Infor LN User Guide for Product Catalogs

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About this document

This document describes the process to set up and use sales catalogs for sales quotations and sales orders, and purchase catalogs for purchase requisitions.

Objectives

This document describes how to set up and use product catalogs in Sales and Procurement.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, familiarity with the business processes involved in handling product catalogs, and general knowledge of the Infor LN functionality will help you understand this guide.

Document summary

This table shows the chapters of this guide:

Chapter number	Chapter title	Content
Chapter 1	Introduction and setup	Introduction to and setup of product catalogs
Chapter 2	Sales quotations and sales orders	Using catalogs in sales orders and sales quotations
Chapter 3	Purchase requisitions	Using catalogs in purchase requisitions

References

Use this guide as the primary reference for product catalogs. Use the current editions of these related references to research information that is not covered in this guide:

- ***User Guide for Sales Quotations U9841 US***
  Use this guide to understand the sales quotation procedure.
- ***User Guide for Sales Orders U9845 US***
  Use this guide to understand the sales order procedure.
- ***User Guide for Purchase Requisitions U9820 US***
  Use this guide to understand the purchase requisition procedure.

How to read this document

This document was assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to *Introduction*. To locate the referred section, please refer to the Table of Contents or use the Index at the end of the document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of the document.

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Chapter 1
Introduction and setup

1

Product catalogs

You can specify product catalogs to group items into logical product categories. Catalogs can be structured hierarchically and contain, at the lowest levels, items that can be sold or purchased.

Catalogs can be used to search for and locate items during sales order, sales quotation, and purchase requisition entry. Based on the user-defined structure, searches can be performed by category, item description, or manufacturer information. When searching by category or item description, LN searches the product catalog(s), level by level. At the lowest level of the catalog, you can view specific information on item, pricing, and availability. You can specify effectivity and expiration dates to restrict the use of the catalog to a specific time period.

Product catalogs can be specified for sales and purchase transactions. They can be created for general use or for a specific sold-to business partner.

These items cannot be included in product catalogs:

- List items (except for kits)
- Generic items and product variants
- Subcontracting items
- Equipment items

Specifying product catalogs

To create a product catalog:

1. Specify a new category in the Category (tdpct0501m000) session and select the **Catalog** check box for the category. This is the highest category level.
2. Specify the subcategories that you want to include in the catalog in the Category (tdpct0501m000) session. These are the categories for which the **Catalog** check box is cleared. If you link items directly to the catalog, you can skip this step.
3. If the catalog is defined as **Specific** in the **General/Specific Identifier** field of the Category (tdpct0101s000) session, you must link the catalog to (a) sold-to business partner(s) in the Category - BP/Employee Linkage Data (tdpct0103m000) session.

4. Structure the product categories hierarchically by linking subcategories or items to the category that is defined as a catalog. For this purpose, select the relevant catalog and click **Category Structure** on the appropriate menu of the Category (tdpct0501m000) session. Consequently, the Category Structure (tdpct0502m000) session starts in which you can link the subcategories/items.
5. If subcategories are linked to a catalog, you must also link items to the subcategory. For this purpose, select the relevant category and click **Category Structure** on the appropriate menu of the Category (tdpct0501m000) session. Consequently, the Category Structure (tdpct0502m000) session starts in which you can link the items.
6. Generate a catalog based on the category that is defined as a catalog. For this purpose, select the relevant catalog and click **Create Product Catalog** on the appropriate menu of the Category (tdpct0501m000) session. Consequently, the Create Product Catalog (tdpct0204m000) session starts, which you must run with the **Save Catalog** check box selected.

Note

- When the catalog is created, you can view the catalog in the Catalogs (tdpct0510m000) session.
- To have a tree structure of the generated catalog structure, select **Tree Structure** from the appropriate menu in the Catalogs (tdpct0510m000) session, or select **Tree Structure** from the appropriate menu in the Category Structure (tdpct0502m000) session.
- You can insert product catalogs into:
  - Sales orders in the Sales Order (tdsls4100m900) session.
  - Sales quotations in the Sales Quotation (tdsls1600m000) session.
  - Purchase requisitions in the Purchase Requisition (tdpur2600m000) session.

Copying category structures

You can copy category structures in the Copy Category Structure (tdpct0201m000) session.

When copying from one category structure to another, the following rules apply for the following fields in the Copy Category Structure (tdpct0201m000) session:

Copy type	From and to values	Fields
Create New Structure	Must match	General/Specific Identifier
Append Structure	Can differ	General/Specific Identifier
Replace Structure	Can differ	General/Specific Identifier

Note

If, in the Copy Category Structure (tdpct0201m000) session, the **Type of Copy** is **Append Structure**, the **Source** is **General**, and the **Target** is **Specific**, links that are specified in the Category - BP/Employee Linkage Data (tdpct0103m000) session, are not copied.

List items in the product catalog

After the catalog is created, and an item is of the list type, the original list item will no longer be visible in the catalog. Only the components of the list item become part of the catalog. Because the list item is exploded when the catalog is created, the list component's quantity cannot be used when creating the item line in your list. If the list item's components change after the catalog is created, the current catalog is not updated. However, each time the catalog structure with the list item as a member is used to create a new catalog, the changes in the list item's components are updated during the creation process.

Chapter 2
Sales quotations and sales orders

2

Specifying sales order lines and quotation lines based on a catalog

To insert items from a catalog:

1. Specify a product catalog. For more information, refer to *Product catalogs (p. 7)*.
2. In the Sales Order (tdsls4100m900) session or Sales Quotation (tdsls1600m000) session, specify sales order or quotation header data.
3. From the appropriate menu on the Lines tab, select **Insert from Catalog** to start the Catalogs (tdpct0510m000) session.
4. From the appropriate menu in the Catalogs (tdpct0510m000) session, select the appropriate catalog and click **Tree Structure**. Consequently, either the Catalog Structure (tdpct0510m100) session or Catalogs with Item Data (tdpct0601m000) session starts in which the defined category structure is displayed.
5. To add items to the sales order or quotation, select an item from the catalog structure and perform this:
   - **Catalog Structure (tdpct0510m100)**
     From the appropriate menu, select Item Information. The Item Information (tdpct0212s000) session starts in which you can first specify an **Order Quantity** and then click **Order Item** to order the item.
   - **Catalogs with Item Data (tdpct0601m000)**
     In the Item Information group box, first specify an **Order Quantity** and then click **Order Item** to order the item.

Chapter 3
Purchase requisitions

3

Specifying purchase requisition lines based on a catalog

To insert items from a catalog:

1. In the Purchase Requisition (tdpur2600m000) session, specify purchase requisition header data.
2. From the appropriate menu on the Lines tab, select **Insert from Catalog**.
3. If, in the Purchase User Profiles (tdpur0143m000) session, the **Product Catalog** field is specified, either the Catalog Structure (tdpct0510m100) or Catalogs with Item Data (tdpct0601m000) session is started for the relevant purchase catalog. If this field is blank, the Catalogs (tdpct0510m000) session is started.
4. If the Catalogs (tdpct0510m000) session was started, select the required catalog and, from the appropriate menu, select **Tree Structure**. Consequently, either the Catalog Structure (tdpct0510m100) session or Catalogs with Item Data (tdpct0601m000) session starts in which the defined category structure is displayed.
5. To add items as requisition lines to the purchase requisition, select an item from the catalog structure and perform this:
   - **Catalog Structure (tdpct0510m100)**
     From the appropriate menu, select Item Information. The Item Information (tdpct0212s000) session starts in which you can first specify an **Order Quantity** and **Order Unit** and then click **Order Item** to order the item.
   - **Catalogs with Item Data (tdpct0601m000)**
     In the Item Information group box, first specify an **Order Quantity** and **Order Unit** and then click **Order Item** to order the item.

Replacing purchase requisition lines based on a catalog

If you use the Purchase Requisition - Prepare Conversion (tdpur2600m100) session to prepare the lines of an **Approved** purchase requisition for conversion to a purchase order or an RFQ, you can replace the item on a requisition line with an item from a product catalog.

In the Prepare Conversion Purchase Requisition Lines (tdpur2502m100) session, to replace a requisition line's item:

1. Select a requisition line.
2. From the appropriate menu, select **Catalog**, which starts the Catalogs (tdpct0510m000) session.
3. Select the required catalog and, from the appropriate menu in the Catalogs (tdpct0510m000) session, select **Tree Structure**. Consequently, the Catalog Structure (tdpct0510m100) session or Catalogs with Item Data (tdpct0601m000) session starts in which the category structure is displayed.
4. To replace a requisition line's item, select an item from the catalog structure and perform this:
   - **Catalog Structure (tdpct0510m100)**
     From the appropriate menu, select Item Information. The Item Information (tdpct0212s000) session starts in which you can first specify an **Order Quantity** and **Order Unit** and then click **Order Item** to order the item.
   - **Catalogs with Item Data (tdpct0601m000)**
     In the Item Information group box, first specify an **Order Quantity** and **Order Unit** and then click **Order Item** to order the item.

Appendix A
Glossary

A

appropriate menu

Commands are distributed across the **Views**, **References**, and **Actions** menus, or displayed as buttons. In previous LN and Web UI releases, these commands are located in the *Specific* menu.

catalog

The highest level of a category structure. A catalog contains one or more categories, which contain items or subcategories. A catalog cannot be a member of another category.

category

A classification or division of items. The classification can be by form, fit, or function. Categories are used in catalogs. The highest level category is referred to as a catalog.

list item

A type of item that consists of multiple components. The components can also be managed and ordered separately. The type of list item (kit, menu, options, or accessories) indicates how the components are related.

List items are used to speed up the order-entry process. The order lines for a list item can contain main items or components.

list type

The way in which a list item can be defined.

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