



Infor LN Sales User Guide for Retrobilling

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About this document

This document describes the process to set up and handle retrobilling, which is used to re-invoice previously shipped items for sales orders and schedules. The price differences are handled using retrobilled sales orders.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, 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	Introduction to retrobilling
Chapter 2	Master data	Setup of the retrobilling master data
Chapter 3	Procedure	Steps in the retrobilling procedure

References

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

- **User Guide for Sales Master Data U9839 US**
Use this guide to understand the setup of sales master data.
- **User Guide for Sales Contracts U9844 US**
Use this guide to understand the sales contract procedure.
- **User Guide for Sales Orders U9845 US**
Use this guide to understand the sales order procedure.
- **User Guide for Purchase and Sales Schedules U9541 US**
Use this guide to understand the purchase and sales schedule procedures.
- **User Guide for Pricing U9179 US**
Use this guide to understand the pricing functionality.

How to read this document

This document was assembled from online Help topics. As a result, references to other sections 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

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If price changes are made to a sales contract or to an item after the renegotiation date, you can use the retrobilling functionality to re-invoice previously shipped items for sales orders and schedules. Price differences are handled through retrobilled sales orders, which have an item quantity of zero and an order amount that includes the price difference.

Retrobilling master data

To set up retrobilling:

1. In the Sales Order Types (tdsls0594m000) session, specify a sales order type for retrobilling.
2. In the Sales Order Parameters (tdsls0100s400) session, specify these fields:
 - **Retro-Billing Implemented**
 - **Order Type Retrobilling**
 - **Retro-Billing Cost/Service**
 - **Number Group Retro-Billing**
 - **Number Group Update**
 - **Date for Generating Retrobilled Advice**
3. In the Items - Sales Business Partner (tdisa0510m000) session, specify these fields:
 - **Item applicable for Retro-Billing**
 - **Retro Billed SO per BP**

Retrobilling procedure

A retrobilled sales order has an item quantity of zero and an order amount that includes the price difference.

To generate a retrobilled sales order:

1. Generate price change advices in the Generate Retrobilled Price Change Advice (tdsls3270d000) session.

You can start this session as follows:

- Automatically, whenever you make a price change to a contract
- Manually, to generate price change advices for changed item prices

Note

- In the Generate Retrobilled Price Change Advice (tdsls3270d000) session, you must manually specify a price change (a percentage or a fixed value). This price change is then applied to the specified range of sales orders, sales schedules, or shipments.
 - Price change advice header information is displayed in the Retrobilled Price Change Advice (tdsls3570d000) session. Price change advice line information is displayed in the Retrobilled Price Change Advice Lines (tdsls3571d000) session. You can change or delete the price change advice line information before you approve the line.
2. Approve the price change advices in the Approve Retrobilled Price Changes (tdsls3275d000) session. You can start this session from the appropriate menu in the Retrobilled Price Change Advice Lines (tdsls3571d000) session.
 3. Generate retrobilled sales orders in the Generate Retrobilled Sales Orders (tdsls3271d000) session. You can start this session from the appropriate menu in the Retrobilled Price Change Advice Lines (tdsls3571d000) session. To update the sales contract with the new price, select the **Update Contract with New Price** check box in the Generate Retrobilled Sales Orders (tdsls3271d000) session.
 4. Use the standard invoicing procedure to invoice the retrobilled sales order for the price difference.

Note

The original invoice line data of retrobilled sales orders is displayed in the Linked Order Line Data (tdsls4102s200) session. This information is released to Invoicing and used for the invoice.

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.

retroactive billing

See: *retrobilling* (p. 13)

retrobilling

To re-invoice previously shipped items using a price based on a new contract negotiation. Retrobilling can also be performed on individual sales orders/schedules that are not related to a contract.

Synonym: retroactive billing

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