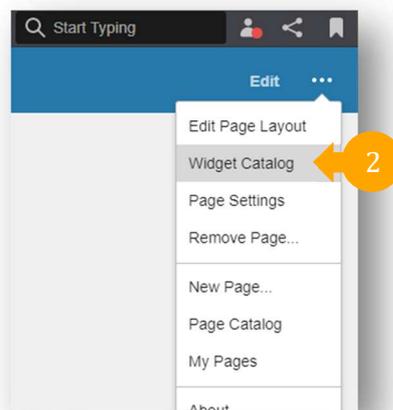
## #04 – Add a widget “Tasks”

In this section, we will add a widget “Tasks”. This widget will resume workflows notifications assigned to the credit manager. No specific configuration is required on this widget.

- 1 Click on the button 



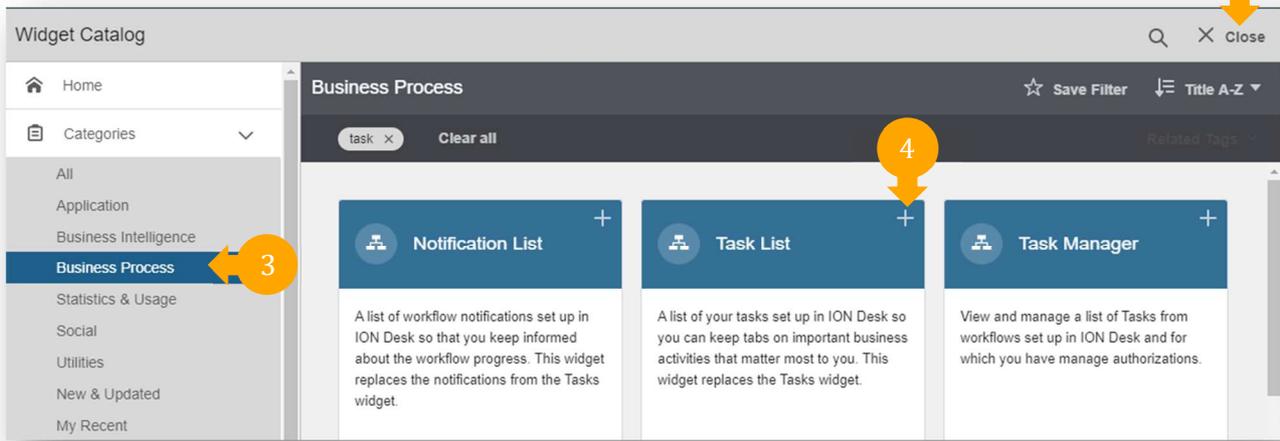
- 2 Select “Widget Catalog”



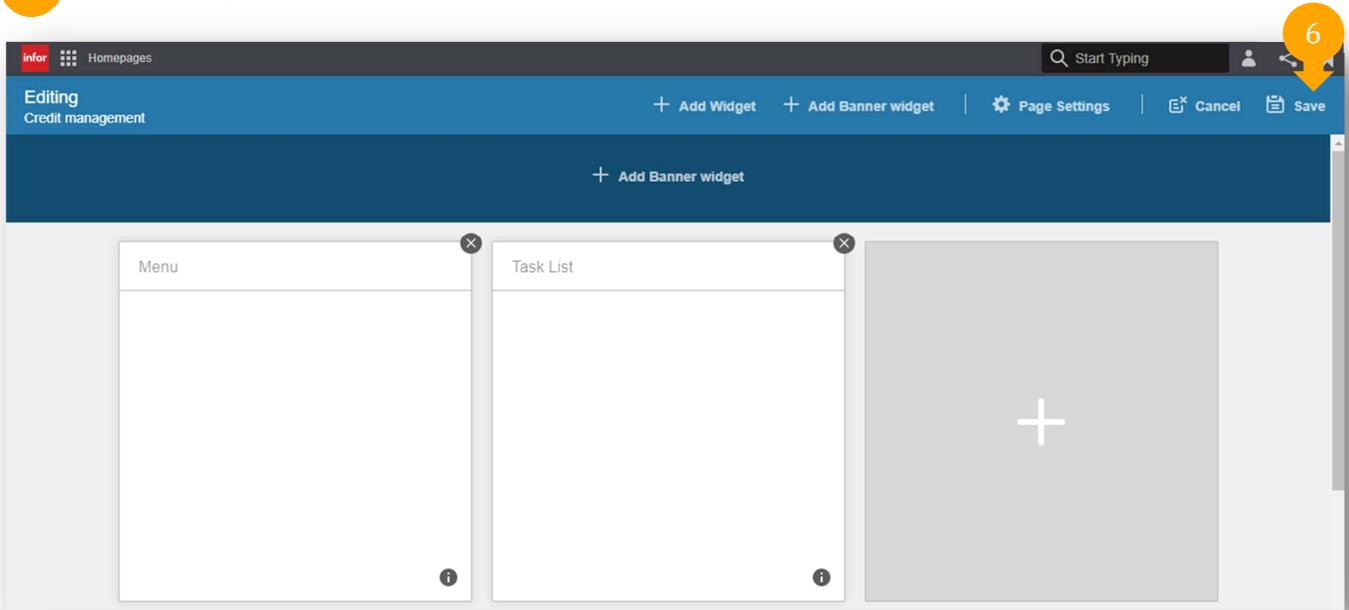
- 3 Select “Business Process”

- 4 Add the widget “Task List” by clicking the button 

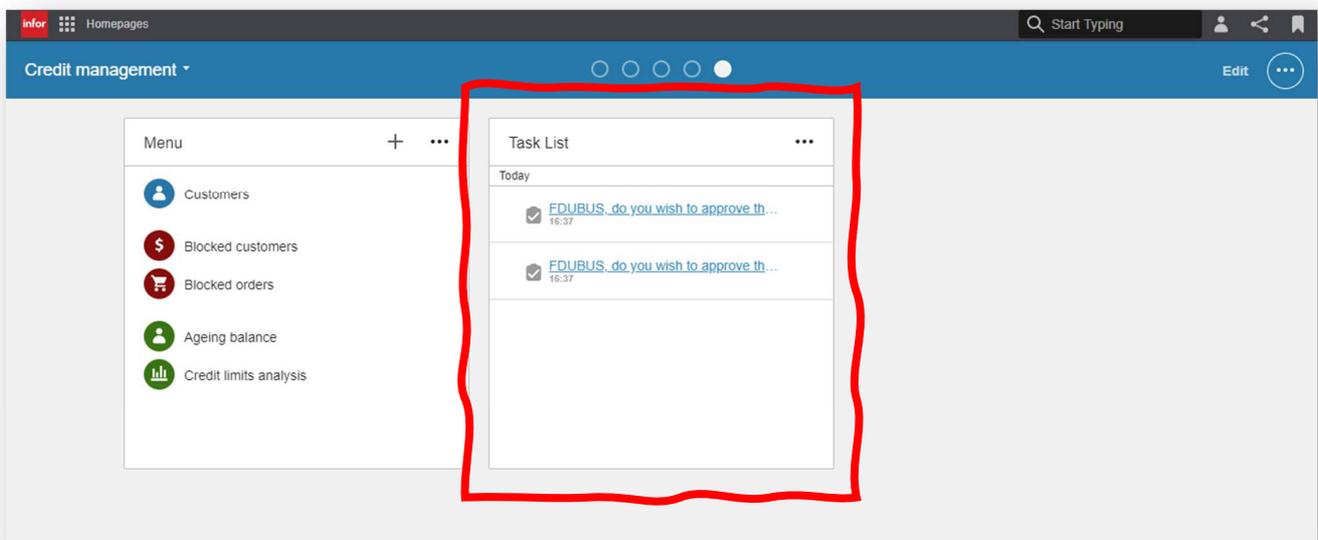
5 Close the widget catalog



6 Click on "Save"



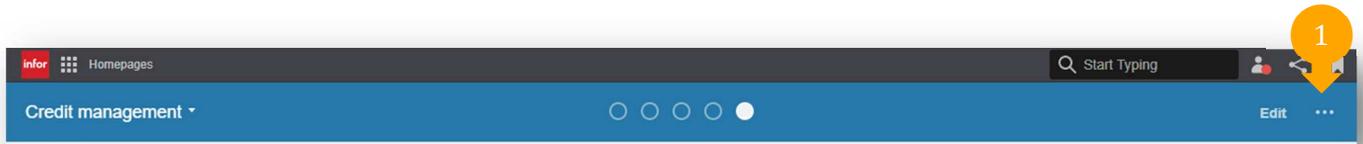
 The widget is added on the homepage



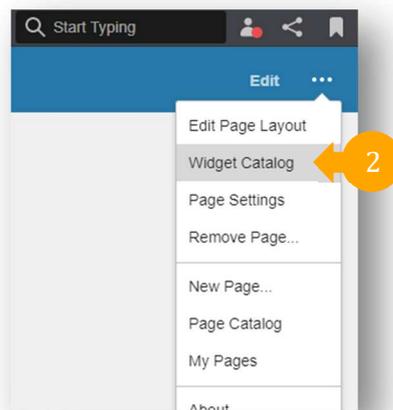
## #05 – Add a widget “M3 Information Monitor”

A monitor is an indicator. In our context, we will create indicators showing number of invoices overdue by range of days.

- 1 Click on the button 



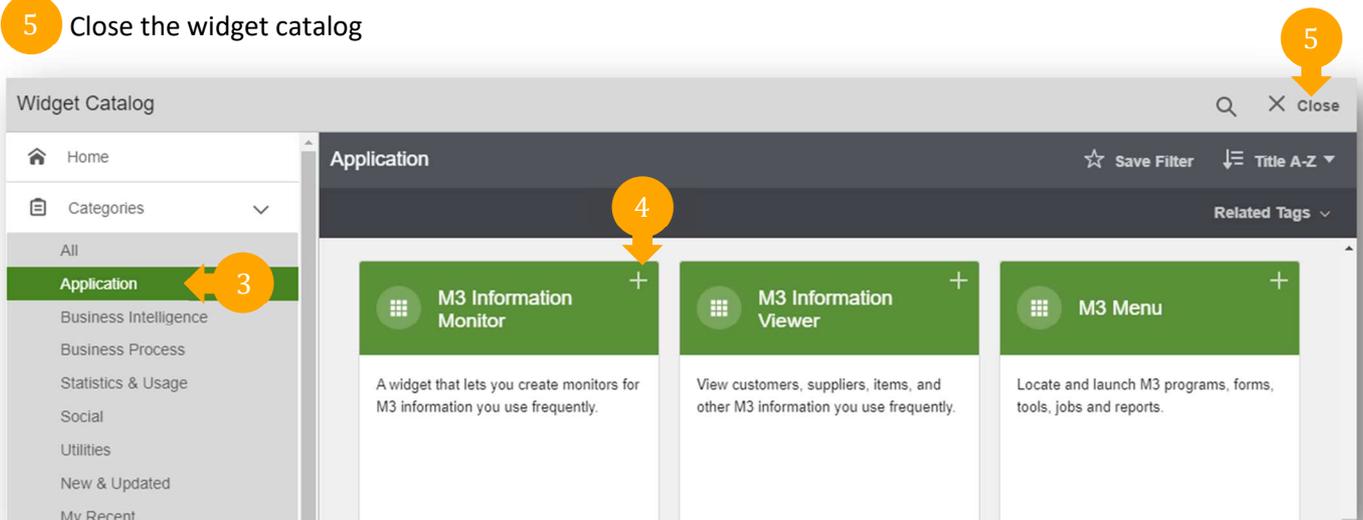
- 2 Select “Widget Catalog”



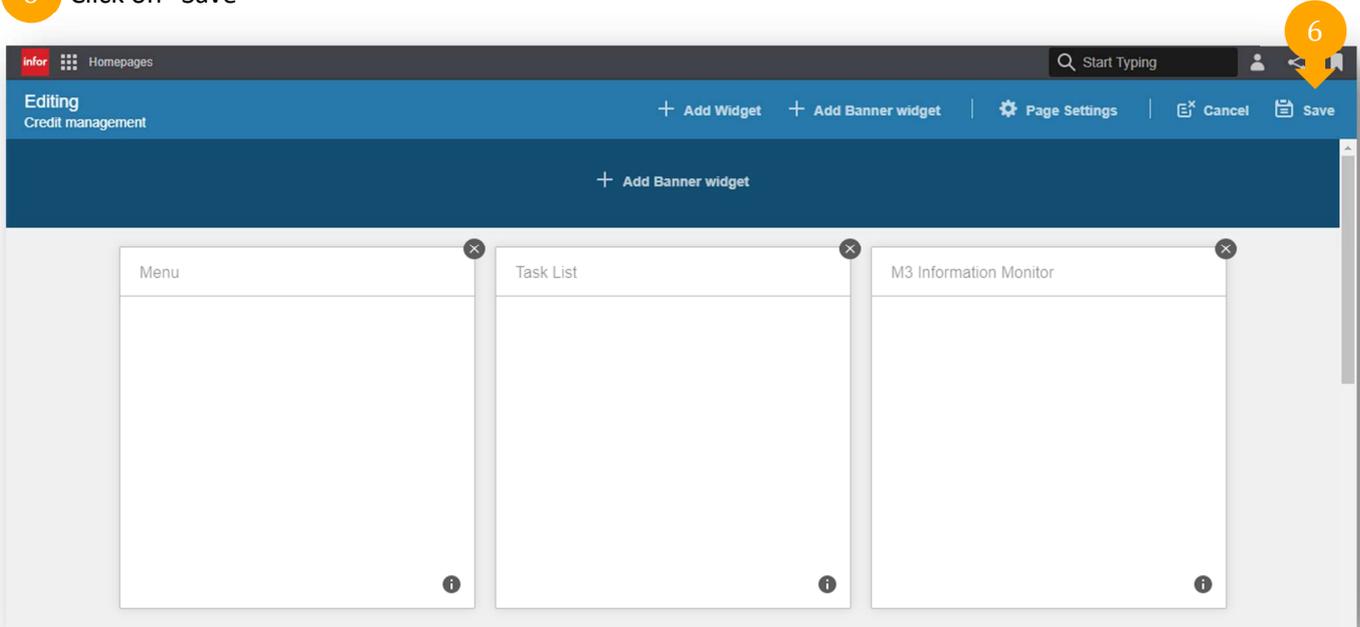
- 3 Select “Application”

- 4 Add the widget “M3 Information Monitor” by clicking the button 

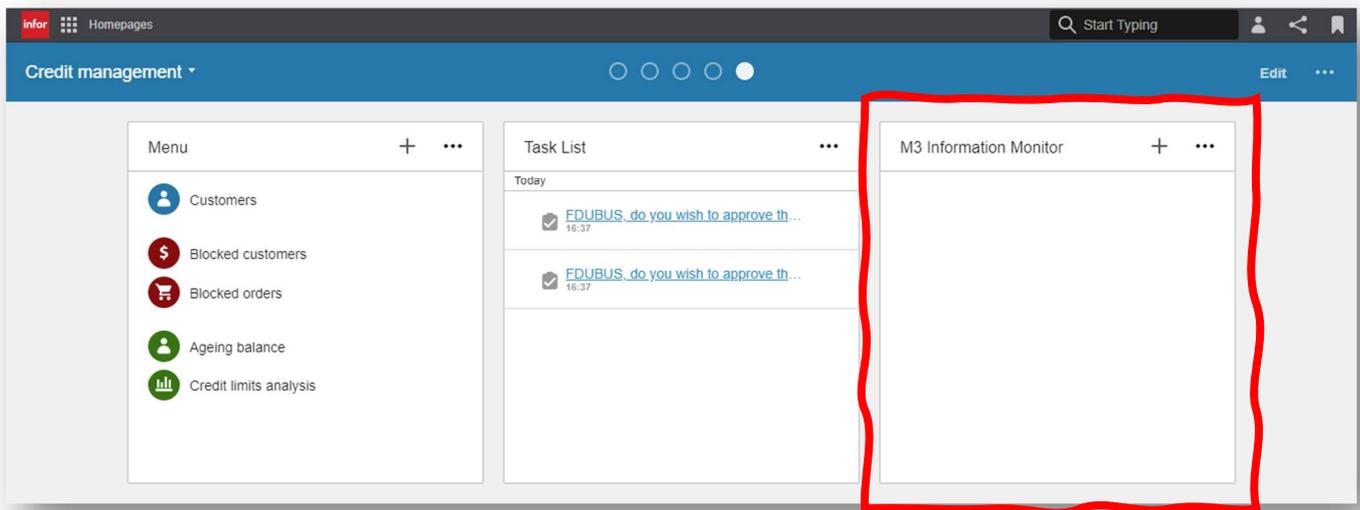
- 5 Close the widget catalog



6 Click on "Save"



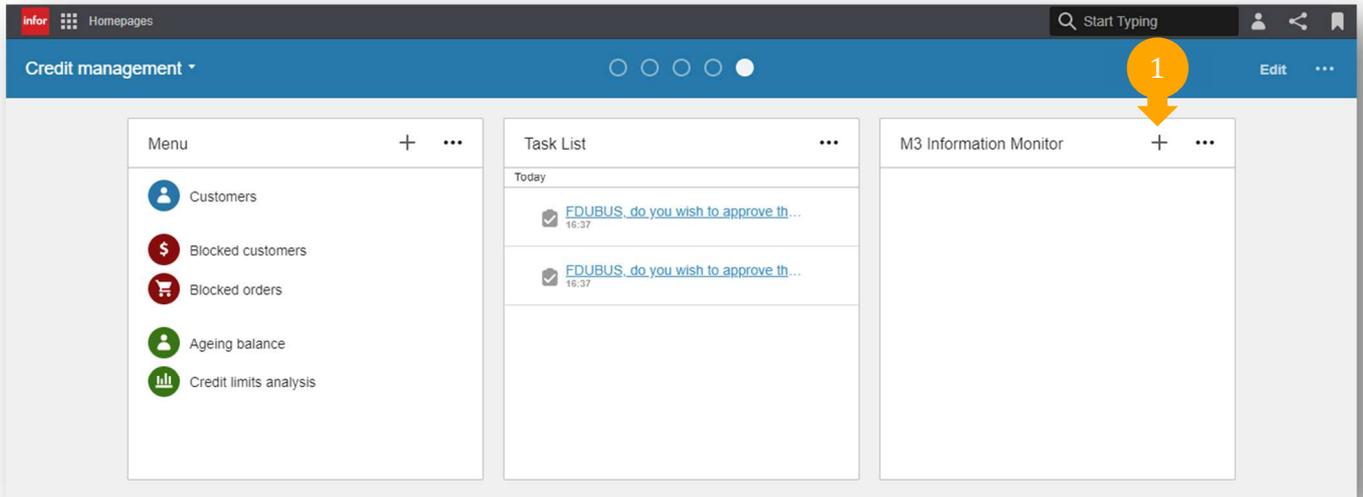
 The widget is added on the homepage



## #06 – Configure the widget “M3 Information Monitor”

In this monitor, we'll configure an API call for retrieving number of invoices that should have been paid since 10 days. Knowledge in API calls and IES search queries are required.

- 1 Click on the button +



- 2 Give a name

The "Add Monitor" dialog box is shown. The "Monitor name" field contains the text "Overdue [0-10 days]". A red circle with the number "2" and an arrow points to this field.

- 3 Select the API “ARS200MI”

The "Add Monitor" dialog box is shown. The "Program" field contains the text "ARS200MI". A red circle with the number "3" and an arrow points to this field.

- 4 Select the transaction “SearchInvoices”

The "Add Monitor" dialog box is shown. The "Transaction" field contains the text "SearchInvoices". A red circle with the number "4" and an arrow points to this field.

- 5 Enter the query

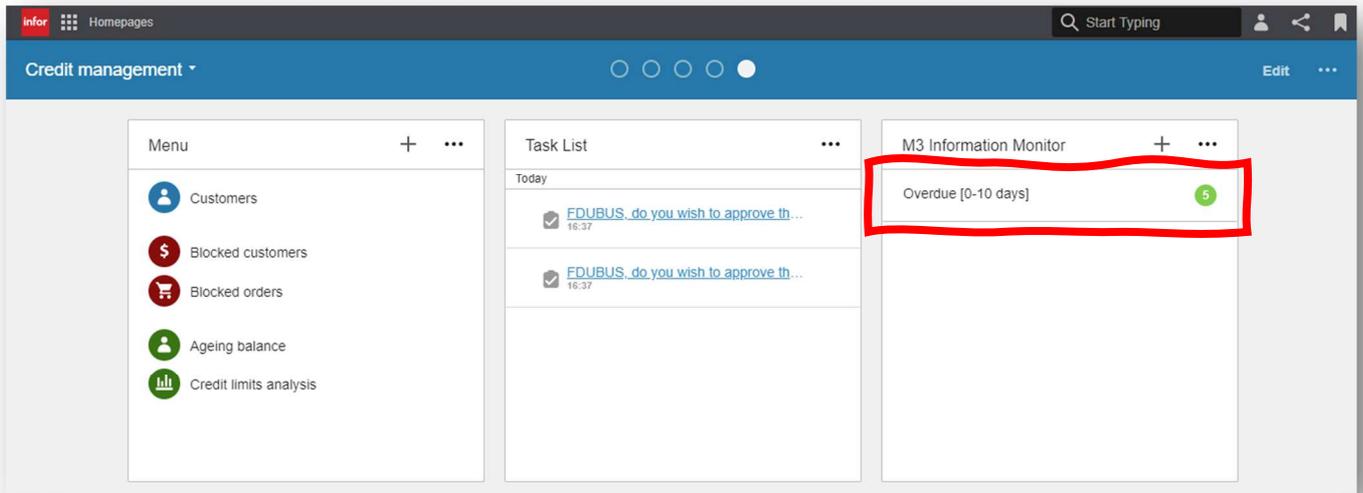
`RECO:0 DUDT:[DATE(-10) TO DATE(0)]`

Name	Description	Value
SQRY	SearchInvoices	RECO:0 DUDT:[DATE(-10) TO DATE(0)]

- 6 Click on “OK”

The "Add Monitor" dialog box is shown. The "OK" button is highlighted with a red circle and the number "6".

 The monitor is added to the widget



These steps can be reproduced for adding other monitors by adjusting query.

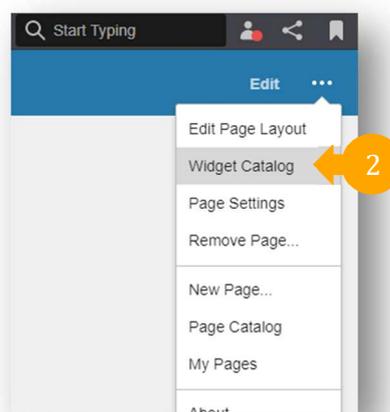
## #07 – Add a widget “M3 Information Viewer”

A viewer is used to display information returned by an API. It can be a list or graph.

1 Click on the button 



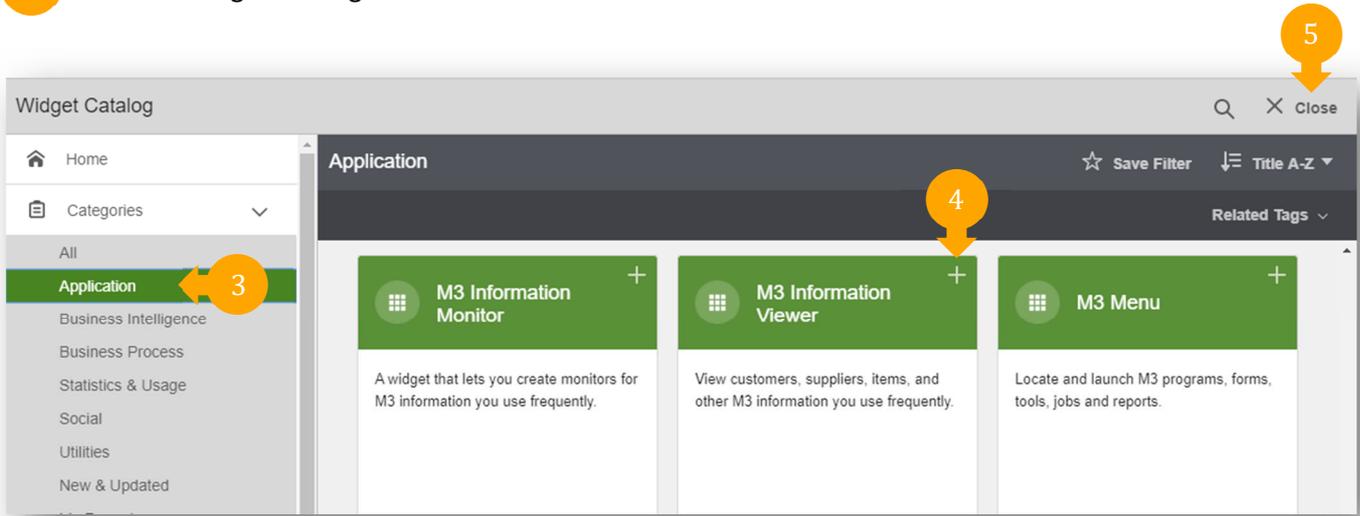
2 Select “Widget Catalog”



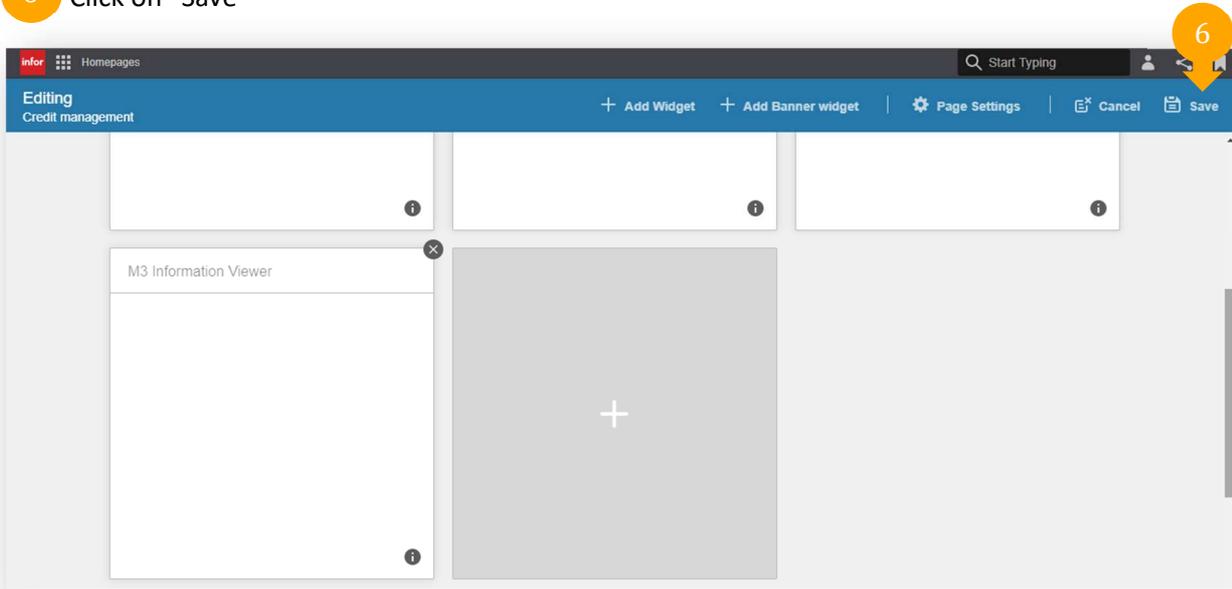
3 Select “Application”

4 Add the widget “M3 Information Viewer” by clicking the button 

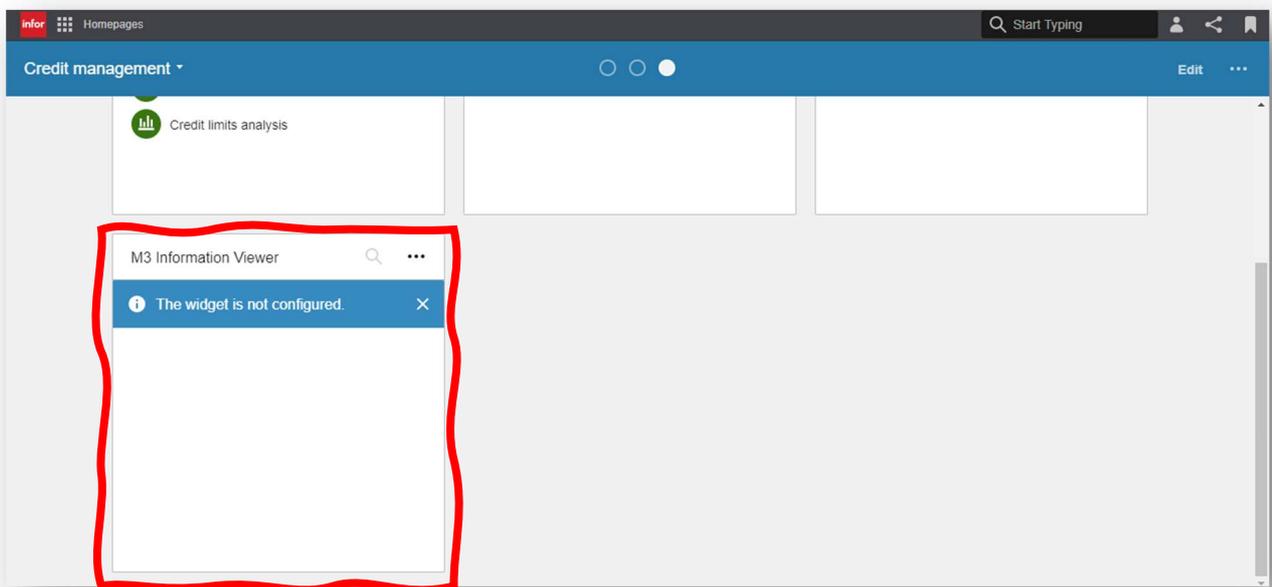
5 Close the widget catalog



6 Click on "Save"



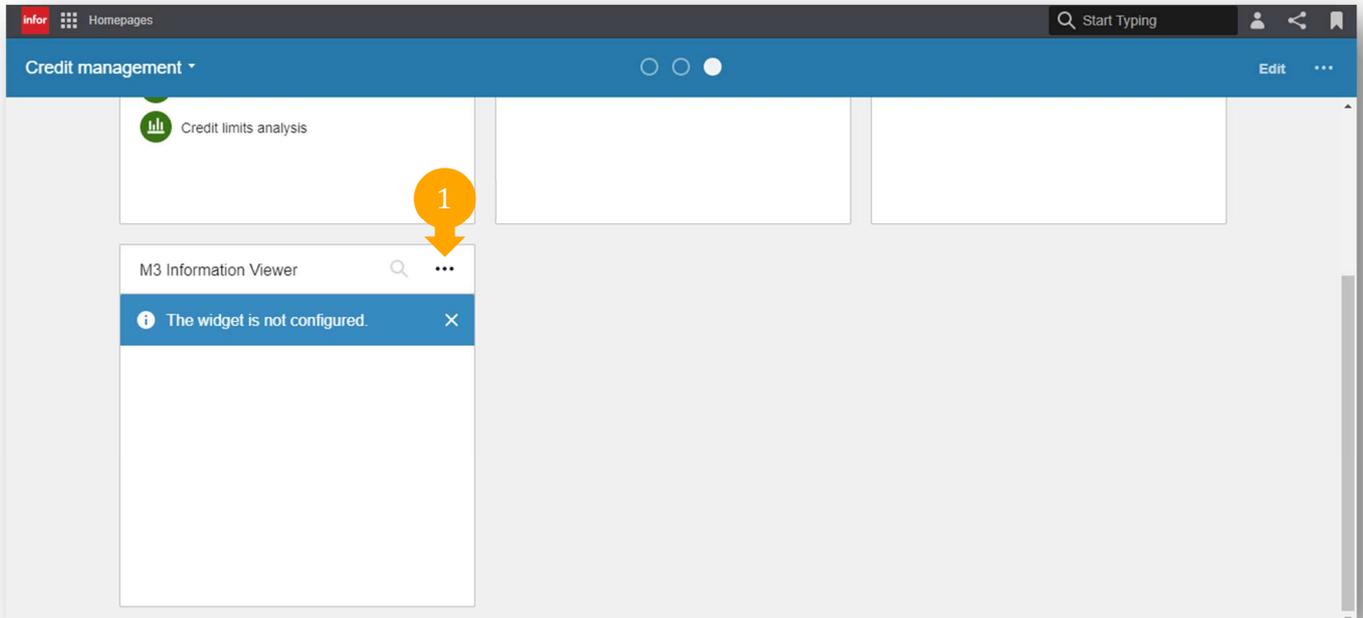
 The widget is added on the homepage



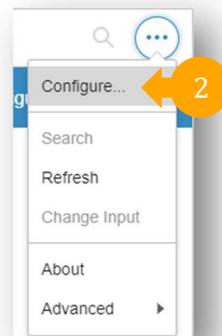
## #08 – Configure the widget “M3 Information Viewer”

In this viewer, we'll configure an API call for retrieving invoices to be paid in the coming months. Knowledge in API calls and IES search queries are required. Note: A custom list MI (CMS015) has been created for that purpose but will not be described here in this tutorial.

- 1 Click on the button ...



- 2 Select “Configure...”



- 3 Select a delay for refreshing data

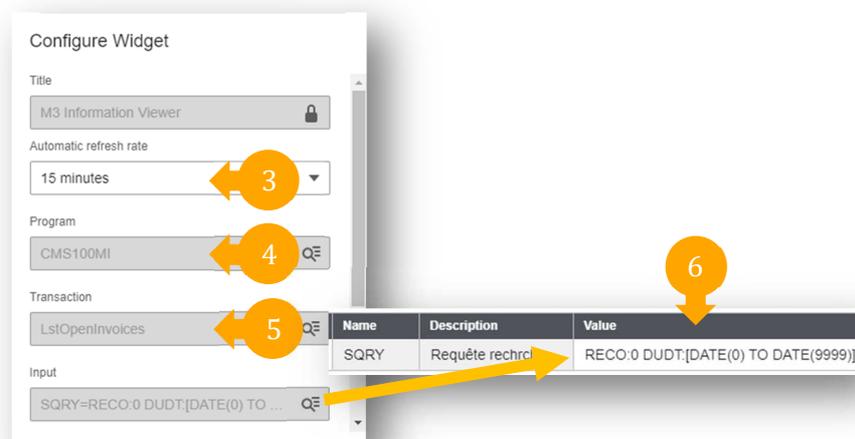
- 4 Select the API “CMS100MI”

- 5 Select your own transaction

Note: created in CMS015

- 6 Enter the query

RECO:0 DUDT:[DATE(0) TO DATE(9999)]



7 Select the fields wished

8 Select "Graph"

9 Click on "Configure"



10 Select "Bar"

11 Select a column

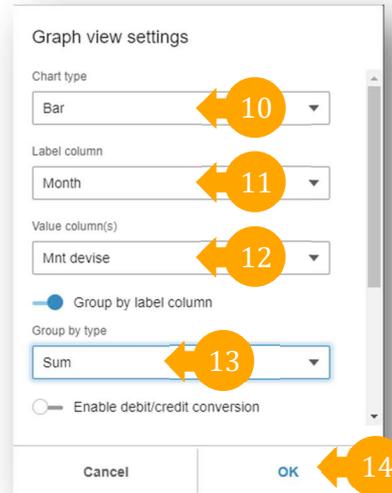
Depends of your transaction created in CMS015

12 Select a value

Depends of your transaction created in CMS015

13 Group by column and select "Sum"

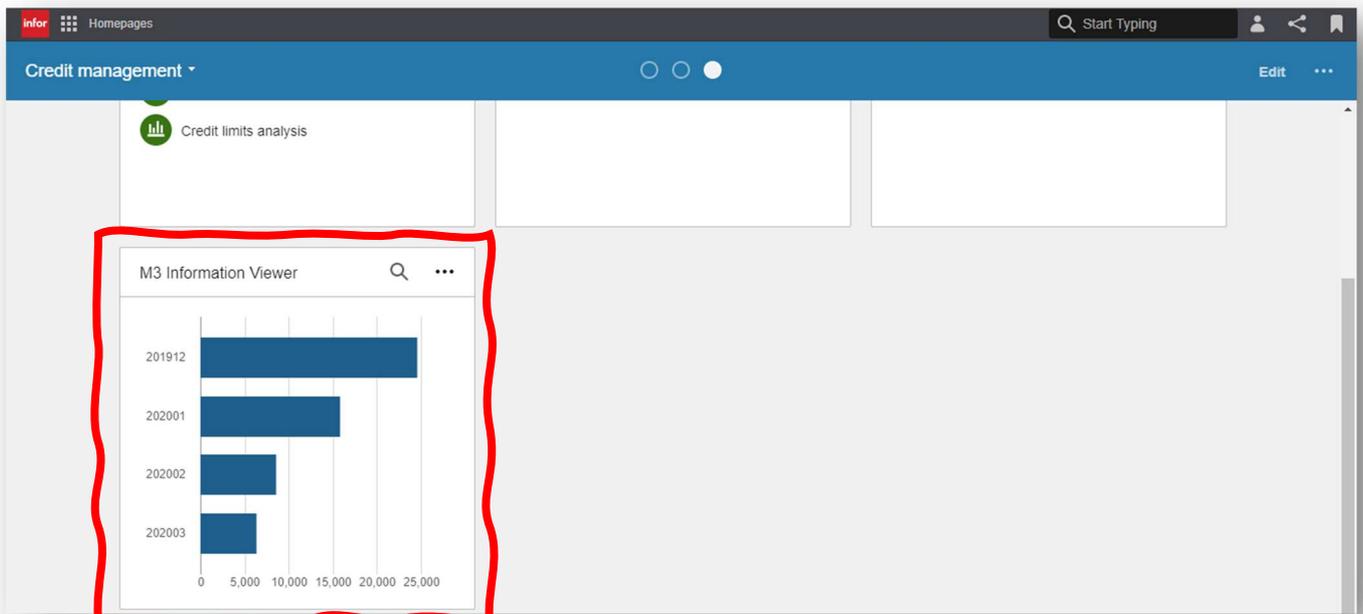
14 Click on "OK"



15 Click on "Save"



The viewer is created and shows information regarding payments forecast

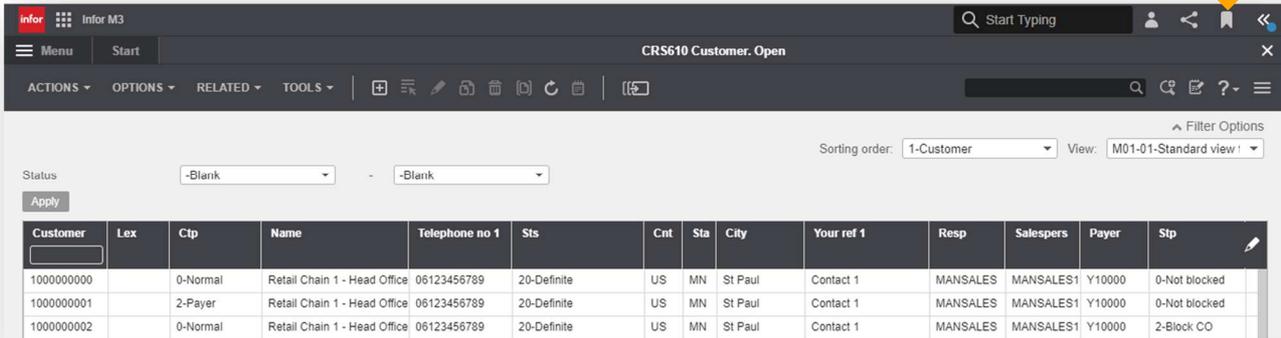


These two last steps can be reproduced for adding same widget in "list" mode with your own API and/or transaction as you can see in final result.

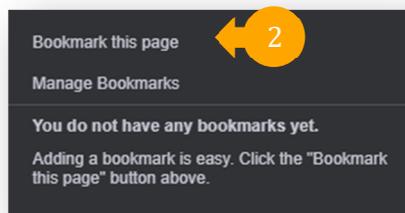
## Additional information

### A. Create a bookmark from a M3 program (CRS610)

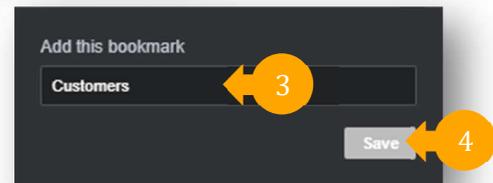
1 When M3 program CRS610 is open, click on bookmark button



2 Click on "Bookmark this page"



3 Give a name to the bookmark



4 Click on "Save"

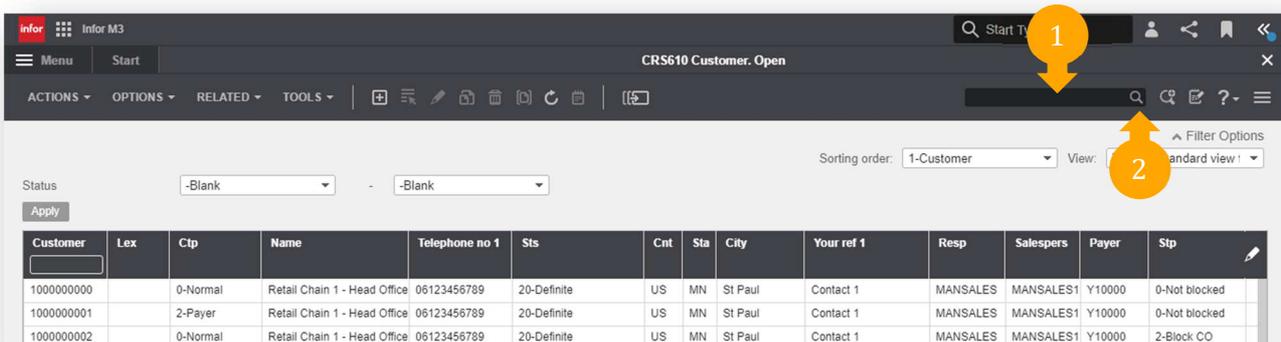
 The bookmark is saved

### B. Create a bookmark from a M3 program (CRS610) with IES functionality (search for blocked customers)

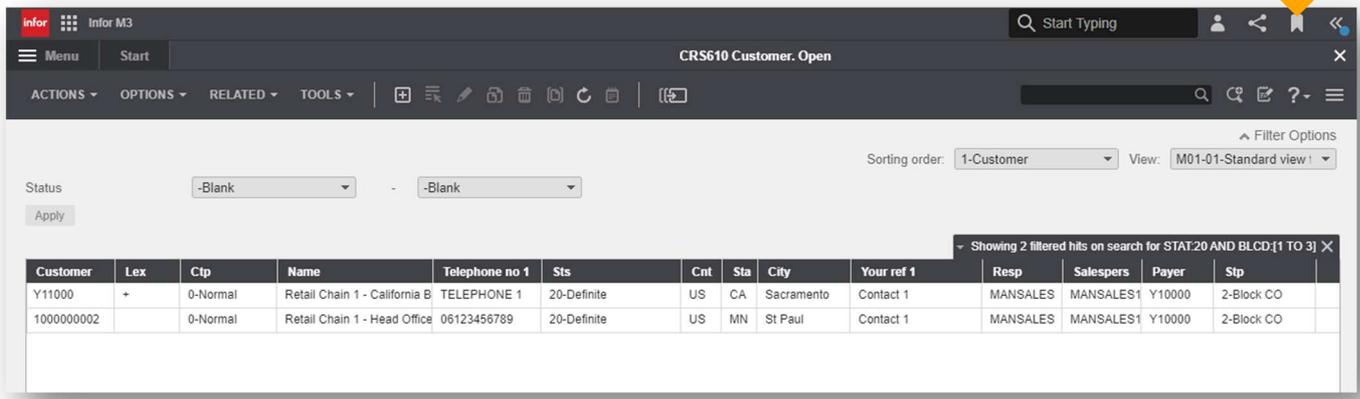
1 When M3 program CRS610 is open, enter criteria in search bar

In our example, we will select active customers but blocked. Syntax will be: `STAT:20 BLCD:[1 TO 3]`

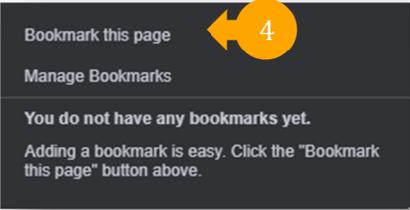
2 Click on the search button



3 When M3 returns records, save the bookmark by clicking the button 

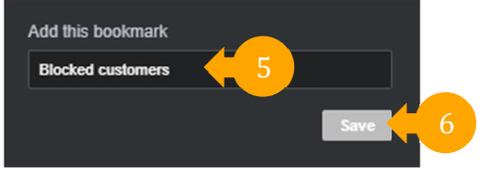


4 Click on “Bookmark this page”



5 Give a name to the bookmark

6 Click on “Save”



 The bookmark is saved

And that's it!

Need help or more information ?  
Reach us now  [contact@authentic-grp.com](mailto:contact@authentic-grp.com)