

Run Instructions

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How to read this document

Chapter 1

Introduction to Infor ERP LX

1

Overview of Infor ERP LX

This topic contains information that pertains to all applications of the Infor ERP LX product. This information enables you to perform the following tasks:

- Navigate through menus and screens
- Specify information in the fields on the screens
- Use the screen actions
- Access the online help text
- Become familiar with terms used throughout Infor ERP LX

Navigation

The features described in the following paragraphs help you navigate within and between Infor ERP LX screens and programs quickly and easily.

Menus

Use Infor ERP LX menus to choose individual programs to process or view information. You can call individual applications directly from any menu.

Dates

Infor ERP LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor ERP LX stores the date as eight characters to include century information. Use Company Name and Date Format, SYS820, in the System Parameters Generation program, SYS800, to configure century dates and specify dates beyond 1999.

Attention key and quick access icon

The character-based user interface uses the attention key to directly access other programs, menus, and applications. On an Infor ERP LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor ERP LX screen, click the Quick Access icon.

You must have security authorization to use these features.

Look-up features

On the character-based user interface, a plus sign (+) indicates a prompt-capable field. Use F4 to display a look-up screen.

On the Webtop user interface, an arrow indicates a prompt-capable field. Click the arrow to display a look-up screen.

Most screens called from inquiry programs allow you to search for alphanumeric strings.

Remembered keys

Infor ERP LX remembers certain key values, such as item number, salesperson, or container, in your workstation memory as you process information in certain programs. You can assign one of the following values to each field:

- 0. Infor ERP LX automatically retrieves this value from remember key memory. Infor ERP LX updates this value on a continual basis.
- 1. Infor ERP LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor ERP LX does not retrieve or update remembered key fields.

Use the Display Remembered Keys program, SYS080, to set up remembered keys.

Standard online help features

Many Infor ERP LX programs display generic help text. Use F1 from within a field on the character-based user interface. Click the Show/Hide Help icon on the Webtop user interface. This generic help text includes help for standard line actions, standard screen actions, which are also called function keys or F keys, the run time parameter, and some screens types.

The information in the generic help text for line actions and screen actions in this document is not included in the help text for individual Infor ERP LX programs and screens. If a line action or screen action other than those defined in the generic help text occurs in a program, the help text for that program describes the specific action.

Additional generic help text is stored in the SSARUNHT document for users of the character-based UI. You can print this document and the individual application run instructions, SSARUN01, SSARUN02, and so on, from the DOC menu on the IBM(R) iSeries(TM) in the character-based user interface.

Generic help text for line actions

Line actions

The following line actions are valid in numerous screens. They have the functions described in the following sections.

1=Create

Specify Create on the prompt line and a value in at least one key field to add new information to the file. The system displays maintenance screens on which you can specify the new data. The system prints the new data on the audit report.

Note: You cannot specify Create next to existing data.

1=Select

On a prompt screen, specify 1 to return the selected data to the original screen.

2=Revise

Specify Revise to change the information for a line. Specify 2 and a value in at least one key field or specify 2 next to a line. The audit report lists the change. If you specify Revise next to a line with inactive information, the system reactivates the information.

3=Copy

Specify Copy to copy existing information. You can specify 3 and a value for at least one key field or you can specify 3 next to a line. The system displays a maintenance screen on which you can specify new data and change existing data.

4=Delete

Specify Delete to deactivate the information on a line. You can specify 4 and a value in the key fields or you can specify 4 next to the line to delete. Use Revise to reactivate deleted information.

5=Display

Specify Display to view information. You can specify 5 and a value in the key fields or you can specify 5 next to a line.

6=Print

Specify Print to print information on the audit trail. You can specify 6 and a value in the key fields or you can specify 6 next to a line.

8=Position To

Specify Position To to move a line to the top of the list. You can specify 8 and a value in the key fields or you can specify 8 next to a line. The system repositions the list to begin with the requested line or, if the line does not exist, to the line that is next in sequence.

After you use the Position To feature, you can page down or you can use the Position To action with a different value, but you cannot page up. You can return to the top of the list if you specify Position To but do not specify a value in the key fields on the prompt line. On a prompt screen, display details matching the information you specified.

10=Search

On the top line of a prompt screen, use 10 and known field data to locate specific information.

Additional line actions

If a program contains additional line actions, see the line actions help text in that specific program for descriptions of those line actions.

Generic help text for screen actions

Many screen actions, also called F keys, perform the same function for every program or screen in Infor ERP LX. Definitions for these screen actions follow.

Enter

Proceed to the next screen of a maintenance program. On the final screen, press Enter to update the file and return to the first screen of the program for additional maintenance activity.

Enter

Validate data in a screen. This function of Enter generally occurs in transaction programs that have an F6=Accept screen action, which saves the data on the screen.

Enter

Send the output from a report or listing program to an output queue for processing.

F1=Help

Display help text. This screen action applies to the character-based user interface only.

F3=Exit

Exit a program and do not record, update, or print the information you specified on the program screens.

F4=Prompt

Display a pop-up screen that lists existing values for the field. A plus (+) character denotes a prompt-capable field in the character-based user interface. In the Webtop user interface, the prompt -capable field has a small arrow that points to the right .

F5=Refresh

On a list screen, redisplay the screen to check the status of an executed function. On a maintenance screen, redisplay the original values on the screen.

F6=Accept

Accept your changes and exit the program.

F7=Backward

Display previous lines, that is, those alphanumerically closer to A or those with earlier dates.

F8=Forward

Display additional lines, that is, those alphanumerically closer to Z or 9, or those with later dates.

F11=Fold

Display a folded view of the screen that contains additional information. Use F11 again to return the screen to its previous format.

F12=Cancel

Return to the previous screen and do not save values you specified on this screen. If you use F12 to return to a selection screen in a maintenance program, you cancel changes you made to any screens in the program.

F23=More Actions

Display additional line actions. If a screen has many screen actions, you may need to press F24 to see that there is an F23 action, which indicates that additional line actions are available.

F24=More Keys

Display additional function keys.

Generic help text for standard screens

Several categories of screens have identical functionality, though the content differs. These types of screens are explained in the following sections.

Generic help text for list screens

Many Infor ERP LX programs contain screens with lists of information to specify for maintenance or inquiry. You have two options to specify the information to process on a list screen:

- Use the Act field and the key fields that appear at the top of the list.
- Specify a line action in the Act field of the line with the information you want to process.

After you make your entries, press Enter to perform the line action.

Generic help text for filter screens

Some Infor ERP LX programs feature a filter screen, which you can access with F13. The filter screen enables you to filter the data to display. For example, if you use F13 in Customer Master Maintenance, ACR100, you can display all records by customer number or only active records, either by customer number or by customer name. You can also specify a sort or sequence.

Generic help text for the run time parameter

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Infor ERP LX menus

This section describes the menus in Infor ERP LX.

ERP LX main menu

The ERP LX Main Menu is the first of five master menus. You can access the four major Infor ERP LX application groups from this menu:

- Configurable Enterprise Financials, CEF
 - Multi-Mode Manufacturing, MMM
-

- Supply Chain Management, SCM
- Cross-Product Applications, XPA

Specify the abbreviated application group fast path code to access the master menu for the desired application group.

Configurable enterprise financials menu

Use the Configurable Enterprise Financials menu, CEF, to access Infor ERP LX financial applications. Specify the application fast path code to access the desired application menu.

Multi-mode manufacturing master menu

Use the Multi-Mode Manufacturing master menu, MMM, to access Infor ERP LX manufacturing applications. Specify the application fast path code to access the desired Infor ERP LX application menu.

Supply chain management master menu

Use the Supply Chain Management master menu, SCM, to access Infor ERP LX supply chain management applications. Specify the application fast path code to access the desired Infor ERP LX application menu.

Cross-product application menu

Use the Cross Product Application menu, XPA, to access, analyze, and transmit information within Infor ERP LX. Specify the application fast path code to access the desired Infor ERP LX application menu.

Commonly used terms in Infor ERP LX

(Y/blank)

If the screen displays (Y/blank) for a field, specify Y or Yes for a particular action to take place. Otherwise, leave the field blank. The screen displays (Y/N) if the field requires a Y or an N.

A/R, A/P

The documentation uses the abbreviations A/R and A/P to denote the terms accounts receivable and accounts payable, respectively. The abbreviations distinguish the terms from the corresponding program indicators of ACR, and ACP, which precede program numbers, for example, ACR500 and ACP100.

Alphanumeric

Alphanumeric refers to text that contains letters, letters and numbers together, and numbers arranged uniformly with special characters, such as dates in MM/DD/YY format. Infor ERP LX sorts reports and inquiries in ascending alphanumeric order, unless indicated otherwise. Ascending order arranges items from the lowest value to the highest value. Alphanumeric text is sorted in ascending order according to the following rules:

- Special characters, such as \$, %, - (hyphen), comma, and period, come before all others
- Lowercase letters come before uppercase letters
- Uppercase letters come before numbers
- Numbers, that is, 0 through 9, come last

Extreme values by default

Some fields display extreme values by default. The system uses an alphanumeric or numeric extreme in these fields if you do not override the value. Use these default values, which are usually specified as ranges, to include all information in the range. The default values or any other values specified to designate a range do not have to be valid values in a database file.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor ERP LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor ERP LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Reference only

Reference only indicates that the system uses the information for the given field only for reference and does not use it for processing.

General instructions

This document includes the following sections:

- Application overview: This section provides a general description of the functions and highlights of the application.
- Application flow: This section describes prerequisites to operate the application, the sequence in which to run the programs, and the functions of this application.
- How-to index: This section is an alphabetical list of application functions. Next to each function is the number of the program to use.
- Glossary: This section provides explanations of terms pertinent to this application.
- Menus: This section displays all the menus associated with the product. The program numbers are to the right of the program name on the menus.

Application overview

Distributors and manufacturers use promotions and deals, which are marketing incentive programs, to stimulate sales, discourage competition, and increase market share. As an element of the marketing mix (distribution, product development, advertising, customer service, direct selling, quality and pricing), these incentive programs play a vital role during the product life cycle.

The Infor ERP LX Promotions and Deals application addresses all aspects of the promotions and deals process as it relates to sales order processing, billing, accounts receivable, general ledger, and sales analysis.

Marketing and sales professionals require the capability to track and analyze promotions and deals based on a promotion calendar. The Infor ERP LX Promotions and Deals Calendar has start and end dates with an associated period. For a customer order to qualify for a promotion or deal, the order entry date or the request date must fall in the promotions and deals period.

Century Dating

Infor ERP LX includes full support for dates up to and beyond the year 2000. Although most date fields display 6 characters, Infor ERP LX records the date as 8 characters. Refer to Company Name and Date Format (SYS820) in the System Parameters Generation program (SYS800) for information to configure century dates and to specify dates beyond 1999.

Rounding

Infor ERP LX supports three system-wide rounding methods:

- Truncate
- Increment
- Half-adjust

Infor ERP LX also supports three round-to positions:

- 0
- 10
- 100

This rounding fulfills legal and fiscal requirements in several European countries. You specify the rounding method and round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies (MLT).

Infor ERP LX then uses the rounding method and round-to position you specify to consistently round calculated amount fields, displayed amount fields, and amount fields on audit reports. This rounding process affects calculated amount totals such as invoice total, taxes total, and amounts in journals. However, the rounding process does not affect the unit cost or unit selling prices.

Product Highlights

- Sequentially assign promotions and deals numbers during Promotions and Deals Maintenance
- (Optional) Automatically assign promotions and deals during customer order processing.
- Assign more than one promotion or deal to the customer order or customer order line item.
- Print promotions and deals information on various documents throughout the order processing, billing, and accounts receivable cycle.
- Print free format notes to include any additional information.
- Accommodate both off-invoice and bill-back terms.
- Support fixed monetary amount discounts, percentage off discounts, free goods or cash value discounts, slotting or kitting allowances, and split discounts.

Throughout the promotions and deals cycle, Infor ERP LX presents information necessary to monitor the performance of the incentive programs. You can access information about discounts offered during the order processing cycle versus discounts taken during the accounts receivable cycle. You can analyze the Expected Lift (projected sales) versus the Actual Lift (actual sales)..

Other files that work in conjunction with Promotions and Deals:

- General Ledger files
- Accounts Receivable (Company, Profit center, Terms, Salesperson, Customer Master)
- Customer Order Entry files (Order Header and Order Lines, Ship-To Master, Special Pricing)
- Sales Report Definition

Application flow

Promotions and Deals Calendar Maintenance (PRO100) Required:

Define start and end dates and (optional) announcement dates for promotion periods.

Promotions and Deals Master Maintenance (PRO110D1) Required:

Define promotion terms and conditions, and qualifications. Define off-invoice and bill-back splits.

Promotion Master Listing (PRO115D) Optional:

Use this program to print a report that lists promotion master information, including promotion terms, conditions, and qualifications.

Promotions and Deals Notes Maintenance (PRO120) Optional:

Use this program to define promotion note text and specify whether to print the notes on acknowledgments, invoices, or statements.

Promotion Calendar Listing (PRO125) Optional:

Use this program to print a list of the start dates, end dates, and announcement dates for each promotion period and year, by company.

Promotion Tracking Maintenance (PRO130) Optional:

Use this program after you run Cash and Memo Posting (ACR500) to reconcile any discrepancies and close out promotions for which the discount offered does not equal the discount taken.

Promotion Tracking Listing (Pro135) Optional:

Use this program to print a list of the defined promotion tracking information.

Special Price Maintenance (PRO140D1) Optional:

Use this program to maintain special prices for items based on customer number or salesperson number. You can then define the special price based on pricing method, company, currency, or item discount code for a defined period of time. If you price by customer, you can also use the customer and customer discount code, Order entry then uses these prices.

List Price Book Maintenance (PRO150D) Optional:

Use this program to maintain a book of list prices and cost-plus list prices for items based on item, customer, region, customer discount code, facility, or a combination of these. Infor ERP LX retrieves this list price during order entry based on the hierarchy you specified on the List Price Hierarchy screen, PRO820D-02.

Special Pricing Listing (PRO240D) Optional:

Use this program to print a list of all special pricing methods you defined in Special Price Maintenance, PRO140.

List Price Book Listing (PRO250D) Optional:

Use this program to print a list of all list price methods you defined in List Price Maintenance, PRO150.

Promotion Inquiry (PRO300) Optional:

Use this program to display information about promotions (PDM file) and promotion tracking (PDT) information.

Special Price Inquiry (PRO340D1) Optional:

Use this program to view the special prices established in Special Price Maintenance, PRO140.

List Price Book Inquiry (PRO350D) Optional:

Use this program to view list prices you defined for items, customers, regions, customer discount codes, facilities, or a combination of these.

Mass List Price Book Update (PRO510D) Optional:

Use this program to update the list price of a range of items. You can use this program to perform "what if" analyses on list price changes.

Cost-Plus List Price Development (PRO520D)

Use this program to develop and update Cost-Plus List Price information based on costs found in Infor ERP LX Cost selection criteria such as item and facility. You can review the effects of your updates before you enter them.

Batch Price Maintenance (PRO530D) Optional:

Use this program to price or reprice an order or group of orders in batch mode rather than interactively during order entry.

Inquiries and Reports

You can request a Promotion Performance report at the summary or detail level and by promotion number, customer number, item number, item class, customer type, region, promotion period, item discount code, or customer discount code.

Promotions and Deals Reports in Detail

A list of the available reports follows.

- Promotion Master Listing
- Promotion Calendar Listing
- Promotion Tracking Listing
- Special Price Listing
- List Price Book Listing
- Promotion Performance Summary by Promotion Information
- Promotion Performance Summary by Customer Information
- Promotion Performance Summary by Item Information
- Promotion Performance Detail by Promotion Information
- Promotion Performance Detail by Customer Information
- Promotion Performance Detail by Item Information

You can inquire on promotions by promotion number, item number, customer number/ship-to, customer type, customer discount code, item class, item discount code, region, and promotion period.

Promotions and deals data files

The following files contain promotions and deals data:

- Item Master (IIM)
 - Customer Master (RCM)
 - Salesperson Master (SSM)
 - Transaction History (ITH)
 - Order Header (ECH)
 - Order Line (ECL)
 - Order Line Notes (ESN)
 - Promotion Calendar (PDC)
-

- Promotion Master (PDM)
- Promotion Tracking Detail (PDA/PDT)

How-to Index

The following list provides a quick reference to the processes that you can perform in this application and the programs that you use for each process. The list also includes programs in related applications.

- Access Order Line Notes - ORD140D1
- Access Promotion Notes - PRO120
- Define Cost-Plus List Prices - PRO520D
- Display List Price Book - PRO350D
- Display Orders - ORD300D
- Display Promotions - PRO300
- Display Promotion Terms Definitions - WINZPM
- Display Special Prices - PRO340D1
- Maintain List Price Book - PRO150D
- Maintain Promotions - PRO110D1
- Maintain Promotions and Deals System Parameters - SYS800
- Maintain Promotion Calendars - PRO100
- Maintain Special Prices - PRO140D1
- Maintain Tax System Parameters - SYS800
- Price or Reprice an Order or Range of Orders - PRO530D
- Print List Price Book - PRO250D
- Print Performance Reports - PRO210-PRO232B
- Print Promotion Calendar Listing - PRO125
- Print Promotion Master Listing - PRO115D
- Print Promotion Tracking Listing - PRO135
- Print Special Prices Listing - PRO240D
- Track Promotions - PRO130
- Update a Range of List Prices - PRO510D

Terms used in Promotions and Deals

Cost-Plus List Price

Cost plus list price is a price calculation that multiplies the item's list price by the selected cost set and/or a percentage multiplier or a net change amount.

Date Flag

The Date Flag Identifies the effective start and end dates of a promotion based on the order entry date and/or request date.

Kitting Allowance

Kitting allowance is a type of discount earned by a customer for an aisle display. Accounts receivable often receives a confirmation of the display.

List Price Book

List price book is a program that stores all the defined list prices based on Item, Customer, Region, Customer Discount Code, Facility, or a combination of these.

The methods available to define List Prices are as follows.

Method Description	
9	Cost-Plus List Price
0	Multi-Currency - Base price/item alone
A	Item/Customer
B	Item/Region
C	Item/Customer Discount Code
D	Item/Facility

Pick-Up

Pick-up is a bill-back discount type. This discount may apply when the customer picks up the product rather than have the product shipped.

Promotion Calendar

A promotion calendar establishes the relationship between the promotions and deals periods and the corresponding start, end, and announcement dates. The start and end dates determine whether a customer qualifies for a promotion and deal discount.

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor ERP LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor ERP LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

Tax Flag

The Tax Flag identifies tax liability on a free goods or cash value promotion or deal.

Promotions and deals menus

The Promotions and Deals menus are discussed in the following sections.

Promotions and deals maintenance menu

To choose one of the menu options on any of the menus, specify the appropriate option number in the Enter Menu Name, Program Name, or Option Number field and press Enter or specify a 1 to the left of the option. To access another product menu (Purchasing, Accounts Payable, and so on), specify the three-character product code in this field (PUR, ACP, and so on)

The Promotions and Deals Menu, PRO, provides access to the processing, maintenance, and inquiry programs. You can also access the Order Management,

Promotions and Deals Performance Reports, Billing, and Sales Analysis menus from this menu.

Promotions and deals performance reports menu

The Promotions and Deals Performance Reports Menu, PRO01 provides access to the available reports.

Parameters generation

You specify the parameters for promotions and deals processing in the System Parameters program, SYS800. From the initial System Parameter Generation screen you can specify the application set whose parameters you want to set or maintain. Infor ERP LX displays the parameters screens for that application.

On the Promotions and Deals System Parameters screens you determine the following parameters:

- Whether to automatically assign promotions during order entry
- The types of discounts to assign automatically during order entry
- Whether to display promotion screens during order entry
- The last promotion number used
- The promotion price basis to use
- The types of promotion information to print on certain documents and forms
- The sequence in which Infor ERP LX checks for a price method to price an item or order.

Access: System Parameter Generation Menu, SYS800D-01

Tax system parameters

Use System Parameters Generation (SYS800) to set or maintain tax parameters. On the initial screen you specify a company whose tax parameter you want to set or maintain. Infor ERP LX then displays the Tax System Parameters Maintenance screen. Use this screen to establish tax processing options necessary for local tax or VAT requirements. You can specify the tax calculation method, whether to adjust the tax amount if discounts are taken, and the method to retain tax history.

Access: SYS800 Parameter Generation screen flow

Promotion calendar, PRO100

Use the Promotion Calendar program to define the promotions calendar, which establishes the relationship between the promotions and deals periods and the corresponding start, end, and announcement dates. The start and end dates determine whether a customer qualifies for a promotion and deal discount.

Access: PRO menu

Add or select a promotion calendar

Use the Promotions and Deals Calendar Maintenance screen, PRO100-01, to add a promotion calendar or to select a promotion calendar to revise, display, or print.

Field descriptions - PRO100-01

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Company (2,0):

Specify the company number for this promotion calendar.

Year (4,0):

Specify the year for this company's promotion calendar. You can use any unique numerical string up to four digits. We recommend that you consistently use a meaningful two-character or four-character string that identifies the year for which you create the calendar, such as 97 or 1997.

Name (30,A):

Infor ERP LX displays the company name for this company number.

Screen actions - PRO100-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view promotion calendar information

If you add a new promotion calendar or specify line action 5, Display, from PRO100-01, the system displays the Promotions and Deals Calendar Maintenance screen, PRO100-02.

Field descriptions - PRO100-02**Company (2,0):**

Infor ERP LX displays the code for the company whose calendar you want to maintain.

Year (4,0):

Infor ERP LX displays the year for this promotion calendar.

Period (2,0):

Infor ERP LX displays the period number automatically assigned to existing promotions and deals periods. The system allows definitions of up to 99 periods per company and year.

To delete a promotion calendar, specify action 2, Revise, on the Promotions and Deals Calendar Maintenance screen, PRO100-01, then Field Exit the start date, end date, and announce date fields for the calendar you want to delete and press Enter.

Start (8,0):

Specify the start date for this promotion or deal. The start and end dates determine whether a customer order qualifies for a specific promotion or deal. You must use the four-digit year.

End (8,0):

Specify the end date for this promotion or deal. You must use the four-digit year.

Announce (8,0):

Specify the announcement date for this promotion or deal. The announcement date is not a required field and cannot be later than the end date.

Screen actions - PRO100-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion master

Use the Promotion Master program to specify the parameters and unique characteristics for each marketing incentive program.

For a customer order to qualify for a marketing incentive program, the order entry date, request date, price book date, or all three dates must fall during the promotion and deal effective date range. If you specify a period, the system uses the period start date and end date from the Promotion and Deals Calendar file. You can modify the dates.

The value in the Qualification Date Type field in Customer Master Maintenance, ACR100, determines whether the system uses the price book date, store date, or warehouse date for qualification.

Infor ERP LX initially displays existing promotion information by company and promotion number. Use F13 to access the Filters screen; you can resequence the information.

You can specify a promotion cap amount to determine whether to limit a promotion. You can limit the quantity of free goods for a free goods promotion.

Access: PRO menu

Add or select a promotion

Use the Promotion Master Maintenance screen, PRO110D1-01, to add a new promotion or to revise, delete, display, or print an existing promotion.

Field descriptions - PRO110D1-01**Line Actions**

The action codes described in the following section are available:

9=Mass Create

Create a mass promotion. Specify 9 on the top line of the list along with a company number. This line action creates multiple promotions at one time.

10=Mass Revise

Mass change a promotion. Infor ERP LX displays the Promotion Master Maintenance - Qualifiers screen, PRO110D2-04, if you press Enter.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Act (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

9=Mass Create

Create a mass promotion. Specify 9 on the top line of the list along with a company number. This line action creates multiple promotions at one time.

10=Mass Revise

Mass change a promotion. Infor ERP LX displays the Promotion Master Maintenance - Qualifiers screen, PRO110D2-04, if you press Enter.

Co (2,0):

Specify the company number for this promotion or deal.

Promotion (6,0):

Specify the promotion code for this promotion or deal.

(Line Number) (3,0):

For existing promotions, Infor ERP LX displays the promotion number followed by the promotion line number. The system allows up to 999 lines per promotion.

To add a new promotion, specify 1 on the first (blank) line. To add a new line to an existing promotion, specify 1 and a promotion number on the first (blank) line.

Each unique combination of promotion and promotion number represents a unique promotion record. You can use a common promotion number and 10 different line numbers to establish 10 related promotions. However, you can establish 10 different promotion numbers for each of the related promotions. One advantage of a common promotion number and 10 different line numbers is for report and inquiry capabilities. If you use the same promotion number, you can more easily select just that one common promotion number.

Item Number (35,A):

Infor ERP LX displays the item number for this promotion or deal, which applies to order line level promotions only (Promotion Terms codes 1, 2, 5 or 7).

Class (2,A):

Infor ERP LX displays the item class for this promotion or deal. You cannot select both item class and item number. This applies to order line level promotions only (Promotion Terms codes 1, 2, 5 or 7).

IDC (2,A):

Infor ERP LX displays the item discount code for this promotion or deal, which applies to order line level promotions only (Promotion terms codes 1, 2, 5 or 7). You define item discount codes in System Table Maintenance (SYS105D1) and assign the codes to items in Item Master Maintenance (INV100).

Bracket Group Code (2,A):

Infor ERP LX displays the bracket group code for this promotion or deal.

Customer Number (8,0):

Infor ERP LX displays the customer number for this promotion or deal.

(Customer) Ship-To (4,0):

Infor ERP LX displays the ship-to number for this customer.

CDC (2,A):

Infor ERP LX displays the customer discount code for this promotion or deal. You define customer discount codes in System Table Maintenance (SYS105D1) and assigned to customers in Customer Master Maintenance (ACR100D1).

(Customer) Type (4,A):

Infor ERP LX displays the customer type for this promotion or deal.

Customer types are used to define customer groups. The customers are grouped together because they use the same currency code and the same set of the following General Ledger accounts: Cash, Accounts Receivable, Accounts Receivable Realized Gain and Loss, Accounts Receivable Unrealized Gain and Loss, and Bill Back Accrual.

Define customer types in Customer Type Maintenance, ACR170D1, and assign them to customers in Customer Master Maintenance, ACR100D1.

Region (6,A):

Infor ERP LX displays the promotion region code for this promotion or deal. Define region codes in System Table Maintenance, SYS105D1, and assign them

to customers in Customer Master Maintenance, ACR100D1. You can assign region codes to the customer ship-to information in Customer Address Master Maintenance, ORD100. If a promotion region code exists at the ship-to level, the system uses the code in the order header; otherwise, the system uses the customer level region code. You can override the region code in Order Entry and Billing.

Record Status (8,A):

Infor ERP LX displays the status of this record or line item. Valid status codes are 1 (Active) and 0 (Inactive).

Warehouse (3,A):

If the system displays a value in this field, only orders for that warehouse qualify for this promotion. If this field is blank, all warehouses apply. If the system displays a value in the Pricing Facility field, this field is blank.

Pricing Facility (3,A):

You can define promotions, charges, and allowances by facility during order entry. The system uses the value from the ordering warehouse, but the user can override the value to obtain different prices. If the system displays a value in the Warehouse field, this field is blank.

Screen actions - PRO110D1-01**F13=Filter**

Access the Filters Options screen. Use this screen to sort the display sequence. You can sort by Company and Promotion Number; by Item Number; by Item Class; by Customer Number; by Customer Type, or by Region.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy a promotion to create a new promotion or line

If you specify line action 3, Copy, Infor ERP LX displays the Promotions and Deals Copy Window, PRO110-06.

Use this screen to add a new line to an existing promotion or to copy an existing promotion to create a new promotion.

You can also duplicate an expired promotion or a promotion that applies to a specific customer or item. You can then change the start and end dates, customer number, item number, and other details for the new promotion.

Field descriptions - Copy Window PRO110-06

Copy From Promotion Number (6,0):

Infor ERP LX displays the promotion number and promotion line you specified with line action 3, Copy, on the Promotion Master Maintenance screen, PRO110D1-01.

Copy From Promotion Line (3,0):

Infor ERP LX displays the promotion number and promotion line you specified with line action 3, Copy, on the Promotion Master Maintenance screen, PRO110D1-01.

Copy To Promotion Number (6,0):

Infor ERP LX displays the default value of the next promotion number to assign and promotion line 001. Use the default values to create a new promotion with the data from the promotion in the Copy From fields. If you do not specify a new promotion number you copy data to an existing promotion number, Infor ERP LX still adds one to the Last Promotion Number Used field in SYS800. This new promotion number, although not used, is not available for further use.

To copy data to an existing promotion, specify the promotion number in the Copy To Promotion Number field. You can specify the next available line number in the Copy To Promotion Line field, or press Field Exit for Infor ERP LX to automatically assign the next available line number.

Copy To Promotion Line (3,0):

Infor ERP LX displays the default value of the next promotion number to assign and promotion line 001. Use the default value to create a new promotion with the data from the promotion in the Copy From fields. If you do not use a new promotion number and you copy data to an existing promotion number, the system still adds one to the Last Promotion Number Used field in SYS800. This new promotion number, although not used, is not available for further use.

To copy data to an existing promotion, specify the promotion number in the Copy To Promotion Number field. You can specify the next available line number in the Copy To Promotion Line field, or press Field Exit for Infor ERP LX to automatically assign the next available line number.

Screen actions - Copy Screen PRO110-06

Enter

Press Enter to copy the requested promotion and line number to the Copy To Promotion Number and Line specified. Infor ERP LX displays the Promotion Master Maintenance screen, PRO110D2-01, with the Copy From promotion information as default values.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view promotion information

Use the Promotion Master Maintenance screen, PRO110D2-01, to add, maintain, or view the details for this promotion.

Field descriptions - PRO110D2-01

Promotion Number (6,0)/(3,0):

Infor ERP LX displays the promotion number and line number that you specified on the Promotion Master Maintenance screen, PRO110D1-01.

Company (2,0):

Infor ERP LX displays the company and the company name from the Company Master file (RCO).

Item Number (35,A):

Infor ERP LX displays the item number and the item description from the Item Master file (IIM) .

You cannot define line level promotions for or assign the promotions to features and options parent items (Item Type 5). Total order promotions can still apply if the order qualifies based on customer number or other promotion qualifications.

Item Class (2,A):

Infor ERP LX displays the item class and the item class description from the Item Class file (IIC).

Bracket Group Code (2,A):

This field is valid only if you specified Yes in the bracket flag option. Infor ERP LX displays the bracket group code, if any, and description for this promotion. You can override the value in this field.

Customer Number (8,0):

Infor ERP LX displays the customer number and the customer name from the Customer Master file (RCM).

Customer/Ship-To (4,0):

Infor ERP LX displays the customer ship-to and the ship-to name from the Customer Master Maintenance file (RCM).

Customer Type (4,A):

Infor ERP LX displays the customer type and the customer type description from the Customer Type file (RCT).

Region code (6,A):

Infor ERP LX displays the region code.

Customer Discount Code (2,A):

Infor ERP LX displays the customer discount code (CDC) for this promotion. You define customer discount codes in System Table Maintenance (SYS105D1) and assign the codes to customers in Customer Master Maintenance (ACR100).

Item Discount Code (2,A):

Infor ERP LX displays the item discount code (IDC) to which this promotion applies. You define item discount codes in System Table Maintenance (SYS105D1) and assign the codes to items in Item Master Maintenance (INV100).

Warehouse (3,A):

If you specify a warehouse, only orders for that warehouse qualify for this promotion. If you leave this field blank, all warehouses apply.

You cannot specify a value here if you make one in the Pricing Facility field.

Pricing Facility (3,A):

You can define promotions, charges, and allowances by facility. During order entry, the system uses the pricing facility from the ordering warehouse, but the user can override the value to obtain different promotions.

The item number (item class, bracket group code, and item discount code) and the customer number (customer type, default promotion region, and customer discount code) usually determine promotion qualifiers. Use the pricing facility to specify a different promotion from that determined by the item number and customer number.

You cannot specify a value here if you specified a value in the Warehouse field.

Promotion Terms (1,A):

Infor ERP LX displays the promotion terms code for this promotion.

1	Off Invoice at Line Item Level
---	--------------------------------

2	Bill Back at Line Item Level
---	------------------------------

3	Off Invoice at Total Order Level
---	----------------------------------

4	Bill Back at Total Order Level
5	Split at Line Level (Off Invoice)
6	Split at Total Order Level (Off Invoice)
7	Split at Line Item Level (Bill Back)
8	Split at Total Order Level (Bill Back)

You can define promotions by item, item class, or item discount code only at the order line level (Promotion Terms codes 1, 2, 5 or 7).

If the current terms code is any number 5 through 8 and you change the code to any number 1 through 4, Infor ERP LX deletes split promotion data in the following fields of the Promotion Master record (PDM):

Split Off Invoice Discount Price
Split Off Invoice Discount Amount
Split Off Invoice Discount Percent
Split Off Invoice Discount Account
Split Bill Back Discount Price
Split Bill Back Discount Amount
Split Bill Back Discount Percent
Split Bill Back Discount Account.

Bracket Flag (1,0):

Specify 1 to allow bracket promotions for this promotion if promotion terms are 1 (Off Invoice at Line Item Level) or 2 (Bill Back at Line Item Level). Otherwise, specify 0. If promotion terms are 3 (Off Invoice at Total Order Level) through 8 (Split at Total Order Level - Bill Back) you must specify 0 in this field.

Currency (3,A):

The system uses the company's base currency as the default currency code for this promotion. If the Infor ERP LX Multiple Currencies product is installed, you can override this value to define a promotion or promotion line in another currency.

Screen actions - PRO110D2-01

F14=Notes

Access Promotions and Deals Notes Maintenance, PRO120.

F15=Split Discount Window

Display the Split Discount screen, if applicable to this promotion.

F19=Override

Change split terms. Infor ERP LX displays a warning message if you change the promotion terms code from a split promotion, terms code 5-8, to a standard promotion, terms code 1-4, on a promotion that is assigned to a customer order. You will lose existing split promotion if you change the terms code. To modify the existing promotion, create a new promotion with the desired terms. You must use F19 to override the warning message, continue with the Promotion Maintenance and change the terms code.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain promotion qualifiers

Use the Promotion Master Maintenance - Qualifiers screen, PRO110D2-04 to add or maintain qualifiers for the promotion. The screen displays the following information:

- Promotion/Line
- Promotion Terms
- Currency
- Bracket Flag
- Warehouse
- Pricing Facility

Field descriptions - PRO110D2-04**Description (50,A):**

Specify a description of the promotion. The system displays the promotion description on Promotion Inquiry (PRO300) screens and prints the information on certain Promotion and Deals reports.

Promotion Period/Year (2,0)/(4,0):

Specify the promotion period and year for this promotion. Define these values in Promotions Calendar Maintenance (PRO100).

Start Date (8,0):

Specify a start date for the promotion. You can change the start date. If the start date is blank, the system uses the start date for the promotion period.

End Date (8,0):

Specify an end date for the promotion. The system uses the end date for the promotion period. You can change the end date.

Store Date (6,0):

If the customer master record for the promotion customer is set to use store dates instead of price book dates during promotion qualification and assignment, you can specify a value or modify this field.

(Store Date) To (6,0):

If the customer master record for the promotion customer is set to use store dates instead of price book dates during promotion qualification and assignment, you can specify a value or modify this field.

Warehouse Date (6,0):

If the customer master record for the promotion customer is set to use warehouse dates instead of price book dates during promotion qualification and assignment, you can specify a value or modify this field.

Warehouse Date (6,0):

If the customer master record for the promotion customer is set to use warehouse dates instead of price book dates during promotion qualification and assignment, you can specify a value or modify this field.

Contract Flag (1,A):

The system qualifies and assigns promotions in the following order:

1=Exclusive promotions.

Only a single promotion applies, with various date and other qualifiers, unless by highly exceptional coincidence two essentially identical exclusive promotions exist.

If an exclusive promotion qualifies, whether or not it is assigned, the system does not search for other promotions.

2=Semi-exclusive.

Only a single promotion applies, with various date and other qualifiers, unless by highly exceptional coincidence two essentially identical semi-exclusive promotions exist.

If a semi-exclusive promotion qualifies, whether or not it is assigned, the system does not search for other promotions with contract flags of best discount, lowest discount, always assigned, or regular.

4=Best Discount.

Only a single promotion applies, although the system analyzes all qualified best discount promotions. The system assigns the single promotion that results in

the largest discount amount offered. You can manually remove this promotion, but you cannot assign any other promotions if any promotion with Contract Flag=Best Discount is assigned.

If a Best Discount promotion qualifies, the system does not search for other promotions with contract flags of lowest discount, always assigned, or regular. This discount does not apply to bracket promotions.

5=Lowest Discount.

Only a single promotion applies, although the system analyzes all qualified lowest discount promotions. The system assigns the single promotion that results in the smallest discount amount. Note that surcharge or penalty-type promotions result in a negative discount amount offered, and in such cases, the system assigns the largest penalty type promotion.

If a least discount promotion qualifies, the system does not search for other promotions with contract flags of always assigned or regular.

This discount does not apply to bracket promotions.

3=Always Assigned.

The system may qualify and assign multiple promotions of this type. You cannot manually remove an always-assigned promotion.

You can think of an always-assigned promotion as a regular promotion with a forced auto-assignment character.

0=Regular.

If no exclusive, semi-exclusive, best-discount, or lowest-discount promotions exist, the system may qualify and assign one or more regular promotions. You can mix regular promotions with always-assigned promotions.

If the Allow Best Price and Least Price Promotions field in Promotions and Deals System Parameters is set to No, the system does not search for best discount or lowest discount promotions.

Auto Assign (1,0):

Specify Yes to automatically assign this promotion during order or quote entry, otherwise specify No.

In Create mode, The system uses the value from the system parameter for automatic assignment of promotions.

This value only applies to new pricing or repricing requests and to future applications of this program.

You cannot specify Yes for split promotions.

In Copy mode, the system uses the value in the From order to populate this field.

Promotion Capping Flag (1,0):

Specify a value in this field to limit a promotion if the promotion exceeds the amount in the Promotion Cap Amt field. Specify one of the following values:

Valid choices

- **0**
Not Applicable. The system does not limit promotions.
- **1**
Error. The system does not allow assignment of this promotion if the promotion exceeds the amount specified in the Promotion Cap Amt field. You cannot automatically or manually assign the promotion.
- **2**
Warning. The system allows the assignment of this promotion if the promotion exceeds the amount specified in the Promotion Cap Amt field and issues a warning message. You can automatically or manually assign the promotion. To manually assign the promotion, you must override the warning message. If the system automatically assigns the promotion during batch pricing and the promotion exceeds the amount specified in the Promotion Cap Amt field, a warning message prints.

Promotion Sequence (3,0):

Default=0 in Create mode. The system assigns promotions with application sequence=0 according to the traditional promotion assignment hierarchy: price, amount, percentage, free goods, and cash value.

You can specify levels, which supersede the traditional assignment sequence, to assign promotions.

If you specify the promotion sequence, then the system supplants the traditional method to calculate the promotion price basis. Specify the promotion price basis level in the Promotion Basis Level field.

This field is available only if the Allow User-Defined Promotion Assignment Sequence flag specifies Yes in Promotions and Deals System Parameters, PR0820.

Promotion Basis Level (3,0):

Use this field to assign the level for a given promotion.

The default value is 0, which signifies the calculated original basis, which is usually based on list price. The system uses multiples of 10.

The system uses this field in conjunction with the Promotion Sequence field.

This field is available only if the Allow User-Defined Promotion Assignment Sequence flag specifies Yes in Promotions and Deals System Parameters, PR0820.

Date Flag (1,A):

Use this field to define the date qualifications for a promotion. The default value is 2.

Valid choices**■ 0=Entry Date**

The promotion is effective if the order entry date (system date) falls within the promotion start and end dates.

■ 1=Request Date

The promotion is effective if the request date specified for the customer order line falls within the promotion start and end dates.

■ 2=Price Book Date

The promotion is effective if the price book date on the order or order lines falls within the starting and ending dates of the promotion. Price book date (booking date) is a date on which to base pricing activity. You specify the booking date in order entry for the order or order lines.

■ 3=All

The promotion is effective if the customer order entry date, the request date and the price book date fall within the promotion start and end dates.\

Projected Quantity (11,3):

Infor ERP LX displays the anticipated unit increase in sales volume based on the effectiveness of this promotion (in stocking unit of measure).

Projected Amount (15,2):

Infor ERP LX displays the anticipated sales amount based on the effectiveness of this promotion.

Promotion Cap Amt (15,2):

Specify the maximum amount to charge against a promotion. If the promotion exceeds this amount, the system either issues a warning or does not automatically assign the promotion, as determined by the value in the Promotion Capping Flag field.

Promotion Type (2,0):

Specify one of the following values for the promotion type:

00=Promotion

This value indicates a traditional promotion type. The Promotion Pricing flag in Customer Master Maintenance, ACR100, determines if the customer is eligible for promotion pricing and the level of pricing.

01=Allowance

This value indicates a traditional promotion with allowances. The Apply Charges/Allowances flag in Customer Master Maintenance, ACR100, determines whether to apply charges or allowances.

02=Pickup

This value indicates a special category of the allowance type for customers who pick up their own orders. The Pickup Flag in Means of Transportation Maintenance, OLM110, determines whether the order is flagged for pickup. In addition, the parameters for allowance type apply.

Allowed on Returns (1,0)

Specify one of the following codes to allow or disallow discounts and allowances on credit orders.

Valid choices

- **0=No**
Do not allow discounts or allowances on credit orders.
- **1>Returns and RMAs**
Allow discounts and allowances on both returns and RMAs.
- **2=RMAs only**
Allow discounts and allowances only on RMAs.
- **3=All**
Allow discounts and allowances on all orders.

Profit Center (10,A):

Specify the profit center to use for this promotion.

You do not have to set up profit centers because validation does not occur against profit centers.

Screen actions - PRO110D2-04**F14=Notes**

Access Promotions and Deals Notes Maintenance, PRO120.

F15=Split Discount Window

Display the Split Discount screen, if applicable to this promotion.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain promotion discount information

If you press Enter to process the information on the Promotions and Deals Master Maintenance - Qualifiers screen, PRO110D2-04, Infor ERP LX displays the Promotions and Deals Discount Window, PRO110D2-02.

Use the Promotions and Deals Discount Window to specify discount qualifications and conditions for promotions with promotion terms codes 1-8.

Access Promotions and Deals Master Maintenance - Qualifiers, PRO110D2-04, if the Promotion Terms code is 1-8 or use F16 from Promotions and Deals Inquiry, PRO110-02

This screen displays the currency code of the currency used for this promotion record along with its description.

Field descriptions - PRO110D2-02

Promotion Number/Line:

Infor ERP LX displays the number and line of the promotion to maintain.

Terms:

Infor ERP LX displays the promotion terms code and description.

Free Good Item Number (35,A):

To offer a free good as part of the promotion, specify the item number of the free good item. You must also specify either a minimum amount or a minimum quantity.

When you specify free goods, Infor ERP LX automatically creates an additional Customer Order Line with a net price of 0.

The system uses this item number to create the free goods order line. Item substitution does not apply.

You can specify free goods item numbers only for promotion terms code 1. You cannot enter a free good item number for promotion terms codes 2, 4, or 5-8, or if you use the Cash Value Item Number, Discount Price, Discount Amount or Discount Percent fields. You cannot enter assortment items (item type 3), kit items (item type 4), or feature and options items (item type 5) as free good items.

Cash Value Item Number (35,A):

If you offer a discount equal to the cash value of a specific item as part of the promotion, specify the item number of the cash value equivalent item. You must also enter a minimum amount or a minimum quantity.

You can specify cash value item numbers for promotion terms codes 1-4. You cannot enter a cash value item number with promotion terms codes 5-8 or if you use the Free Good Item Number, Discount Price, Discount Amount or Discount Percent fields. You cannot enter assortment items (item type 3), kit items (item type 4), or feature and options items (item type 5) as cash value items.

Discount Price (13,3):

To calculate discounts, Infor ERP LX uses the list price of the item ordered. To base discounts on another price, specify the discount price in this field.

You cannot enter a discount price with promotion terms codes 3, 4, 6 or 8, or if you use the Free Good Item Number, Cash Value Item Number, Discount Amount or Discount Percent fields.

Example: If the list price is 100 and the discount price is 90, the Discount field shows 90.000 (actual net price).

Discount Amount (14,4):

To apply a flat discount amount to orders that use this promotion, specify the discount amount. Infor ERP LX applies this discount to the net price.

You can specify a discount amount with promotion terms 1-8. You cannot enter a discount amount if you use the Free Good Item Number, Cash Value Item Number, Discount Price or Discount Percent fields.

Example: If the list price is 100 and the promotion calls for 10 off (net price=90), the Discount field shows 10.00 (amount off list price).

If you enter a negative amount, the net price increases.

Discount Percent (5,2):

To apply a discount percent to orders that use this promotion, specify the discount percentage. Infor ERP LX applies this discount to the net price.

You can specify a discount percentage with promotion terms 1-8. You cannot specify a discount percent if you use the Free Good Item Number, Cash Value Item Number, Discount Price or Discount Amount fields.

Example: If the list price is 100, and the promotion specifies a 10% discount (net price=90), the Discount field shows 90.00 (percentage of list price).

Minimum Amount (15,2):

For free goods or cash value promotions, specify a minimum order line amount used to qualify for the quantity of free goods or cash value equivalent specified in the FG or CV Quantity field.

For free goods or cash value promotions, you must specify a minimum amount or a minimum quantity.

Example: If you specify a minimum amount of \$300 and an FG or CV Quantity of 5, the customer receives 5 units of the item specified in the FG Item Number or CV Item Number field for every \$300 ordered.

If you do not specify an FG or CV quantity, this field is the minimum order or order line amount to qualify for this promotion.

You can specify a minimum amount with promotions terms 1-8, and you can use this field in combination with the other minimum/maximum fields on this screen.

Maximum Amount (15,2):

Specify a maximum amount for this promotion. Order lines exceeding this amount do not qualify for the promotion. If you do not specify a maximum amount, Infor ERP LX uses 9999999999.99.

Use this field to establish pricing tiers to apply different discounts at different order levels.

Example: You define the first promotion with a 10% discount if a minimum of \$100 is ordered. You define the second promotion with a 20% discount if a minimum of \$200 is ordered. If you defined the first promotion with a maximum amount of \$200, an order for \$250 receives a 20% discount. Without the maximum amount, the order qualifies for both promotions and receives a 30% discount.

You can specify a maximum amount with promotion terms 1 through 8, and you can use this field in combination with other minimum/maximum fields on this screen.

Minimum Quantity (11,3):

For free goods or cash value promotions, specify a minimum order line quantity (in stocking unit of measure) used to qualify for the free goods or cash value equivalent specified in the FG or CV Quantity field.

For free goods or cash value promotions, you must specify a minimum amount or a minimum quantity.

Example: If you define a minimum quantity of 300 and an FG or CV quantity of 5, the customer receives 5 units of the item specified in the FG Item Number or CV Item Number field for each 300 units ordered.

If no FG or CV quantity is specified, this field is the minimum order line quantity (in stocking unit of measure) to qualify for this promotion.

You can specify a minimum quantity with promotions terms 1-8, and you can use this field in combination with the other minimum/maximum fields on this screen.

Maximum Quantity (11,3):

Specify a maximum quantity for this promotion. Order lines exceeding this quantity (in stocking unit of measure) do not qualify for the promotion. If you do not specify a maximum quantity, Infor ERP LX uses 9999999.99.

Use this field to establish pricing tiers to apply different discounts at different order levels.

Example: Promotion 3 is defined with a 10% discount if at least 100 units are ordered. Promotion 4 is defined with a 20% discount if at least 200 units are ordered. If Promotion 3 is defined with a maximum quantity of 200, an order for 250 units receives a 20% discount. Without the maximum quantity, the order qualifies for both promotions and receives a 30% discount.

You can specify a maximum quantity with promotion terms 1 through 8, and you can use this field in combination with other minimum/maximum fields on this screen.

Minimum/Maximum Volume (11,3):

The system displays this option only for bracket promotions. Specify a minimum and maximum allowable volume of product for the promotion. The minimum value must be less than or equal to the maximum value.

You can specify a minimum/maximum volume with promotions terms 1 and 2 (bracket promotions) and use this option in combination with the other minimum/maximum options on this screen.

Minimum/Maximum Weight (11,3):

The system displays this option only for bracket promotions. Specify a minimum and maximum allowable weight of product for the promotion. The minimum value must be less than or equal to the maximum value. You can specify a minimum/maximum weight with promotions terms 1 and 2 (bracket promotions) and use this option in combination with the other minimum/maximum option on this screen.

Minimum YTD Sales Amount (15,2):

Use this field to limit a promotion to customers with a minimum year-to-date sales amount. Infor ERP LX compares the value you specify in this field with the sum of the MTD and the YTD Sales Amount fields in the Customer Master (RCM) file to determine whether the customer qualifies for the promotion.

Customers' year-to-date sales figures are based on invoices, not orders.

You can use this field in combination with other minimum/maximum fields on this screen.

Currency (3,A):

The code displayed represents the promotion currency defined for this record.

Cur Description (15,A):

This field contains a description of the promotion currency defined for this record.

Free Goods or Cash Value Quantity (11,3):

This field is required if you specify a value in the Free Goods Item Number or Cash Value Item field.

For free goods promotions, specify the quantity of free goods (in stocking unit of measure) to be given if the other promotion conditions are met.

For cash value promotions, Infor ERP LX applies a discount of the cash value equivalent of the quantity entered in this field times the list price of the cash value item.

Max Free Goods Qty (11,3):

Specify the maximum quantity in stocking units of measure to limit the quantity of free goods for a free goods promotion.

Tax Flag (1,A):

For free goods promotions, specify how to apply taxes. The tax flag applies only to the customer order line created for the free good item. This field is required if you enter a free good item number, the default value is No.

Valid choices

- **0**
No tax applies to the free good item.
- **1**
Tax applies at the rate defined for this customer and item. The customer pays the tax.
- **2**
Tax applies at the rate defined for this customer and item. The seller pays the tax.

Full Pallet Flag (1,0):

Specify Yes to calculate bracket promotions based on full pallet quantities rather than on ordered quantity.

Single Line Example:

A promotion is defined with a 10% discount, based on full pallet quantities. 100 of the item fit on a pallet. The order line is for a quantity of 250, priced at \$10 each.

The order line extended amount is \$2500 before any discount calculation. However, the value for the Full Pallet Flag calculates the discount based only on that part of the order line that is for full pallets. At 100 per pallet, the discount is based on a quantity of 200. Therefore, 2 (qualifying pallets)/2.500 (actual pallets)=80% (0/80000). 80% of the calculated Discount Offered of \$250=\$200.

The system applies the discount amount to the order line in the normal manner to arrive at a new net price per unit. \$2500-\$200=\$2300. \$2300/250 ordered=\$9.20. The Promotion Price Basis is similarly affected if additional promotions qualify.

Multiple Line Example:

A bracket promotion is defined with a 10% discount, based on full pallet quantities. 100 of the Item A fit on a pallet, 100 of Item B fit on a pallet, and 20 of Item C fit

on a pallet. Order lines are for 10 of Item A at \$10 (extended amount \$100), 60 of Item B at \$20 (extended amount \$1200), and 10 of Item C at \$30 (extended amount \$300). No individual order line separately qualifies for a full pallet; even though each individual line might meet the direct promotion qualifiers; if considered separately the discount amount is based on 0 because it does not meet the full pallet condition. But together, a full pallet can be made up (calculated as 0.1 for Item A + 0.6 for Item B + 0.5 for Item C=1.2 pallets).

The bracket (or total order) extended amount is \$1600 before any discount calculation. However, the Full Pallet Flag calculates the discount based only on that part of the qualifying order line that is for full pallets. The discount is based on a pallet of 100. Therefore, $1 \text{ (qualifying pallets)} / 1.2 \text{ (actual pallets)} = 83.333\%$ (0.83333). 83.333% of the calculated Discount Offered of \$160=\$133.33.

For bracket promotions the discount offered (PDS.DSDSCO) is spread across the qualifying order lines in proportion to the relative value of each line, as with any bracket promotion. The difference is that the calculated bracket discount amount has been altered to reflect only the value of a full pallet.

For total order promotions, this becomes the total order discount amount (ECHW.HDTOT) as with any total order promotion.

Print Promotion Number (1,0):

Specify Yes in the Ack (Order Acknowledgement) field to print the promotion number on the order acknowledgement. Otherwise, specify No.

Print Promotion Number (1,0):

Specify Yes in the Invc (Invoice) field to print the promotion number on the invoice. Otherwise, specify No.

If you select 1=Yes, Infor ERP LX prints the promotion number on the following invoice formats:

Proforma A

Proforma B

Proforma C/EDIT INVOICES

Regular and Consolidated Invoices,

Delivery Note Invoices

Regular Invoice 2

Reprints of all formats

Print Promotion Number (1,0):

Specify Yes in the Stmt (Statement) field to print the promotion number on the statement. Otherwise, specify No.

Print Promotion Desc (1,0):

Specify Yes in the Ack (Order Acknowledgement) field to print the promotion description on the order acknowledgement. Otherwise, specify No.

Print Promotion Desc (1,0):

Specify Yes in the Invc (Invoice) field to print the promotion description on the invoice. Otherwise, specify No.

If you select 1=Yes Infor ERP LX prints the promotion description on the following invoice formats:

Proforma A

Proforma B

Proforma C/Edit Invoices

Regular and Consolidated Invoices,

Delivery Note Invoices

Regular Invoice 2

Reprints of all formats

Print Promotion Desc (1,0):

Specify Yes in the Stmt (Statement) field to print the promotion description on the statement. Otherwise, specify No.

Print Discount Offered (1,0):

Specify Yes in the Ack (Order Acknowledgement) field to print the discount offered on the order acknowledgement. Otherwise, specify No.

Print Discount Offered (1,0):

Specify Yes in the Invc (Invoice) field to print the discount offered on the invoice. Otherwise, specify No.

If you select 1=Yes Infor ERP LX prints the discount offered on the following invoice formats:

Proforma A

Proforma B

Proforma C/Edit Invoices

Regular and Consolidated Invoices,

Delivery Note Invoices

Regular Invoice 2

Reprints of all formats

Print Discount Offered (1,0):

Specify Yes in the Stmt (Statement) field to print the discount offered on the statement. Otherwise, specify No.

Screen actions - PRO110D2-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Define split discount conditions

For promotions with promotion terms code 5-8, Infor ERP LX automatically displays the Promotions and Deals Split Discount Window when you press Enter on the Promotions and Deals Discount Window, PRO110D2-02.

Use this screen to define discounts that are split between the original customer invoice and a later invoice. Often, customers must reach a required sales level or meet shelf space or advertising requirements to qualify for the bill back discount.

Access: If promotion terms code is 5-8, press Enter from Promotions and Deals Discount Window, PRO110D2-02, use F15 from Promotion Master Maintenance, PRO110D2-01, or use F15 from Promotions and Deals Inquiry, PRO110-02

Field descriptions - PRO110D2 split discounts**Promotion Number/Line:**

Infor ERP LX displays the promotion number and promotion line of the promotion to maintain.

(Contract Flag Description):

Infor ERP LX displays the description for the contract flag you specified.

Off Invoice Discount Price (14,4):

If you set the bracket flag to Yes, leave this field blank. If you specify a discount method of price on the Promotions and Deals Discount Window, specify the off invoice discount price to use in place of the list price. You must also specify a bill back discount price.

Price: If the list price is 100, and the discount price is 90, the Discount field shows 90.000 (actual net price).

Off Invoice Discount Percent (5,2):

Specify the off invoice discount percent. You must also specify a bill back discount percent. You can specify a value in this field only if you specified a discount method of percent on the Promotions and Deals Discount Window.

Percent: If the list price is 100, and the promotion is set up for a 10% discount (net price=90), the Discount field shows 90.00 (percentage of list price).

Off Invoice Discount Amount (14,4):

Specify the off invoice discount amount. You must also specify a bill back discount amount. You can specify a value in this field only if you specified a discount method of amount on the Promotions and Deals Discount Window.

If you specify a negative amount, the net price increases.

Amount: If the list price is 100, and the promotion calls for 10 off (net price=90), the Discount field shows 10.00 (amount off list price).

Bill Back Discount Price (14,4):

If you set the bracket flag to Yes, leave this field blank. If you specified a discount method of price on the Promotions and Deals Discount Window, specify the bill back discount price to use instead of the list price. This is a required field if you specify an off invoice discount price with this promotion. (See Off Invoice Discount Price example.)

Bill Back Discount Percent (5,2):

Specify the bill back discount percent. You can specify a value in this field only if you specified a discount method of percent on the Promotions and Deals Discount Window. This is a required field if you specify an off invoice discount percent with this promotion. (See Off Invoice Discount Percent example.)

Bill Back Discount Amount (14,4):

Specify the bill back discount amount. You can specify a value in this field only if you specified a discount method of amount on the Promotions and Deals Discount Window. This is a required field if you specify an off invoice discount amount with this promotion. (See Off Invoice Discount Amount example.)

If you specify a negative amount, the net price increases.

Currency (3,A):

The code displayed represents the promotion currency defined for this promotion.

Cur Description (15,A):

This field contains a description of the promotion currency defined for this promotion.

Print Split O/I Discount Offered (1,0):

Specify Yes in the Ack (Order Acknowledgement) field to print the split O/I discount offered on the order acknowledgement. Otherwise, specify No.

Print Split O/I Discount Offered (1,0):

Specify Yes in the Invc (Invoice) field to print the split O/I discount offered on the invoice. Otherwise, specify No.

If you specify 1=Yes, Infor ERP LX prints the discount offered on the following invoice formats:

Proforma A

Proforma B

Proforma C/Edit Invoices

Regular and Consolidated Invoices,

Delivery Note Invoices

Regular Invoice 2

Reprints of all formats

Print Split O/I Discount Offered (1,0):

Specify Yes in the Stmt (Statement) field to print the split O/I discount offered on the statement. Otherwise, specify No.

Print Split B/B Discount Offered (1,0):

Specify Yes in the Ack (Order Acknowledgement) field to print the split B/B discount offered on the order acknowledgement. Otherwise, specify No.

Print Split B/B Discount Offered (1,0):

Specify Yes in the Invc (Invoice) field to print the split B/B discount offered on the invoice. Otherwise, specify No.

If you specify 1=Yes, Infor ERP LX prints the discount offered on the following invoice formats:

Proforma A

Proforma B

Proforma C/Edit Invoices

Regular and Consolidated Invoices,

Delivery Note Invoices

Regular Invoice 2

Reprints of all formats

Print Split B/B Discount Offered (1,0):

Specify Yes in the Stmt (Statement) field to print the split B/B discount offered on the statement. Otherwise, specify No.

Screen actions - PRO110D2 split discounts**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion line prompt

Access: The prompt is available from the following screens:

- PRO110-06, Promotions and Deals Copy Window
- PRO120-01, Promotions and Deals Notes Maintenance
- PRO130-01, Promotions and Deals Tracking Maintenance
- PRO115-01, Promotions and Deals Master Listing
- PRO135-01, Promotions Tracking Listing
- PRO210-01, Item Promotion Summary Report
- PRO212-01, Item Promotion Detail Report
- PRO300-01, Promotions and Deals Inquiry

Select a promotion line

If you use F4 with the cursor in a promptable Promotion Number field, Infor ERP LX displays the Promotions/Line List screen (WINPDM).

Field descriptions - promotion/line window**Act (2,A):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions. See the overview information in this document.

Promotion Number (6,0):

Infor ERP LX displays the promotion number, sequenced by promotion number/line number.

Line Number (3,0):

Infor ERP LX displays the line number and promotion description, sequenced by promotion number/line number.

Description (50,A):

Infor ERP LX displays the promotion number, line number, and promotion description, sequenced by promotion number/line number.

Screen actions - promotion/line window**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion term prompt

Access: Use F4 with the cursor in the Promotion Terms field of Promotion Master Maintenance, PRO110-02

Select a promotion term

This Promotion Terms screen displays the valid promotion terms codes and their definitions. You can select a promotion terms code and return the value to the original screen.

Field descriptions - WINZPM**Act (2,A):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Screen actions - WINZPMD**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion period prompt

Access: Press F4 with the cursor in the Promotion Period field of Promotion Master Maintenance, PRO110-02, or Promotions and Deals Inquiry, PRO300-01.

Select a promotion period

The Promotion Period List screen displays the valid promotion periods and their start, end, and announce dates. You can select a period and year and return the value to the original screen.

Field descriptions - promotion period window

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Company (2,0):

Infor ERP LX displays the company number for this promotion or deal.

Year (4,0):

Infor ERP LX displays the year for this promotion or deal.

Period (2,0):

Infor ERP LX displays the period for this promotion or deal.

Start Date (8,0):

Infor ERP LX displays the start and end dates for this promotion or deal.

End Date (4,0):

Infor ERP LX displays the start and end dates for this promotion or deal.

Screen actions - promotion period window

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for screen actions* in the overview information in this document.

Customer address master list prompt

Use the Customer Address Master Listing prompt program to select from available ship-to number.

Select a ship-to number

Use F4 from the Ship-To field to access the Customer Address Master Listing screen, WINESTD. This window displays defined ship-to numbers for the requested customer number.

Field descriptions - WINESTD

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Customer Number (6,0):

Infor ERP LX displays the customer number requested from the calling screen.

Ship-To Number (4,0):

Infor ERP LX displays the ship-to numbers for the requested customer.

Description (30,A):

Infor ERP LX displays the description of the ship-to number.

Screen actions - WINESTD

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Mass promotion update

Use Mass Promotion Update to specify selection criteria if you create or revise mass promotions.

Only certain combinations of criteria are valid. The following criteria combinations are valid:

Customer Region, Customer Type
Customer Region, Customer Discount Code
Customer Type, Customer Discount Code
Item Class, Item Discount Code
Customer Region, Item Class
Customer Region, Item Discount Code
Customer Region, Item Number
Customer Type, Item Class
Customer Type, Item Discount Code
Customer Type, Item Number
Customer Discount Code, Item Class
Customer Discount Code, Item Discount Code
Customer Discount Code, Item Number
Customer Number, Item Class
Customer Number, Item Discount Code
Customer Number, Item Number
Customer Number, Customer Ship-To, Item Class
Customer Number, Customer Ship-To, Item Discount Code
Customer Number, Customer Ship-To, Item Number
Customer Region
Customer Type
Customer Discount Code
Customer Number
Customer Number, Customer Ship-To
Item Class
Item Discount Code
Item Number

Specify selection criteria for a mass promotion

Use the Mass Promotion Update Selection screen, PRO110D3-01, to specify all criteria to include in the selection for a mass promotion. In Revise mode you can leave all ranges blank.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Use F9 to proceed. Infor ERP LX displays all active promotion lines for the promotion you selected or that match the criteria you specified.

Field descriptions - PRO110D3-01**Promotion Number:**

This is the promotion to maintain.

Customer Number (8,0):

Specify a range of values to limit the customer numbers displayed on the Customer Selection screen.

Region (6,A):

Specify a range of values to limit the regions displayed on the Region Selection screen.

Customer Type (4,A):

Specify a range of values to limit the customer types displayed on the Customer Type Selection screen.

Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes displayed on the Selection screen.

Customer Ship-To (4,0):

Specify a range of values to limit the customer ship-to numbers displayed on the Selection screen.

Item Class (2,A):

Specify a range of values to limit the item classes displayed on the Selection screen.

Item Discount Code (2,A):

Specify a range of values to limit the item discount codes displayed on the Selection screen.

Item Number (35,A):

Specify a range of values to limit the item numbers displayed on the Selection screen.

Records to appear Selected or Unselected (1,0):

Specify 1 to display the resulting data with an asterisk (*). Otherwise specify 0. When Infor ERP LX displays the records you can manually select or deselect the records.

Screen actions - PRO110D3-01

F9=Mass Create/Mass Revise

Create or change the mass promotion and display the next selection screen.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select customers for a mass promotion

The Customer Selection screen, PRO110D3-02, displays all customer records within the range you specified on the Mass Promotion Update Selection screen. The system displays this screen only if you specified a range for customers.

Use this screen to select and deselect customer records if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-02

Promotion Number (6,0):

Infor ERP LX displays the promotion number.

Actions:

The action codes described in the following section are available:

11=Select

Select a customer record.

12=De-Select

Deselect a customer record.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Customer (8,0):

Infor ERP LX displays the customer number for each customer number found within the range you specified on the initial selection screen.

Customer Name (35,A):

Infor ERP LX displays the corresponding customer name for each customer number found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-02**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all customers. Infor ERP LX marks each customer with an asterisk (*) in the Status field and you can manually de-select individual customers.

F15=De-Select All

De-select all customers. Infor ERP LX removes the asterisk (*) from each customer and you can manually select the customers you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select regions for a mass promotion

The Region Selection screen, PRO110D3-03, displays all promotion region records within the range you specified on the Mass Promotion Update Selection screen. The system displays this screen only if you specified a range for region. Use this screen to select and de-select promotion regions if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-03**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Line actions:

The action codes described in the following section are available:

11=Select

Select a region record.

12=De-Select

Deselect a region record.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Action (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Region (6,0):

Infor ERP LX displays the region number for each region number found within the range you specified on the initial selection screen.

Region Name (35,A):

Infor ERP LX displays the corresponding region name for each region number found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-03**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all regions. Infor ERP LX marks each region with an asterisk (*) in the Status field and you can manually de-select individual regions.

F15=De-Select All

De-select all regions. Infor ERP LX removes the asterisk (*) from each region and you can manually select the regions you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select customer types for a mass promotion

The Customer Type Selection screen, PRO110D3-04, displays all customer type records within the range you specified on the Mass Promotion Update Selection screen. The system displays this screen only if you specified a range for customer type.

Use this screen to select and deselect customer type records if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-04

Promotion Number (6,0):

Infor ERP LX displays the promotion number.

Line actions

The action codes described in the following section are available:

11=Select

Select a customer type record.

12=De-Select

Deselect a customer type record.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Customer Type (4,0):

Infor ERP LX displays information for each customer type found within the range you specified on the initial selection screen.

Description (35,A):

Infor ERP LX displays the corresponding description for each customer type.

Screen actions - PRO110D3-04

F6=Accept

Accept the information on the screen.

F14=Select All

Select all customer types. Infor ERP LX marks each customer type with an asterisk (*) in the Status field and you can manually de-select individual customer types.

F15=De-Select All

De-select all customer types. Infor ERP LX removes the asterisk (*) from each customer types and you can manually select the customer types you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select customer discount codes for a mass promotion

The Customer Discount Code Selection screen, PRO110D3-05, displays all customer discount code records within the range you specified on the Mass Promotion Update Selection screen. The system displays this screen only if you specified a range for customer discount code.

Use this screen to select and deselect customer discount codes if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-05**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Line action:

The action codes described in the following section are available:

11=Select

Select a customer discount code.

12=De-Select

Deselect a customer discount code.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Customer Discount Code (2,A):

Infor ERP LX displays information for each customer discount code found within the range you specified on the initial selection screen.

Description (35,A):

Infor ERP LX displays the corresponding description for each customer discount code.

Screen actions - PRO110D3-05**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all of the customer discount codes. Infor ERP LX marks each customer discount code with an asterisk (*) in the Status field and you can manually de-select individual customer discount codes.

F15=De-Select All

De-select all of the customer discount codes. Infor ERP LX removes the asterisk (*) from each customer discount code and you can manually select the customer discount codes you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select ship-to numbers for a mass promotion

The Ship-to Selection screen, PRO110D3-06, displays all ship-to information within the range you entered on the Mass Promotion Update Selection screen. Infor ERP LX displays this screen only if you specified a range for ship-to number.

Use this screen to select and deselect ship-to numbers if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-06**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Line action:

The action codes described in the following section are available:

11=Select

Select a ship-to number.

12=De-Select

Deselect a ship-to number.

All other line actions on this screen perform standard Infor ERP LX functions.
See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Customer (8,0):

Infor ERP LX displays the customer number for each customer number found within the range you specified on the initial selection screen.

Ship-To Number (4,0):

Infor ERP LX displays the corresponding ship-to number for each customer number found within the range you specified on the initial selection screen.

Address Type:

Infor ERP LX displays the address type for each customer number found within the range you specified on the initial selection screen. Only the following address types display here:

0 or blank=All addresses

1=Ship-to address

You maintain the address type in the Address Master program, ORD100.

Name (35,A):

Infor ERP LX displays the corresponding customer name for each customer number found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-06**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all of the ship-to numbers. Infor ERP LX marks each ship-to number with an asterisk (*) in the Status field and you can manually de-select individual ship-to codes.

F15=De-Select All

De-select all of the ship-to numbers. Infor ERP LX removes the asterisk (*) from each ship-to numbers and you can manually select the ship-to numbers you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select item classes for a mass promotion

The Item Class Selection screen, PRO110D3-07, displays all item class records within the range you specified on the Mass Promotion Update Selection screen. Infor ERP LX displays this screen only if you specified a range for item class.

Use this screen to select and deselect item classes if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-07**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Line actions:

The action codes described in the following section are available:

11=Select

Select an item class.

12=De-Select

Deselect an item class.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Item Class (2,A):

Infor ERP LX displays each item class found within the range you specified on the initial selection screen.

Description (35,A):

Infor ERP LX displays the description for each item class found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-07**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all of the item classes. Infor ERP LX marks each item class with an asterisk (*) in the Status field and you can manually de-select individual item classes.

F15=De-Select All

De-select all of the item classes. Infor ERP LX removes the asterisk (*) from each item class and you can manually select the item classes you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select item discount codes for a mass promotion

The Item Discount Code Selection screen, PRO110D3-08, displays all item discount codes within the range you specified on the Mass Promotion Update Selection screen. Infor ERP LX displays this screen only if you specified a range for item discount code.

Use this screen to select and deselect item discount codes if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-08**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Line actions:

The action codes described in the following section are available:

11=Select

Select an item discount code.

12=De-Select

Deselect an item discount code.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Item Discount Code (2,A):

Infor ERP LX displays the item discount code for each customer number found within the range you specified on the initial selection screen.

Description (35,A):

Infor ERP LX displays the description for each item discount code found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-08**F6=Accept**

Accept the information on the screen.

F14=Select All

Select all item discount codes. Infor ERP LX marks each item discount code with an asterisk (*) in the Status field and you can manually de-select individual item discount codes.

F15=De-Select All

De-select all item discount codes. Infor ERP LX removes the asterisk (*) from each item discount code and you can manually select the item discount codes you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select item numbers for a mass promotion

The Item Number Selection screen, PRO110D3-09, displays all items within the range you specified on the Mass Promotion Update Selection screen. Infor ERP LX displays this screen only if you specified a range for item number.

Use this screen to select and deselect items if you create or revise mass promotions. Use F6 to continue to the next selection screen, if any.

Field descriptions - PRO110D3-09

Promotion Number (6,0):

Infor ERP LX displays the promotion number.

Line actions:

The action codes described in the following section are available:

11=Select

Select an item.

12=De-Select

Deselect an item.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Item Number (35,A):

Infor ERP LX displays the item number for each customer number found within the range you specified on the initial selection screen.

Description (35,A):

Infor ERP LX displays the description for each item number found within the range you specified on the initial selection screen.

Screen actions - PRO110D3-09

F6=Accept

Accept the information on the screen.

F14=Select All

Select all item numbers. Infor ERP LX marks each item number with an asterisk (*) in the Status field and you can manually de-select individual item numbers.

F15=De-Select All

De-select all item numbers. Infor ERP LX removes the asterisk (*) from each item and you can manually select the items you want.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select lines for a mass promotion

The Mass Promotion Update List Panel screen, PRO110D3-10, displays all of the data lines that Infor ERP LX uses to create promotion lines. Infor ERP LX selects each line with an asterisk to indicate that the line is ready to accept. Infor ERP LX displays the bracket group code in the header area only if the selected promotion is a bracket promotion.

Field descriptions - PRO110D3-10**Promotion Number (6,0):**

Infor ERP LX displays the promotion number.

Bracket Group Code (1,0):

Infor ERP LX displays the bracket group code only if the promotion is a bracket promotion.

Line actions:

The action codes described in the following section are available:

11=Select

Select a line.

12=De-Select

Deselect a line.

12=Region

Display the Region List screen for reference.

14=Customer Type

Display the Customer Type List screen for reference.

15=Customer Discount Type

Display the Customer Discount Code List screen for reference.

16=Customer Ship-To

Display the Ship-To List screen for reference.

17=Item Number

Display the Item Number List Panel for reference.

18=Item Class

Display the Item Class List Panel for reference.

19=Item Discount Code

Display the Item Discount Code List Panel for reference.

20=Customer

Display the Customer List Panel for reference.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Action (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

Customer (8,0):

Infor ERP LX displays the customer number if you specified a range on the selection screen.

Ship-To (4,0):

Infor ERP LX displays the ship-to number if you specified a range on the selection screen.

Region (6,0):

Infor ERP LX displays the region number for each region number if you specified a range on the selection screen.

Type (4,0):

Infor ERP LX displays information for each customer type if you specified a range on the selection screen.

Discount (Customer Discount Code) (2,A):

Infor ERP LX displays a the customer discount code if you specified a range on the selection screen.

Item (35,A):

Infor ERP LX displays the item discount code if you specified a range on the selection screen..

Item Class (2,A):

Infor ERP LX displays the item class if you specified a range on the selection screen.

Item Discount (2,A):

Infor ERP LX displays the item discount code if you specified a range on the selection screen.

Promotion Line Number:

Infor ERP LX displays the promotion line number.

Screen actions - PRO110D3-10**F6=Batch Post**

Submit a batch job to create the mass promotions.

F14=Select All

Select all customer types. Infor ERP LX marks each customer type with an asterisk (*) in the Status field and you can manually de-select individual customer types.

F15=De-Select All

De-select all customer types. Infor ERP LX removes the asterisk (*) from each customer type and you can manually select the customer types you want.

F18=Interactive Post

Run the job interactively and create the mass promotions.

Standard screen actions

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion master list

This report provides a list of the promotion master information, including promotion terms, conditions, and qualifications.

Access: PRO menu

Print a promotion report

Use the Promotion and Deals Master Listing screen, PRO115D-01, to specify the selection criteria for a promotion master report.

Field descriptions - PRO115D-01

(From) Promotion Number (6,0):

Specify a range of values to limit the promotion and line numbers to include in the report. For information on range fields, see the Ranges topic in the overview section of this document.

(To) Promotion Number (6,0):

Specify a range of values to limit the promotion and line numbers to include in the report. For information on range fields, see the Ranges topic in the overview section of this document.

Infor ERP LX uses 999999/999 as the default value for all promotions..

Print Notes (1,A):

Specify Yes to include promotion notes on the report. Otherwise, specify No.

Screen actions - PRO115D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion notes

You can add a note at the promotion line level. Use this program to define the promotion line note text and select the documents on which to print the note.

Access: PRO menu or F14 from Promotion and Deals Maintenance/Inquiry screens PRO110-02.

Add or select a promotion line for a note

Use the Promotions and Deals Notes Maintenance screen, PRO120-01, to select a promotion and line for which to add or maintain a note.

Field descriptions - PRO120-01

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

All line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Promotion (6,0)/Line (3,0):

Infor ERP LX displays the promotion number and line number.

Description (50,A):

Infor ERP LX displays the description of the promotion from the Promotion Master (PDM) file.

Screen actions - PRO120-01

All screen actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for screen actions* in the overview information in this document.

Add or maintain a note for a promotion line

Infor ERP LX displays the Promotion and Deals Notes Maintenance screen, PRO120-02, if you perform one of the following actions:

- Specify line action 1 to create, 2 to revise, or 5 to display on the Promotions and Deals Notes Maintenance screen, PRO120-01
- Specify line action 2 for notes from the Promotion Master Maintenance screen, PRO110D2-01, in display mode
- Use F14 from the Promotion Master Maintenance screen, PRO110D2-01 or the Promotion Master Maintenance - Qualifiers screen, PRO110D2-04

Field descriptions - PRO120-02

Promotion Number (6,0)/Line (3,0):

Infor ERP LX displays the promotion and line number you specified on the Promotions and Deals Notes Maintenance screen, PRO120-01. To specify a different promotion number, use F12 to return to the Promotions and Deals Notes Maintenance screen, PRO120-01.

Seq (Sequence Number) (3,0):

Infor ERP LX displays the sequence number for this promotion notes line. The system automatically assigns sequence numbers. You can define up to 140 sequence lines for each promotion line.

Note Text (50,A):

Infor ERP LX displays the note text for this promotion line.

To delete note text, press Field Exit for each line to delete.

Print flags (1,A):

Specify 1 (default) for each promotion line note to print on the acknowledgement, invoice, and statement. Otherwise, specify 0.

Screen actions - PRO120-02**All Screen Actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion calendar list

This program prints a list of the start dates, end dates, and announcement dates for each promotion period and year, by company.

Access: PRO menu

Print a promotion calendar report

Use the Promotion Calendar Listing screen, PRO125-01, to specify the selection criteria for a promotion calendar report.

Field descriptions - PRO125-01**Promotion Period/Year (2,0):**

Specify a range of values to limit the promotion periods and years to include in the report. See the overview information in this document.

Infor ERP LX uses all promotion periods and years as the default value.

Screen actions - PRO125-01

All Screen Actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotions and deals tracking maintenance

After you run Cash and Memo Posting, ACR500, use the Promotions and Deals Tracking Maintenance program to reconcile any discrepancies and close out promotions for which the discount offered does not equal the discount taken. You can use this program to close out promotions used as rebates.

Access: PRO menu

Select promotion tracking records

Use the Promotions and Deals Tracking Maintenance screen, PRO130-01, to reduce the discount offered, close the promotion tracking record, or offer the discount amount as a rebate. You cannot increase the value in the Discount Offered field (or Split Discount Offered fields) here. To increase the discount applied to an order, you must change the order to qualify for additional discounts, for example, increase the quantity ordered if quantity is a discount qualifier for this promotion, or you can create additional promotions that apply to the order.

Field descriptions - PRO130-01

Act (2,A):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

11=Rebate

Display the Promotions and Deals Tracking Maintenance screen, PRO130-02, so you can update existing promotion tracking information.

You can use both the revise and rebate line actions to maintain the discount offered; however, the system updates different fields with each line action. If you specify Revise, the system updates the discount offered values. If you specify Rebate, the system updates the discount taken values. In this case, the system updates the discount taken with the difference between discount offered and discount taken. If you specify Rebate, the system closes out the tracking information.

If you delete a record, Infor ERP LX automatically creates a journal entry for the deleted record.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Promotion (6,0):

Infor ERP LX displays the promotion number for this promotion tracking record.

(Promotion) Line (3,0):

Infor ERP LX displays the promotion line number within this promotion.

Customer Order (8,0):

Infor ERP LX displays the customer order number that applies to this promotion.

(Order) Line (4,0):

Infor ERP LX displays the customer order line number that applies to this promotion.

Caution: You can create orders of up to 9999 lines. However, a large number of extremely long orders can negatively affect system performance.

Prefix (2,A):

Infor ERP LX displays the prefix of the original document.

Document (8,0):

Infor ERP LX displays the number for the document that references this customer order.

Year (2,0):

Infor ERP LX displays the year of the invoice that earned this discount.

(Document) Line (4,0):

Infor ERP LX displays the number for the invoice line that references this customer order.

Record Status (8,A):

Infor ERP LX displays the status of this tracking information.

- Active
 - Inactive
-

Screen actions - PRO130-01

F13=Filter

Sort the information on this screen. Infor ERP LX displays the Sequence and Filter Selection screen, PRO130-03.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Filter promotion tracking information

Use F13 from Promotions and Deals Tracking Maintenance, PRO130-01, Infor ERP LX to access the Sequence and Filter Selection screen.

Use this screen to sort the records displayed on Promotions and Deals Tracking Maintenance, PRO130-01. You can resequence the display by promotion number/line number, customer order/line number, or prefix/document/line number. You can display all records in the Promotion Tracking file, PDT, or just active records.

Field descriptions - PRO130-03

Act (2,A):

Specify the number for the line action to perform and press Enter. Specify 0 to display all records, or 1 to display Active records only. Specify the line action in one of the filter fields to resequence the Promotions and Deals Tracking Maintenance screen, PRO130-01, by that field.

Screen actions - PRO130-03

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Cross-reference promotion records

If you press F4 with the cursor in the Document Number field of the Promotions and Deals Tracking Maintenance screen, PRO130-01, Infor ERP LX displays the Promotions and Deals Invoice Cross Reference Window.

Use this window to cross reference the document number, promotion number, and customer order number on which a discount was earned with the document number to which the discount was applied.

Field descriptions - WINPDX

Act (1,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

1=Select

Return to the original screen with the selected data. To select an item, specify 1 next to the cross reference record and press Enter.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Document Earned Prefix (2,A):

Infor ERP LX displays the prefix for the invoice that earned this discount.

(Document Earned) Number (8,0):

Infor ERP LX displays the number of the invoice that earned this discount.

(Document Earned) Line Number (3,0):

Infor ERP LX displays the line number of the invoice that earned this discount.

(Document Earned) Year (2,0):

Infor ERP LX displays the year of the invoice that earned this discount.

Promotion Number (6,0) :

Infor ERP LX displays the promotion number on which this discount was earned.

(Promotion) Line Number (3,0):

Infor ERP LX displays the line number of the promotion on which this discount was earned.

Customer Order Number (6,0):

Infor ERP LX displays the customer order number on which this discount was earned.

(Customer Order) Line Number (4,0):

Infor ERP LX displays the line number of the customer order on which this discount was earned.

Caution: You can create orders of up to 9999 lines. However, a large number of extremely long orders can negatively affect system performance.

Document Applied Prefix (2,A):

Infor ERP LX displays the prefix number of the document to which this discount applies.

Number (8,0):

Infor ERP LX displays the number of the document to which this discount applies.

Line Number (3,0):

Infor ERP LX displays the line number of the document to which this discount applies.

Year (2,0):

Infor ERP LX displays the year of the document on which the earned discount was applied. This value can differ from the document number shown in the Document Earned field.

Document Date (8,0):

Infor ERP LX displays the date on the document to which the discount was applied. This value can differ from the date on the document on which the discount was earned.

Amount Applied (14,4):

Infor ERP LX displays the discount amount applied to the invoice in the Invoice Applied field.

Screen actions - WINPDX**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Maintain or view promotion tracking records

If you specify line action 2 to revise, 4 to delete, 5 to display, or 11 to rebate on the Promotions and Deals Tracking Maintenance selection screen, PRO130-01, Infor ERP LX displays the Promotions and Deals Tracking Maintenance screen, PRO130-02.

Field descriptions - PRO130-02**Company (2,A):**

Infor ERP LX displays the company number specified on the previous screen.

Promotion Number (6,0):

Infor ERP LX displays the promotion number of the promotion selected on the previous screen.

(Promotion) Line Number (3,0):

Infor ERP LX displays the line number of the promotion selected on the previous screen.

Customer Order (8,0):

Infor ERP LX displays the customer order number for the promotion selected on the previous screen.

(Order) Line Number (4,0):

Infor ERP LX displays the order line number for the promotion selected on the previous screen.

Caution: You can create orders of up to 9999 lines. However, a large number of extremely long orders can negatively affect system performance.

Prefix (2,A):

Infor ERP LX displays the prefix of the document for the promotion selected on the previous screen.

Document Number (8,0):

Infor ERP LX displays the number of the document for the promotion selected on the previous screen.

(Invoice) Line Number (3,0):

Infor ERP LX displays the document line number for the promotion selected on the previous screen.

Discount Offered (15,2):

Infor ERP LX displays the total discount offered under this promotion number/customer order number/invoice number combination.

You can change the discount offered if you specify line action 2 to revise or 11 to rebate on the Promotions and Deals Tracking Maintenance selection screen, PRO130-01. You can change the values only for promotion terms 2,4,7, and 8.

You cannot change the discount offered to an amount less than the discount already taken.

Use this screen to reduce the discount offered, close the promotion tracking record, or offer the discount amount as a rebate. You cannot increase the value in the Discount Offered field or Split Discount Offered fields. To increase the discount applied to an order, you must change the order to qualify for additional

discounts , for example, increase the quantity ordered if quantity is a discount qualifier for this promotion, or create additional promotions that apply to the order.

Quantity Ordered (11,3):

Infor ERP LX displays the total quantity ordered under this promotion number/customer order number/invoice number combination.

Split Off-Invoice Discount Offered (15,2):

Infor ERP LX displays the total amount of the split off-invoice discount offered under this promotion number/customer order number/invoice number combination. The system displays this field only for split promotions (Promotion Terms codes 5 - 8).

For example, you can offer a 10% discount and then take 5% off the invoice and deduct the remaining 5% when the customer pays the invoice.

Use this screen to reduce the discount offered, close the promotion tracking record, or offer the discount amount as a rebate. You cannot increase the value in the Discount Offered field or Split Discount Offered fields. To increase the discount applied to an order, you must change the order to qualify for additional discounts. For example, increase the quantity ordered if quantity is a discount qualifier for this promotion, or create additional promotions that apply to the order.

Quantity Invoiced (11,3):

Infor ERP LX displays the total quantity invoiced under this promotion number/customer order number/invoice number combination.

Split Bill-Back Discount Offered (15,2):

Total amount of the bill back discount offered under this promotion number/customer order number/invoice number combination.

You can change the split bill back discount offered if you specify line action 2, Revise, or line action 11, Rebate, on the Promotions and Deals Tracking Maintenance screen, PRO130-01. You can change the values only for promotion terms 5-8.

You cannot change the split bill back discount offered to an amount less than the discount already taken.

In this screen, you can reduce the discount offered, close the promotion tracking record, or offer the discount amount as a rebate. You cannot increase the value in the Discount Offered field or Split Discount Offered fields. To increase the discount applied to an order, you must change the order to qualify for additional discounts, for example, increase the quantity ordered if quantity is a discount qualifier for this promotion, or create additional promotions that apply to the order.

Date Invoiced (6,0):

Infor ERP LX displays the date of this customer invoice. The system uses the invoice date to determine the exchange rate.

Discount Taken (15,2):

Infor ERP LX displays the discount amount taken under this promotion number/customer order number/invoice number combination.

The system displays this field only for promotion terms codes 1 through 4.

If the discount taken equals the discount offered, Infor ERP LX automatically closes the promotion tracking record.

Split O/I Disc. Taken (15,2):

Infor ERP LX displays the off-invoice discount amount taken under this promotion number/customer number/invoice number combination.

The system displays this field only for promotion terms codes 5 or 6.

Split B/B Disc. Taken (15,2):

Infor ERP LX displays the bill-back discount amount taken under this promotion number/customer number/invoice number combination.

The system displays this field only for promotion terms codes 7 or 8.

G/L Reason Code (5,A):

Infor ERP LX displays the default reason code that you specified in Default Reason Codes Maintenance, SYS180, and determines the event in CEA that Infor ERP LX uses to create journal entry transactions. You can override this code.

Exchange Rate (15,7):

Infor ERP LX displays the exchange rate for this customer order or invoice. For customer orders, the system uses the exchange rate as of the request date if your system is not euro-enabled. For invoices, Infor ERP LX uses the exchange rate as of the invoice date.

If your system is euro-enabled in Multi-Currency System Parameters, MLT800, the system displays the multiplier exchange rate in this field. You cannot maintain the exchange rate on this screen. Instead, use F2 to access the Override Exchange Rate screen, MLT940D, where you can specify overrides to the appropriate multiplier or divisor exchange rate. You can maintain exchange rates only between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro.

Currency Code (3,A):

Infor ERP LX displays the currency code that applies to the Exchange Rate field. The system displays the currency description to the right.

Close (1,A):

Infor ERP LX displays 0 (No) for open promotion tracking records or 1 (Yes) for closed promotion tracking records.

If the discount taken equals the discount offered is the system automatically sets the value to 1. If you specify line action 11 to rebate on the Promotions and Deals Tracking Maintenance selection screen, PRO130-01, Infor ERP LX sets the value to 2; you cannot change this value.

To close a promotion tracking record, specify 2 in this field. You cannot take any further discounts on this promotion. You cannot reopen closed promotion tracking records.

Screen actions - PRO130-02**F2=Exchange Rate**

Access the Override Exchange Rate screen. The system displays this screen action if the Multiple Currencies Product is installed and turned on for Order Entry and Billing or Accounts Receivable, and euro support is enabled in Multi-Currency System Parameters, MLT800. In this case, the Exchange Rate field is display-only. On the Override Exchange Rate screen, MLT940D you can maintain the exchange rate between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro. This screen displays the multiplier exchange rate and divisor exchange rate.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion tracking

Use Promotion Tracking to print a list of the defined promotion tracking records.

Access: PRO menu

Print a promotion tracking report

Use the Promotion Tracking Listing screen to specify the information to print on the promotion tracking report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO135-01**(From) Promotion Number (6,0):**

Specify a range of values to limit the promotion numbers to include in the report.

(To) Promotion Number (6,0):

Specify a range of values to limit the promotion numbers to include in the report.

(From) Line Number (3,0):

Specify a range of values to limit the line numbers to include in the report.

(To) Line Number (3,0):

Specify a range of values to limit the line numbers to include in the report.

Run Time Parameter (1,A):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO135-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Special price maintenance

To calculate and retrieve prices for orders and order lines, Infor ERP LX determines prices based on list prices, special prices, promotions and deals, and user override prices. Only one special price applies to an order line or order. You can cumulatively apply promotions. Promotions also keep track of the amount and quantity of sales tied to a promotion and the amount and quantity of invoice activity tied to a promotion.

Pricing Method: Use special pricing to establish separate pricing methods that make up a special price book. You can specify parameters to determine the characteristics of a special price.

- Determine whether to use the customer number or the salesperson number for special pricing. You specify this parameter in Order Entry System Parameters, ORD820D-01
-

- Set a pricing hierarchy. You specify this parameter in Order Entry System Parameters, ORD820D-02
- Select a Pricing Method. You specify this parameter in Special Pricing Maintenance, PRO140
- Select a Price Type. You specify this parameter in Special Pricing Maintenance, PRO140

If you price by customer, you can specify one of the following pricing methods:

Method 1

Item/Customer - item ordered and customer who places the order

Method 2

Customer - customer who places the order only

Method 3

Item - item ordered only

Method 4

Item Discount Code/Customer - discount class of the item from the item master and customer who places the order

Method 5

Item Discount Code - discount class of the item from the item master

Method 6

Customer Discount Code - discount class of the customer from the customer master

Method 7

Item/Customer Discount Code - item ordered and discount class of the customer from the customer master

Method 8

Item Discount Code/Customer Discount Code - discount class of the item and discount class of the customer

Method T

Total Order Discount

If you price by salesperson, you can use one of the following pricing methods:

Method 1

Item/Salesperson - item ordered and salesperson number

Method 2

Salesperson - salesperson number only

Method 3

Item - item ordered only

Method 4

Item Discount Code/Salesperson - discount class of the item and salesperson number

Method 5

Item Discount Code - discount class of the item only

Total Order Discount

If you price by salesperson, you can use one of the following pricing methods:

Price Types: You can choose one of four available price types if you create a special price record. Infor ERP LX uses price type discounts if an order quantity or amount reaches a specified break point. Use these types to set the discount as either a percent or a discount price (fixed amount) and to base the discount on either quantity (number of items) or amount (currency value) totals. Infor ERP LX automatically assigns Price Type 2 as a default, but you can select others. The following price types are available:

Type	Description
1	Percent Discount - Based on Amount
2	Percent Discount - Based on Quantity
3	Discount Price - Based on Amount
4	Discount Price - Based on Quantity*

*You cannot use discount price based on quantity with the following scenarios:

- Customer alone if pricing by customer (Pricing Method 2)
- Customer discount code alone if pricing by customer (Pricing Method 6)
- Salesperson alone if pricing by salesperson (Pricing Method 2).

If you use a percent discount, price type 1 or 2, the system multiplies the value in the factor field by either the list price, for line level discount, or by the sum of the extended order lines, for total order level discount. Therefore, a factor of 90% results in a 10% discount of the line or order. See the examples below for price type 1 and 2.

If you use a discount price, price type 3 or 4, the system subtracts a discrete value from the order total for the factor field. See the examples below for price type 3 and 4.

Example: Price Type 1 - Discount Percent Based on Amount

Parameters

Item A List Price=25.00:

Amount	Percent
100	98

200	96
-----	----

300	94
-----	----

- For every 100 (monetary value) of product A ordered, the discount is 2%.
- For every 200 (monetary value) of product A ordered, the discount is 4%.
- For every 300 (monetary value) of product A ordered, the discount is 6%.

Result

- If you order 3 units of Item A, the line extended amount is 75.00 No special price applies. Net price per unit is 25.00.
- If you order 5 units of Item A, the line extended amount is 125.00. A discount percent factor of 98 (2% discount) applies. Net price per unit is $(25.00 * .98)=24.50$.
- If you order 8 units of Item A, the line extended amount is 200.00. A discount percent factor of 96 (4% discount) applies. Net price per unit is $(25.00 * .96)=24.00$.

Example Price Type 2 - Discount Percent Based on Quantity

Parameters

Item A List Price=25.00

Quantity	Percent
4	98
8	96
12	94

- For every 4 units of product A ordered, the discount is 2%.
- For every 8 units of product A ordered, the discount is 4%.
- For every 12 units of product A ordered, the discount is 6%.

Result

- If you order 3 units of Item A, the line extended amount is 75.00 No special price applies. Net price per unit is 25.00.
- If you order 5 units of Item A, a discount percent factor of 98 (2% discount) applies. Net price per unit is $(25.00 * .98)=24.50$.
- If you order 8 units of Item A, a discount percent factor of 96 (4% discount) applies. Net price per unit is $(25.00 * .96)=24.00$.

Example Price Type 3 - Discount Price Based on Amount

Parameters

Item A List Price=25.00

Amount	Price
100	24.50
200	24.00
300	23.50

- For every 100 units of product A ordered, the discount price is 24.50.
- For every 200 units of product A ordered, the discount price is 24.00.
- For every 300 units of product A ordered, the discount price is 23.50.

Result

- If you order 3 units of Item A, the line extended amount is 75.00 No special price applies. Net price per unit is 25.00.
- If you order 5 units of Item A, the line extended amount is 125.00. A special price of 24.50 applies.
- If you order 8 units of Item A, the line extended amount is 200.00. A special price of 24.00 applies.

Example Price Type 4 - Discount Price Based on Quantity

Parameters

Item A List Price=25.00

Quantity	Price
4	24.50
8	24.00
12	23.50

- For every 4 units of product A ordered, the discount price is 24.50.
- For every 8 units of product A ordered, the discount price is 24.00.
- For every 16 units of product A ordered, the discount price is 23.50.

Result

- If you order 3 units of Item A, the line extended amount is 75.00 No special price applies. Net price per unit is 25.00.

- If you order 5 units of Item A, a special price of 24.50 applies.
- If you order 8 units of Item A, a special price of 24.00 applies.

Use this program to establish separate pricing methods. The system determines the pricing method based on the following conditions:

- Item numbers;
- Customer or salesperson numbers;
- Item discount codes;
- Customer or salesperson discount codes;
- A combination of the above; or
- The total order amount.

You can enter the following price type codes to denote the usage of the factor entries assigned to the price breaks below:

1

A percent discount based on price. The discount percentage in the Factor column applies to the total monetary amount ordered for this item if you reach the corresponding total amount (for this item, customer, and so on.) in the Qty/Price column.

2

A percent discount based on quantity. The discount percentage in the Factor column applies to the item's list price if you reach the corresponding item quantity amount in the Qty/Price column.

3

A discount amount based on price. The system uses the total monetary amount in the Factor column as the item's list price if you reach the corresponding total amount (for this item, customer, and so on) in the Qty/Price column.

4

A discount amount based on quantity. The system uses the total monetary amount in the Factor column as the item's list price if you reach the corresponding item quantity amount in the Qty/Price column.

The pricing methods use either a percentage discount factor or a discount amount for up to nine quantity/amount breaks. If you use a percentage discount factor (Price Types 1 and 2) to price an item, the system accesses the appropriate discount factor based on the quantity sold. The system then multiplies the unit price by the percentage discount factor. If you use a discount amount (Price Types 3 and 4) to price an item, the system accesses a discounted net price that you enter.

The pricing methods depend on four basic classifications, and a combination of these classifications, as indicated below.

The four basic classifications are listed below:

- Item - the item ordered
 - Item discount - discount class of the item from the item master
-

- Customer (or salesperson) - the customer or salesperson who places the order
- Customer discount - the discount class of the customer

In addition, pricing methods depend on four combinations of the basic classifications and an overall order discount.

When Infor ERP LX checks for item discounts, it first determines if special pricing is based on the customer number or the salesperson number set on the Order Entry System Parameters screen, ORD820D-01. The system then searches the pricing structures hierarchy defined on the next Order Entry System Parameters screen, ORD820D-02. The system locates a pricing matrix for a specific item in any structure and uses the discount factor in that structure.

If the start and end dates for multiple pricing methods overlap, Infor ERP LX uses the pricing method with the most recent start date to retrieve a pricing method.

If you define different list prices in a list price book, Infor ERP LX bases the special price on the list price for the item. See List Price Maintenance (PRO150).

The system stores special pricing data in the Special Prices (ESP) file.

Screens:

Special Pricing Maintenance selection, PRO140D1-01

Special Price Maintenance filter, PRO140D1-02

Special Pricing Maintenance detail, PRO140D2-01

Add or select a special pricing method

The Special Price Maintenance selection screen, PRO140D1-01, displays the special pricing information for specific pricing methods. Use the screen to create a special pricing method or select a special pricing method to view or maintain. To limit the information to view, use F13 to access the Special Price Maintenance filter screen.

Field descriptions - PRO140D1-01

Method (1,A):

Specify a pricing method. Infor ERP LX then displays a list of the special prices defined for this pricing method. If you set up special prices based on customer, the system displays information for the following values:

1

Item/Customer - item records sorted by item number then customer

2

Customer - customer records in customer number sequence

3

Item - item records in item number sequence

4

Item Discount Code/Customer - item discount code records sorted by item discount code then customer number

5

Item Discount Code - item discount code records sorted by item discount code

6

Customer Discount Code - customer discount code records sorted by customer discount code

7

Item/Customer Discount Code - item records sorted by item then by customer discount code

8

Item Discount Code/Customer Discount Code Customer - item discount code records sorted by item discount code then customer discount code

T

Total Order Discount - customer records sorted by customer number

If you set up special prices based on salesperson, the system displays information for the following values:

1

Item/Salesperson - item records sorted by item number then salesperson number

2

Salesperson - salesperson records sorted by salesperson number

3

Item - item records sorted by item number

4

Item Discount Code/Salesperson - item discount code records sorted by item discount code then salesperson

5

Item Discount Code - item discount code records sorted by item discount code

T

Total Order Discount - customer records sorted by customer

Co (2,0):

Specify the number of a company for this customer and pricing method.

Curr (3,A):

Specify a currency defined for the company in the Co field. You must specify a value in this field if you designate the company as a multi-currency company.

Customer/Salesperson (8,0):

Specify a customer number for this special pricing record if you set the order entry parameter to use the customer number for special pricing. Specify a salesperson number for this special pricing record if you set the order entry parameter to use the salesperson number for special pricing. You must specify a customer in this field if you use pricing method 1, 2, 4 or T to price by customer. You must specify a salesperson number if you use pricing method 1, 2, 4, or T to price by salesperson.

CDC (2,A):

The system displays this field only if you set the special price based on customer number. Specify the customer discount code if appropriate for this special price. You define customer discount codes in System Table Maintenance, SYS105D1, and assign the codes to a customer in Customer Master Maintenance, ACR100. You must specify a value in this field if you use pricing method 6, 7, or 8 to price by customer.

Item (35,A):

Specify the item for which this discount applies if appropriate for this special price. You define item numbers in Item Master Maintenance, INV100. You must specify a value in this field if you use pricing method 1, 3, or 7 to price by customer or pricing method 1 or 3 to price by salesperson.

Unit of Measure (2,A):

Specify the unit of measure code for the item for which this discount applies. You must specify a value in this field if you use any pricing method other than T to create a special price for an item.

IDC (2,A):

Specify the item discount code if appropriate for this special price. You define item discount codes in System Table Maintenance, SYS105D1, and assign the code to one item in Item Master Maintenance, INV100. You must specify a value in this field if you use pricing method 4, 5, or 8 to price by customer or pricing method 4 or 5 to price by salesperson.

Start Date (8,0):

(Required) Specify the start date of the effective period for this special price. The start date must be earlier than the end date.

List price effective periods of one company/currency code combination can overlap. The date range for one special price can fall within another date range or it can extend only partly into the range of another special price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent starting date.

End Date (8,0):

(Required) Specify the end date of the effective period for this special price. The end date must be later than the start date.

Screen actions - PRO140D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Filter pricing method information

Use the Special Price Maintenance filter screen to limit the information to display on the Special Price Maintenance selection screen, PRO140D1-01.

To access this screen, use F13 Filters on the Special Price Maintenance selection screen, PRO140D1-01.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO140D1-02**From/To Pricing Method (1,A):**

Specify a range of values to limit the pricing method codes to display on the Special Price Maintenance selection screen.

From/To Company (2,0):

Specify a range of values to limit the companies to display on the Special Price Maintenance selection screen.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to display on the Special Price Maintenance selection screen.

From/To Start Date (8,0):

Specify a range of values to limit the start dates to display on the Special Price Maintenance selection screen.

From/To Item (35,A):

Specify a range of values to limit the items to display on the Special Price Maintenance selection screen. You can specify a value in this field only if you

use pricing method 1, 3, or 7 to price by customer or pricing method 1 or 3 to price by salesperson.

From/To Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to display on the Special Price Maintenance selection screen. You can specify a value in this field only if you use pricing method 4, 5, or 8 to price by customer or pricing method 4 to price by salesperson.

From/To Customer/Salesperson (8,0):

If you set the order entry parameter to use the customer number for special pricing, specify a range of customer numbers to limit the customer numbers to display on the Special Price Maintenance selection screen. If you set the order entry parameter to use the salesperson number for special pricing, specify a range of salesperson numbers to limit the salesperson numbers to display on the Special Price Maintenance selection screen. You can specify a value in this field only if you use pricing method 1, 2, 4, or T to price by customer or pricing method 1, 2, or 4 to price by salesperson.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to display on the Special Price Maintenance selection screen. The system displays this field only if you set the special price based on customer number. You can specify a value in this field only if you use pricing method 6, 7, or 8 to price by customer.

Record Status (1,0):

Specify 0 to list all records in the range selected. Specify 1 to list only the active records in the range selected.

Screen actions - PRO140D1-02

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view a special pricing method

Infor ERP LX displays the Special Price Maintenance screen if you press Enter to process the Special Pricing Maintenance selection screen. The fields that the system displays depend on the pricing method. The line action that you choose on the selection screen, create, revise, or copy, determines whether you can specify a value in the fields.

If you are in order entry and you choose to see the special price record used to price the order line, Infor ERP LX displays this screen. In order entry all fields are display-only.

Field descriptions - PRO140D2-01

Pricing Method (1,A):

Infor ERP LX displays the pricing method you select or enter on the Special Pricing Maintenance selection screen, PRO140D1-01, along with the pricing method description.

Co (2,0):

Specify the number of a company for this customer defined within the pricing method in the Pricing Method field.

Curr (3,A):

Specify a currency defined for the company in the Co field. You must specify a value in this field if you designate the company as a multi-currency company.

Item (35,A):

Specify the item for which this discount applies if appropriate for this special price. You must specify a value in this field if you use pricing method 1, 3, or 7 to price by customer or pricing method 1 or 3 to price by salesperson.

Unit of Measure (2,A):

Specify the unit of measure code for the item for which this discount applies. You must specify a value in this field if you use any pricing method other than T to create a special price for an item.

Total Order Discount Flag (1,0):

The system displays this field only if you use pricing method T. You must specify a value in this field; you can change the value. 0 and 1 are valid values; blank is not a valid value. The system uses the value from the Total Order Discount Flag in the customer master record that corresponds to this special price customer.

A value of 0 indicates that the total order discount record reflects values based on stocking unit of measure. A value of 1 indicates that the total order discount record reflects values based on selling unit of measure.

Customer/Salesperson (8,0):

Specify a customer number if you set the order entry parameter to use the customer number for special pricing. Specify a salesperson number if you set the order entry parameter to use the salesperson number for special pricing.

You must specify a value in this field if you use pricing method 1, 2, 4, or T to price by customer or pricing method 1, 2, 4, or T to price by salesperson.

CDC (2,A):

Specify the customer discount code if appropriate for this special price. The system displays this field only if you set the special price based on customer number. You must specify a value in this field if you use pricing method 6, 7, or 8 to price by customer

IDC (2,A):

Specify the item discount code if appropriate for this special price. You must specify a value in this field if you use pricing method 4, 5, or 8 to price by customer or pricing method 4 or 5 to price by salesperson.

Start Date (8,0):

Specify the start date of the effective period for this special price. The start date must be earlier than the end date.

List price effective periods of one company/currency code combination can overlap. The date range for one special price can fall within another date range or it can extend only partly into the range of another special price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent starting date.

End Date (8,0):

Specify the end date of the effective period for this special price. The end date must be later than the start date.

Allowed on Returns (1,0)

Specify one of the following codes to allow or disallow discounts and allowances on credit orders.

Valid choices

- **0=No**
Do not allow discounts or allowances on credit orders.
 - **1=Returns and RMAs**
Allow discounts and allowances on both returns and RMAs.
 - **2=RMAs only**
Allow discounts and allowances only on RMAs.
 - **3=All**
Allow discounts and allowances on all orders.
-

Contract (7,0):

Specify the contract number to which this special price applies if one exists.

Notes (15,A):

Infor ERP LX displays any notes that apply to this special price. Specify any appropriate notes.

Price Type (1,0):

Specify the price type to apply to this special price. The following price types are valid:

- | | |
|---|--------------------------------------|
| 1 | Percent Discount - Based on Amount |
| 2 | Percent Discount - Based on Quantity |
| 3 | Discount Price - Based on Amount |
| 4 | Discount Price Based on Quantity |

Do not use Price Type 4 with the following pricing methods: Customer Alone, Customer Discount Alone, Salesperson Alone.

Commission Code (2,A):

(Reference Only) Specify the user defined two-character identifier for a customer, item, or salesperson commission code.

List Price:

If you are in order entry, Infor ERP LX displays the list price for the item ordered.

Stocking U/M:

If you are in order entry, Infor ERP LX displays the stocking unit of measure for the item ordered.

Quantity/Amount Breaks (11,3):

Changed: MR76061 Change "stocking" to "pricing"

Specify the quantity or price break at which each corresponding discount factor or price applies. If the item's quantity or price reaches or exceeds a quantity or price break level but does not equal or exceed the next quantity or price break, Infor ERP LX applies the corresponding price or percentage factor. Specify values in this field in ascending order. The system displays quantity breaks in the pricing unit of measure.

Factor (14,4):

Specify a percentage factor or monetary amount to use with the quantity or monetary amount break point of the item in the Quantity/Price column.

- If the price type is 1 (Percent Discount - Based on Amount) or 2 (Percent Discount - Based on Quantity), the factor is a percentage applied to the unit list price or the total order amount./
- If the price type is 3 (Discount Price - Based on Amount) or 4 (Discount Price - Based on Quantity), the factor represents the order line net selling price or the amount of the total order discount.

Net Price:

If you are in order entry, Infor ERP LX displays the net price for the item based on the list price factored by the discount percent or the discount price defined in the Special Price (ESP) file.

Screen actions - PRO140D2-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price book maintenance

To calculate and retrieve prices for orders and order lines, Infor ERP LX determines prices based on list prices, special prices, promotions and deals, and user override prices. The system applies only one list price to an order line. Only one special price applies to an order line or order. You can apply promotions cumulatively. Promotions and Deals also keeps track of the amount and quantity of sales tied to a promotion and the amount and quantity of invoice activity tied to a promotion.

Use this program to define various list prices based on item, customer, region, customer discount code, facility, or a combination of these. Infor ERP LX retrieves this list price during order entry based on the hierarchy you set on the List Price Hierarchy screen, PRO820D-02. When you set up the list price hierarchy, you can also choose to use the list price entered on the Item Master, INV100.

The following methods are available to define list prices:

Method Description

9	Cost-Plus List Price
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0	Multi-Currency - Base price/item alone*
A	Item/Customer
B	Item/Region
C	Item/Customer Discount Code
D	Item/Facility

* You can also maintain the multi-currency pricing method in the item master on the last screen in Item Master Maintenance.

Screens

List Price Book Maintenance filter, PRO150D-01

List Price Book Maintenance detail for pricing method A, PRO150D-02

List Price Book Maintenance detail for pricing method B, PRO150D-03)

List Price Book Maintenance detail for pricing method C, D, 9, PRO150D-04

List Price Book Maintenance detail for pricing method 0, PRO150D-05

Filter list price book information

Use the List Price Book Maintenance filter screen, PRO150D-01, to limit the information on the List Price Book Maintenance detail screens.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

To access this screen , F13 from any of the List Price Book Maintenance detail screens.

Field descriptions - PRO150D-01

Pricing Method (1,A):

Specify the pricing method code for the detail screen you want to display. The following pricing methods are valid:

9	Cost-Plus List Price
0	Multi-Currency - Base price/item alone*

A Item/Customer

B Item/Region

C Item/Customer Discount Code

D Item/Facility

From/To Company (2,0):

Specify a range of values to limit the companies to display on the List Price Book Maintenance detail screen.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to display on the List Price Book Maintenance detail screen.

From/To Start Date (8,0):

Specify a range of values to limit the start dates to display on the List Price Book Maintenance detail screen.

From/To Item (35,A):

Specify a range of values to limit the item numbers to display on the List Price Book Maintenance detail screen.

From/To Customer (8,0):

Specify a range of values to limit the customer numbers to display on the List Price Book Maintenance detail screen.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to display on the List Price Book Maintenance detail screen.

From/To Region (6,A):

Specify a range of values to limit the regions to display on the List Price Book Maintenance detail screen.

From/To Facility (4,A):

Specify a range of values to limit the facilities to display on the List Price Book Maintenance detail screen.

Record Status (1,0):

Specify 0 to list all records in the range selected. Specify 1 to list only the active records in the range selected.

Screen actions - PRO150D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain a list price book for pricing method A

The List Price Book Maintenance detail screen for pricing method A, PRO150D-02, displays a list of the method A, item/customer, list prices defined. The system sequences the information on this screen by company, currency, item number, customer, and then start date. The system highlights inactive (logically deleted) information. The Status field shows 1 for Active records and 0 for Inactive records.

Use this screen to create or maintain pricing method A list prices.

Field descriptions - PRO150D-02**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

(Optional) Infor ERP LX displays the company used for the specific list price information. To define a new list price, on the first line specify the company for the list price.

Curr (3,A):

(Optional) Infor ERP LX displays the currency used for the specific list price information. To define a new list price, on the first line specify the currency for the list price. The system displays this field only if you have Multi-Currency installed.

Item (35,A):

(Required for this pricing method.) Infor ERP LX displays the item used for the specific list price information. To define a new list price, on the first line specify the item for the list price.

Customer (8,0):

(Required for this pricing method.) Infor ERP LX displays the customer used for the specific list price information. To define a new list price, on the first line specify the customer for the list price.

Start Date (8,0):

(Required) Infor ERP LX displays the start dates used for this specific list price information. To define a new list price, on the first line specify the start date for the list price.

List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

(Required) Infor ERP LX displays the end dates used for the specific list price information. In Revise mode, you can override the information in this field. To define a new list price, on the first line specify the end date for the list price. You can maintain this field in Revise mode.

List Price (14,4):

(Required) Infor ERP LX displays list price used for this list price information. You can maintain this field in Revise mode. To define a new list price, on the first line specify the list price. You can maintain this field in Revise mode.

Screen actions - PRO150D-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain a list price book for pricing method B

The List Price Book Maintenance detail screen for pricing method B, PRO150D-03, displays a list of the method B, item/region, list prices defined. The system highlights inactive (logically deleted) information. Use this screen to create or maintain pricing method B list prices.

Field descriptions - PRO150D-03**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

(Optional) Infor ERP LX displays the company associated with the specific list price record information. To define a new list price, on the first line specify the company for the list price.

Curr (3,A):

(Optional) Infor ERP LX displays the currency used for the specific list price information. To define a new list price, on the first line specify the currency for the list price. The system displays this field only if you have Multi-Currency installed.

Item (35,A):

(Required for this pricing method.) Infor ERP LX displays the item used for the specific list price information. To define a new list price, on the first line specify the item for the list price.

Region (6,A):

(Required for this pricing method.) Infor ERP LX displays the pricing region used for the specific list price information. To define a new list price, on the first line specify the region for the list price.

Start Date (8,0):

(Required) Infor ERP LX displays the start dates used for this specific list price information. To define a new list price, on the first line specify the start date for the list price.

List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

(Required) Infor ERP LX displays the end dates used for the specific list price information. In Revise mode, you can override the information in this field. To define a new list price, on the first line specify the end date for the list price.

List Price (14,4):

(Required) Infor ERP LX displays list price used for this list price information. You can maintain this field in Revise mode. To define a new list price, on the first line specify the list price.

Screen actions - PRO150D-03**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain a list price book for pricing method C, D, or 9

The List Price Book Maintenance detail screen for pricing method C, D, or 9, PRO150D-04, displays a list for one of the following list prices defined:

Method C - item/customer discount code

Method D - item/facility cost-plus list price

Method 9 - item/customer, list prices defined

The system highlights inactive (logically deleted) information. Use this screen to create or maintain pricing method C, D, or 9 list prices.

Field descriptions - PRO150D-04**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

(Optional) Infor ERP LX displays the company associated with the specific list price information.. To define a new list price, on the first line specify the company for the list price.

Curr (3,A):

(Optional) Infor ERP LX displays the currency used for the specific list price information. To define a new list price, on the first line specify the currency for the list price. The system displays this field only if you have Multi-Currency installed.

Item (35,A):

(Required for this pricing method.) Infor ERP LX displays the item used for the specific list price information. To define a new list price, on the first line specify the item for the list price.

CDC/Facility (4,A):

The system displays the CDC field only for Pricing Method C; the system displays the Facility field only for Pricing Methods 9 and D. Infor ERP LX displays the customer discount code or facility, depending on the pricing method, defined for this list pricing method. To define a new list price, on the first line specify the facility for the list price. CDC is a required field for pricing method C; Facility is required for pricing method D and optional for pricing method 9.

Start Date (8,0):

(Required) Infor ERP LX displays the start dates used for this specific list price information. To define a new list price, on the first line specify the start date for the list price.

List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

(Required) Infor ERP LX displays the end dates used for the specific list price information. In Revise mode, you can override the information in this field. To define a new list price, on the first line specify the end date for the list price.

List Price (14,4):

(Required) Infor ERP LX displays the list price used for this list price information. You can maintain this field in Revise mode. To define a new list price, on the first line specify the list price.

Screen actions - PRO150D-04**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain a list price book for pricing method 0

The List Price Book Maintenance detail screen for pricing method 0, PRO150D-05, displays a list of the method 0, multi-currency - base price/item alone list prices defined. The system highlights inactive (logically deleted) information. Use this screen to create or maintain pricing method 0 list prices. If you have multi-currency installed, specify line action 10 to display the multi-currency screen.

Field descriptions - PRO150D-05**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

(Optional) Infor ERP LX displays the company used for the specific list price information. To define a new list price, on the first line specify the company for the list price.

Curr (3,A):

(Optional) Infor ERP LX displays the currency used for the specific list price information. To define a new list price, on the first line specify the currency for the list price. The system displays this field only if you have Multi-Currency installed.

Item (35,A):

(Required for this pricing method.) Infor ERP LX displays the item used for the specific list price information. To define a new list price, on the first line specify the item for the list price.

Start Date (8,0):

(Required) Infor ERP LX displays the start dates used for this specific list price information. To define a new list price, on the first line specify the start date for the list price.

List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

(Required) Infor ERP LX displays the end dates used for the specific list price information. In Revise mode, you can override the information in this field. To define a new list price, on the first line specify the end date for the list price.

List Price (14,4):

(Required) Infor ERP LX displays the list price used for this list price information. You can maintain this field in Revise mode. To define a new list price, on the first line specify the list price.

Screen actions - PRO150D-05**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price bracket group code maintenance

Use List Price Bracket Group Code Maintenance, PRO160, to maintain bracket group codes. Brackets define prices based on the quantity ordered in units, weight, or volume and discounts or markups applied to those quantities.

Add or select a bracket group code

Use the List Price Bracket Group Code Selection screen to add a new bracket group code or to select a bracket group code to revise, display, or print.

Field descriptions - PRO160D1-01**Bracket Group Code (3,A):**

This code represents a pricing structure based on the quantity ordered and the discounts or markups applied to those quantities.

Screen actions - PRO160D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view a bracket group code

Use the List Price Bracket Group Code Maintenance screen, PRO160D2-01, to maintain or view bracket group codes. First select the type of bracket as units, weight, or volume. Then enter the break levels, the point at which one markup percent ends and another begins, and the associated markup percents. Use F6 to save your changes or creation.

Field descriptions - PRO160D2-01

Bracket Group Code (3,A):

Infor ERP LX displays the code you enter or select on the List Price Bracket Group Code Maintenance screen, PRO160 D1-01.

Bracket Code Description (30,A):

This is a description of the bracket group code. If you create, revise, or copy a bracket group code, you can specify a value in this field.

Bracket Type (1,A):

Specify the bracket type. Specify one of the following values:

0=Units

The break level applies to a number of units in pricing unit of measure.

1=Weight

The break level applies to weights in common system weight, that use pricing unit of measure quantities for recalculation.

2=Volume

The break level applies to volumes in common system volume, that use pricing unit of measure quantities for calculation.

Break Level (11,3):

Break levels can be in stocking units, weight or volume.

Each level must contain a number higher than the previous level.

For bracket type=units, the break levels are quantities in pricing units of measure.

For bracket type=weight, the break levels are raw weight numbers. The system defines all weight values from the Item Master, INV100, in a single common system-wide unit of weight.

For bracket type=volume, the break levels are raw volume numbers. The system defines all volume values from the Item Master, INV100, in a single common system-wide unit of volume.

If you clear a break level, the higher break levels fall into its place.

You must specify a value in the first break level to store the information.

Markup Percent (5,2):

The markup percentages modify the list price entered in List Price Book Maintenance, PRO150. For example:

Markup of 10=Add 10% to the list price

Markup of -8=Subtract 8% from the list price

Markup percents cannot be less than -99.99%. You cannot specify markup percentages that result in a price of 0 or in a negative price.

Screen actions - PRO160D2-01

All Screen Actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price bracket group code listing

Use List Price Bracket Group Code Listing to generate a list of bracket group codes and their brackets based on your input criteria.

Print a bracket group code report

Use the List Price Bracket Group Code Listing screen, PRO165D01, to specify the range of group codes to print on the bracket group code report.

Field descriptions - PRO165D01

From/To Bracket Group Code (3,A):

Specify a range of values to limit the bracket group codes to include in the report. For information on range fields, see the Ranges topic in the overview section of this document.

Screen actions - PRO165D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Requirements group maintenance

Use Requirements Group Maintenance, PRO170, to maintain requirements that qualify or disqualify entire price structures for advanced list pricing consideration. You define the fields, character positions, or other conditions that Infor ERP LX uses to qualify or disqualify an order line for a given price structure. You can use these codes in Price Structure Maintenance, PRO176.

Add or select a requirements group

Use the Requirements Group Maintenance selection screen, PRO170D-01, to create a requirements group or select a requirements group to maintain.

Field descriptions - PRO170D-01

Requirements Group (6,A):

This is the unique code that describes a set of requirements used to qualify price structures.

Sequence (3,0):

You can specify multiple sequences within a requirements group. Enter the sequences in multiples of 10 to allow for insertion. If you specify a value in the And/Or field, specify another value for the same requirements group code with a higher sequence number.

You specify values in the And/Or field on the Requirements Group Maintenance screen, PRO17D-02. You can see that value on this screen if you use F11 to see additional fields.

Screen actions - PRO170D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain requirements group details

Use the Requirements Group Maintenance screen, PRO170D-02, to maintain the details of the requirements.

Field descriptions - PRO170D-02

Requirements Group:

Infor ERP LX displays the group code to maintain.

Sequence:

Infor ERP LX displays the sequence number within the group code to maintain.

File Name (10,A):

Specify the file to include in this code. Infor ERP LX checks for valid file-field combinations.

Field Name (10,A):

Specify the field name to include in this code. Infor ERP LX checks for valid file-field combinations.

Offset (2,0):

Optional. The system uses the offset to test only a portion of the file-field combination. The offset is valid only for alpha fields. For example, to test the last 3 bytes of a 15-byte field, specify 13. To test the full value of a field, specify 0.

You can use the Offset field to create subset fields. For example, you can divide the 6-byte Pricing Region field into these 2-byte fields: region, district, and market.

Length (2,0):

Optional. The system uses the length for comparison purposes. Length is valid only for alpha fields. For example, to test the last 3 bytes of a 15-byte field that starts with position 13, specify 3 here and 13 in the Offset field. The Offset value, 13, plus the Length, 3, minus 1 equals the defined field size of 15.

Operation (2,A):

Required. You must specify a valid query operation. Specify one of the following values:

EQ Equal

NE Not equal

GT Greater than

LT Less than

NG Not greater than

NL Not less than

GE Greater than or equal

LE Less than or equal

Specify the value exactly as shown above for all language versions of Infor ERP LX. Because these values become instructions in a programming statement, the values are not language-specific.

Value (10,A):

You must specify a value for the query operation to test. You can specify an alpha or numeric value. You do not have to use quotation marks for alpha entries. You can use a period or a comma as the decimal indicator.

If you specify more digits than the decimal field can support, the system ignores the additional decimals. For example, in a field that accepts only three decimal places, if you enter 482.1239, Infor ERP LX uses 482.123.

The value in this field is not subject to region code decimal support. The system displays the value exactly as entered by the original user.

And/Or (3,A):

Optional. Use this field to create advanced queries. If you use this field, define another value for the same requirements group code with a higher sequence number. The query statement is not valid without a completing statement.

Screen actions - PRO170D-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Requirement group selectable fields

Use Requirement Group Selectable Fields, PRO171, to select the files and fields to use in Requirements Group Maintenance, PRO170.

You access this program from the promptable File Name field in the Requirements Group Maintenance program (PRO170).

You cannot maintain this information. You cannot create, revise, or delete the selectable fields.

Select files and fields for a requirements group

Use the Requirements Group Selectable Fields selection screen, PRO171D-01, to select the files and fields to use in Requirements Group Maintenance, PRO170.

Field descriptions - PRO171D-01**Action (2,0):**

Specify 9 next to a file to include the file in the requirements group.

File (10,A):

This is the name of the file you can include in the requirements group.

Field (10,A):

This is the name of the field you can include in the requirements group.

Attribute (1,A):

This field displays whether the field is alphanumeric (A) or numeric (N).

Length (2,0):

This is the length of the field, including decimal places.

Decimals (2,0):

This is the number of decimal places for the field.

Screen actions - PRO171D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Requirements group listing

Use Requirements Group Listing, PRO175, to produce a list of requirements group codes and their values.

Print a requirements group report

Use the Requirements Group Code Listing screen, PRO175D-01, to specify the range of requirements group codes to print on the requirements group report.

Field descriptions - PRO175D-01**From/To Requirements Group Code (3,A):**

Specify a range of values to limit the requirements group codes to include in the report. For information on range fields, see the Ranges topic in the overview section of this document.

Screen actions - PRO175D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Price structure maintenance

Use Price Structure Maintenance, PRO176, to maintain price structures to use in Advanced List Price Maintenance, PRO180.

Add or select a price structure

Use the Price Structure Selection screen, PRO176D1-10, to add a price structure or to select a price structure to revise or display.

Field descriptions - PRO176D1-01

Actions (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

11=List Price Maintenance

Access Advanced List Price Maintenance.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Sequence (3,0):

This number must be unique. Create sequence numbers in increments of 10 to allow for insertion.

Screen actions - PRO176D1-01

F14=Resequence

Resequences the sequence numbers to start with 10 for the lowest numbered record and to increment by 10 for each higher record.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain price structure details

Use the Price Structure Maintenance detail screen, PRO176D2-01, to maintain the details of the price structure. The system uses the information when you run Advanced List Price Maintenance, PRO180.

Field descriptions - PRO176D2-01

Sequence (3,0):

Specify a value to sequence the information. You can change the sequence.

Price Structure Code (4,A):

Specify a name for this price structure.

Description (30,A):

Specify a description of the pricing structure.

Requirement Code (6,A):

Optional. You can link this pricing structure to a requirements group code; you maintain the code in Requirements Group Code Maintenance, PRO170.

FOB Pricing Indicator (1,0):

Specify whether to use the FOB Price field in Advanced List Price Maintenance, PRO180.

Price Options Flag (1,0):

Specify whether to use price options in Advanced List Price Maintenance, PRO180.

Customer Format (1,0):

You can define the customer number Infor ERP LX uses for pricing purposes. Specify a customer format value only if you want to specify customers for a given price structure or advanced list price setup.

If the qualifications are based only on item number or item discount code, specify 0.

Similarly, if the qualifying customer is specified through the requirements group code definition, specify 0. To specify the qualifying customer, specify the fields to test in Requirements Group Code Selectable Fields.

Specify one of the following values:

0	None
1	Pricing customer
2	Sold To customer
3	Accounts Receivable customer
4	Promotion customer
5	Ship To customer
6	Customer Discount Code

You maintain customer numbers in Customer Master Maintenance, ACR100.

Facility Flag (1,0):

Specify whether to enter a facility in Advanced List Price Maintenance, PRO180.

Item Format (1,0):

Specify one of the following values:

1=Item number

2=Item discount code

This value in this field determines the screens that you access in Advanced List Price Maintenance, PRO180.

Region Flag (1,0):

Specify whether to enter a region in Advanced List Price Maintenance, PRO180.

Screen actions - PRO176D2-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Price structure maintenance error

This is an error screen.

Error in accessing price structure maintenance

The system displays the Price Structure Maintenance Error screen, PRO177D-01, only if you try to access Advanced List Price Maintenance, PRO180, or Price Structure Maintenance, PRO176 when the program is in use. Infor ERP LX allows only one user at a time.

Advanced list price maintenance

Use Advanced List Price Maintenance, PRO180, to create and maintain advanced list prices. To use the prices during order entry, specify Yes for the Use Advanced List Pricing field on the Promotions and Deals System Parameters List Price Hierarchy screen, PRO820D-03.

Add or select an advanced list price

Use the Advanced list Price Maintenance selection screen to add, maintain, or display an advanced list price.

Field descriptions - PRO180D1-01

Action (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

15=Copy All

Copy the header information (PAH file) and all associated details (PAD file). You can create an item-based list price, with numerous customer number qualifiers, then copy the entire structure or setup to another item with the same customers. You can then add additional customers or delete customers who do not qualify. All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Reference (10,A):

Specify a name for the list price.

Sequence (3,0):

Specify a sequence number for the list price. Within a single reference code, you can specify multiple sequences.

Company (2,0):

Advanced list price information is valid only for transactions for this company. You maintain companies in the Company Master program, ACR120.

Currency (3,A):

Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Start Date (6,0):

Specify the start date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

End Date (6,0):

Specify the end date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

Option (1,0):

Specify an option number and press Enter. If you specify 5, you must specify the name of a price structure. You maintain price structures in Price Structure Maintenance, PRO176.

Screen actions - PRO180D1-01-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view advanced list price details

Use the Advanced List Price Maintenance Detail screen, PRO180D2-01, to specify the details for this advanced list price. After you specify values in the fields, press Enter and then use F6. The system validates the information and updates the advanced list price details.

Field descriptions - PRO180D2-01**Reference (10,A):**

Infor ERP LX displays the name of the list price. You can specify a name only in Copy mode.

Sequence (3,0):

Infor ERP LX displays the sequence number for the list price. You can specify multiple sequences within a single reference code. You can specify a sequence only in Copy mode.

Price Structure (6,A):

Required. You must link the advanced list price information to a price structure. You maintain price structures in Price Structure Maintenance, PRO176.

The values you specify in the FOB Flag, Price Options, Facility, and Region fields on this screen must be consistent with the values for the corresponding fields in Price Structure Maintenance, PRO176.

If you revise an advanced list price and you change the price structure, Infor ERP LX deletes the existing information.

Company (2,0):

Specify a company. Advanced list price information is valid only for transactions for this company. You maintain companies in the Company Master program, ACR120.

Currency (3,A):

Specify a currency. Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Start Date (6,0):

Specify the start date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

End Date (6,0):

Specify the end date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

Bracket Group (3,A):

Optional. Specify a bracket group code. You create bracket group codes in List Price Bracket Group Code Maintenance, PRO160.

Bracket Type (1,A):

This field displays the bracket type for the bracket group.

FOB Flag (1,0):

Specify one of the following values:

0=Regular

Normal freight charges apply.

1=Special

For example, freight charges do not apply or the system builds the freight charge into the pricing structure.

The details of the pricing structure you enter on this screen determine what you must specify here. If the FOB Pricing Indicator field in the pricing structure specifies Yes, you must specify 1 or 0 here. If the FOB Pricing Indicator field specifies No, Infor ERP LX ignores this field. You maintain price structures in Price Structure Maintenance, PRO176.

Price Options (1,A):

Specify a price option. The details of the pricing structure you enter on this screen determine what you must specify here. If the Price Options Flag field in the pricing structure specifies Yes, you must specify a price option. If the Price Options Flag field specifies No, leave this field blank. You maintain price structures in Price Structure Maintenance, PRO176. You maintain price options in the Table Definition program, SYS105.

Requirements Code (3,A):

The system uses the value from the price structure you specified. However, you can specify any valid requirements code. You maintain requirements in Requirements Group Maintenance, PRO170.

Description 1 (30,A):

Specify a description for this advanced list price.

Description 2 (30,A):

Optional. Specify an additional description for this advanced list price.

Facility (3,A):

The details of the pricing structure you enter on this screen determine what you must specify here. If the Facility field in the pricing structure specifies Yes, you must specify a pricing facility. You maintain price structures in Price Structure Maintenance, PRO176.

Region (6,A):

The details of the pricing structure you enter on this screen determine what you must specify here. If the Region field in the pricing structure specifies Yes, you must specify a pricing region. You maintain price structures in Price Structure Maintenance, PRO176.

Eligible for Credit Orders (1,0):

Specify one of the following values:

Valid choices

- **0**
0=Applies to orders only
- **1**
1=Applies to returns and RMAs
- **2**
2=Applies to RMAs only.
- **3**
3=Applies to all

Screen actions - PRO180D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add item information for an advanced list price

Use the Advanced List Price Maintenance - Item screen, PRO180D3-01 to add items and prices to this advanced list price. The header information displays the information you entered on the Advanced List Price Maintenance Detail screen, PRO180D2-01. The system displays this screen if the Item Format field in the price structure associated with this advanced list price specifies Item. You maintain price structures in Price Structure Maintenance, PRO176.

Field descriptions - PRO180D3-01**Action (2,0):**

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

11=Bracket Prices

If this advanced list price uses a bracket group, display the bracket breaks and prices for that group in the Bracket Prices screen, PRO750.

14=Customers

Display the Advanced List Price Maintenance - Customers screen, PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

15=Copy All

Copy an item and price to another item. This line action copies all underlying information viewed on the Advanced List Price Maintenance - Customers screen, PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

21=Unit of Measure

Display a list of all the units of measure in Infor ERP LX

24=Item Lookup

Display a list of all the items in Infor ERP LX.

All other line actions on this screen perform standard Infor ERP LX functions.

See *Generic help text for line actions* in the overview information in this document.

Reference:

Infor ERP LX displays the name of the list price.

Sequence:

Infor ERP LX displays the sequence number for the list price. Multiple sequences can exist within a single reference code.

Price Structure:

Infor ERP LX displays the price structure. You must link the advanced list price to a price structure. You maintain price structures in Price Structure Maintenance, PRO176.

Company:

Infor ERP LX displays the company. Advanced list price information is valid only for transactions for this company. You maintain companies in the Company Master program, ACR120.

Currency:

Infor ERP LX displays the currency. Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Start Date:

Infor ERP LX displays the start date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

End Date:

Infor ERP LX display the end date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

Bracket Group:

Infor ERP LX displays the bracket group code, if any, for this price structure. You maintain bracket codes in List Price Bracket Group Code Maintenance, PRO160.

Bracket Type:

Bracket groups are based on units, weight, or volume.

Valid choices

- **0**
Units
- **1**
Weight
- **2**
Volume

FOB Flag:

Specify one of the following values:

Valid choices

- **0=Regular**
Normal freight charges apply.
- **1=Special**
For example, freight charges do not apply or the system builds the freight charge into the pricing structure.

Price Options:

Infor ERP LX displays the price option. The details of the pricing structure you specify for this advanced list price determine the price option. If the Price Options Flag field in the pricing structure specifies Yes, the system includes a price option in this advanced list price. If the Price Options Flag field specifies No, this field is blank. You maintain price structures Price Structure Maintenance, PRO176.

Requirements Code:

The system uses the value from the price structure you selected or you can specify any valid requirements code. You maintain requirements in the Requirements Group Maintenance, PRO170.

Description 1:

Infor ERP LX displays a description of this advanced list price.

Description 2:

Infor ERP LX displays an additional description of this advanced list price.

Facility:

The system displays a value that depends on the details of the pricing structure associated with this advanced list price. If the Facility field in the pricing structure specifies Yes, the system displays a pricing facility. You maintain price structures in Price Structure Maintenance, PRO176.

Region:

The system displays a value that depends on the details of the pricing structure associated with this advanced list price. If the Region field in the pricing structure specifies Yes, the system displays a pricing region. You maintain price structures in Price Structure Maintenance, PRO176.

Item Number (35,A):

Specify an item number.

Base Price (14,4):

Specify the base price. If the bracket type is units, the system defines prices in the item's pricing unit of measure. If the bracket type is weight or volume, the system defines prices in the common system unit of measure. Infor ERP LX converts these to stocking and selling unit of measure and to base currency as required during order entry.

Specify prices in the currency defined for this advanced list price. The system displays the currency on this screen. Only transactions in this currency qualify for this list price.

The price must be greater than or equal to 0.

Pricing Unit of Measure:

This system uses the value from one of the following sources, depending on the bracket code:

Valid choices

- **0=Units**
The unit of measure comes from the Item Master, INV100
- **1=Weight**
The unit of measure comes from the common system weight.
- **2=Volume**
The unit of measure comes from the common system volume

Screen actions - PRO180D3-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or maintain discount information for an advanced list price

Use the Advanced List Price Maintenance - IDC screen, PRO180D3-02, to add or revise the item discount codes and base prices for this advanced list price. The header information displays the information you entered on the Advanced List Price Maintenance Detail screen, PRO180D2-01. The system displays this screen if the Item Format field in the price structure associated with this advanced list price specifies Item Discount Code. You maintain price structures in Price Structure Maintenance, PRO176.

Field descriptions - PRO180D3-02**Line action:**

The following line actions are available:

11=Bracket Prices

If this advanced list price uses a bracket group, display the bracket breaks and prices for that group in the Bracket Prices screen, PRO750.

14=Customers

Display the Advanced List Price Maintenance - Customers screen, PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

15=Copy All

Copy an item and price to another item. This line action copies all underlying information viewed on the Advanced List Price Maintenance - Customers screen,

PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

21=Unit of Measure

Display a list of all the units of measure in Infor ERP LX.

25=Item Discount Code Lookup

Display a list of codes and their descriptions.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Line actions:

The following line actions are available:

11=Bracket Prices

If this advanced list price uses a bracket group, display the bracket breaks and prices for that group in the Bracket Prices screen, PRO750.

14=Customers

Display the Advanced List Price Maintenance - Customers screen, PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

15=Copy All

Copy an item and price to another item. This line action copies all underlying information viewed on the Advanced List Price Maintenance - Customers screen, PRO180D4-01 or the Advanced List Price Maintenance - Customer Discount Code screen, PRO180D4-02.

21=Unit of Measure

Display a list of all the units of measure in Infor ERP LX.

25=Item Discount Code Lookup

Display a list of codes and their descriptions.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Reference:

Infor ERP LX displays the name of the list price.

Sequence:

Infor ERP LX displays the sequence number for the list price. Multiple sequences can exist within a single reference code.

Price Structure:

Infor ERP LX displays the price structure. You must link an advanced list price to a price structure. You maintain price structures in Price Structure Maintenance, PRO176.

Company:

Infor ERP LX displays the company. Advanced list price information is valid only for transactions for this company. You maintain companies in the Company Master program, ACR120.

Currency:

Infor ERP LX displays the currency. Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Start Date:

Infor ERP LX displays the start date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

End Date:

Infor ERP LX displays the end date for this advanced list price. To qualify during order entry, the price book date must fall within the start date-end date range on this screen.

Bracket Group:

Infor ERP LX displays the bracket group code, if any, for this price structure. You maintain bracket codes in List Price Bracket Group Code Maintenance, PRO160.

Bracket Type:

Bracket groups are based on units, weight, or volume.

Valid choices

- 0
Units
 - 1
Weight
-

- **2**
Volume

FOB Flag:

Specify one of the following values:

Valid choices

- **0=Regular**
Normal freight charges apply.
- **1=Special**
For example, freight charges do not apply or the system builds the freight charge into the pricing structure.

Price Options:

Infor ERP LX displays the price option. The details of the pricing structure you entered for this advanced list price determine the price option. If the Price Options Flag field in the pricing structure specifies Yes, the system includes a price option in this advanced list price. If the Price Options Flag field is specifies No, this field is blank. You maintain price structures in Price Structure Maintenance, PRO176.

Requirements Code:

The system uses the value from the price structure or you can specify any valid requirements code. You maintain requirements in Requirements Group Maintenance, PRO170.

Description 1:

Infor ERP LX displays a description of this advanced list price.

Description 2:

Infor ERP LX displays an additional description of this advanced list price.

Facility:

The system displays a value that depends on the details of the pricing structure associated with this advanced list price. If the Facility field in the pricing structure specifies Yes, the system displays a pricing facility. You maintain price structures in Price Structure Maintenance, PRO176.

Region:

The system displays a value that depends on the details of the pricing structure associated with this advanced list price. If the Region field in the pricing structure specifies Yes, the system displays a pricing region. You maintain price structures in Price Structure Maintenance, PRO176.

Item Discount Code (2,A):

You can specify a value in this field only in Create mode. You can specify line action 25 to see a list of list of item discount codes and descriptions.

Base Price (14,4):

Specify the base price. If the bracket type is units, the system defines prices in the item's pricing unit of measure. If the bracket type is weight or volume, the system defines prices in the common system unit of measure. Infor ERP LX converts these to stocking and selling unit of measure and to base currency as required during order entry.

Specify prices in the currency defined for this advanced list price. The system displays the currency on this screen. Only transactions in this currency qualify for this list price.

The price must be greater than or equal to 0.

Screen actions - PRO180D3-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Copy items or discount codes

Use the Copy Window, PRO180D3-03, to copy items or item discount codes. The system displays this window if you specify line 15 on the Item Discount Code screen, PRO180D3-02, or the Item screen, PRO180D3-01.

Field descriptions - PRO180D3-03**Item Number (35,A):**

Infor ERP LX displays the number to copy from. You can specify the item to copy to.

Item Discount Code (2,A):

Infor ERP LX displays the item discount code to copy from. You can specify the item discount code to copy to.

Screen actions - PRO180D3-03

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select the customers to qualify for the advanced list price

Use the Advanced List Price Maintenance - Customers screen, PRO180D4-01, to add the customers who qualify for this advanced list price. Infor ERP LX displays the existing records for the selected item number, sequenced by ascending customer number.

Field descriptions - PRO180D4-01

Actions (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

15=Bracket Prices

If this advanced list price uses a bracket group, display the bracket breaks and prices for that group in the Bracket Prices screen, PRO750.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Reference:

Infor ERP LX displays the name for the list price.

Sequence (3,0):

Infor ERP LX displays the sequence number for the list price. Within a single reference code, multiple sequences can exist.

Base Price

The system displays the base price you entered. If the bracket type is units, the system defines prices in the item's pricing unit of measure. If the bracket type is weight or volume, the system defines prices in the common system unit of measure. Infor ERP LX converts these to stocking and selling unit of measure and to base currency as required during order entry.

Item Discount Code

The system displays this field only if the Item Format field for the pricing structure (PRO176) has a value of 2 for item discount code. Infor ERP LX displays the item discount code you entered.

Pricing Unit of Measure:

This system uses the value from one of the following sources, depending on the bracket code:

0=Units

The unit of measure comes from the Item Master, INV100

1=Weight

The unit of measure comes from the common system weight.

2=Volume

The unit of measure comes from the common system volume

Item Number:

This system displays this field only if the Item Format field for the price structure (PRO176) has a value of 1 for item number. Infor ERP LX displays the item number you entered.

Currency:

Infor ERP LX displays the currency. Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Customer Number (8,0):

Specify a customer number. You can specify a pricing customer, sold-to customer, ship-to customer, accounts receivable customer, or any other valid customer number. You can specify a value in this field only in Create mode.

Ship To Number (4,0):

This system displays this field only if the Customer Format field for the price structure (PRO176) has a value of 5 for ship-to customer. You can specify a value in this field only in Create mode.

Screen actions - PRO180D4-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Select the discount codes to qualify for the advanced list price

Use the Advanced List Price Maintenance - CDC screen, PRO180D4-02, to add the customer discount codes that qualify for this advanced list price. Infor ERP LX displays the existing records for the selected item discount code, sequenced by ascending customer discount code.

Field descriptions - PRO180D4-02

Actions (2,0):

Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

11=Bracket Prices

If this advanced list price uses a bracket group, display the bracket breaks and prices for that group in the Bracket Prices screen, PRO750.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Reference:

Infor ERP LX displays the name of the list price.

Sequence:

Infor ERP LX displays the sequence number for the list price. Multiple sequences can exist within a single reference code.

Base Price:

The system displays the base price you entered. If the bracket type is units, the system defines prices in the item's pricing unit of measure. If the bracket type is weight or volume, the system defines prices in the common system unit of measure. Infor ERP LX converts these to stocking and selling unit of measure and to base currency as required during order entry.

Item Discount Code:

The system displays this field only if the Item Format field for the pricing structure (PRO176) has a value of 2 for item discount code. Infor ERP LX displays the item discount code you entered.

Pricing Unit of Measure:

This system uses the value from one of the following sources, depending on the bracket code:

Valid choices

- **0=Units**
The unit of measure comes from the Item Master, INV100
- **1=Weight**
The unit of measure comes from the common system weight.
- **2=Volume**
The unit of measure comes from the common system volume

Item Number:

This system displays this field only if the Item Format field for the price structure (PRO176) has a value of 1 for item number. Infor ERP LX displays the item number you entered.

Currency:

Infor ERP LX displays the currency. Advanced list price information is valid only for transactions that use this currency. You maintain currencies in the Currency Code program, CLD107.

Customer Discount Code (2,A):

You can specify a value in this field only in Create mode. Infor ERP LX displays the customer discount code.

Screen actions - PRO180D4-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price report

Use the List Price Report program, PRO185, to produce a list of your advanced list prices. The report includes data entered in Advanced List Price, PRO180.

Print an advanced list price report

Use the Advanced List Price Report screen, PRO185D-01, to specify the information to print on the advanced list price report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO185D-01**From/To Reference (10,A):**

Specify a range of values to limit the advanced list price reference numbers to include in the report.

From/To Sequence (3,0):

Specify a range of values to limit the sequence numbers to include in the report.

From/To Item Number (35,A):

Specify a range of values to limit the item numbers to include in the report.

From/To Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the report.

From/To Customer (8,0):

Specify a range of values to limit the customer numbers to include in the report.

From/To Ship-to (3,0):

Specify a range of values to limit the ship-to numbers to include in the report. If you use ship-to numbers, only the ship-to numbers for the lower customer number apply.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report. The system displays extreme values by default in this field. See the overview information in this document.

From/To Facility (3,A):

Specify a range of values to limit the facilities to include in the report.

From/To Region (6,A):

Specify a range of values to limit the regions to include in the report.

From/To Price Structure (6,A):

Specify a range of values to limit the price structures to include in the report.

FOB Flag (1,0):

You can specify * to include both 1 and 0.

Valid choices

- **0=Regular**
Normal freight charges apply.
- **1=Special**
For example, freight charges do not apply or the system builds freight charges into the pricing structure.

Price Options (1,A):

Specify a price option or * for all price options. You maintain price options in Table Definition, SYS105.

From/To/Created/Revised Date (6,0):

Specify a range of dates to limit the information to include in the report.

From/To/Created/Revised User (10,A):

Specify a user to limit the information to include in the report by a specific user.

Report Sequence (1,A):

You can sequence the report in the following ways:

Valid choices

- **0**
By reference code
- **1**
By item number
- **2**
By customer number

Screen actions - PRO185D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Charge/allowance assignment

Use Charge/Allowance Assignment, PRO190, to create and modify charges or allowances to build as a special line.

Add or select a charge or allowance code

On the Charge/Allowance Assignment selection screen, PRO190D1-01, use the line actions to select a charge or allowance code to maintain. To create a charge or allowance code, specify 1 on the first line and specify a name, facility, and method.

Field descriptions - PRO190D1-01

Allowance Code (10,A):

Specify a code for the allowance to create or maintain. You maintain the codes in the Shipment Charge program, OLM162.

Facility (3,A):

Optional. Specify the pricing facility or the actual facility associated with this code. Use the pricing facility if the Pricing Facility field in Promotions and Deals System Parameters, SYS820, specifies Yes.

Charge/Allowance Method (1,A):

Required. Specify a valid method. You maintain the methods in the Charge/Allowance Method program, PRO195.

Screen actions - PRO190D1-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view charge/allowance assignment details

Use the Charge/Allowance Assignment Detail screen, PRO190D2-01, to specify the details for this charge/allowance.

Field descriptions - PRO190D2-01

Allowance Code:

Infor ERP LX displays the allowance code. You can specify a value only in Copy mode.

Facility:

Infor ERP LX displays the facility. You can specify a value only in Copy mode.

Allowance Method:

Infor ERP LX displays the allowance method. You can specify a value only in Copy mode. You maintain the methods in Charge/Allowance Method, PRO195.

Start Date (6,0):

Specify the date when this charge/allowance becomes effective.

End Date (6,0):

Specify the date when this charge/allowance ends.

Description (30,A):

Specify a description of this charge/allowance.

Allowance Type (1,A):

Specify a valid allowance type. You maintain allowance types in the Table Definition program, SYS105.

Eligible for Credit Orders (1,0):

Specify one of the following values:

0

Applies to orders only

1

Applies to returns and RMAs

2

Applies to RMAs only

3

All

Screen actions - PRO190D2-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or select a charge/allowance qualifier

Use the Advanced List Price Maintenance qualifiers screen, PRO190D3-01, to create and maintain more details for this charge/allowance. The fields on this screen vary based on the Charge/Allowance method. These methods are maintained in the Charge/Allowance Method program, PRO195.

For example, if the method is by region and item discount code, then the customer, ship-to, customer discount code, and item fields are not displayed. If the method is by item number and customer discount code, then the customer, ship-to, item discount code and region fields are not displayed.

Field descriptions - PRO190D3-01

Allowance Code:

Infor ERP LX displays the allowance to maintain.

Facility:

Infor ERP LX displays the facility for this allowance.

Start Date:

Infor ERP LX displays the start date for this allowance.

Allowance Method:

Infor ERP LX displays the method for this allowance. You maintain the methods in Charge/Allowance Method, PRO195.

End Date:

Infor ERP LX displays the end date for this allowance.

Customer Number (8,0):

Specify a customer for this allowance.

Ship-to Number (4,0):

Specify a ship-to number.

Item Discount Code (2,A):

Specify an item discount code.

Customer Discount Code (2,A):

Specify a customer discount code.

Item Number (35,A):

Specify an item.

Region (6,A):

Specify a region.

Screen actions - PRO190D3-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view charge/allowance code details

Use the Charge/Allowance Method Maintenance screen, PRO190D3-02, to maintain the details of the allowance code. The fields on this screen vary depending on the Charge/Allowance method. You maintain these methods in the Charge/Allowance Method program, PRO195.

Field descriptions - PRO190D3-02

Allowance Code:

Infor ERP LX displays the allowance code to maintain.

Facility:

Infor ERP LX displays the facility that uses this allowance code.

Start Date:

Infor ERP LX displays the date the allowance becomes effective.

Method:

Infor ERP LX displays the allowance method associated with this allowance code.

End Date:

Infor ERP LX displays the date the allowance code is no longer effective.

Customer Number (8,0):

Specify the customer this allowance code applies to.

Ship-to Number (4,0):

Specify the ship-to number for this customer.

Customer Discount Code (2,A):

Specify the customer discount code.

Region (6,A):

Specify the region.

Item Number (35,A):

Specify the item.

Item Discount Code (2,A):

Specify the item discount code.

Screen actions - PRO190D3-02**F15=Copy and Accept**

Complete the copy action and add the record to the file. The system displays this screen action only if you specify copy.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Charge/allowance assignment listing

Use Charge/Allowance Assignment Listing, PRO191, to produce a list of your charge/allowance codes.

Print a charge/allowance assignment report

Use the Charge/Allowance Assignment Listing screen, PRO191D-01, to specify the charges or allowances to print on the advanced list price report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO191D-01**From/To Allowance Code (10,A):**

Specify a range of values to limit the allowance codes to include on the report.

From/To Facility (3,A):

Specify a range of values to limit the facilities to include in the report.

From/To Allowance Method (1,A):

Specify a range of values to limit the allowance methods to include in the report.

Effective Date (6,0):

Infor ERP LX selects charges or allowances for which the effective date is within the start and end date range defined in Charge/Allowance Assignment, PRO190. Specify a date of 99/99/99 to display all charges or allowances with an end date of 99/99/99 (permanent).

From/To Sold-to Customer (8,0):

Specify a range of values to limit the sold-to customers to include in the report.

From/To Ship-to Customer (8,0):

Specify a range of values to limit the ship-to customers to include in the report.

From/To Ship-to Code (4,0):

Specify a range of values to limit the ship-to codes to include in the report.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report.

From/To Region (6,A):

Specify a range of values to limit the regions to include in the report.

From/To Item Number (35,A):

Specify a range of values to limit the item numbers to include in the report.

From/To Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the report.

Record Type (1,A):

Specify a code for the allowance to create or maintain. You maintain the codes in the Shipment Charge program, OLM162.

1=Active records

2=All records

Screen actions - PRO191D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Allowance method maintenance

Use Allowance Method Maintenance, PRO195, to add and maintain charge/allowance method codes.

Add or select a charge/allowance method

Use the Charge/Allowance Method Selection screen, PRO195D01 to add an allowance method or to select an allowance method to revise or display.

Field descriptions - PRO195D-01

Method (1,A):

Specify an allowance method. The following methods are reserved and ship with Infor ERP LX.

A=Ship-to customer and ship-to number and item

B=Ship-to Customer and Ship-to number and item discount code

C=Ship-to customer and ship-to number

D=Sold-to customer and item

E=Sold-to customer and item discount code

F=Sold-to customer

G=Customer discount code and item

H=Customer discount code and item discount code

J=Customer discount code

K=Region and item

L=Region and item discount code

M=Region

N=Item

P=Item discount code

Sequence (3,0):

If you filter this screen by Sequence number, you can specify line action 8 to begin the list with a specific sequence number.

Screen actions - PRO195D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add, maintain, or view charge/allowance method details

Use the Charge/Allowance Method Maintenance detail screen, PRO195D2-01, to maintain the details for the method.

Field descriptions - PRO195D-02

Method:

Infor ERP LX displays the method to maintain.

Sequence (3,0):

This number must be unique. Create sequence numbers in increments of 10 to allow for insertion.

Method Description (30,A):

Specify a description of this method.

Screen actions - PRO195D-02

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Charge/allowance method listing

Use Charge/Allowance Method Listing, PRO196, to generate a list of charge/allowance codes.

Print a charge/allowance method report

Use the Charge/Allowance Method Listing screen, PRO196D-01, to specify whether to print all allowance methods or only active allowance methods in the report.

Field descriptions - PRO196D-01

Record Type (1,A):

Specify one of the following values:

1=Active records

2=All records

Screen actions - PRO196D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Performance report by item information

Use the Summary Performance Report by Item Information, PRO210 to print a summary promotion performance report by item.

Use the Detail Performance Report by Item Information, PRO212B, to print a detail promotion performance report by item.

Infor ERP LX prints the following report fields from the Promotions and Deals Master file, PDM:

- Company
- Promotion Number and Line Number
- Promotion Terms Code
- Projected Quantity
- Projected Amount
- Actual Quantity
- Actual Amount
- Quantity Variance (Projected Quantity - Actual Quantity)
- Amount Variance (Projected Amount - Actual Amount)
- Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
- Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
- Discount Remaining (Discount Offered - Discount Taken)
- Free Good Item or Cash Value Item
- Currency
- Promotion Period
- Promotion Start Date and End Date

Access: PRO01 menu

Print a promotion summary report by item

Use the Item Promotion Summary Report screen, PRO210D-01, to specify the information to print on the item promotion summary report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO210D-01**Item Class (2,A):**

Specify a range of values to limit the item class codes to include in the report. Infor ERP LX uses all item class codes as the default value.

Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the report. Infor ERP LX uses all item discount codes as the default value.

Item Number (35,A):

Specify a range of values to limit the item numbers to include in the report. Infor ERP LX uses a blank value for all items.

Bracket Group Code (2,A):

Specify a range of values to limit the bracket group codes to include in the report.

Sequence (1,0):

The system sequences reports by item class, item discount code, item number, and bracket group code. To specify a different sequence, specify the numbers 1 through 4 in the appropriate sequence.

If you specify item number for the primary sequence, you cannot specify a further sequence. You can specify the following sequences:

- By Item Number
- By Item Discount Code/Item Number
- By Item Class/Item Number
- By Bracket Group Code/Item Number
- By Item Discount Code/Item Class/Item Number
- By Item Class/Item Discount Code/Item Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO210D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Print a promotion detail report by item

Use the Item Promotion Detail Report screen, PRO212D-01, to specify the information to print on the item promotion detail report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Infor ERP LX prints the following report fields from the Promotions and Deals Tracking file, PDT; and fields from other files as noted:

- Company
- Promotion Number and Line Number
- Promotion Terms Code from Promotion Master file, PDM
- Invoice Number and Line Number
- Order Number and Line Number
- Item Number
- Item Description from Item Master file, IIM
- Customer Number
- Customer Name from Customer Master file, RCM
- Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
- Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
- Discount Balance (Discount Offered - Discount Taken)
- Currency
- Quantity Invoiced

Access: PRO01 menu

Field descriptions - PRO212D-01**Item Class (2,A):**

Specify a range of values to limit the item class codes to include in the report. Infor ERP LX uses all item class codes as the default value.

Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the report. Infor ERP LX uses all item discount codes as the default value.

Item Number (35,A):

Specify a range of values to limit the item numbers to include in the report. Infor ERP LX uses a blank value for all items.

Bracket Group Code (2,A):

Specify a range of values to limit the bracket group codes to include in the report.

Sequence (1,0):

The system sequences reports by item class, item discount code, item number, and bracket group code. To specify a different sequence, specify the numbers 1 through 4 in the appropriate sequence.

If you specify item number for the primary sequence, you cannot specify a further sequence. You can specify the following sequences:

- By Item Number
- By Item Discount Code/Item Number
- By Item Class/Item Number
- By Bracket Group Code/Item Number
- By Item Discount Code/Item Class/Item Number
- By Item Class/Item Discount Code/Item Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO212D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Performance report by customer information

Use the Summary Performance Report by Customer Information, PRO220, to print a summary promotion performance report by customer.

Use the Detail Performance Report by Customer Information, PRO222B to print a detail promotion performance report by customer.

The system prints the following report fields from the Promotions and Deals Master file, PDM:

- Company
 - Promotion Number and Line Number
 - Promotion Terms Code
 - Projected Quantity
 - Projected Amount
 - Actual Quantity
 - Actual Amount
 - Quantity Variance (Projected Quantity - Actual Quantity)
 - Amount Variance (Projected Amount - Actual Amount)
 - Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
 - Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
 - Discount Remaining (Discount Offered - Discount Taken)
 - Free Good Item or Cash Value Item
 - Currency
 - Promotion Period
 - Promotion Start Date and End Date
-

Access: PRO01 menu

Print a promotion summary report by customer

Use the Customer Promotion Summary Report screen, PRO220-01, to specify the information to print on the promotion summary report by customer.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO220D-01

Customer Number (8,0):

Specify a range of values to limit the customer numbers to include in the report. Infor ERP LX uses all customers as the default value.

Customer Type (4,A):

Specify a range of values to limit the customer type codes to include in the report. Infor ERP LX uses all customer types as the default value.

Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report. Infor ERP LX uses all customer discount codes as the default value.

Ship-To (4,0):

Specify a range of values to limit the ship-to numbers to include in the report. Infor ERP LX uses all ship-to numbers for the customer in the Customer Number field as the default value.

Region (6,A):

Specify a range of values to limit the regions to include in the report.

You define regions in System Table Maintenance, SYS105D1 and assign the regions to customers in Customer Master Maintenance, ACR100. You can also assign promotion region codes to customer ship-to records in Ship-To Master Maintenance, ORD100.

Sequence (1,0):

The system sequences reports by region, customer discount code, customer type, then customer number. To specify a different sequence, specify the numbers 1 through 4 in the appropriate sequence.

If you specify customer number for the primary sequence, you cannot specify a further sequence. You can specify the following sequences:

- By Customer Number
-

- By Customer Type/Customer Number
- By Customer Discount Code/Customer Number
- By Region/Customer Number
- By Customer Type/Customer Discount Code/Customer Number
- By Customer Discount Code/Customer Type/Customer Number
- By Region/Customer Type/Customer Number
- By Customer Type/Region/Customer Number
- By Customer Discount Code/Region/Customer Number
- By Region/Customer Discount Code/Customer Number
- By Customer Discount Code/Region/Customer Type/Customer
- By Customer Discount Code/Customer Type/Region/Customer
- By Region/CDC/Customer Type/Customer Number
- By Region/Customer Type/CDC/Customer Number
- By Customer Type/Region/CDC/Customer Number
- By Customer Type/CDC/Region/Customer Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO220D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Print a promotion detail report by customer

Use the Customer Promotion Detail Report screen, PRO222D-01, to specify the information to print on the customer promotion detail report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Infor ERP LX prints the following report fields from the Promotions and Deals Tracking file, PDT; and fields from other files as noted:

- Company
- Promotion Number and Line Number
- Promotion Terms Code from Promotion Master file, PDM
- Invoice Number and Line Number
- Order Number and Line Number
- Item Number
- Item Description from Item Master file, IIM
- Customer Number
- Customer Name from Customer Master file, RCM
- Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
- Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
- Discount Balance (Discount Offered - Discount Taken)
- Currency
- Quantity Invoiced

Access: PRO01 menu

Field descriptions - PRO222D-01

Customer Number (8,0):

Specify a range of values to limit the customer numbers to include in the report. Infor ERP LX uses all customers as the default value.

Customer Type (4,A):

Specify a range of values to limit the customer type codes to include in the report. Infor ERP LX uses all customer types as the default value.

Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report. Infor ERP LX uses all customer discount codes as the default value.

Ship-To (4,0):

Specify a range of values to limit the ship-to numbers to include in the report. Infor ERP LX uses all ship-to numbers for the customer in the Customer Number field as the default value.

Region (6,A):

Specify a range of values to limit the regions to include in the report.

You define regions in System Table Maintenance, SYS105D1 and assign the regions to customers in Customer Master Maintenance, ACR100. You can also assign promotion region codes to customer ship-to records in Ship-To Master Maintenance, ORD100.

Sequence (1,0):

The system sequences reports by region, customer discount code, customer type, then customer number. To specify a different sequence, specify the numbers 1 through 4 in the appropriate sequence.

If you specify customer number for the primary sequence, you cannot specify a further sequence. You can specify the following sequences:

- By Customer Number
- By Customer Type/Customer Number
- By Customer Discount Code/Customer Number
- By Region/Customer Number
- By Customer Type/Customer Discount Code/Customer Number
- By Customer Discount Code/Customer Type/Customer Number
- By Region/Customer Type/Customer Number
- By Customer Type/Region/Customer Number
- By Customer Discount Code/Region/Customer Number
- By Region/Customer Discount Code/Customer Number
- By Customer Discount Code/Region/Customer Type/Customer
- By Customer Discount Code/Customer Type/Region/Customer
- By Region/CDC/Customer Type/Customer Number
- By Region/Customer Type/CDC/Customer Number
- By Customer Type/Region/CDC/Customer Number
- By Customer Type/CDC/Region/Customer Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO222D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Summary performance report by promotion info

Use Summary Performance Report by Promotion Information, PRO230, to print the summary promotion performance report by promotion number.

The system prints the following report fields from the Promotions and Deals Master file, PDM:

- Company
 - Promotion Number and Line Number
 - Promotion Terms Code
 - Projected Quantity
 - Projected Amount
 - Actual Quantity
 - Actual Amount
 - Quantity Variance (Projected Quantity - Actual Quantity)
 - Amount Variance (Projected Amount - Actual Amount)
 - Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
 - Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
 - Discount Remaining (Discount Offered - Discount Taken)
 - Free Good Item or Cash Value Item
 - Currency
-

- Promotion Period
- Promotion Start Date and End Date

Access: PRO01 menu

Print a promotion summary report by promotion

Use the Promotion Summary Report screen, PRO230-01, to specify the information to print on the promotion summary report by promotion number.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO230D-01

Promotion Period/Year (2,0)/(4,0):

Specify a range of values to limit the promotion periods and years to include in the report. Both fields are required if you specify a value in either field. Infor ERP LX uses all promotion periods/years as the default value.

Period-based reports include all promotions defined for that period, even if you override the start date or end date for that period in Promotion Master Maintenance.

Promotion Number (6,0):

Infor ERP LX defaults to blanks for all promotions. Specify a range of values to limit the promotion numbers to include in the report. Specify an upper limit to exclude all records for which this field is blank.

Sequence (1,0):

The system sequences reports by promotion period/year, then promotion number. To specify a different sequence, specify 1 for primary sequencing and 2 for the remaining Sequence field.

Two different reports are available:

- By Period/Year and Promotion Number
- By Promotion Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Run Time Parameter (1,0):

Specify interactive to process the data in real time or batch to process the data in the job queue. If you specify interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PRO230D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Detail performance report by promotion information

Use Detail Performance Report by Promotion Information, PRO232B, to print the detail promotion performance report by promotion number.

Infor ERP LX prints the following report fields from the Promotions and Deals Tracking file, PDT, and fields from other files as noted:

- Company
 - Promotion Number and Line Number
 - Promotion Terms Code from Promotion Master file, PDM
 - Invoice Number and Line Number
 - Order Number and Line Number
 - Item Number
 - Item Description from Item Master file, IIM
 - Customer Number
 - Customer Name from Customer Master file, RCM
 - Discount Offered (Total Discount Offered + Total Split Off Invoice Discount Offered + Total Split Bill Back Discount Offered)
 - Discount Taken (Total Discount Taken + Total Split Off Invoice Discount Taken + Total Split Bill Back Discount Taken)
 - Discount Balance (Discount Offered - Discount Taken)
 - Currency
 - Quantity Invoiced
-

Access: PRO01 menu

Print a promotion detail report by promotion

Use the Promotion Detail Report screen, PRO232D-01, to specify the information to print on the promotion detail report by promotion number.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document

Field descriptions - PRO232D-01

Promotion Period/Year (2,0)/(4,0):

Specify a range of values to limit the promotion periods and years to include in the report. Both fields are required if you specify a value in either field. Infor ERP LX uses all promotion periods/years as the default value.

Period-based reports include all promotions defined for that period, even if you override the start date or end date for that period in Promotion Master Maintenance.

Promotion Number (6,0):

Infor ERP LX defaults to blanks for all promotions. Specify a range of values to limit the promotion numbers to include in the report. Specify an upper limit to exclude all records for which this field is blank.

Sequence (1,0):

The system sequences reports by promotion period/year, then promotion number. To specify a different sequence, specify 1 for primary sequencing and 2 for the remaining Sequence field.

Two different reports are available:

- by Period/Year and Promotion Number
- by Promotion Number

The system prints the filters and sequence you selected in the report, and reprints the sequence each time the field value changes. The system further sequences the report by promotion number and line number.

Print Notes (1,A):

Infor ERP LX uses Yes as the default value to include promotion notes after each promotion summary line. Otherwise, specify No.

Completed Promotions? (1,A):

Infor ERP LX uses Yes as the default value to include both active and inactive (completed) promotions in the summary report. Otherwise, specify No.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file; PDM. Inactive promotions have an ID of DZ.

Screen actions - PRO232D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Special price

The Special Price program, PRO240D, prints a list of all special pricing methods that you define in Special Price Maintenance, PRO140. The report prints by pricing method and then company number.

Screens:

Special Price Listing, PRO240D-01

Print a special price report

Use the Special Price Listing screen, PRO240D-01, to specify the information to print on the special price report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO240D-01

From/To Pricing Method (1,A):

Specify a range of values to limit the pricing methods to include in the report.

If you set pricing by customer, specify one of the following values:

Method 0

Multi-Currency - Base price/item alone

Method 1

Item/Customer - item ordered and customer who places the order

Method 2

Customer - customer who places the order only

Method 3

Item - item ordered only

Method 4

Item Discount Code/Customer - discount class of the item from the item master and customer who places the order

Method 5

Item Discount Code - discount class of the item from the item master

Method 6

Customer Discount Code - discount class of the customer from the customer master

Method 7

Item/Customer Discount Code - item ordered and discount class of the item

Method 8

Item Discount Code/Customer Discount Code - discount class of the item and discount class of the customer

Method T

Total Order Discount

If you price by salesperson, you can use one of the following pricing methods:

Method 0

Multi-Currency - Base price/item alone

Method 1

Item/Salesperson - item ordered and salesperson number

Method 2

Salesperson - salesperson number only

Method 3

Item - item ordered only

Method 4

Item Discount Code/Salesperson - discount class of the item and salesperson number

Method 5

Item Discount Code - discount class of the item only

Total Order Discount

From/To Company (2,0):

Specify a range of values to limit the companies to include in the report.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to include in the report.

From/To Start Date (8,0):

Specify a range of dates to limit the start dates for defined pricing methods to include in the report.

From/To Item (35,A):

Specify a range of values to limit the items to include in the report.

From/To Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the report.

From/To Customer (8,0):

Specify a range of values to limit the customer numbers or salesperson numbers to include in the report. The system displays this field for the customer or the salesperson depending on whether you set the order entry parameter to use the customer number or the salesperson number for special pricing.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report. The system displays this field only if you set the order entry parameter to use the customer number for special pricing.

Record Status (1,0):

Specify whether to include all special prices or only the active special prices in the report.

Screen actions - PRO240D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price book

Use the List Price Book program, PRO250D, to print a list of all list price methods that you define in List Price Maintenance, PRO150. The report prints by pricing method and then company number. Some filter options apply only to specific pricing methods, as indicated in the descriptions of the individual filter fields.

Screen:

List Price Book List, PRO250D-01

Print a list price report

Use the List Price Book List screen, PRO250D-01, to specify the information to include in the report.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO250D-01

Pricing Method (1,A):

Specify a range of values to limit the pricing method codes to include in the report. Specify one of the following values:

9	Cost-Plus List Price
0	Multi-Currency - Base price/item alone*
A	Item/Customer
B	Item/Region
C	Item/Customer Discount Code
D	Item/Facility

From/To Company (2,0):

Specify a range of values to limit the companies to include in the report. This filter applies to all pricing methods.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to include in the report. This filter applies to all pricing methods.

From/To Start Date (8,0):

Specify a range of dates to limit the start dates to include in the report. This filter applies to all pricing methods.

From/To Item (35,A):

Specify a range of values to limit the item numbers to include in the report. This filter applies to all pricing methods.

From/To Customer (8,0):

Specify a range of values to limit the customer numbers to include in the report. This filter applies to pricing method A only.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the report. This filter applies to pricing method C only.

From/To Region (6,A):

Specify a range of values to limit the regions to include in the report. This filter applies to pricing method B only.

From/To Facility (4,A):

Specify a range of values to limit the facilities to include in the report. This filter applies to pricing methods D and 9 only.

Record Status (1,0):

Specify whether to include all list prices or only the active list prices in the report.

Screen actions - PRO250D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion inquiry

Use Promotion Inquiry, PRO300, to display information about promotions (PDM file) and promotion tracking (PDT) information.

Select criteria to display promotions

Use the Promotions and Deals Inquiry selection screen, PRO300-01, to specify criteria for your inquiry. Depending on the criteria you specify, the system displays the appropriate promotion inquiry fold screen..

Field descriptions - PRO300-01**Promotion Number (6,0):**

Specify a promotion number to view promotion information for this promotion number.

Item Number (35,A):

Specify an item number to view promotion information for this item.

Customer Number (8,0):

Specify a customer number to view promotion information for this customer.

(Customer) Ship-To (4,0):

Specify a ship-to number to view promotion information for this customer and ship-to number. You must specify a customer number if you specify a ship-to number.

Customer Type (4,A):

Specify a customer type to view promotion information for this customer type.

Customer Discount Code (2,A):

Specify a customer discount code to view promotion information for this customer discount code.

Item Class (2,A):

Specify an item class to view promotion information for items defined in this item class.

Item Discount Code (2,A):

Specify an item discount code to view promotion information for this item discount code.

Bracket Group Code (6,A):

Specify a bracket group code to display view promotion information for this bracket group code.

Region (6,A):

Specify a region code to view promotion information for customer orders from that region. The system uses the region from the ship-to number for the customer order; or if no ship-to number exists, the promotion region from the Customer Master file.

Period (2,0):

Specify a period to view promotion information for that year. If you specify a period, you must specify a year.

Period-based inquiries include all promotions defined for that period, even if you override the start date or end date for that period in Promotion Master Maintenance.

Year (4,0):

If you specify a year to view promotion information for that year. If you specify a year, you must specify a period.

Include Completed Promotions (1,A):

The system uses No as the default value for open promotions only. Specify Yes to include completed promotions in the displayed inquiry information.

A promotion is completed if you deleted the promotion in Promotion Master Maintenance, PRO110. Active promotions have an ID of DM in the Promotion Master file, PDM; inactive records have an ID of DZ.

Screen actions - PRO300-01**F13=Performance**

Display performance screens for the requested data. Infor ERP LX displays the data on the appropriate promotion inquiry detail screen.

F14=Sales Inquiry

Access Sales History Inquiry, SAL300.

All other screen actions on this screen perform standard Infor ERP LX functions. See the overview information in this document.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

View the promotion list

If you specify criteria other than the promotion number for your inquiry, the system displays the Promotions and Deals Inquiry list fold screen, PRO300-02. Use F11 to view additional information.

Field descriptions - PRO300-02**Selection Value (15,A)/(30,A):**

Infor ERP LX displays the selection value you requested on the first Promotions and Deals Inquiry selection screen, PRO300-01. The screen also displays a description of the selection value.

Act (2,A):

Specify the number for the line action to perform and press Enter.

10=Details

Display the detail for this promotion line on the Promotion Master Maintenance screen, PRO110D2-01.

11=Notes

Display the notes for this promotion line on the Promotions and Deals Notes Maintenance screen, PRO120-01.

Promotion Number/Line Number (6,0/3,0):

Infor ERP LX displays the promotion number and line number.

Term (1,A):

Infor ERP LX displays the promotion terms code for this promotion.

- | | |
|----|--|
| 1. | Off Invoice at Line Item Level |
| 2. | Bill Back at Line Item Level |
| 3. | Off Invoice at Total Order Level |
| 4. | Bill Back at Total Order Level |
| 5. | Split at Line Level (Off Invoice) |
| 6. | Split at Total Order Level (Off Invoice) |
| 7. | Split at Line Item Level (Bill Back) |
| 8. | Split at Total Order Level (Bill Back) |

Discount (13,3):

Infor ERP LX displays the discount amount for the method in the Method field.

Method (7,A):

Infor ERP LX displays the discount method for this promotion line.

Price

The amount in the Discount field is the actual price used in the promotion.

Amount

The amount in the Discount field is the discount amount off promotion price basis value.

Percent

The amount in the Discount field is a percentage of the promotion price basis value.

Examples:**Price**

If the promotion price basis is 100, and the discount price is 90, the Discount field shows 90.000 (actual net price).

Amount

If the promotion price basis is 100, and the promotion calls for 10 off (net price=90), the Discount field shows 10.00 (amount off list price).

Percent

If the promotion price basis is 100, and the promotion is set up for a 10% discount (net price=90), the Discount field shows 90.00 (percentage of list price).

Cur (3,A):

Infor ERP LX displays the currency code for this promotion line.

Start Date (6,0):

Infor ERP LX displays the start date for this promotion.

End Date (6,0):

Infor ERP LX displays the end date for this promotion.

DF (Date/Discount Flag) (1,A):

Infor ERP LX displays the date/discount value for this promotion line.

Valid choices**■ 0=Entry Date**

The promotion is effective if the order entry date (system date) falls within the promotion start and end dates.

■ 1=Request Date

The promotion is effective if the request date specified for the customer order line falls within the promotion start and end dates.

■ 2=Price Book Date

The promotion is effective if the price book date on the order or order lines falls within the start and end dates of the promotion. Price book date (booking date) is a date on which to base pricing activity. The user sets the booking date in order entry for the order or order lines.

■ **3=All**

The promotion is effective if the customer order entry date, the request date, and the price book date fall within the promotion start and end dates.

CF (Contract Flag) (1,A):

The system qualifies and assigns promotions in the following order:

1=Exclusive promotions

Only a single promotion applies, which uses various date and other qualifiers, unless by highly exceptional coincidence two essentially identical exclusive promotions exist.

If an exclusive promotion qualifies, whether it was assigned or not, the system does not search for other promotions.

2=Semi-exclusive

Only a single promotion applies, which uses various date and other qualifiers, unless by highly exceptional coincidence two essentially identical semi-exclusive promotions exist.

If a semi-exclusive promotion qualifies, whether it was assigned or not, the system does not search for other promotions with Contract Flag values of best discount, lowest discount, always assigned, or regular.

4=Best Discount

Only a single promotion applies, although the system analyzes all qualified best discount promotions. The system assigns the single promotion that results in the largest discount amount. You can manually remove this promotion, but you cannot assign other promotions if any promotion with a Contract Flag value of best discount is assigned.

If a Best Discount promotion qualifies, the system does not search for other promotions with Contract Flag values of lowest discount, always assigned, or regular.

A best discount promotion is not applicable for bracket promotions.

5=Lowest Discount

Only a single promotion applies, although the system analyzes all qualified lowest discount promotions. The system assigns the single promotion that results in the smallest discount amount offered. Surcharge or penalty-type promotions result in a negative discount amount offered, and in such cases the system assigns the largest penalty type promotion.

If a lowest discount promotion qualifies, the system does not search for other promotions with Contract Flag values of always assigned or regular.

A lowest discount promotion is not applicable for bracket promotions.

3=Always Assigned

The system may qualify and assign multiple promotions of this type. You cannot manually remove an always-assigned promotion.

An always assigned promotion is basically a regular promotion with a forced auto assignment character.

0=Regular

If there are no exclusive, semi-exclusive, best-discount, or lowest-discount promotions, the system may qualify and assign one or more regular promotions. You can mix regular promotions with always-assigned promotions.

If the Allow Best Price and Least Price Promotions field in Promotions and Deals System Parameters is set to No, the system does not search for best discount or lowest discount promotions.

Screen actions - PRO300-02

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

View the promotion list with additional fields

Use F11 from the Promotions and Deals Inquiry detail fold screen, PRO300-02, to display additional information on the Promotions and Deals Inquiry list fold screen, PRO300-03.

Field descriptions - PRO300-03

Split (13,3)/(13,3):

Infor ERP LX displays the off invoice and bill back split discounts. The Discount Method field, price, amount or percent, applies to both fields.

Tax (1,A):

Infor ERP LX displays the tax setting that indicates how to apply taxes on free goods promotions. The tax setting applies only to the customer order line created for the free good item.

Valid choices

- **0**
No tax applies to the free good item.
 - **1**
Tax applies at the rate defined for this customer and item. The customer pays the tax.
 - **2**
Tax applies at the rate defined for this customer and item. The seller pays the tax.
-

FG or CV Item (35,A):

Free goods or cash value item number. For free goods promotions, this field displays the free item offered. For cash value promotions, the discount is equal to the cash value of this item at its list price.

Screen actions - PRO300-03**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion List for a Promotion Number

Use this program to view the promotion list for promotion numbers.

View the promotion list for a promotion number

If you specify a promotion number for your inquiry, the system displays the Promotions and Deals Inquiry list fold screen, PRO300-04. Use F11 to view additional information.

This screen displays a summary of the lines that apply to the selected promotion. Specify line action 10 to display the detail for that line on the Promotion Master Maintenance screen, PRO110D2-01, in display mode; specify line action 11 to display the notes on the Promotions and Deals Notes Maintenance screen, PRO120-01.

Field descriptions - PRO300D2-04**Promotion Number (6,0):**

Infor ERP LX displays the promotion number you selected on the first Promotions and Deals Inquiry selection screen, PRO300-01.

Act (1,A):

Specify the number for the line action to perform and press Enter.

10=Detail

Display the detail for this promotion line on the Promotion Master Maintenance screen, PRO110D2-01.

11=Notes

Display the notes for this promotion line on the Promotions and Deals Notes Maintenance screen, PRO120-01.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

For the following fields, Infor ERP LX displays the combination of promotion categories defined for this promotion number:

Item Number (35,A):

Infor ERP LX displays the item number for this promotion.

Item Class (2,A):

Infor ERP LX displays the item class for this promotion.

ID (Item Discount Code) (2,A):

Infor ERP LX displays the item discount code for this promotion.

Bracket Group Code (2,A):

Infor ERP LX displays the bracket group code for this promotion.

Customer Number (8,0):

Infor ERP LX displays the customer number for this promotion.

(Customer) Ship-To (4,0):

Infor ERP LX displays the customer ship-to number for this promotion.

CD (Customer Discount Code) (2,A):

Infor ERP LX displays the customer discount code for this promotion.

(Customer) Type (4,A):

Infor ERP LX displays the customer type for this customer and promotion.

Reg (Region Code) (6,A):

Infor ERP LX displays the region code for this promotion.

Discount (13,3):

Infor ERP LX displays the discount amount that is used with the Method field.

Method (7,A):

Infor ERP LX displays the discount method for this promotion line.

Price

The amount in the Discount field is the actual price used in the promotion.

Amount

The amount in the Discount field is the discount amount off promotion price basis value.

Percent

The amount in the Discount field is a percentage of the promotion price basis value.

Examples:**Price**

If the promotion price basis is 100, and the discount price is 90, the Discount field shows 90.000 (actual net price).

Amount

If the promotion price basis is 100, and the promotion calls for 10 off (net price=90), the Discount field shows 10.00 (amount off list price).

Percent

If the promotion price basis is 100, and the promotion is set up for a 10% discount (net price=90), the Discount field shows 90.00 (percentage of list price).

Cur (3,A):

Infor ERP LX displays the currency code for this promotion line.

Screen actions - PRO300D2-04**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

View the promotion list for a promotion number with additional fields

Use F11 from the Promotions and Deals Inquiry detail fold screen, PRO300-04, to display additional details on the Promotions and Deals Inquiry detail fold screen, PRO300-05.

Field descriptions - PRO300D2-05**Term (1,A):**

Infor ERP LX displays the promotion terms code for this promotion.

1	Off Invoice at Line Item Level
2	Bill Back at Line Item Level
3	Off Invoice at Total Order Level
4	Bill Back at Total Order Level
5	Split at Line Level (Off Invoice)
6	Split at Total Order Level (Off Invoice)
7	Split at Line Item Level (Bill Back)
8	Split at Total Order Level (Bill Back)

Start Date/End Date (6,0):

Infor ERP LX displays the start date and end date for this promotion.

Discount Flag (1,A):

Infor ERP LX displays the discount option for this promotion line.

Valid choices

- **0 - Entry Date**
The promotion is effective if the order entry date (system date) falls within the promotion start and end dates.
 - **1 - Request Date**
The promotion is effective if the request date specified for the customer order line falls within the promotion start and end dates.
 - **2 - Price Book Date**
The promotion is effective if the price book date on the order or order lines falls within the start and end dates of the promotion. Price book date (booking date) is a date on which to base pricing activity. The user sets the booking date in order entry for the order or order lines.
 - **3 - All**
The promotion is effective if the customer order entry date, the request date, and the price book date fall within the promotion start and end dates.
-

Contract Flag (1,A):

The system qualifies and assigns promotions in the following order:

SL

1=Exclusive promotions

Only a single promotion applies, which uses various date and other qualifiers, unless by highly exceptional coincidence two essentially identical exclusive promotions exist.

If an exclusive promotion qualifies, whether it was assigned or not, the system does not search for other promotions.

2=Semi-exclusive

Only a single promotion applies, which uses various date and other qualifiers, unless by highly exceptional coincidence two essentially identical semi-exclusive promotions exist.

If a semi-exclusive promotion qualifies, whether it was assigned or not, the system does not search for other promotions with contract flags of best discount, lowest discount, always assigned, or regular.

4=Best Discount

Only a single promotion applies, although the system analyzes all qualified best discount promotions. The system assigns the single promotion that results in the largest discount amount offered. You can manually remove this promotion, but you cannot assign other promotions if any promotion with a Contract Flag value of best discount is assigned.

If a best discount promotion qualifies, the system does not search for other promotions with Contract Flag values of lowest discount, always assigned, or regular.

Not applicable for bracket promotions.

5=Lowest Discount

Only a single promotion applies, although the system analyzes all qualified lowest discount promotions. The system assigns the single promotion that results in the smallest discount amount offered. Surcharge or penalty-type promotions result in a negative discount amount offered, and in such cases the system assigns the largest penalty type promotion.

If a least discount promotion qualifies, the system does not search for other promotions with * values of always assigned or regular.

A best discount promotion is not applicable for bracket promotions.

3=Always Assigned

The system may qualify and assign multiple promotions of this type. You cannot manually remove an always-assigned promotion.

An always assigned promotion is basically a regular promotion with a forced auto assignment character.

0=Regular

If there are no exclusive, semi-exclusive, best-discount, or lowest-discount promotions, the system may qualify and assign one or more regular promotions. You can mix regular promotions with always-assigned promotions.

If the Allow Best Price and Least Price Promotions field in Promotions and Deals System Parameters is set to No, the system does not search for best discount or lowest discount promotions.

Split (14,4)/(14,4):

Infor ERP LX displays the off invoice and bill back split discounts. The Discount Method field, price, amount or percent, applies to both fields.

Tax (1,A):

The Tax field indicates how taxes should be applied on free goods promotions. This option applies only to the customer order line created for the free good item.

Valid choices

- **0= No Tax**
No tax applies to the free good item.
- **1= Payable by Customer**
Tax applies at the rate defined for this customer and item. The customer pays the tax.
- **2= Payable by Seller**
Tax applies at the rate defined for this customer and item. The seller pays the tax.

FG or CV Item (35,A):

Infor ERP LX displays the free goods or cash value item number. For free goods promotions, the system displays the free item offered. For cash value promotions, the discount is equal to the cash value of this item at its list price.

Screen actions - PRO300D2-05

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotions and deals performance inquiry

Access: F13 from Promotion and Deals Inquiry screen PRO300D1-01 brings up screen PRO300-09 when you have entered any of the following:

- Item Number
- Customer Number
- Item Class
- Item Discount Code
- Bracket Group Code
- Ship-To and Customer Number
- Customer Discount Code
- Customer Type

Display performance discount information

The Promotions and Deals Inquiry discount screen, PRO300-08, displays the total discount offered, discount taken, and remaining discount to be taken for each promotion and line. Use F11 to display the Promotions and Deals Inquiry discount screen, PRO300-09 with additional fields.

Field descriptions - PRO300-08/09

Act (1,A):

Specify the number for the line action to perform and press Enter.

10=Detail

Display the promotion detail on the Promotion Master Maintenance screen PRO110D2-01.

11=Notes

Display the Promotion and Deals Notes Maintenance screen, PRO120-01.

12=Performance Detail

Display the promotion performance detail on the Promotions and Deals Inquiry performance detail screen, PRO300-13.

Promotion/Line Number (6,0/3,0):

Infor ERP LX displays the promotion and line number.

Term (1,A):

Infor ERP LX displays the promotion terms code for this promotion.

-
- | | |
|---|--------------------------------|
| 1 | Off Invoice at Line Item Level |
|---|--------------------------------|
-
- | | |
|---|------------------------------|
| 2 | Bill Back at Line Item Level |
|---|------------------------------|
-

3	Off Invoice at Total Order Level
4	Bill Back at Total Order Level
5	Split at Line Level (Off Invoice)
6	Split at Total Order Level (Off Invoice)
7	Split at Line Item Level (Bill Back)
8	Split at Total Order Level (Bill Back)

Disc Offer (14,2):

Infor ERP LX displays the total discount offered under this promotion. The system uses the value from the Promotion Master file, PDM.

Disc Taken (14,2):

Infor ERP LX displays the total discount taken under this promotion line. The system uses the value from the Promotion Master file, PDM.

Disc Bal (14,2):

Infor ERP LX displays the remaining discount to take under this promotion line. The discount balance is the total discount offered less the discount taken.

Cur (3,A):

Infor ERP LX displays the currency code for this promotion line.

Per (2,0):

Infor ERP LX displays the period for this promotion.

Year (4,0):

Infor ERP LX displays the year for this promotion.

Screen actions - PRO300-08/09**F11=Fold**

Toggle between the folded and unfolded screen views to display or hide additional fields. The folded screen is PRO300-09. The additional fields and their descriptions follow.

Projected Amt

Infor ERP LX displays the projected sales amount from this promotion. You define the projected sales amount when you create the promotion in Promotions and Deals Master Maintenance, PRO110.

Actual Amt

Infor ERP LX displays the actual sales amount realized from this promotion. The system updates the actual sales amount in Order Entry each time you create, change, or delete an order line that uses that promotion,.

Variance

Infor ERP LX displays the actual sales amount divided by projected amount, expressed as a percentage. If the variance calculates to less than zero or greater than 999%, the value is zero.

Projected Qty (11,3)

Infor ERP LX displays the projected unit sales from this promotion. You define the projected quantity when you create the promotion in Promotions and Deals Master Maintenance, PRO110.

Actual Qty (11,3)

Infor ERP LX displays the actual unit sales realized from this promotion. The system updates the actual quantity in Order Entry each time you create, change, or delete an order line that uses that promotion.

Variance (3,0)

Infor ERP LX displays the actual sales quantity divided by projected quantity, expressed as a percentage.

F14=Customer Order Inquiry

Access Customer Order Inquiry, ORD300.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotions and deals performance inquiry detail

Use the Promotions and Deals Performance Inquiry detail program, PRO303, to view performance details for a promotion.

Display performance discount information for a promotion by line

If you specify a promotion number on the Promotions and Deals Inquiry selection screen, PRO300-01, and use F13 for promotion performance data, Infor ERP LX displays discount information for that promotion by line on the Promotions and Deals Inquiry fold screens, PRO303-10 and PRO303-11.

Field descriptions - PRO303-10/11**Act (1,A):**

Specify the number for the line action to perform and press Enter.

10=Detail

Display the promotion detail on the Promotion Master Maintenance screen, PRO110D2-01.

11=Notes

Display the Promotions and Deals Notes Maintenance screen, PRO120-01.

12=Performance Detail

Display the promotion performance detail on the Promotions and Deals Inquiry fold screens, PRO300-12 and PRO300-13.

Line (3,0):

Infor ERP LX displays the promotion line number.

Term (1,A):

Infor ERP LX displays the promotion terms code for this promotion.

1	Off Invoice at Line Item Level
2	Bill Back at Line Item Level
3	Off Invoice at Total Order Level
4	Bill Back at Total Order Level
5	Split at Line Level (Off Invoice)
6	Split at Total Order Level (Off Invoice)

7 Split at Line Item Level (Bill Back)

8 Split at Total Order Level (Bill Back)

Disc Offer (15,2):

Infor ERP LX displays the total discount offered under this promotion. The system uses the value from the Promotion Master file, PDM.

Disc Taken (15,2):

Infor ERP LX displays the total discount taken under this promotion line. The system uses the value from the Promotion Master file, PDM.

Disc Bal (15,2):

Infor ERP LX displays the remaining discount to take under this promotion line. The discount balance is the total discount offered less the discount taken.

Cur (3,A):

Infor ERP LX displays the currency code for this promotion line.

Per (2,0):

Infor ERP LX displays the period for this promotion.

Year (4,0):

Infor ERP LX displays the year for this promotion.

Screen actions - PRO303-10/11

F11=Fold

Toggle between the folded and unfolded screen views to display or hide additional fields. The folded screen is PRO300-09. The additional fields and their descriptions follow.

Projected Amt

Infor ERP LX displays the projected sales amount from this promotion. You define the projected sales amount when you create the promotion in Promotions and Deals Master Maintenance, PRO110.

Actual Amt

Infor ERP LX displays the actual sales amount realized from this promotion. The system updates the actual sales amount in Order Entry each time you create, change, or delete an order line that uses that promotion,.

Variance

Infor ERP LX displays the actual sales amount divided by projected amount, expressed as a percentage.

Projected Qty (11,3)

Infor ERP LX displays the projected unit sales from this promotion. You define the projected quantity when you create the promotion in Promotions and Deals Master Maintenance, PRO110.

Actual Qty (11,3)

Infor ERP LX displays the actual unit sales realized from this promotion. The system updates the actual quantity in Order Entry each time you create, change, or delete an order line that uses that promotion.

Variance (3,0)

Infor ERP LX displays the actual sales quantity divided by projected quantity, expressed as a percentage.

F14=Customer Order Inquiry

Access Customer Order Inquiry, ORD300.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Promotion performance detail

Use the Promotion Performance Detail program to view promotion performance detail information.

Display performance detail information

If you specify line action 12 for performance detail from a promotion performance screen, Infor ERP LX displays the Promotions and Deals Inquiry performance detail fold screen, PRO300-12/13. PRO300-13 is the folded screen that displays additional fields, described under screen action 11 below.

Field descriptions - PRO300-12/13

Customer (8,0):

Infor ERP LX displays the customer number for this order line.

Order (8,0):

Infor ERP LX displays the customer order and line number.

Prefix (2,A):

Infor ERP LX displays the prefix number.

Invoice (8,0):

Infor ERP LX displays the invoice and invoice line number.

Disc offer (13,2):

Infor ERP LX displays the total discount offered under this promotion for this customer, order line, and invoice line. The system uses the value from the Promotion Tracking file, PDT.

Disc Taken (13,2):

Infor ERP LX displays the discount taken under this promotion number for this customer, order line, and invoice line. The system uses the value from the Promotion Tracking file, PDT.

Disc Bal (13,2):

Infor ERP LX displays the balance of discount under this promotion number for this customer, order line, and invoice line. The discount balance is the total discount offered less the discount taken.

Screen actions - PRO300-12/13**F11=Fold**

Toggle between the folded and unfolded views of the screen to display or conceal additional fields. The folded screen is PRO300D5-13.

The additional fields are described below:

Order Quantity (11,3)

Infor ERP LX displays the total quantity ordered on this order line.

Invoice Quantity (11,3):

Infor ERP LX displays the total quantity invoiced on this invoice line.

Invoice (Date) (6,0)

Infor ERP LX displays the date on the invoice. *Infor ERP LX displays the date according to the parameters set in Company Name and Date Format, SYS820, in Parameters Generation, SYS800.*

F14=Customer Order Inquiry

Access Customer Order Inquiry, ORD300.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Special price inquiry

Use Special Price Inquiry, PRO340D1, to view the special prices established in Special Price Maintenance, PRO140.

Screens:

Special Pricing List Inquiry, PRO340D1-01
Special Price Inquiry Selection, PRO340D1-02
Special Pricing Inquiry, PRO340D2-01

Display special price information

The Special Price Inquiry selection screen, PRO340D1-01, displays special pricing information for specific pricing methods. When you process this screen, Infor ERP LX displays the detail for the special price method you select. To limit the special prices to include, use F13 to filter the information.

If you specify 5, Display, the system displays the Special Pricing Maintenance screen, PRO140D2-01, in Display mode.

Field descriptions - PRO340D1-01

Method (1,A):

Specify a pricing method. Infor ERP LX then displays a list of the special prices defined for this pricing method. If you set up special prices based on customer, the system displays the following methods:

- 1 Item/Customer (item records sorted by item number then customer)
- 2 Customer (customer records in customer number sequence)
- 3 Item (item records in item number sequence)
- 4 Item Discount Code/Customer (item discount code records sorted by item discount code then customer number)
- 5 Item Discount Code (item discount code records sorted by item discount code)
- 6 Customer Discount Code (customer discount code records sorted by customer discount code)
- 7 Item/Customer Discount Code (item records sorted by item then by customer discount code)
- 8 Item Discount Code/Customer Discount Code Customer (item discount code records sorted by item discount code then customer discount code)
- T Total Order Discount (customer records sorted by customer number)

If you set up special prices based on salesperson, the system displays the following methods:

- 1 Item/Salesperson (item records sorted by item number then salesperson number)
-

2 Salesperson (salesperson records sorted by salesperson number)

3 Item (item records sorted by item number)

4 Item Discount Code/Salesperson (item discount code records sorted by item discount code then salesperson)

5 Item Discount Code (item discount code records sorted by item discount code)

T Total Order Discount (customer records sorted by customer)

Co (2,0):

Infor ERP LX displays a list of companies with special prices for the pricing method.

Curr (3,A):

Infor ERP LX displays a currency defined for the company. The system displays this field only if the company is a multi-currency company.

Customer/Salesperson (8,0):

Infor ERP LX displays a customer number for this special pricing record if you set the order entry parameter to use the customer number for special pricing. The system displays this field if you inquire on pricing method 1, 2, 4, or T.

CDC (2,A):

Infor ERP LX displays the customer discount code if appropriate for this special price. The system displays this field if you inquire on pricing method 6, 7, or 8 with the special price based on customer number.

Item (35,A):

Infor ERP LX displays the item for which this discount applies if appropriate for this special price. The system displays this field if you inquire on pricing method 1, 3, or 7.

IDC (2,A):

Infor ERP LX displays the item discount code if appropriate for this special price. The system displays this field if you inquire on pricing method 4, 5, or 8.

Start Date (8,0):

Infor ERP LX displays the start date of the effective period for this special price.

List price effective periods of one company/currency code combination can overlap. The date range for one special price can fall within another date range or it can extend only partly into the range of another special price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

Infor ERP LX displays the end date of the effective period for this special price.

Screen actions - PRO340D1-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Filter special price information

Use the Special Price Inquiry filter screen, PRO340D1-02, to limit the special prices to include on the Special Price Inquiry selection screen, PRO340D1-01

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

To access this screen, use F13 on the Special Price Inquiry selection screen, PRO340D1-01.

Field descriptions - PRO340D1-02**From/To Pricing Method (1,A):**

Specify a range of values to limit the pricing method codes to include in the inquiry.

From/To Company (2,0):

Specify a range of values to limit the companies to include in the inquiry.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to include in the inquiry.

From/To Start Date (8,0):

Specify a range of dates to limit the start dates to include in the inquiry.

From/To Item (35,A):

Specify a range of values to limit the item numbers to include in the inquiry. You can specify a value in this field only if you price by customer with pricing method 1, 3, or 7 or by salesperson with pricing method 1 or 3.

From/To Item Discount Code (2,A):

Specify a range of values to limit the item discount codes to include in the inquiry. You can specify a value in this field only if you price by customer with pricing method 4, 5, or 8 or by salesperson with pricing method 4.

From/To Customer/Salesperson (6,0):

If you set the order entry parameter to use the customer number for special pricing, specify a range of values to limit the customer numbers to include in the inquiry. If you set the order entry parameter to use the salesperson number for special pricing, specify a range of values to limit the salesperson numbers to include in the inquiry. You can specify a value in this field only if you price by customer with pricing method 1, 2, 4, or T or by salesperson with pricing method 1, 2, or 4.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the inquiry. You can specify a value in this field only if you use pricing method 6, 7, or 8. The system displays this field only if you set the special price based on customer number.

Record Status (1,0):

Specify 0 to list all special prices in the range selected. Specify 1 to list only the active special prices in the range selected.

Screen actions - PRO340D1-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

List price book inquiry

Use List Price Book Inquiry to view list prices you defined for items, customers, regions, customer discount codes, facilities or a combination.

Screens:

List Price Book Inquiry selection, PRO350D-01

List Price Book Inquiry detail for pricing method A, PRO350D-02

List Price Book Inquiry detail for pricing method B, PRO350D-03

List Price Book Inquiry detail for pricing methods C, D, or 9, PRO350D-04)

List Price Book Inquiry detail for pricing method 0, PRO350D-05

Display list price book information

Use F13 to access the List Price Book Inquiry selection screen, PRO350D-01, from a List Price Book Inquiry detail screen. Use this screen to limit the list price book information on the List Price Book Inquiry detail screens.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO350D-01

Pricing Method (1,A):

Specify the pricing method code for which you want to display the details. Specify one of the following values:

9	Cost-Plus List Price
0	Multi-Currency - Base price/item alone*
A	Item/Customer
B	Item/Region
C	Item/Customer Discount Code
D	Item/Facility

From/To Company (2,0):

Specify a range of values to limit the companies to include in the inquiry.

From/To Currency Code (3,A):

Specify a range of values to limit the currency codes to include in the inquiry.

From/To Start Date (8,0):

Specify a range of values to limit the start dates to include in the inquiry.

From/To Item (35,A):

Specify a range of values to limit the item numbers to include in the inquiry.

From/To Customer (8,0):

Specify a range of values to limit the customer numbers to include in the inquiry.

From/To Customer Discount Code (2,A):

Specify a range of values to limit the customer discount codes to include in the inquiry.

From/To Region (6,A):

Specify a range of values to limit the regions to include in the inquiry.

From/To Facility (4,A):

Specify a range of values to limit the facilities to include in the inquiry.

Record Status (1,0):

Specify All to list all list price books in the range selected. Specify Active to list only the active list price books in the range selected.

Screen actions - PRO350D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display list price book details for method A

The List Price Book Inquiry detail screen, PRO350D1-02, displays a list of the method A, item/customer, list prices defined. The system sequences the list price books on this screen by company, currency, item number, customer, then start date. The system highlights inactive (logically deleted) list price books on this screen.

Field descriptions - PRO350D-02**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

Infor ERP LX displays a list of companies defined for this list pricing method.

Curr (3,A):

Infor ERP LX displays a list of currencies defined for this list pricing method. This field is valid only if you have Multi-Currency installed.

Item (35,A):

Infor ERP LX displays a list of items defined for this list pricing method.

Customer (8,0):

Infor ERP LX displays a list of customers defined for this list pricing method.

Start Date (8,0):

Infor ERP LX displays a list of start dates defined for this list pricing method. List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency.

End Date (8,0):

Infor ERP LX displays a list of end dates defined for this list pricing method.

List Price (14,4):

Infor ERP LX displays list prices defined for this list pricing method.

Screen actions - PRO350D-02**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display list price book details for method B

The List Price Book Inquiry detail screen, PRO350D1-03, displays a list of the method B, item/region, list prices defined.

Field descriptions - PRO350D-03**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

Infor ERP LX displays a list of companies defined for this list pricing method.

Curr (3,A):

Infor ERP LX displays a list of currencies defined for this list pricing method. This field is valid only if you have Multi-Currency installed.

Item (35,A):

Infor ERP LX displays a list of items defined for this list pricing method.

Region (6,A):

Infor ERP LX displays a list of regions defined for this list pricing method.

Start Date (8,0):

Infor ERP LX displays a list of start dates defined for this list pricing method. List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency.

End Date (8,0):

Infor ERP LX displays a list of end dates defined for this list pricing method.

List Price (14,4):

Infor ERP LX displays list prices defined for this list pricing method.

Screen actions - PRO350D-03**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display list price book details for method C, D, or 9

The List Price Book Inquiry detail screen, PRO350D1-04, displays a list of the method C, item/customer discount code; method D, item/facility; or method 9, cost-plus list price, list prices defined.

Field descriptions - PRO350D-04**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

Infor ERP LX displays a list of companies defined for this list pricing method.

Curr (3,A):

Infor ERP LX displays a list of currencies defined for this list pricing method. This field is valid only if you have Multi-Currency installed.

Item (35,A):

Infor ERP LX displays a list of items defined for this list pricing method.

CDC/Facility (4,A):

The system displays the CDC field only for pricing method C; the system displays the Facility field displays only for pricing methods 9 and D. Infor ERP LX displays a list of customer discount codes or facilities, depending on the pricing method, defined for this list pricing method.

Start Date (8,0):

Infor ERP LX displays a list of start dates defined for this list pricing method. List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, the system uses the list price with the most recent start date.

End Date (8,0):

Infor ERP LX displays a list of end dates defined for this list pricing method.

List Price (14,4):

Infor ERP LX displays list prices defined for this list pricing method.

Screen actions - PRO350D-04**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display list price book details for method 0

The List Price Book Inquiry detail screen, PRO350D1-05, displays a list of the list prices defined for method 0, multicurrency-base price/item alone.

Field descriptions - PRO350D-05**Pricing Method (1,A):**

Infor ERP LX displays the pricing method you select along with the pricing method description.

Co (2,0):

Infor ERP LX displays a list of companies defined for this list pricing method.

Curr (3,A):

Infor ERP LX displays a list of currencies defined for this list pricing method. This field is valid only if you have Multi-Currency installed.

Item (35,A):

Infor ERP LX displays a list of items defined for this list pricing method.

Start Date (8,0):

Infor ERP LX displays a list of start dates defined for this list pricing method. You can override the information in this field. List price effective periods of one company/currency code combination can overlap. The date range for one list price can fall within another date range or it can extend only partly into the range of another list price for the same company and currency. In this case, Infor ERP LX uses the list price with the most recent start date.

End Date (8,0):

Infor ERP LX displays a list of end dates defined for this list pricing method.

List Price (14,4):

Infor ERP LX displays list prices defined for this list pricing method.

Screen actions - PRO350D-05**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Advanced list price inquiry

Use Advanced List Price Inquiry, PRO380, to view advanced list price information.

Display advanced list price information

Use the Advanced List Price Inquiry selection screen, PRO380D1-01, to specify the criteria for your inquiry. The system displays a second screen with information that meets the criteria. From that screen, you can view the details of the advanced list prices.

Field descriptions - PRO380D1-01

Item Number (35,A):

Specify either an item number or item discount code.

Item Discount Code (2,A):

Specify either an item number or item discount code.

Customer Number (8,0):

Optional. Specify a customer number to limit the inquiry to this customer.

Ship-to Number (4,0):

Optional. You must specify a customer number if you specify a ship-to number.

Customer Discount Code (2,A):

Optional. Specify a customer discount code to limit the inquiry to this code.

Effective Date (6,0):

Infor ERP LX selects advanced list prices for which the effective date is within the start and end date range defined in Advanced List Price Maintenance, PRO180.

You can specify a date of 99/99/99 to display all advanced list prices that have an end date of 99/99/99 (permanent).

You can specify 00/00/00 to display advanced list prices that meet all the other criteria specified on this screen without regard to date.

Screen actions - PRO380D1-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Display advanced list price detail information

The Advanced Price List Inquiry - Detail screen, PRO380D2-01, displays the advanced list price details for the criteria you entered on the Advanced List Price Inquiry selection screen, PRO380D1-01. The top half of this screen displays the criteria you entered. The bottom half of this screen displays the information that meets your criteria. Use the line actions to see more details.

Field descriptions - PRO380D2-01

Action (2,0):

Specify the number for the line action to perform and press Enter.

10=Detail

Display the Advanced List Price Maintenance Detail screen, PRO180D2-01, in the display mode.

11=Bracket Prices

Display the Bracket Prices screen, PRO750, which displays the calculated prices for different brackets based on their markup percentages.

All other line actions on this screen perform standard Infor ERP LX functions. See *Generic help text for line actions* in the overview information in this document.

Item Number:

Infor ERP LX displays the item number, if any.

Item Discount Code:

Infor ERP LX displays the item discount code, if any.

Item or Customer Discount Code Description:

Infor ERP LX displays a description of the code, if any.

Effective Date:

Infor ERP LX displays the effective date of the inquiry.

Customer Number:

Infor ERP LX displays the customer number, if any, on the top half of the screen. On the bottom half, you can specify a customer number to position to or to see its details

Ship-to Number:

Infor ERP LX displays the ship-to number, if any, on the top half of the screen. On the bottom half, you can specify a ship-to number to position to or to see its details.

Customer Name:

Infor ERP LX displays the name of the customer, if any.

Customer Discount Code:

Infor ERP LX displays the customer code, if any, on the top half of the screen. On the bottom half, you can specify a customer code to position to or to see its details.

Screen actions - PRO380D2-01**F13=Switch**

Switch between the customer mode and customer discount code mode. In the customer mode, which is the default value, the system displays list prices in ascending order by customer and ship-to number. In the customer discount code mode, the system displays list prices in ascending order by customer discount code.

This screen action is not available if the criteria entered on the Advanced List Price Inquiry selection screen, PRO380D1-01, screen included a customer number or a customer discount code.

F16=Order Inquiry

Display the Order Inquiry program, ORD300.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Mass list price book update

Use Mass List Price Book Update, PRO510, to update the list price of a range of items. You can perform what if analyses on list price changes. As with List Price Development and Update, the Mass List Price Book Update generates an audit trail to use as a review tool, a what-if simulation, before you perform the update to the prices. You can limit updates to selected groups of items for a facility, company, and currency.

Screen:

Mass List Price Book Update, PRO510D-01

Select a pricing method for a mass list price update

Use the Mass List Price Book Update screen, PRO510D-01, to update the list price of a range of items based on the pricing method you specify. For all updates you must specify a pricing code and a range of items. The fields in which you specify values depend on the pricing method you specify. The table below lists the fields that apply to each pricing method.

Pricing Method Code	Pricing Method Description	Fields
0	Multi-Currency	Item, Currency Code
9	Cost-Plus List Price	Item, Facility
A	Item/Customer List Price	Item, Customer
B	Item/Region List Price	Item, Region
C	Item/Customer Discount Code List Price	Item, Customer Discount Code
D	Item/Facility List Price	Item, Facility
E	Item Master Record (IIM) List Price	Item

You must specify a value in either the Price Multiplier or Net Change Amount field to increase or decrease this range of item list prices.

You can enter a percentage in the Price Multiplier field or an amount in the Net Change Amount field to increase or decrease the list price.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO510D-01

Pricing Method (1,A):

Specify the pricing method to use to update the list price for this range of items.

- 0=Multi-Currency
- 9=Cost-Plus List Price
- A=Item/Customer List Price
- B=Item/Region List Price

- C=Item/Customer Discount Code List Price
- D=Item/Facility List Price
- E=List Price defined in the Item Master (IIM) record

From/To Company (2,0):

(Optional) Specify a range of companies to include for this list price.

Currency Code (3,A):

(Optional) Specify a range of currency codes to include for this list price. Specify a value in this field only if the company is designated as a multi-currency company in Company Master Maintenance, GLD125.

Start Date (8,0):

Specify the start date and end date for this list price.

From/To Item (35,A):

Specify a range of items to which this list price applies. The From value must be less than or equal to the To value.

From/To Unit of Measure (4,A):

Specify a range of pricing units of measure for which price updates apply.

From/To Customer (8,0):

Specify a range of customers to whom this list price applies.

From/To Customer Discount Code (2,A):

Specify a range of customer discount codes to which this list price applies.

From/To Region (6,A):

Specify a range of regions to which this list price applies. You define regions and the system assigns the regions to customers in Customer Master Maintenance, ACR100. You can also assign region codes to customer ship-to numbers in Ship-To Master Maintenance, ORD100.

From/To Facility (4,A):

Specify a range of facilities to which this list price applies. The system displays extreme values by default in this field. Blank is a valid value. You assign facilities in Facility Code Maintenance, SYS190.

Price Multiplier (9,2):

Specify the percentage by which to increase or decrease the list price. You cannot specify a negative percentage. The program factors the list price by the price multiplier. See the example that follows. If you specify a value in this field you cannot specify a value in the Net Change Amount field.

Example:

Current List Price=A

Price Multiplier=B

New List Price =A * B

A: Current List Price	B: Price Multiplier	C: New List Price	Result
100	1.10	110	10% Price Increase
130	1.20	156	20 % Price Increase
100	.9	90	10% Price Decrease
130	.8	104	20% Price Decrease
0	1.10	0	Apply to 0 List Price

Net Change Amount (14,4):

Specify the amount by which to increase or decrease the list price. The program adds positive amounts to the list price and subtracts negative amounts from the list price. Infor ERP LX accepts an amount of zero. However, if the calculation returns a negative number, the system defaults to zero. See the example that follows. If you specify a value in this field you cannot specify a value in the Price Multiplier field.

Example:

Current List Price=A

Net Change Amount=B

New List Price =A + B. If negative, List Price is 0

A: Current List Price	B: Net Change Amt	C: New List Price	Result
100	5.00	105	\$5.00 Price Increase

100	-5.00	95	\$5.00 Price Decrease
130	5.00	135	\$5.00 Price Increase
130	-5.00	125	\$5.00 Price Decrease
0	5.00	5.00	\$5.00 Price Increase
0	-5.00	0	Price does not change
3	5.00	8.00	\$5.00 Price Increase
3	-5.00	0	\$3.00 Price Decrease

Update Prices (1,0):

To view the results of your entries before you change the prices, specify No. To update the prices based on your entries, specify Yes.

Screen actions - PRO510D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Cost-plus list price development

Use Cost-Plus List Price Development, PRO520, to develop/update the cost-plus list price information based on costs found in Infor ERP LX cost selection criteria such as item and facility. You can specify a percentage in the Cost Multiplier field or an amount in the Flat Amount field to increase or decrease the list price. You can review the effects of your updates before you perform the updates.

Screens:

Cost-Plus List Price Development, PRO520D-01

Cost-Plus List Price Development, PRO520D1-02

Select a cost set to calculate a cost-plus list price

Use the Cost-Plus List Price Development screen, PRO520D-01, to identify a cost set to use in the calculation of the new cost-plus list price. You can specify the amount of the increase or decrease for a specific group of items that you can limit by facility, company, and currency.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO520D-01

Cost Set Currency (3,A):

The system displays this field only if you have the Multi-Currency product installed. Infor ERP LX displays the global currency you specified for the system.

Facility (4,A):

Specify the facility to use as the basis for the cost-plus calculation. For example, to base the cost-plus calculation on facility blank but update the information for facility 1, leave the Facility field blank on this screen and specify 1 for the Facility field on the selection screen that follows. Conversely, to base the cost-plus calculation on facility 1 but update facility blank, specify 1 in the Facility field on this screen and leave the Facility field blank on the selection screen that follows.

Cost Set (2,0):

Specify the cost set to use as the basis for the cost-plus calculation. Valid values are the system predefined cost sets 01 (Actual), 02 (Standard), 03 (Frozen), 04 (Simulated) or any of your user-defined cost sets.

From/To Item Class (2,A):

Specify a range of item classes within the facility and cost set you specified. You must specify a value in this field if you do not specify information in the Item Number field.

From/To Item Number (15,A):

Specify a range of items, within the facility and cost set you specified. You must specify a value in this field if you do not enter information in the Item Class field.

Set Multiplier (9,7):

Specify percentage to calculate a list price within the specified facility/cost set range. The system calculates the values for facility and cost set at $100 \times (\text{Set Multiplier Value})$. The system uses the set multiplier 1.0000000 to yield 100 percent. To increase a value by 50 percent, specify a multiplier of 01.5000000. To decrease a value to 50 percent of its original amount, specify a multiplier of

00.5000000. If you specify a value in this field you cannot specify a value in the Net Change Amount field. You must specify a value in this field if you do not enter information in the Net Change Amount field.

Net Change Amount (15,5):

Specify the amount by which to increase or decrease the list price. The system adds positive amounts to the list price cost and subtracts negative amounts from the cost list price. The system accepts zero for the resulting price but does not accept a negative value. You must specify a value in this field or the Set Multiplier field; you cannot specify a value in both fields.

Screen actions - PRO520D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Add or update a list price

Use the Cost-Plus List Price Development screen, PRO520D-02 to specify the cost-plus list price information to create or update with the new list price. If you specify update and a record you specify on this screen does not have list price information, this program ignores that record and does not create/update a list price for the record. The audit trail lists the record used as a create, but this program does not create the record.

Use this screen to perform a what-if analysis to see the effects of the cost-plus price change before you update the list price. If you do not choose to update or create prices, the program performs a what if analysis. Specify a value in the From field and leave the To field blank; Infor ERP LX copies the same value into the To field

Field descriptions - PRO520D1-02**Facility (4,A):**

(Optional) /Specify the facility for which to create or update the cost-plus list price . If you do not specify a facility, Infor ERP LX updates/creates only those records with Item only and no Facility.

Company (2,0):

(Optional) Specify the company for which to create or update the cost-plus list price.

Currency (3,A):

(Optional) If the company you specified is not a multicurrency company, leave this field blank. If the company is a multicurrency company, specify a currency defined for the company. Infor ERP LX creates or updates only the records that have this specific currency. For example, for a multicurrency company if you leave this field blank, the system creates or updates only those records with no currency specified. For multicurrency companies, the system uses the global currency you defined in system parameters, MLT800.

Recognition Rate (15,7):

The system displays this field only if Multi-Currency is installed. If you specify a currency other than the global currency and leave this field blank, Infor ERP LX uses the recognition rate in the Currency Conversion file, GCC, based on the recognition date.

If your system is euro enabled in Multi-Currency System Parameters, MLT800, the system displays the multiplier exchange rate in this field. You cannot maintain the exchange rate on this screen. Instead, use F2 to access the Override Exchange Rate Window, MLT940D, where you can override the appropriate multiplier or divisor exchange rate, if allowed. You can maintain exchange rates only between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro.

You must specify valid values in the Currency Code and Recognition Date fields. Use F2 to access the Override Exchange Rate program.

Recognition Date (8,0):

The system displays this field only if Multi-Currency is installed. If you specify a currency other than the global currency and leave this field blank, Infor ERP LX uses the current date as the default value in this field and uses that date to find the correct recognition rate in the Currency Conversion file, GCC. If you specify a currency other than the global currency and specify a date in this field, the system uses the date to find the correct recognition rate in the Currency Conversion file, GCC.

Update Prices (1,0):

Specify Yes to update the current list price value with the newly calculated list price for the records you selected on this screen. Infor ERP LX uses the from and to start dates to determine which cost-plus list prices to update. You must specify a value in this field if you did not specify a value in the Create Prices field.

Infor ERP LX updates only the records that match the criteria you specify on this screen. For example, if item A's cost is updated based on the cost set selections but there is no list price record for item A in the ESP record, an update ignores that record. The system displays the record on the audit trail for what if analysis purposes as a create, but the system does not create the record.

From/To Start Date (8,0):

Specify a range of start dates. Infor ERP LX uses these dates to determine which cost-plus list prices to update.

Create Prices (1,0):

Specify Yes to create a list price for records that do not have a list price. Infor ERP LX uses the Start and End date field to determine the period for which this list price is valid for the selected records. You must specify a value in this field if you did not specify a value in the Update Prices field.

Infor ERP LX creates only the records that match the criteria you specify on this screen. For example, if item A's cost is updated based on the cost set selections but there is no list price record for item A in the ESP record, Infor ERP LX creates the record. The system displays the record on the audit trail as a create and creates the record.

Screen actions - PRO520D-02**F2=Exchange Rate**

Access the Override Exchange Rate screen. The system displays this screen action only if Multiple Currency is installed and turned on for order entry and billing or accounts receivable, and euro support is enabled in Multi-Currency System Parameters, MLT800. In this case, you cannot specify a value in the Exchange Rate field. Use F2 to access the Override Exchange Rate screen, MLT940D, in which you can maintain the exchange rate between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro. The screen displays the multiplier exchange rate and divisor exchange rate.

All other screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Batch price maintenance

Use Batch Price Maintenance, PRO530, to price or reprice an order or group of orders in batch mode rather than interactively during order entry. If you choose to assign promotions during order entry, Infor ERP LX displays Order Total Promotions, ORD740D1, from which you can choose the order level promotion. If you use Batch Price Maintenance, the system does not price, perform second level credit checks, or calculate margins during order entry. Instead, the batch pricing program performs margin and credit check functions and puts orders that violate either of these conditions on hold. If a customer order that is tagged for batch pricing has a tax exemption declaration and does not pass Infor ERP

LX validation checks, the system fails the batch pricing for that order. The batch pricing audit trail lists the order, and you must manually maintain the order according to order type and class.

If you tagged the order for batch pricing, you cannot override prices during order entry. Also, if batch pricing is set to Yes at the order header level, the system ignores the Reprice and Display Promotions settings during order entry.

Batch pricing generates an audit trail that identifies whether the order/order lines were successfully priced. The Pricing Source Code option of the audit report identifies any problems that caused a failure in batch pricing. For listings of order line net price and list price source codes, see tables OLLPSC and OLNPSCL in Table Code Maintenance, SYS105. For order header pricing, see table OPRC. To view the codes and their descriptions, specify 9 in the Act field for each table.

Use Batch Price Maintenance to select and process an order or group of orders for batch pricing. If Infor ERP LX cannot price an order line during batch pricing, the system does not price any of the order lines. However, to maintain the integrity of bracket pricing and total order level pricing, the order is eligible for the next batch price generation. An order line fails pricing if pricing results in a negative value for the net selling price, extended amount, order total amount, or order net difference. The program's audit trail listing identifies which order lines failed pricing and the reason for the failure.

Screen:

Batch Price Maintenance, PRO530D-01

Specify selection criteria for batch price maintenance

Use the Batch Price Maintenance screen, PRO530D-01, to specify the selection criteria for batch price maintenance.

This screen contains range fields that you use to limit the data the system selects. For information on range fields, see the Ranges topic in the overview section of this document.

Field descriptions - PRO530D-01

Order Class (3,0):

Specify an order class to select all unpriced orders in that class for batch pricing. If you leave this field blank, the system selects all order classes. Infor ERP LX uses regular orders as the default value. The following order classes are not valid entries:

- Order Class 007 - includes only order entry and invoicing events. The system always prices post-ship orders during order entry
 - Order Class 008 - includes only order entry and invoicing events. The system always prices financial orders during order entry
 - Order Class 006 - includes only quotes.
-

- Order Class 003 - includes only Return Material Authorization (RMAs). Batch Price Maintenance never prices or reprices RMAs.

User ID (10,A):

Specify the user ID to select orders for batch pricing entered only by that user. Infor ERP LX uses blank as the default value, which includes all user IDs.

From/To Order Number (8,0):

Specify a range of order numbers to include in batch pricing.

From/To Order Entry Date (8,0):

Specify a range of order entry dates to use batch pricing for orders in that range.

From/To Order Request Date (8,0):

Specify a range of request dates to use batch pricing for orders in that range.

For special prices, line promotions, and other line-based pricing, the system selects records based on the time zone for the line warehouse. For total order discounts, total order promotions, and other header-level pricing, the system selects records based on the time zone for the header warehouse.

From/To Price Book Date (8,0):

Specify a range of price book dates to use batch pricing for orders in that range.

From/To Customer (8,0):

Specify a range of customer numbers to use batch pricing for orders in that range.

Reprice Orders (1,0):

Specify 1 to price or reprice all active orders that meet the selection criteria. Specify 0 to exclude any orders that meet the selection criteria but are already priced.

Screen actions - PRO530D-01**Standard screen actions**

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Bracket prices calculation

Bracket Prices Calculation, PRO750, calculates advanced list prices based on the specified break levels and base price.

Display calculated bracket list prices

Use the Bracket Prices screen, PRO750D-01, to display calculated advanced list prices based on the break levels and on the base price you entered.

Field descriptions - PRO750D-01

Base Price:

The system displays the base price you entered. If based on units, the system displays the price in the item's pricing unit of measure. If based on weight or volume, the system displays the price in the common system unit of measure. Infor ERP LX converts these list prices to stocking and selling unit of measure and to base currency as required during order entry.

Bracket Type:

Bracket groups are based on units, weight or volume.

Valid choices

- **0**
Units
- **1**
Weight
- **2**
Volume

Break Level:

Infor ERP LX displays the break levels you defined in the List Price Bracket Group program, PRO160.

Markup:

Infor ERP LX displays the markups you defined for each break level in the List Price Bracket Group program, PRO160.

List Price: Infor ERP LX displays the price for each break level based on the markup and base price.

Currency:

Infor ERP LX displays the currency for this Advanced List Price. Advanced List Price records are valid only for transactions that use this currency.

Screen actions - PRO750D-01

Standard screen actions

All screen actions on this screen perform standard Infor ERP LX functions. See *Generic help text for screen actions* in the overview information in this document.

Appendix A

Glossary

A

Ranges

Ranges refer to fields you can use to limit an inquiry or report or to display specific data. If there are multiple range fields in a program, you can tailor your inquiry or report to produce only the data you need.

Infor ERP LX sorts the information alphanumerically. Therefore, the value in the *From* field must be a lower alphanumeric value than the value in the *To* field.

Infor ERP LX usually inserts extreme values as defaults in the lower and upper fields. See the description for Extreme values by default. The entries you make in range fields do not have to be valid values in a database file.

Review the following suggestions to limit the information:

Specify the first value to include on the inquiry or report in the *From* field. Leave the *To* field blank to include all information to the end of the file. For example, you can print a report that starts with the customer number you specify in the *From* field and stops at the end of the Customer Master file.

Specify the last value to include on the inquiry or report in the *To* field. Leave the *From* field blank to start at the beginning of the file. For example, you can perform an inquiry that starts with the beginning of the Customer Master file and ends with the customer number you specify in the *To* field.

Specify the same value in both the *From* and *To* fields. For example, you can limit a display to one customer.

To include a group of items, specify a value in the *From* field and another value in the *To* field. For example, you can perform an inquiry that starts with the first of the month and ends with the last day of the month.

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