Order Management Run Instructions

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Chapter 1
Introduction to Infor LX

1

Overview of Infor LX

This topic contains information that pertains to all applications of the Infor 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 LX

Navigation

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

Menus

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

Dates

Infor LX includes full support for dates up to and beyond the year 2000. Although most date fields display six characters, Infor 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 LX screen, press the Esc key.

The Webtop user interface uses the Quick Access icon to directly access programs. On an Infor 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 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 LX automatically retrieves this value from remember key memory. Infor LX updates this value on a continual basis.
- 1. Infor LX automatically retrieves the value you specify in Display Remembered Keys, SYS080. It does not update the value from any other program.
- 2. Infor 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 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 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 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 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 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 Warehouse Master Maintenance, INV110, you can display all records by warehouse or active records by warehouse or active records by description. Some filter screens provide sort or sequence options.

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 LX menus

This section describes the menus in Infor LX.

ERPLX main menu

The ERPLX Main Menu is the first of five master menus. You can access the four major Infor 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 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 LX manufacturing applications. Specify the application fast path code to access the desired Infor LX application menu.

Supply chain management master menu

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

Cross-product application menu

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

Commonly used terms in Infor LX

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.

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 defaults values or any other values specified to designate a range do not have to be valid values in a database file.

(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.

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 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 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.

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 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

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 ACP150.

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 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 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.

Chapter 2
ORD Overview

2

General information about the ORD document

This document is divided into the following sections:

Overview of Infor LX

These sections contain general information about the application, including navigation hints, definition of standard line actions and function keys, and a description of some screens that are standard throughout Infor LX.

Application overview

This section provides a general description of the functions and highlights of the application.

Key functions and concepts

This section describes some special functions and concepts used in Order Management.

Application flow

This section describes the basic flow of processing within the order management application.

How-to index

This section contains a list of application functions. Next to each function is the number of the program to use.

Order management menus

This section briefly describes the three menus provided for the ORD application.

Application overview

The Order Management application, ORD, is a key components of Infor LX. Use Order Management to enter and maintain various types of orders, acknowledge and allocate stock, and print standard business documents.

Product Highlights

Use the Order Management application to perform the following functions:

- Specify and maintain various order types from a single order entry and maintenance application.
- Define required order processing events for each order.
- Automatically generate various business documents at each order processing event.
- Backorder automatically.
- Establish customer and supplier item number cross references.
- Optionally pre-allocate inventory online.
- Consolidate orders online.
- Check inventory availability and allocation by lot, location, or container.
- Inquire on open orders by customer name, customer number, item, request date, order, or picker number.
- Inquire on customers, customer quotes, ship-to locations, lot/location allocations, material status, and warehouses.
- Check customer credit.
- Review and release four types of order holds : customer, credit, margin and user.
- Maintain multiple addresses, including Ship-to, Promotional Payment-to, Invoice-to, and Lock Box-to.
- Perform special pricing by customer, salesperson, item, and discount classes.
- Set up contract and discount pricing with nine quantity breaks.
- Maintain multiple companies, profit centers, and locations.
- Process made-to-order or one-time special items.
- Perform optional batch detail allocations to orders.
- Print pickable orders reports.
- Maintain multiple customer terms per company.
- View online shipment history.
- Allocate to the location/lot/container level when you enter or pick orders.
- Control and monitor customer requests for returned goods.
- Accept and process customer orders for inventory items shipped directly from a vendor to the customer.

Related applications

Order Management is integrated with many other Infor LX applications to perform fully integrated order processing. These include the following applications:

- Accounts Receivable
- Billing
- Configurable Enterprise Accounting
- Distribution Resource Planning
- Draft Management
- Forecasting
- Inventory
- Manufacturing Data Management
- Master Production Scheduling
- Multiple Currencies
- Promotions and Deals
- Sales Analysis
- User Performance Measurement
- Shop Floor Control

The Order Management application is particularly closely integrated with the Accounts Receivable, Inventory, Billing, and Promotions and Deals applications. Infor recommends that you read the documentation for these applications before you implement Order Management.

Key functions and concepts

This section describes fundamental functions and concepts that apply to Order Management and related applications.

Resupply orders

A resupply order, RO, is a special order, order type 9, that is used by Distribution Resource Planning, DRP. It is an order to ship from one facility to another. You can enter ROs through two different programs in Infor LX. If you specify a resupply order through customer order entry, it acts like a customer orders as far as the ship-from facility is concerned: you must print shipping papers and make adjustments during billing release. The second way to specify an RO is to release planned and firm planned through Release Planned Orders, DRP540C. ROs create demand on the ship-from facility just like customer orders, and they absorb forecasts and distribution requirements.

A resupply order is basically a customer order if the customer is a facility. Unlike with customer orders, there is no sale, no accounts receivable, and no effect on the general ledger. Like customer orders, resupply orders represent a demand on the supply facility and they follow the whole shipping cycle. The system also tracks additional information, such as insurance value, for resupply orders. In addition to normal customer order information, ROs include the scheduled receipt date at the ship-to facility. ROs act just like purchase orders from the ship-to facility perspective: they are supply scheduled for receipt on a certain date. This allows Infor LX DRP to keep track of in-transit material. A separate RO receipt program allows you to receive ROs. The default order class for resupply orders must include a ship confirm event.

When a resupply order creates a demand from the supply facility, the receiving facility automatically picks up the order as a scheduled receipt. The system receives resupply orders via inventory transactions like any other scheduled receipts.

Special pricing

To calculate and retrieve prices for orders and order lines, Infor 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. See the documentation for Special Price Maintenance, PRO140D, in the Promotions and Deals documentation for a thorough discussion of special pricing.

Inventory availability checking

When you create a customer order for an item, Infor LX checks availability of the item. To calculate the quantity of inventory available for the item, the system subtracts the stock that is already committed to customer orders from the stock it has on hand. Optionally, it checks the inventory balances by warehouse. You can override the result of this check. The inventory check also considers order entry activity that someone performs simultaneously at another workstation.

You can inquire on existing and planned inventory with Material Status Inquiry, INV300D.

Customer credit checking

Infor LX performs credit checking during Order Entry and Pick Release. Credit checking looks at the value you enter in the Credit Limit field in the Customer Master file, RCM. If a customer's total amount due plus the on-order amount exceeds the credit limit, the customer fails the credit check. The system displays the Credit Check screen. You can override the message and continue, cancel the order, or place it on credit hold.

Use the Order Hold Manual Release and Order Hold Batch Release programs to release customer orders from credit hold.

Taxes

The system computes taxes on a line-item basis at invoice print time. It totals the taxes for the lines to get the tax total for the invoice. The system retrieves tax rates from Tax Rate Tables, SYS150D. These consist of a combination of a customer (or vendor) tax code, an item tax code, and a warehouse code.

Warehouse and allocations concepts

The way you set up warehouses and locations determines how the Infor LX Customer Order and Shop Order applications handle allocations. Choice of warehouses impacts the allocation logic in the customer order and shop order programs. Conceptually, allocations of inventory to line items on a customer order and to component lines on a shop order are identical. They are discussed together in the following sections.

Allocations are performed at two levels, the warehouse level and the lot/location level.

Warehouse-level allocation:

The first level of allocation is the warehouse-level allocation, which is done during order entry. At this level, Infor LX tracks the total inventory for each item at each warehouse and the total quantity of that item that is ordered from each warehouse. The material availability check that the Order Entry program performs compares the available inventory at the warehouse with the quantity you order.

During order entry, you assign a warehouse to each line item on the customer order or each component line on a shop order. You can assign different warehouses to separate lines on a customer order, but you can only assign one warehouse to all of the component lines on a shop order.

Inventory is often over-allocated at the warehouse level, because the inventory is usually not needed until the requested date that you specify on the customer order. You can enter an unlimited number of orders, regardless of the inventory status, but the system sends warning messages if you enter orders that over-allocate the item at the warehouse you assign.

An allocation at the warehouse level is relieved when the system issues (ships) the material. Over-issues or under-issues are accounted for when the allocation is reduced.

Lot/location level allocation

The second level of allocation is the lot/location level, which the system performs when it prints pick slips. You can also perform lot/location allocation online in On-line Allocation, ORD720D1. In the Order Entry process, this occurs during Pick Release and printing of pick slips, ORD550D.

You allocate specific lots and locations of inventory to line items on the customer order or components on the shop order. If you do not using lot control, you just allocate material from specific locations.

The allocation at the lot/location level is called a hard allocation because it considers only inventory that is actually available. No over-allocation is allowed. For a specific line item, the system only allocates inventory that is available in the warehouse you specify for that line. The pick slips print the total quantity required and all of the allocation details, including lot numbers, location numbers, and quantities.

The system performs allocations from inventory in two different ways, depending on how you set up default values in the Warehouse Inventory file, IWI. Your entry in the Override Location field of the JIT Override Location Maintenance program, JIT110, determines this.

If the default is a specific location, the system allocates inventory only from that location. To make a special case of the default location, specify *BLANK. This entry causes allocations to be made from a location defined as *BLANK. Use the special case default if you do not routinely use locations in your inventory system. You can have a few locations for special uses, but most inventory is in a general *BLANK location.

If you leave the default field blank (no entry in the field, not *BLANK, as described above), the system performs allocation from inventory in alphanumeric sequence by lot and then by location number. If you use lot control, the system saves lot allocation totals in the Lot Master file, ILN.

You should not print pick slips until you pick the material to fill an order. The planning system ensures that the right inventory is available at the warehouse level. The lot/location allocation specifies where to pull the inventory from, and it ensures that no other order pulls that specific inventory. Accurate and timely inventory balances, assisted by the Cycle Counting programs from the INV03 menu, are essential.

You can adjust detail allocations at any time after you enter the order, even before you print pick slips. The On-line Allocation program, ORD720D, allows you to review inventory in detail, allocate it to orders, and change existing order allocations.

Detail allocations are relieved when the system issues material.

Return material authorization

The Return Material Authorization process, RMA, controls and monitors the return of goods.

Infor LX generates an RMA which mirrors the terms and conditions of the return. You can copy the RMA from a processed invoice or create it independently of an existing order. If you copy an invoice to create an RMA, Infor LX copies only regular lines, not special lines. You can manually add special lines as credits on the RMA. Enter RMAs in the same manner as a customer quote. Like a customer quote, an RMA has no immediate affect on inventory, accounts receivable, sales, or the general ledger.

Infor LX then generates a Return Material Document which provides the customer with the authorization to proceed with the return. Internal procedures, return reason codes, and instructional notes on the RMA identify the disposition processing.

You can perform credit processing and determine update effects by entering the RMA number and assigning the appropriate order type.

Drop shipment

Infor LX provides a tightly integrated drop shipment processing capability. The product supports the creation, tracking, and management of customer drop shipment orders via the Order Management, Purchasing, and Billing applications.

The order processing professional initiates drop shipments during customer order creation. You can designate any order line for drop shipment if it meets user-defined drop ship controls. If you designate a line as a drop ship line, the system automatically creates a drop ship request in purchase order processing.

When a buyer responds to a drop ship request and creates a purchase order, Infor LX notifies the order processing department and cross references both the customer order and the purchase order. After vendor shipment confirmation, Infor LX automatically notifies the Billing application to initiate the invoice process. Infor LX supports constant communication between the order professional, the buyer, and the billing professional throughout the order cycle.

Note that Order Management performs soft allocations for drop shipments to allow the MPS/MRP application to net customer order drop ship demand against open purchase orders. Drop Ship Confirmation, BIL650, removes the soft allocation. Order Management does not allow hard allocations for drop ship items because the items are not physically received or issued from inventory.

Order Entry defaults to the Warehouse Master's Default Receiving Location for all drop ship lines to specify the profit center for inventory and general ledger transactions.

Time Zone Conversion

Time zone conversion functionality can be activated in Infor LX. The following section briefly describes how this functionality operates in the Order Management Application.

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

Not all dates in the supply chain are converted as part of the time conversion process, because some are always stored as entered or displayed, printed, and stored in system time zone values. The following list shows the common conversions performed for typical date fields when time zone conversion is active. Exceptions are discussed in the help text for individual date fields in individual screens.

- Request Date: In order entry, this is the date on which the user expects shipment of the order line from the ship-from warehouse. This date is generally the date of the order line warehouse. In order inquiry screens, it can be called the Shipping Date. It affects pricing and promotion qualification, lot availability and expiration, MRP available-to-promise processing (it is the demand date), OLM load generation, and selection of records for display or processing in multiple other programs. The system displays this date to the user for the time zone of the warehouse.
- Entry Date and Entry Time: These are audit fields, and theEntry Date is also used in Order Entry as a promotion qualifier, as well as for other purposed. Entry Date and time are never converted. They are stored and displayed for the system date and time zone.
- Schedule Date and Time: Users generally use these these fields to record the date and time at which the customer wants to receive an order line. These dates are generally entered and displayed for the ship-to number time zone, or if there is no ship-to number, the time zone of the ship-to customer.
- Customer Requested Ship Dates and Dock Dates: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. Note that the Customer Requested Ship Date/Time is converted to the equivalent value in the warehouse time zone when it is passed to Cell Workbench Detail, LMP500D2.

- CTP Ship Date and CTP Dock Date: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. They are calculated values that indicate when you should ship a line from your warehouse. Therefore, they are converted based on the time zone of the line warehouse.
- Price Book Date: Order Entry uses this date for pricing and promotion qualification. Date ranges in the Price Book have no associated time or time zone. The are saved and displayed as entered with no time zone conversion. Store Date and Warehouse Date are variants of the Price Book Date. They are also stored and displayed without time zone conversion.
- User Date and Time 1 and 2: These fields are user definable and have no pre-defined usage. They are not associated with any regional time zones. The date and time values are stored and displayed as entered with no time zone conversion.
- Receipt Date/Time: These resupply order fields represent the planned receipt date and time (expected delivery date and time) at the To Warehouse. They are entered for the time zone of the ship-to warehouse and converted to the equivalent system date and time for storage, then converted back to ship-to warehouse time zone for on-screen display and printing in reports and inquiries.

Note that dates that are converted for time zone differences are only converted if the governing entity for the date and time, such as the ship-from warehouse or the ship-to number, contain a region code. If the governing entity has a blank region code, no conversion is performed. The date is stored, retrieved, printed, and displayed as entered on the screen.

Application flow

This section discusses variations in the order management process flow.

Workflow events in general

The order processing work flow events determine the processing path for each order. You can define and configure these events by order class. Each order class is associated with an order type and a sold-to customer. You can also attach a variety of standard documents to each order class and print or save them when the order passes through each processing event.

The order type determines whether the order impacts inventory, sales history, or accounts receivable. You can define multiple order types to use with resupply orders, financial orders, and so on, in Order Type Maintenance, ORD180.

The following sections briefly describe the order processing work flow events. For a more detailed explanation of each event, refer to the program overview for each event.

Order entry event

The Order Entry program, ORD700, is the entry point for an order into the system. It is the only required work flow event. Each order includes header detail and line item information. Acknowledgments print automatically when you exit this program.

You can update orders existing orders using the same program. After you update an order, a change of order report prints automatically.

If a customer exceeds his or her credit limit, you can accept the order, reject the order, or accept the order subject to later credit release. The Order Hold Manual Release program, ORD580, and the Order Hold Batch Release program, ORD680, allow you to release orders that you placed on hold in Order Entry. For example, if an order is on credit hold, Infor LX does not release it, even if the customer has already paid. You must run one of the release programs before the system can release the order for shipping. You can release individual orders or all orders for that customer.

Infor LX allocates inventory instantly, so the quantity still available is always up-to-date. If the quantity allocated for an order exceeds the quantity available, you can either reject or accept that particular line item on the order. You can accept order lines or entire orders as backorders, or you can cancel them based on the backorder option you defined for each customer in Customer Master Maintenance. You can also override this option during Order Entry.

When you enter and accept an order, it is immediately available for picking. Infor LX considers it an open order. When you exit the program, Order Entry prints any documents you assigned to the order class of the order.

Pick release event

The Pick Release program, ORD550, allows you to release open orders, optionally allocate inventory, and print picking documents. Infor LX can only release orders that are not on any type of order hold (customer, credit, margin, or user) and are not fully shipped. To release open orders, select orders by warehouse within a variety of ranges. The program displays each order for that warehouse that falls within the specified parameters. You can release the whole order or individual line items. You can perform additional credit checking for each customer before pick release. You can perform optional allocations at the lot and location level within the warehouse of the customer line item. Note that stock allocations at this stage are only allocations, they have not been shipped. These detail allocations print on the picking documents. The program preserves any allocations that you make through the On-line Allocation program.

Pick confirm event

Use the Pick Confirm program, ORD570, to confirm quantities that are actually shipped and to backorder or cancel lines or orders that cannot be shipped. Back order processing is based on the backorder codes you define for each customer in Customer Master Maintenance. You can override them for individual orders during order entry. You can also initiate order consolidation or reconsolidation during pick confirm. This process performs all inventory-related file updates, and it creates the required records for invoice processing.

Invoicing event

The Customer Document Release program, BIL500, creates and maintains regular and proforma invoices for customer orders.

Regular invoices notify customers of the money they owe. When you release regular invoices, Infor LX updates the files Accounts Receivable, RAR, Sales History, SSH, and Sales Invoice History, SIH.

You can use proforma invoices for a variety of purposes. For example, proforma invoices provide documentation of valuation for a shipment of goods that must be insured. You can create proforma invoices either before or after order confirmation. Infor LX automatically generates this type of invoice when you run the application.

For maintenance purposes, you can update invoice information without printing a copy of the invoice. This feature allows you to maintain master and transaction file information as frequently as you desire without printing the invoice each time.

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.

- Acknowledge an order - ORD700
- Allocate orders in batch by warehouse/date - ORD400
- Allocate orders on-line by lot/location/container - ORD720
- Consolidate/reconsolidate orders - ORD550
- Copy order information to another order - ORD700
- Copy quote information to a customer order - ORD700
- Customer listing - ACR105
- Delete closed RMAs - ORD935
- Display open order information - ORD700
- Display orders on credit hold - ORD580
- Specify an order - ORD700
- Enter customer quotes - ORD700
- Include special lines in order total discount (flag) - SYS800
- Inquire on customers - ACR310
- Inquire on holds - ORD380
- Inquire on lot/location allocations by lot or order - ORD720
- Inquire on material status - INV300
- Inquire on open orders - ORD700
- Inquire on quotes - ORD700
- Inquire on warehouses - INV330
- Inquire on customer RMAs - ORD700
- Maintain customers - IDF Customer

- Maintain customer notes - ORD140
- Maintain item cross reference - ORD150
- Maintain an order - ORD700
- Maintain an order line - ORD700
- Maintain quotes - ORD700
- Maintain customer addresses - ORD100
- Maintain special prices - PRO140
- Order exception report - ORD410
- Override an order on credit hold - ORD700
- Pickable orders report - ORD420
- Pick confirm - ORD570
- Pick release - ORD550
- Print customer quotes - ORD260
- Print open orders by class/item - ORD240
- Print open orders by customer - ORD200
- Print open orders by item/date - ORD210
- Print open orders by customer item number - ORD280
- Print open orders by planner - ORD250
- Print open orders by salesperson - ORD220
- Print open orders by warehouse/date - ORD230
- Print order exceptions (orders not fully allocated) - ORD410
- Print picking documents - ORD550
- Print special price listing - PRO140
- Print item cross reference listing - ORD155
- Purge order files - ORD990
- Purge quotes - ORD930
- Release all orders for a customer from credit hold - ORD680
- Release one customer order from credit hold - ORD580
- Release order for picking - ORD550
- Select orders to pick - ORD550
- Select paperwork for special line printing - SYS800
- Select special pricing method (salesperson/customer) - SYS800
- Set special pricing hierarchy - SYS800
- Special price listing - PRO140
- View customer orders on hold - ORD380
- View last customer order number used - SYS800
- View last quote number used - SYS800

Order management application menus

The ORD application provide access to key programs via the following menus:

Order Management

The Order Management menu, ORD, provides access to the major order processing programs. It also provides access to relevant programs from other Infor LX applications.

Two inquiry programs from other applications are particularly relevant in ORD:

Material status inquiry, INV300D, allows you to view the inventory status of items in inventory.

Warehouse Inquiry, INV330D, allows you to review warehouse information sequenced by pick sequence number and location number.

See the Inventory Management documentation for additional information about these two programs.

Order Maintenance and Reports

The Order Maintenance and Reports menu, ORD01, primarily provides access to the numerous reports and listings that the Order Maintenance application offers. It also provides access to master file maintenance programs that are relevant to the customer order processing work flow.

Return Material Authorization

The Return Material Authorization menu, ORD02, provides access to programs that process the tracking of returned materials.

Chapter 3
Programs

3

Address master maintenance, ORD100D1

The Address Master Maintenance program, ORD100D1, allows you to enter and maintain consistent address and phone information throughout Infor LX. This program enables you to define address information by type.

Access: ORD01 menu

Add or select customer or vendor address information

Address Master Selection, ORD100D1-01, displays a list of addresses. The addresses apply to either a customer or a vendor. Select the customer or vendor and address type to maintain, or specify a customer or vendor number, address code, and address type to create new address information.

Only vendor addresses use address type 06.

Field descriptions - ORD100D1-01

Fields	Description
Line actions	The action codes described in the following section are available: **14=Language Override** Display the Address Master Language Override screen, ORD101D-01. The list is positioned at the customer address that you selected on ORD100D1-01. Select this address, or another address, and the language for translation. **22=Customer Notes** Access the Note Mode Selection (SYS255D) screen to view or maintain customer notes.

49=User Defined Fields

Access SYS109D1-01 to display or maintain user-defined data for this application.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

14=Language Override

Display the Address Master Language Override screen, ORD101D-01. The list is positioned at the customer address that you selected on ORD100D1-01. Select this address, or another address, and the language for translation.

22=Customer Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain customer notes.

49=User Defined Fields

Access SYS109D1-01 to display or maintain user-defined data for this application.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Customer Number (8,0): Specify the number of the customer or vendor for whom you maintain the address. If the Address Type is 06, the customer is actually a vendor; otherwise the customer is a regular customer.

Address (4,0): Specify the code to identify the address location to maintain for this customer.

Type (2,A): Specify the type of address you want to maintain for this customer. The following values are valid:

0	All addresses
1	Ship-to address
2	Promotional Payment-to address
3	Invoice-to address

4	Lock Box-to address
6	Vendor Ship-from address. Need ILM.
7	Return-to address. Return to vendor.

Programs in Customer Master Maintenance, Order Entry, Purchasing, and Invoicing search the address types for valid records specific to their function. If they do not find a more specific applicable address, they default to the 00 address type.

Name: This field displays the customer name associated with this address and type.

Status: Infor LX displays the address status. Valid statuses are active and inactive.

Screen actions - ORD100D1-01

Commands	Description
F11=Fold	Fold the screen to display the Status field.
F13=Filters	Access the filter screen and choose to view all records or only active records.
F14=Customer Alpha	Access Customer Alpha Lookup, ACR310D-01.
F15=Language Overrides	Display the Address Master Language Override screen, ORD101D-01. Select a customer address and the language for translation.
F16=Toggle Language	Use F16=Toggle Language to switch between the customer name in the master file (base) language and in your language, assuming the name was translated into your language.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter Options

Added: *MR80791 Added new field to for customer selection filter*

Use this screen to limit the address master records displayed for the customers on the Address Master Selection screen, ORD100D1-02.

Field descriptions - Filter ORD100D1-02

Fields	Description
Filter Options (1,0):	**Added:** *MR80791 Added new field to filter address records of the customers* Specify the option for the number of the records to be included in the list. ■ 1=All Records (All active or inactive address records) ■ 2=Active Records (only active address records) **Default value** The default value is 1=All Records.
Customer	Default = blank. ORD100D1 Address Master Selection lists all address master records for all customers, using other filter options, such as Active/All Records. **Note** For some address types, the customer field may hold a vendor number or a specific value such as 99999999. Enter a customer number filter to limit the display to just Address Master records defined for that customer. ORD100D1 displays only active records that are defined for the selected customer, for address types 0=Global, 1=Ship-To, 2=Promotional Payment-To, 3=Invoice To, and 4=Lock Box-To. Address types are defined for specific customers. For example, Ship-To numbers are defined for the Ship-To Customer, and Invoice-To numbers are defined for the Invoice-To Customer. For customers without a complex customer hierarchy, such as where the Sold-To Customer and Ship-To Customer are the same, using the Customer filter will effectively display Address Master records for the Sold-To Customer. ORD100D1 users can see records that are defined for vendors by clearing the Customer filter. Note that some vendor Address Master records are maintained through a different program such as Vendor Ship To Maintenance (PUR130).

Screen actions - ORD100D1-02

Commands	Description
Standard screen action/ function keys	**Added:** *MR80791 Added the standard screen actions/functions field for ORD100D*

All screen actions/function keys on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view basic address information

Use Address Master Maintenance, ORD100D2-01, to specify the address information for the customer or vendor you selected on the previous screen.

Field descriptions - ORD100D2-01

Fields	Description
Customer/Vendor Number:	Infor LX displays the customer or vendor number you specified on the selection screen.
Address Number:	Infor LX displays the address code you specified on the selection screen.
Address Type:	Infor LX displays the address type you specified on the selection screen.
Address Name (50,A):	Specify the name to associate with this address.
Attention To (50,A):	Specify the name of the person to associate with this address.
Address Lines 1-6 (50,A):	Specify up to six lines of address information that precedes the state. You must specify an address on the first address line.
State (3,A):	Specify the state abbreviation for this address. Infor LX validates this entry against the state code table.
Postal Code (9,A):	Specify the postal code for this address.
Country Code (4,A):	Specify the country code for this address.
Phone Number (25,A):	Specify the phone number to associate with this address.
Fax Number (25,A):	Specify the fax number to associate with this address.
E-mail Address (80,A):	Specify an email address to associate with this address.
Contact Name (30,A):	Specify the name of the person to contact for this ship-to address.
Primary Language (3,A):	This information defaults from the language field in the customer's master record. You can override this information. Infor LX translates all documents

	sent to this address to the primary language you define here. Infor LX validates this value against the language code table.
Lock Box ID Number (35,A):	The screen displays this field only if this is an address type 0 (Global) or 4 (Lock Box Address). Specify the lock box number to associate with this address.
Region Code (10,A):	Specify the region code for this address. The region code determines the region-specific attributes such as time zone and date and decimal formats for this address.

Screen actions - ORD100D2-01

Commands	Description
F6=Accept	Accept changes made in all screens.
F21=Language Override	Display the Address Master Language Override screen, ORD101D-01. Select a customer address and the language for translation.
F22=Toggle Language	Use F22=Toggle Language to switch between the customer name in the master file (base) language and in your language, assuming the name was translated into your language. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view address information for distribution and sales

The system displays the Address Master Maintenance distribution and sales screen, ORD100D2-02, only for the global address type 00, the ship-to address type 01, or the ship-from address type 06. Use this screen to specify district and sales information for the customer and address you selected on the initial screen.

Field descriptions - ORD100D2-02

Fields	Description
Customer/Vendor Number:	Infor LX displays the number of the customer or vendor you specified on the selection screen.
Address Code:	Infor LX displays the address code you specified on the selection screen.

Address Type: Infor LX displays the address type you specified on the selection screen.

Override Tax Code (5,A): Specify the tax code to apply to goods shipped to this address. This code overrides any tax code you established for this customer in IDF Customer.

Country Code (2,A): Specify the customer's value added tax (VAT) country code, if any, for this address. This code combined with the registration number in the following field forms the EC VAT number. If you specify the country code, also specify the registration number.

Registration No (25,A): Specify the customer's registration number for this address. This number combined with the country code make up the EC VAT number. If you specify the registration number, also specify the country code.

Salesperson Number (6,0): Infor LX displays this information from the Customer Master, RCM, file. To override the value, specify a valid salesperson number from the Salesperson Master, SSM, file. This salesperson then becomes the default on any order that uses this ship-to customer/address combination. If the address type is 06, this field defaults to zero and is not enterable.

Split Salesperson (6,0): **Added:** *MR 12278 Added new field to ORD100D2-02*

Infor LX defaults this value from the Customer Master, RCM file. To override the value, specify a valid Split Salesperson number from the Salesperson Master, SSM file. This split salesperson then becomes the default value for all the orders that use this ship-to customer/address combination. If the address type is 06, zero is displayed in this field, and cannot be modified.

Promotion Region (6,A): (Optional) Infor LX displays this information from the Customer Master, RCM, file. To override this value, specify a valid promotion region from the Promotion Region Code table. This promotion region then becomes the default promotion region for this ship-to customer/address combination.

Pricing Region (6,A): Infor LX displays this information from the Customer Master file, RCM. To override this value, specify a valid pricing region from the Pricing Region Code table. This pricing region then becomes the default pricing region for this ship-to customer/ address combination. You can override this code in Order Entry and Billing.

Asterisks (*) are not permitted in this field.

Resupply Warehouse (3,A): (Optional) Use this field only if you have the Distribution Resource Planning (DRP) application installed. Specify the code of the warehouse that the system resupplies through the DRP System. The warehouse must exist in the Warehouse file, IWM. You must specify a resupply warehouse if the customer associated with this address is a warehouse that you resupply through DRP. If the customer/vendor address type is 06, this field defaults to blank and is not enterable.

The Ship-To file, EST, has a resupply warehouse for each customer number that is a warehouse resupplied through DRP. When you run DRP, Infor LX finds the first occurrence in the EST file of the warehouse number you enter in DRP. It uses the customer number linked to that warehouse, based on your entries in this program. Infor LX uses that customer number for the resupply orders that it generates.

Ensure that you have only one customer number linked to a resupply warehouse in this program. Otherwise, you can get the wrong customer for generated resupply orders.

Store (5,0): Specify the store number to associate with this ship-to customer/address combination. Store numbers are user defined.

Route (6,A): Infor LX displays this information from the Customer Master, RCM, file. You can override this value. Specify the routing code that applies to this ship-to customer/address combination. Routing codes are user defined. If the customer/vendor address type is 06, this field defaults to blank and is not enterable.

If you have the Outbound Logistics Management application, OLM, installed, the route you enter must exist in the Shipping Route Master, LSR, file. If you do not have OLM installed, the route must exist in the Route Code table.

Warehouse (3,A): Infor LX displays this information from the Customer Master file, RCM. To override this value, specify a default warehouse from which to ship the ordered items for this ship-to customer/address combination. The warehouse must exist in the Warehouse file, IWM, and be valid for this customer's default company. If the customer/vendor address type is 06, this field defaults to blank and is not enterable.

Back Order (1,0): Infor LX displays this information from the Customer Master file. You can override this value. Specify the backorder code for this ship-to customer/address combination.

Supplier (25,A): (Reference) Specify the supplier code for this customer. This field defaults from the Customer Master but you can change it.

Screen actions - ORD100D2-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view address information for release management

Use Address Master - Release Management, ORD100D2-03, to provide address information for release management use. The customer number, name, address number, name, address type and description for the information to maintain display at the top of the screen. This screen does not appear if the address type is 06.

Field descriptions - ORD100D2-03

Fields	Description
Control Release Management by Ship-To (1,A):	Specify Yes to use Release Management values that are defined on this screen to control release processing. Otherwise, specify No.
Release Reconciliation Method (1,A):	This field determines the reconciliation method the system uses to convert new release requirements to order lines. The following values are valid: 2 Cumulative - rec. on a cume basis 3 Discrete - rec. on a discrete basis 4 None - not reconciled This field defaults to the Release Reconciliation Method defined for the Ship-To Customer on **IDF Customer > Logistics/Contract Shipping** tab. You cannot reconcile releases by identifier.
JIT Reconciliation Method (1,A):	This field determines the reconciliation method the system uses to convert new JIT requirements to order lines. This field is input capable only in create and copy mode. The following options are valid: 1 ID - reconciled by Identifier 2 Cum - rec. on a cumulative basis

3	Discrete - rec. on a discrete basis
4	None - not reconciled

JIT Reconciliation Method 4 is valid only where the release reconciliation method is 4. This field defaults to the JIT Reconciliation Method defined for the Ship-To Customer on **IDF Customer > Logistics/Contract Shipping** tab.

Start Date for Conversion Horizon (1,A): This field specifies the start date to use in RMS Conversion for the Convert to Order Lines parameter that you define on screen Release - Authorizations, RMS500D3-03, when you specify a number of weeks to convert.

1	Release Date
2	System Date

JIT Conversion Horizon (3,0): This parameter determines the number of days for which the release requirements are overlaid by any existing JIT requirements. This occurs when the system creates or maintains the outstanding requirements for the customer order during RMS Conversion. Valid values are 1-999.

Retain Past Due Order Lines (1,A): Set Retain Past Due Order Lines to No if the release reconciliation method is 2 or 3. Set this field to Yes if the release reconciliation method is 4.

Use this field to specify whether outstanding quantity on order lines that has a date earlier than the release date is retained during conversion for release reconciliation method 4 only. Set this parameter to 0 if any of the following conditions apply to the customer:

It provides an arrears or past due figure when something is past due. This figure is entered in the Customer Stated Arrears/Past Due on screen Release Header - Dynamic Data, RMS500D3-01.

It rolls past due into the first requirement.

It cancels all previous requirements that are not specified on the new release.

Set this parameter to 1 to retain the order lines if any past due is still considered outstanding, and the customer does not provide an arrears or past due figure or roll the past due into the first requirement.

Apply rounding to Pack Quantity (1,A): The system uses this parameter during RMS Conversion to determine whether requirements are rounded to multiples of the pack size. Specify Yes to round the requirements or No not to round them.

% of extra pack required (3,0):	This parameter is mandatory if you set the Apply rounding to Pack Quantity field to Yes. The system uses the percentage value during RMS Conversion to determine whether to round a requirement up or down. The system only rounds up to the next whole pack if the percentage of the partial pack quantity over the pack quantity is equal to or greater than the percentage you specify here. Valid values are 1-99.
Shipping Lead Time (Days) (3,0):	The system uses this parameter when it calculates the ship date from the customer request date in conjunction with the customer's carrier and internal non-working days during release entry and maintenance. Valid values are 1-999.
Shipping Lead Time (Hrs/Min):	The system uses this parameter when it calculates the ship time from the customer request time in conjunction with the Lead Time Days.
Write Release history details (1,A):	Specify Yes to create release history during RMS Conversion, otherwise, specify No.
Write JIT history details (1,A):	Specify Yes to create JIT history during RMS Conversion, otherwise, specify No.
Signal Label Format (10,A):	This parameter determines the label format to assign to any signal label data.
Signal Label Copies (2,0):	This parameter is output as part of any signal label data created. It indicates the number of copies of the label required.

Screen actions - ORD100D2-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view address information for the shipping policy

Use Address Master - Shipping Policy, ORD100D2-04, to maintain shipping policy data for this address master record. This screen does not appear if the address type is 06.

The screen displays customer number, name, address number, name, address type, and description for the record you are maintaining.

Field descriptions - ORD100D2-04

Fields	Description
Receiving Dock (35,A):	Specify a receiving dock to default to the order line if no receiving dock is defined on a corresponding JIT requirement.
Load Build Policy (1,A):	Specify one of the following codes to indicate whether loads/shipments and packing groups are generated during pick release and/or the format to use: When Loads are generated, consignment numbers are always assigned to each Load/Shipment combination, based on the next consignment number at the warehouse, company, or system level. 0 The system generates no load/shipment or consignment details during pick release. 1 The system generates one load for each customer/ship-to and one shipment and packing group for each ship-to address. 2 The system generates one load for each customer/ship-to, one shipment for each ship-to address, and one packing group for each dock code. 3 The system generates one load for each customer/ship-to, one shipment for each ship-to address, and one packing group for each order/item. If you define one load and shipment per customer/ship-to or one load per customer/ship-to/dock, the system attempts to consolidate all requirements for a customer/ship-to or customer/ship-to/dock selected during pick release onto one packing group, with the following restrictions: The ship-to address, carrier, route, means of transportation, freight terms, shipping zone, delivery times, and order class currency must be identical for each order that it considers. If the Match Packing Group to Invoice flag for the customer is set to Yes, the following values must be identical to consolidate order lines on the same packing group: currency, reason code, billing customer, payment type, user order type, document prefix, invoice-to customer number, invoice-to (address) number, exchange rate, global exchange rate, and customer exchange rate. If you build loads at Pick Release, the system usually builds the loads based on the order line request date. The system groups order lines to ship on the same day prior to the application of the load build policy and consolidation rules. To override this within pick release, specify a ship date that causes all

of the order lines that meet the selection criteria to be processed as if the order line request date was the override date.

Auto Create Packaging (1,A): Specify whether the system automatically creates packaging records for loads created during pick release. Set this flag to Yes for the system to use any other packaging flags. The Yes setting causes the Outbound Logistics Management application to create Load Carton Header, LCH, and Load Line Cartons, LLC, records during load generation. This field is only meaningful with OLM installed.

Validate Packaging (1,A): Specify Yes to require packaging information, otherwise, specify No. If packaging is required, the system validates that the items and quantities that you selected for pick confirm correspond to the items and quantities packed, by lot if they are lot controlled.

You cannot confirm requirements where the selection and packaging do not correspond.

You must set the Auto Create Packaging field to Yes to activate the Packaging Required field. This field is only meaningful with OLM installed.

External Pack Validation (1,A): Specify whether to check packaging prior to pick confirm. Where pack details for the shipment may or may not be extracted, the packs are externally checked (for example, by scanning) and the information is uploaded for comparison within Infor LX. Set the Packs to be Checked parameter 1 to ensure that externally supplied data exists and that the data is analogous with the shipping details prior to pick confirm.

The Packaging Required flag must be on in order to turn on the Packs to be Checked flag. This field is only meaningful with OLM installed.

Issue Packaging Allowed (1,A) Specify whether the system issues inventory of the packaging during pick confirm. The system only issues packaging if the field is set to Yes and the pallet or carton to ship has a corresponding Infor LX item number, as defined in Container Master Maintenance, API140.

You must have the Auto Create Packaging flag on to turn on the Issue Packaging field. This field is only meaningful with OLM installed.

Warning: If you ship from a managed warehouse, you must have sufficient stock on hand for the required packaging items, otherwise, the system ignores this flag.

Invoice Packaging Allowed (1,A): Specify whether the system creates invoice lines for the packaging during pick confirm. This occurs only if this parameter is set to Yes, Issue Packaging is set to Yes, and the pallet or carton to ship has a corresponding Infor LX item number as defined in Container Master Maintenance, API140.

The Issue Packaging flag must be set to Yes to turn on the Invoice Packaging flag. Infor LX ignores this field for Release Management (RMS) orders that use base Order Class 010 because these orders have no invoicing event. This field is only meaningful with OLM installed.

Warning: If you ship from a managed warehouse, you must have sufficient stock on hand for the required packaging items, otherwise, the system ignores this flag.

Override Ship Date at Pick Release

Specify Yes to override the ship date during Pick Release processing, otherwise, specify No.

Note: If you specify Yes to override and the Ship Date field on Pick Release, ORD550D1, is set to 0, Infor LX override the ship date with the current system date.

Next/Lower/Upper Pallet Number (20,A):

The next pallet number and pallet number range to use to create pallet records can optionally be defined for this customer. All values default to blank. Screen validation ensures the following:

All values are numeric.

Next pallet number is equal to or greater than the lower pallet number.

Next pallet number is equal to or less than the upper pallet number.

Lower pallet number is less than the upper pallet number.

Next/Lower/Upper Carton Number (20,A):

The next carton number and carton number range to be used by the system when creating carton records can optionally be defined for this customer. All values default to blank. Screen validation ensures the following:

All values are numeric.

Next carton number is equal to or greater than the lower carton number.

Next carton number is equal to or less than the upper carton number.

Lower carton number is less than the upper carton number.

Screen actions - ORD100D2-04

Commands	Description
F22=Packaging Inquiry	Access Packaging Maintenance, OLM600D1, in Inquiry mode. OLM600D1 automatically positions to the first active LPK record defined for this customer/ship-to combination.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Address master language override, ORD101D

Use this program to enter the translations for customer names and addresses. The screen lists existing records in the Customer Address MLS file, ESX. See Auto Create Language Record, SYS091D, and Mass Create Language Records, SYS092D, for more information.

If you use the auto create feature, the list of customers on the ORD101D-01 screen includes changes made in Address Master Maintenance, ORD100D1. The new and updated records have status Review Required. When you translate the names and addresses and press Enter, the status changes to Active.

If you did not auto-create the ESX records, use action 1=Create to create the records in this program. When you create a record in the language extension file, the system copies the record, in the master file (base) language, from the Address Master file, EST, to the ESX file. The record is then available for translation.

If you use the Infor Development Framework (IDF) you must create a blank Language record in SYS091D for File 002 and Language Code ***. ORD100D2 automatically creates and maintains this record. The blank Language record is not listed on ORD101D-01 and you cannot revise or delete it. To display or copy the record, enter action 5=Display or 3=Copy, specify the customer number and leave the language field blank.

Access:

- Menu ORD01
- Action 14=Language Override or F15= Language Overrides from the Address Master Selection screen, ORD100D1-01
- F21=Language Override from the Address Master Maintenance screen, ORD100D2-01

Add or select an address record

Use the Address Master Language Override screen, ORD101D-01, to add or select an address record to translate.

Field descriptions - ORD101D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Customer (8,0):	Specify the number of the customer to translate.
Address (4,0):	Specify the address code.
Type (2,0):	Specify the address type.
Language (3,A):	Specify the language to use in the translation.

Screen actions - ORD101D-01

Commands	Description
F13 = Filters	Access the Filter Options screen to select from the following sequences: 1=Address/Language - Active 2=Address/Language - All 3=Only Review Required Records All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter options

Use the Filter Options screen to limit the list of Address records.

Field descriptions - Filter

Fields	Description
Filter Options (1,0):	Specify one of the following options to limit the list of records. 1=Address/Language - Active 2=Address/Language - All 3=Only Review Required Records
Filter (3,A):	Specify a language to display only records for that language.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Enter translated address information

Use the Address Information - Language Maintenance screen, ORD101D-03, to enter the translated name and address for the Address that you selected on the previous screen.

The screen displays the name and address, in the master file (base) language, from the Address master file, EST. Enter the translated information in the fields at the bottom of the screen. When you press Enter, the system updates the Address MLS file, ESX.

Access: Enter from the Address Master Language Override screen, ORD101D-01

Field descriptions - ORD101D-03

Fields	Description
Customer (8,0):	If you are in Create or Copy mode, specify the number of the customer record to create or copy.
Address (4,0):	If you are in Create or Copy mode, specify the address code to create or copy.
Type (2,0):	If you are in Create or Copy mode, specify the address type to create or copy.
Language Code (3,A):	If you are in Create or Copy mode, specify a language to use for translation.

Address Name (50,A):	Specify the customer name for this address in the selected language.
Attention To (30,A):	Specify the name of the contact in the selected language.
Address (50,A):	Specify the address for this customer in the selected language.

Screen actions - ORD101D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Address master listing, ORD110D

The Address Master Listing program, ORD110D, prints a listing of all current customer addresses. They are printed in numeric order by customer, next by ship-to location.

Print an address master list

The Ship To Master Listing screen, ORD110D-01, 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.

Access: ORD01 menu

Field descriptions - ORD110D-01

Fields	Description
From Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the list.
To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the list.
Override Print Option (1,0):	Use this field to specify the language or languages for the names and addresses on the report. If you use the default print option 0, Infor LX prints the report in the master file (base) language. If you select option 1 or 2, but a language record does not exist, the system prints the information from the base master

	file. If you choose options 3 or 4, but a language record does not exist, the report does not include data for that record. Before you submit the job, verify that your printer supports the languages that you select for the report. 0=Print Base Name and Address Information Print the names and addresses in the master file (base) language. 1=Print User Language Override for Name/Address Print the names and addresses in the language of the user who submits the job. The system prints the data in the language assigned to the user ID in Infor LX User Authorization Maintenance, SYS600D1. 2=Print Language Overrides in Address Language Print the names and addresses in the language assigned to the address in the master file, EST. 3=Print Language Overrides in Specified Language Print the names and addresses in the language that you select, assuming that the data is translated into that language. 4=Print All Available Languages Print the names and addresses from all the language (ESX) records.
Language (3,A):	Specify the language to use on the report.

Screen actions - ORD110D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card provider master, ORD130D1

The Credit Card Provider Master Program, ORD130D1, allows you to set up basic information that identifies the providers of credit cards that you accept in your business, such as Master Card(R), Discover(R), and so on. The information in these records identifies the type of card by code and number of digits for card validation purposes, and it allows you specify a Merchant ID to tell the credit card processing application who to pay after Infor LX submits a credit card transaction for settlement. You can also set up provider records by company with company-specific detail information.

Add or maintain a credit card provider

Use the Credit Card Provider Master Selection screen, ORD130D1-01, to create a new credit card provider record, or to select a credit card provider to maintain.

Field descriptions - ORD130D1-01

Fields	Description
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.
Company (3,A):	Specify a three-character code to associate a specific company with this credit card provider code and prefix. You can set up detail information for this provider with the specified prefix that apply specifically to the company. If you leave this field blank, the provider record applies to any company that uses this provider and prefix and does not have a company-specific record for the provider and prefix.
Code (2,A):	Specify a two-character code to identify the credit card provider. These values are user defined. For example, you can use acronyms, such as MC for Master Card, AE for American Express, or you can use any other unique code.
Prefix (4,A):	Specify the beginning digits of a card that are unique to this provider. You an specify up to four digits. These are the first characters of the card number displayed on each Master Card, Discover Card, and so on. For example, you might use MC for a code and 52 for the prefix. Validation of a Master Card would look for your MC record, then look at the first two digits to see if they equal 52. If they do not match, the validation fails. If they do match, the process looks at other qualifying information.
Provider:	Infor LX displays the name of the credit card provider.
Status:	Infor LX displays the status of the record, Active or Inactive.

Screen actions - ORD130D1-01

Commands	Description
F13 = Filters	Access the Filter Options screen to specify whether to sort the selection screen by credit card provider code or by credit card prefix.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify credit card provider detail information

Use the Credit Card Provider Master Maintenance screen, ORD130D2-01, to provide detailed information to use to validate cards and to authorize payments of transactions charged to cards from this provider.

Field descriptions - ORD130D2-01

Fields	Description
Company (3,A):	Specify a three-character code to associate a specific company with this credit card provider code and prefix. You can set up detail information for this provider with the specified prefix that apply specifically to the company. If you leave this field blank, the provider record applies to any company that uses this provider and prefix and does not have a company-specific record for the provider and prefix.
Credit Card Code:	Infor LX displays the code of the credit card provider from the selection screen. In Copy mode, you can change this value.
Credit Card Prefix:	Infor LX displays the prefix of the credit card provider from the selection screen. In Copy mode, you can change this value.
Credit Card Provider Name:	Infor LX displays the name of the credit card provider from the selection screen.
Minimum Number of Characters (2,0):	Specify the number of characters that this credit card provider uses in a credit card number. Do not include spaces.
Days Authorization Effective (2,0):	Specify the number of days an authorization of a credit card payment amount remains in effect, beginning with the date on which authorization occurred.
Authorization Tolerance Days (2,0):	Specify a number of days that the system can use as a tolerance value to add to the days an authorization is effective. You can leave this field blank or use it to accommodate your billing schedule. For example, you might run your Billing/Invoicing process only every second day. If you ship goods late today, you might not bill them until two days from now. You run the risk that an authorization that is valid when you ship expires by the time you bill. For this scenario, if you add two days tolerance to the

effective days for the authorization, you can bill the transaction with the original authorization.

Allow On-Line Authorization (1,A):	Specify Yes to allow on-line authorization of credit cards from this provider. Specify No to require authorization of credit card transactions in batch.
Masking Character (1,A):	Specify the character to use to mask part of a credit card number for security.
Begin Characters to Show (2,0):	For security, Infor LX does not display all characters in a credit card number on the screen. Specify the number of characters at the beginning of the credit card number to display on the screen. Valid values are 0, 1, 2, 3, or 4.
End Characters to Show (2,0):	For security, Infor LX does not display all characters in a credit card number on the screen. Specify the number of characters at the end of the credit card number to display on the screen. Valid values are 0, 1, 2, 3, or 4.
Minimum Amount to Authorize (15,2):	Some credit card providers require a minimum charge amount for a transaction. Specify the minimum amount in global currency. If the provider does not have a required minimum, leave this field blank.
Merchant ID (20,A):	Specify a Merchant ID for use by the Credit Card Manager to identify where to pay the authorized amount. Your business might use different bank accounts to receive payments for different credit card providers. In this scenario, the individual provider codes would have different Merchant IDs. Or, your business might accept only Master Card, but you might want payments for one customer to go into a different bank account than payments from a second customer. In this scenario, you might have two different provider codes for Master Card, each with a different Merchant ID. If you want all credit card payments made to the same bank account, regardless of the credit card provider or customer, you can use the same Merchant ID value for all provider codes.

Screen actions - ORD130D2-01

Commands	Description
F6=Accept	Accept changes to the screen.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter credit card provider information

Use the Filter Options screen, ORD130D3-01, to sort the information on the selection screen by credit card provider code, then prefix, or by credit card prefix.

Field descriptions - ORD130D3-01

Fields	Description
Option (1,0):	Specify the sorting sequence for the information on the selection screen. The following options are available: ■ 1=Company/Credit Card Code/Prefix ■ 2=Company/Prefix ■ 3=Credit Card Code/Prefix ■ 4=Credit Card Prefix

Screen actions - ORD130D3-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Approval/decline code master, ORD131D1

Each credit card provider has a set of numeric codes that identify the reasons it approves or declines a transaction. To create approval and decline code information for the Infor LX system, you must have a list of the approval and decline codes used by each of the credit card providers you work with. The Approval/Decline Code Master program, ORD131D1, allows you to define the affect on order processing of the individual approval or decline codes that the credit card provider sends in response to a validation or authorization request. You can also create descriptive text to identify the meaning of the approval and decline codes.

If you do not provide information to Infor LX for a particular provider and code, the system does not recognize the code. It assumes that the transaction is neither validated nor authorized and places the order on credit card hold. You must manually release the order from hold in Order Hold Manual Release, ORD580D1, and add the missing code to the system for future use with this Approval/Decline Code Master program.

Add or maintain approval/decline code reason information

Use the Approval/Decline Code Master Selection screen, ORD131D1-01, to create a new record for a decline or approval code, or to select a record to maintain.

Field descriptions - ORD131D1-01

Fields	Description
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.
Co (3,0):	Specify the three-character code of the company with which to associate this approval or decline code definition. If you leave the field blank, the definition applies to all companies for which you do not provide a company-specific definition of this code from this provider.
Code (2,A):	Specify the two-character code that Infor LX uses to identify the credit card provider.
Approval/Decline Code (A,10):	Specify a numerical approval or decline code that the credit card provider uses.
Description:	Infor LX displays text that describes the approval or decline code.
Status:	Infor LX displays the status of the record, Active or Inactive.

Screen actions - ORD131D1-01

Commands	Description
F13 = Filters	Access the Filter Options screen to specify how to sort the selection screen. You can do a first sort by company, credit card provider code, or approval/ decline code.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify details for an approval or decline code

Use the Approval/Decline Code Master Maintenance screen, ORD131D2-01, to provide descriptive text and processing details for the selected credit card approval or decline code.

Note that the Authorized, Validated, Credit Card Hold, and Threshold fields you set for each approval or decline code work together to determine what happens next in processing of a credit card order. For example, you could define one decline code to set the credit card transaction to a status of "not authorized" and place the order on credit card hold. You could define a different decline code to have the transaction set to a status of "authorized" but placed on credit card hold only if the amount of the transaction exceeds the value you put in the Threshold field, and so on.

Field descriptions - ORD131D2-01

Fields	Description
Company:	Infor LX displays the company to which this code definition applies. In Copy mode, you can change this value.
Credit Card Code:	Infor LX displays the code of the credit card provider from the selection screen. In Copy mode, you can change this value.
Approval/Decline Code:	Infor LX displays the approval or decline code from the selection screen. In Copy mode, you can change this value.
Approval/Decline Description (A,30):	Provide descriptive text to accompany the selected approval or decline code so you can easily identify the reason a credit card transaction was approved or declined.
Authorized (1,A):	Specify how the system interprets the approval or decline code. 1=Authorized. The transaction is considered authorized. This setting works in combination with the Validated, Credit Card Hold, and Threshold fields. 0=Not authorized. The order is placed on credit card hold. Further processing depends on settings in other fields.
Validated (1,A):	Specify how the system interprets the approval or decline code. 1=Validated. The credit card is considered to be validated. 0=not validated. The card requires validation before the process can continue. Further processing depends on settings in other fields.

Credit Card Hold (1,A):	Specify whether to place transactions for which you receive this code on credit card hold. 1=Yes, 0=No. This setting can be overridden by a value in the Threshold field, which allows acceptance of authorized orders for transaction amounts below a threshold value.
Threshold (15,2):	Specify a threshold value to use with this approval or decline code. This value is used to set a limit below which an authorized transaction can be automatically accepted. For this code, a transaction for authorized amounts higher than the threshold are placed on credit card hold pending review.

Screen actions - ORD131D2-01

Commands	Description
F6=Accept	Accept changes to the screen.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter approval/decline code information

Use the Filter Options screen, ORD131D3-01, to sort the information on the selection screen.

Field descriptions - ORD131D3-01

Fields	Description
Option (1,0):	Specify a sorting sequence. The following options are available: ■ 1=Company/Credit Card Code/Approval-Decline Code ■ 2=Company/Approval-Decline Code ■ 3=Credit Card Code/Approval-Decline Code

- 4=Approval-Decline Code

Screen actions - ORD131D3-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card provider listing, ORD135D

Use the Credit Card Provider Listing program, ORD135D, to print a report of existing credit card providers.

Access: ORD01 menu

Specify selection criteria for a report of credit card providers

Use the Credit Card Provider Listing screen, ORD135D-01, to specify criteria to limit the credit card providers to include in the list.

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

Field descriptions - ORD135D-01

Fields	Description
From/To Company (3,0):	Specify a range of values to limit the credit card providers to include in the report by company.
From/To Provider (2,A):	Specify a range of values to limit the credit card providers to include in the report.
From/To Prefix (4,A):	Specify a range of values to limit the credit card providers to include in the report by prefix.

Record Status (1,0):	Specify 0 to include all providers or 1 to include only active providers in the report.
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 - ORD135D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Approval/decline code listing, ORD136D

Use the Approval/Decline Code Listing program, ORD136D, to print a report of existing approval and decline codes for credit card transactions.

Access: ORD01 menu

Specify selection criteria for a report of approval and decline codes

Use the Approval/Decline Code Listing screen, ORD136D-01, to specify criteria to limit the approval and decline codes to include in the list.

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

Field descriptions - ORD136D-01

Fields	Description
From/To Company (3,0):	Specify a range of values to limit the approval and decline codes to include in the report by company.
From/To Provider (2,A):	Specify a range of values to limit the approval and decline codes to include in the report by credit card provider.
From/To Approval/Decline Code (10,A):	Specify a range of values to limit the approval and decline codes to include in the report.

Record Status (1,0):	Specify 0 to include all providers or 1 to include only active providers in the report.
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 - ORD136D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Notes maintenance, ORD140D1

The Notes Maintenance program, ORD140D1, allows you to assign user-defined notes to the following information:

- A customer and (optionally) ship-to number combination (customer notes)
- A particular customer order (customer order notes)
- A specific line of an order (order line notes)
- A purchase order (purchase order notes)
- A purchase order requisition (requisition notes)
- A shipping document
- A vendor

You can designate that the notes print on some or all of the accompanying paperwork, which depends on the type of note. Possibilities include order acknowledgment, picking slip, invoice, purchase order, requisition, customer statement, and bill of lading.

Access this program from the ORD01 menu or from within other programs, such as Order Entry, with screen actions or line actions. The fields on the first screen vary slightly, depending on the type of note you maintain.

All notes are stored in the Notes file, ESN. Purchase order notes, customer order notes, and order line notes are saved in a temporary file only for the life of the order.

Access: ORD01 menu, PUR menu, within screens

Select a note type to maintain

Use the Notes Maintenance selection screen, ORD140D1-01, to select a note type to maintain. The fields that appear on the Notes Maintenance detail screen, ORD140D1-02, depend on the type of note you specify. All fields that may appear on the screen are described in the following. The program may bypass the ORD140D1-01/02 screens if you call the notes program from a specific order record. Use the maintenance screens to specify note parameters.

Field descriptions - ORD140D1-01/02

Fields	Description
Type (1,A):	This field specifies the type of notes to add or maintain. It is an enterable field in the selection screen. Valid values and their meanings follow. C, Customer Notes. Attached to a customer number and always appear on that customer's orders. O, Customer Order Notes. Attached to an order number and appear on all lines for that order. L, Customer Order Line Notes. Apply only to the specified order line. V, Vendor Notes. Attached to a vendor and appear where defined. P, Purchase Order or Purchase Order Line Notes. Attached to a purchase order or purchase order line and appear where defined for that document. Q, Requisition Notes. Attached to a purchase order requisition and appear where defined for that document. S, Shop Order Notes. Attached to a shop order and appear where defined for that document. Other note types are stored in the Notes file, ESN. However, these additional note types cannot be maintained through Notes Maintenance, ORD140.
Record Number:	The field name depends on the type of note. If you accessed the Notes program from a menu, type or select the customer number, order number, vendor number, or purchase order number for which to maintain the notes. If you accessed the Notes program with a screen action or line action from within another program, this field defaults to the selected record number.
Vendor (8,0):	Specify the vendor number the note applies to. The screen displays the Vendor field if you specified note type V in the initial screen, or if you accessed the program from the PUR menu.

Ship-To (4,0):	To maintain customer notes and assign them to only one specific ship-to location for this customer, specify a ship-to location number. If the notes apply to all ship-to locations for the customer, leave the field blank.
Record Line Number (4,0):	The name of this field depends on the type of note requested. To maintain notes for an order line, a requisition line, or a purchase order line, specify the line number.

Screen actions - ORD140D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain note text and print information

If you continue with Notes Maintenance, Infor LX displays the Notes Maintenance text input screen, ORD140D2-01. Type the note text and select the documents on which to print each line of text. If you specify a print flag for a document associated with an event that has already taken place, it will have no effect. Changes you make in this screen print on documents as the order or line moves forward through order processing events. For example, you can add or modify notes at Pick Release before you print the pick slip or at pick confirm before you print the Invoice.

Field descriptions - ORD140D2-01

Fields	Description
Header Information:	Infor LX displays the note type, field headings, and values from the Notes Maintenance selection and detail screens.
Note Text (50,A):	Specify the text for notes you want to print on paperwork associated with the customer, order, vendor, purchase order, requisition, ship-to location, line, or shipping document. These include one or more of the following documents, depending on the note type: order acknowledgment, picking slip, invoice, purchase order, statement, requisition, receiver ticket, shipping document. To erase note text, use the space bar. Use F7/F8 to display additional note text lines.
Print On Field 1 (1,A)	Specify Yes for each document on which to print the text line. Otherwise, specify No.

The Print On fields represent documents to print the note on. The type of note you work with determines how many of these fields are visible and what documents they represent.

For example, if you work with customer notes, customer order notes, or customer order line notes, the screen displays four Print On fields are displayed to represent the Order Acknowledgement (Ackn), Picker Ticket (Pickr), Customer Invoice (Inv) and Statement (Stmt). However, if you are working with vendor notes, it displays only two Print On fields representing the Purchase Order (PO) and Receiver Ticket (Rec), since these are the only two documents that vendor notes can print on.

If you specify Y in a Print On field next to line, the note on that line is printed on the document.

If you specify Y for a document associated with an event that has already taken place, it will have no effect. Changes you make will print on documents as the order or line moves forward through order processing events. For example, you can add or modify notes at Pick Release before you print the Pick Slip or at Pick Confirm before you print the Invoice.

Only purchase order line notes (no purchase order notes) print on the receiver ticket.

Other documents that can be displayed include shipping documents (Shi) and Requisitions (Req).

If you specify that you want a note to print on shipping documents, the note also prints on the Bill of Lading in OLM.

Print On Field 2 (1,A): Specify Yes for each document on which to print the text line. Otherwise, specify No. See the Print On Field 1 help text for additional details.

Print On Field 3 (1,A): Specify Yes for each document on which to print the text line. Otherwise, specify No. See the Print On Field 1 help text for additional details.

Print On Field 4 (1,A): Specify Yes for each document on which to print the text line. Otherwise, specify No. See the Print On Field 1 help text for additional details.

Screen actions - ORD140D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Item X-reference Maintenance, ORD150D1

Use Customer Item X-Reference, ORD150D1, to establish several default relationships between your customers, suppliers, and your company.

Customer Item X-Reference Inquiry, ORD350B, shares screens with this maintenance program. When you view the screens in inquiry mode, the screen and title indicate that you are in ORD350D. The informational fields are display only in that mode.

Customer Item Cross References - Item Synonym Identification

This relationship establishes a cross reference between a customer's external item number and your internal item numbers. After you establish customer item cross references, you can process orders using the customer's item number, based on the parameters set for this customer in IDF Customer. Order Entry uses the item cross-reference customer number to search for and use customer item numbers. You can also specify the documents on which to print the customer's item number.

Ship-from Warehouses

This relationship sets up the default ship-from warehouses by customer, ship-to number, and item. After you establish default ship-from warehouses, you can process orders that use these defaults. Order Entry uses the ship-to customer and ship-to number on the order to search for default warehouses on the item cross-reference records.

Customer Exclude/Include

This field defines items that a customer cannot order due to government restrictions or customs laws. Order Entry uses this value when you create new orders for the sold-to customer. The name for this field changes based on the exclude/include field you chose in IDF Customer. Order Entry uses the sold-to customer to retrieve these records.

Supplier Item Cross References

This relationship establishes a cross reference between the supplier's external item number and your internal Item Master number. Infor LX does not currently use these records.

Support for Continuous Replenishment

This field adds the fields that are necessary to process continuous replenishment of customer inventories. Infor LX does not currently use these fields.

Access: ORD01 menu

Add or select an item x-reference relationship

Use the Item X-Reference Maintenance selection screen, ORD150D1-01, to create or maintain item cross-reference relationships.

Field descriptions - ORD150D1-01

Fields	Description
Line actions	The action codes described in the following section are available: **14=Language Override** Display the (Customer) Master Language Override screen, ORD151D1-01. The list is positioned at the customer that you selected on ORD150D1-01. Select this customer, or another customer, and the language for translation. **49=User Defined Fields** Access SYS109D1-01 to display or maintain user-defined data for this application. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. **14=Language Override** Display the (Customer) Master Language Override screen, ORD151D1-01. The list is positioned at the customer that you selected on ORD150D1-01. Select this customer, or another customer, and the language for translation.

	49=User Defined Fields Access SYS109D1-01 to display or maintain user-defined data for this application. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Customer/Supplier Item No.:	Infor LX displays the external item number, based on either the customer's or the supplier's item number. You can filter the screen to display customer or supplier information.
Customer/Supplier No. (8,0):	Infor LX displays the number of the customer or supplier for which you maintain the item cross reference.
Ship-To:	Infor LX displays the ship-to number associated with each record. The screen displays this field if you filter to display customer information.
X-Reference Number (35,A):	Infor LX displays the customer number and customer item number. Specify your internal item number.
Status (x):	This is a display only field. The status is active if an active external item cross reference exists for this item or inactive if it has been deleted. To reactivate and revise a record, use 2 in the Act field in front of the record.

Screen actions - ORD150D1-01

Commands	Description
F13=Filters	Access the filter selection screen to request display of customer or supplier information. You can also use the Filter screen to access synonym identification records. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain item synonym identification information

Use F13 and select 5=All Item Synonym Records or 6=Active Item Synonym Records to call Item Synonym Identification Selection, ORD150D1-02. Use this screen to create a relationship between your customer's item number and your internal item number.

Field descriptions - ORD150D1-02

Fields	Description
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.
Item Synonym Identification (50,A):	Specify the customer's identification for the item.
Customer (8,0):	Specify the customer to order this item.
Item Number (35,0):	After you create, revise, or copy an item synonym identification record, Infor LX displays the item number you specified on the selection screen.
Status (1,0):	Infor LX displays the status of the current record.

Screen actions - ORD150D1-02

Commands	Description
F13=Filters	Access the filter screen to specify the records to display in the list. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.
F15=Language Overrides	Display the Customer Master Language Override screen, ORD151D-01, to select a customer and the language for translation.
F16=Toggle Language	Use F16=Toggle Language to switch between the customer name and address in the master file (base) language and in your language, assuming the customer information was translated into your language. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view item x-reference information

After you select an action and enter an item number and customer number, press Enter. Infor LX displays screen Item X-Reference Maintenance, ORD150D2-01.

Infor LX displays the Customer Item Number, Customer Number, and Ship-to; or Supplier Item Number and Supplier Number from the previous screen. You can override them by selecting action code 3 (Copy) on screen ORD150D1-01.

Field descriptions - ORD150D2-01

Fields	Description
X-Reference Item Number (35,A):	Specify your internal item number.
Include/Exclude (1,0):	If the Exclude field appears, this customer is prevented from ordering any items that are listed in the Customer Item X-Reference file, EIX, for the include/exclude rule. To allow this customer to order the item, specify 0, No, so the item is not added to the EIX. If the Include field appears, this customer is allowed to order only items that are listed in the Customer Item X-Reference file, EIX, for the include/exclude rule. To allow this customer to order the item, specify 1, Yes, so the item is added to the EIX.
Description (50,A):	Specify the description of the customer item. If you do not specify a description, Infor LX defaults to the internal item number description from the Item Master file.
Description (Additional) (50,A):	Specify any additional information to describe the item.
Ship-From Warehouse (3,A):	Specify the warehouse code that indicates where to ship this item from. The warehouse description associated with this code appears. The ship-from warehouse defaults to the order line according to a pre-determined search hierarchy. For more information on the search hierarchy, refer to the Order Entry help documentation.
Ack (Acknowledgment or EDI Documents):	If you filtered by customer, this is the Acknowledgment field. This flag affects the Order Acknowledgment, Quote Acknowledgment, and RMA documents. All of these documents are generated by program Order Acknowledgement Print, ORD508B. For acknowledgment documents, specify the print action code. 0 Print only your internal item number and description. 1

Print only the customer/supplier item number and description.

2

Print both your internal item number and description and those of the customer/supplier.

Pck (Picking Slip or Purchase Order Documents):

If you filtered by customer, this is the Picking Slip field. This flag affects the picking slip document generated by Pick Release, ORD550B1.

If you filtered by supplier, this is the Purchase Order field. It affects only the Purchase Order document generated by Print Purchase Orders, PUR520D.

Specify the print action code. The following codes are valid:

0

Print only your internal item number and description.

1

Print only the customer/supplier item number and description.

2

Print both your internal item number and description and those of the customer/supplier.

Shp (Shipping Documents):

This flag affects these following documents: Hazardous Bill of Lading, Packing List, and RMS Packing List.

Specify the print action code. The following codes are valid:

0

Print only your internal item number and description.

1

Print only the customer/supplier item number and description.

2

Print both your internal item number and description and those of the customer/supplier.

Inv (Invoice Documents):

This flag affects these documents: Proforma A, Proforma B, Proforma C (or Edit Invoice), and Regular (or Consolidated) Invoice. These documents are generated by program Invoice Print, BIL550B.

This flag also affects the Delivery Notice Invoice generated by program Delivery Notice Invoice (BIL555B.

Specify the print action code. The following codes are valid:

0

Print only your internal item number and description.

1

Print only the customer/supplier item number and description.

2

Print both your internal item number and description and those of the customer/supplier.

EDI Documents: This functionality is not implemented.

Customer On Hand: Specify the customer's current on-hand quantity for this item.

Customer Minimum: Specify the minimum quantity that the customer wants to keep on hand for this item.

Customer Maximum: Specify the maximum quantity that the customer wants to keep on hand for this item.

Trigger (Reorder) Point: Specify the quantity at which the customer will order this item. This quantity is usually determined by adding the customer minimum quantity and safety stock. If the customer does not use safety stock, enter the customer's minimum quantity here.

Standard Quantity: Specify the item quantity commonly ordered by this customer in stocking unit of measure.

Incr Order Quantity: Specify the item quantity used to increment planned order requirements for this item in stocking unit of measure.

Order Policy Specify the customer order policy associated with this item. The following options are valid:

A	Discrete (lot for lot)
H	Discrete above lot size
I	Incremental above lot size
J	Multiple of standard lot size.

Item Synonym Identifier	Select item synonym identification records for maintenance. The following options are valid: 1 — All item synonym ID records 2 — Active item synonym ID recs only
Minimum Order Quantity (11,3):	Specify the minimum order quantity for this customer's item in stocking unit of measure. Validation requires the following: The Customer Standard Order Quantity cannot be less than the Customer Minimum Order Quantity. This quantity must be an even multiple of the Customer Incremental Order Quantity.
Perform Order Quantity Edit (1,A):	Specify Yes to allow edits of order quantities for this item. Otherwise, specify No.
Comparison Un of Meas (2,A):	You can specify a valid unit of measure, which is stored. This field is not used or supported.

Screen actions - ORD150D2-01

Commands	**Description**
F22=Language Overrides	Display the Customer Master Language Override screen, ORD151D-01, to select a customer and the language for translation.
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Maintain or view additional item x-reference information

The system displays the Item X-reference Maintenance screen, ORD150D2-02, if you press Enter in the first maintenance screen. Use this screen to specify additional details.

Field descriptions - ORD150D2-02

Fields	Description
Receiving Dock (10,A):	Specify the customer's receiving dock associated with this item and customer ship-to location. If the Outbound Logistics Management application is installed, you can set up load building policies that use this value when you generate loads and shipping documents.
Kanban Card Description (35,A):	Specify a description that refers to the identity of the bin where items are put or taken from. This description acts as a replenishment reason code. Typically, a description is a shortened form of the customer's item number. This entry can change from one requirement line to another if a surge in demand causes both the main and safety-stock bins to become depleted.
Line Feed Location (35,A):	Specify the final delivery point on the assembly line. It can change from one requirement line to another if the process of Kaizen results in an item being fitted at an earlier or later operation.
Engineering Change Level (35,A):	Specify the Engineering Change Level for the customer item you selected on the Item X-Reference Maintenance screen, ORD150D1-01. The Engineering Change Level identifies the exact version or model of the customer's item that they use. Update the Engineering Change Level if you make minor modifications to the item and still consider it the same base item. Infor LX uses the Engineering Change Level for validation purposes.
Engineering Change for Ship (1,A):	Specify 1=Yes to indicate that this is the first time you are shipping this item to the customer under this Engineering Change Level.

Screen actions - ORD150D2-02

Commands	Description
F22=Language Overrides	Display the Customer Master Language Override screen, ORD151D-01, to select a customer and the language for translation.
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter item cross-reference information

After you use F13 in Customer Item X-Reference, ORD150D-01, Infor LX displays the Item X-Reference Filter screen.

Field descriptions - Filter

Fields	Description
Filter Option (1,0):	Specify the code to determine what information appears on the selection screen.

1	All Customer Records
2	Active Customer Records
3	All Supplier Records
4	Active Supplier Records
5	All Item Synonym Records
6	Active Item Synonym Records

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

X-Ref Information Language-Maintenance, ORD151D

Use the X-Ref Information Language-Maintenance program, ORD151D, to enter the translations for item descriptions. The screen lists existing records in the Company Master MLS file, ROX. See Auto Create Language Record, SYS091D, and Mass Create Language Records, SYS092D, for more information.

If you use the auto-create feature, the list of company records on the ORD151D-01 screen includes changes made in X-Ref Information Language-Maintenance, ORD151D-01. The new and updated records have status Review Required. After you revise the names and addresses and press Enter, the status changes to Active.

If you did not auto-create the ROX records, use action 1=Create to create the records in this program. When you create a record in the language extension file, the system copies the record, in your master file (base) language, from the Company Master file, RCO, to the ROX file. The record is then available for translation.

If you use the Infor Development Framework (IDF) you must create a blank Language record in SYS091D for File 010 and Language Code ***. ORD151D-03 automatically creates and maintains this record. The blank Language record is not listed on ORD151D-01 and you cannot revise or delete it. To display or copy the record, enter action 5=Display or 3=Copy, specify the company number, and leave the language field blank.

Access:

- Menu ORD01
- Action 14=Language Override from the Item X-Reference Maintenance screen, ORD150D1-01
- F14=Language Override from the Item X-Reference Maintenance screen, ORD150D-01

Add or select a item x-reference record to translate

Use the X-Ref Information-Language Maintenance screen, ORD151D-01, to add or select a item x-reference record to translate.

Field descriptions - ORD151D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Customer (8,0):	Specify the number of the customer associated with the record to translate.
Ship (4,0)	Specify the ship-to number associated with the record to translate.
Language (3,A):	Specify the language to use in the translation.
Customer Item (35,A):	Specify the external item number for the customer or supplier.

Item Number (35,A):	Specify the x-reference item number.
Status:	This field displays the status of the record: Active, Inactive, or Review Required. Review Required displays only for active records for which address information may require translation.

Screen actions - ORD151D-01

Commands	Description
F13=Filters	Access the Filter Options screen to select from the following sequences. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter Options

Use the Filter Options screen to limit the list of x-reference items, records, or languages.

Field descriptions - Filter

Fields	Description
Item X-Reference Selection (1,0):	Select the type of item x-reference to display in the list. 1=Customer X-Ref by Customer, Ship-To, External Item 2=Vendor X-Ref by Vendor, External Item 3=Synonym X-Ref by Synonym, External Item
Record Selection (1,0):	Select one of the following options to limit the list of records. 1=Customer/Vendor/Synonym / Language - Active 2=Customer/Vendor/Synonym / Language - All 3=Only Review Required Records
Language (3,A):	Specify a language to display only records for that language.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Enter translated item x-reference information

Use the Item X-Reference Language Override screen, ORD151D-03, to enter the translated external item description and additional description for the customer item.

The screen displays the external item description and additional description in your master file (base) language, from the Company Master File, RCO. Enter the translated information in the fields at the bottom of the screen. When you press Enter, the system updates the Company Master MLS Address file, ROX.

Access: Enter from the X-Ref Information-Language Maintenance screen, ORD151D-01

Field descriptions - ORD151D-03

Fields	Description
Customer/Supplier Item No.:	Infor LX displays the external item number, based on either the customer's or the supplier's item number.
Ship-To:	Infor LX displays the ship-to number associated with each record. The screen displays this field if you filter to display customer information.
Language Code:	Infor LX displays the language code.
Customer Item:	Infor LX displays the external item number, based on either the customer's or the supplier's item number.
Internal Item:	Infor LX displays the customer number and customer item number.
External Item Desc. (50,A):	If you are in Create or Copy mode, specify the external item description information for the item.
Additional Description (50,A):	If you are in Create or Copy mode, specify any additional information for the item.
Review:	The Review field shows a value of 1 if the field needs to be reviewed for possible translation.

Screen actions - ORD151D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Item cross reference listing, ORD155D

The Customer Item X-Reference Listing program, ORD155D, prints a listing by customer of the external (customer's) item number and description along with the cross-referenced internal item number and description. You can limit the information on this report by customer, supplier, and/or item number range. The following information prints on the listing:

Customer number

Internal item number and description

Cross referenced external (customer) item number and description

The printed documents that will contain this information

The listed information is stored in the Item Cross Reference file, EIX.

Access: ORD01 Menu

List customer item cross-reference information

Use the Customer Item X-Reference List screen, ORD155D-01, to select item cross-references to print on the listing.

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 - ORD155D-01

Fields	Description
Record Type (1,0):	Select the record type to print:

0	Customer - customer records
1	Supplier - supplier records

2	Synonym - cust. or supplier item ID
3	All - all three types of records

From/To Customer/ Supp Number (8,0): Specify a range of values to limit the customer or supplier numbers to include.

From Customer/Supp Address (4,0): Specify a range of values to limit the customer or supplier addresses to include.

To Customer/Supp Address (4,0): Specify a range of values to limit the customer or supplier addresses to include.

From/To Item Reference Number (35,A): Specify a range of values to limit the item reference numbers to include.

Item Number (35,A): Specify a range of values to limit the item numbers to include.

Record Status (1,0): Specify the type of records you want to print, all records or active records only.

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 - ORD155D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Ship-to/vendor class x-ref maintenance, ORD160D

Use the Ship-To/Vendor Class Cross Reference Maintenance program, ORD160D, to establish a cross reference relationship between the ship-to address and the vendor class number. Use this program to add, update, or delete a Ship-To/Vendor Class cross reference in the Ship-To/Vendor Class Cross-reference file, ESV.

Access: F21 from Address Master Maintenance - Shipping, OLM140D-01

Maintain ship-to/vendor class cross reference information

Use the Ship To/Vendor Class Cross Reference Maintenance screen, ORD160D-01 to maintain cross references between ship-to addresses and vendor class numbers.

Field descriptions - ORD160D-01

Fields	Description
Customer Number (8,0):	Infor LX displays the number of the customer for whom you maintain the item cross reference. This option does not display if the address type is 06.
Purchasing Vendor	Infor LX displays the number of the vendor for whom you maintain the item cross reference. This option displays only if the address type is 06.
Ship to/Ship-from (4,0):	Infor LX displays the ship to number of the customer or the ship-from address of the vendor for whom you maintain the item cross reference.
Vendor Class (8,A):	Specify the vendor class of the vendor for whom you maintain the item cross reference.
Class Vendor Number (8,0):	Specify the vendor number for whom you maintain the item cross reference.
Line actions	The following line action is available: **9=Shipment Charges** View shipment charges for the line. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD160D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Supplemental order maintenance, ORD162D1

Use the Supplemental Order Maintenance program, ORD162D1, to create and maintain supplemental orders. Supplemental orders are lists of frequently ordered items or items that you want to promote. The order entry operator can view and use these lists to streamline order entry. You can enable four kinds of supplemental orders in your environment: shopping lists, standing orders, a global order, and template orders. Each is described in the following paragraphs.

Supplemental orders require a default value for the order header warehouse. The order header warehouse defaults from the Ship To Customer, if available. If there is no default ship-to customer, then the order header warehouse defaults from the Sold To Customer. Warehouse is an optional field in IDF Customer and, if Warehouse is not defined, certain supplemental order capabilities may not be available to customers.

Shopping lists

Shopping lists consist of the items that a customer orders most commonly, based on previous sales by value. A shopping list is specific to a customer. You can create shopping lists manually in this program, or you can generate them automatically with the Shopping List Rebuild program, ORD490D. The system regenerates shopping list items you create with the Rebuild program each time you run the Rebuild program. The system protects from regeneration any items that you add or change manually with the Supplemental Order Maintenance program. They remain on the shopping list until you delete them manually.

Standing orders

Standing orders consist of lists of items and quantities that a customer orders regularly. You must create standing orders manually with the Supplemental Order Maintenance program. A standing order is specific to a customer number and a day of the week or month. You can create multiple standing orders per customer, but you cannot create standing orders for both week days and days of the month for the same customer. Standing orders are the only supplemental order type that you can create with a quantity.

Global order

A global order applies to all customers. You can create this type of supplemental order to prompt the order entry operator to mention specific promotional items to the customers. You can only have one global order.

Template orders

Template orders are item lists that you create with a unique identity that you define. You can create multiple template orders. During the order entry process, the order entry operator can specify the template ID you defined to access the template order list. You can use this type of supplemental order to create a list of items that interest a particular category of customers. For example, if you know which of your customers order gourmet dog treats, you could create a SPOILDOG template that includes other high-end dog items to recommend to these customers.

Access: ORD01 menu

Add or select a supplemental order

Use the Supplemental Orders Selection screen, ORD162D1-01, to create a supplemental order or revise an existing order.

Field descriptions - ORD162D1-01

Fields	Description
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.
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Supp Order Type (1,0):	Specify the type of supplemental order to create. One or more of the following options are available, depending on your system parameter settings:

Type	Description
1	Standing Order
2	Shopping List
3	Global Order
4	Template Order

Identification (15,A): Specify a unique ID for this supplemental order. For a shopping list or standing order, this must be a valid, active customer number. Leave the field blank for a global order. For template orders, create a unique ID to identify the order.

Day (2,0): Specify 0 for all orders except standing orders. For standing orders, specify the day of the week or month to which the standing order applies, or indicate that it applies to all days. Note that you cannot create standing orders by both days of the month and days of the week. The following values are valid:

Value	Effect
1 to 31	Specific day of the month
32	Last day of the month
51	Monday
52	Tuesday
53	Wednesday
54	Thursday
55	Friday
56	Saturday
57	Sunday
99	All days

Screen actions - ORD162D1-01

Commands	Description
F13 = Filter	Access a filter window to limit the orders to display in the list.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter orders in the supplemental order selection screen

Use the Filter Options screen to limit the orders to display in the selection screen. You can include all orders or only all active orders, or you can limit the display to only a specific type of order.

Field descriptions - Filter

Fields	Description
Option (1,0):	Specify the number of a filter option and press Enter. The selection screen displays the information you request.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Copy order information to create a new order

Use the Supplemental Order Maintenance - Copy screen, ORD162D5-01, to copy a supplemental order to a new supplemental order. The screen displays the key field values of the original order in the Copy From fields. After you fill in the Copy To fields and accept the copy, the program copies valid related details to the new supplemental order. For standing orders, it also copies the quantities to the new order. For all other types, the quantities are zero.

Field descriptions - Copy

Fields	Description
Copy To Type (1,0):	Specify the supplemental order type of the new order. One or more of the following options are available, depending on your system parameter settings:

Type	Description
1	Standing Order
2	Shopping List
3	Global Order
4	Template Order

Copy To Identification (15,A): Specify an ID for this supplemental order. For a shopping list or standing order, this must be a valid, active customer number. Leave the field blank for a global order. For template orders, create a unique ID to identify the order.

Copy To Day (2,0): Specify 0 for all orders except standing orders. For standing orders, specify the day of the week or month to which the new standing order applies, or indicate that it applies to all days. The following values are valid:

Value	Effect
1 to 31	Specific day of the month
32	Last day of the month
51	Monday
52	Tuesday
53	Wednesday
54	Thursday
55	Friday
56	Saturday
57	Sunday
99	All days

Screen actions - Copy

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, delete, or select a supplemental order line

Use the Supplemental Order Maintenance - Item screen, ORD162D2-01, to create a new order line, delete an existing line, or select an order line to maintain.

Field descriptions - ORD162D2-01

Fields	Description
Line actions:	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.
Item Number (35,A):	Specify an item number to add to the order.

Screen actions - ORD162D2-01

Commands	Description
F6=Accept	Accept changes to the screen. If you chose a line to display or maintain, the system displays the Supplemental Order Maintenance - line detail screen, ORD162D3-01. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain order line details

Use the Supplemental Order Maintenance - line detail screen, ORD162D3-01, to add or maintain order line details.

Field descriptions - ORD162D3-01

Fields	Description
Quantity (11,3):	This field applies to standing orders only. If you want to include a quantity for this item in the order, specify a positive value here.
Unit of Measure (2,A):	Specify a unit of measure for the item in this order line. Leave the field blank to use the stocking unit of measure.

Screen actions - ORD162D3-01

Commands	Description
F6=Accept	Accept changes to the screen and update the order. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Supplemental order listing, ORD167D

Use the Supplemental Order Listing program, ORD167D, to print a list of existing supplemental orders.

Access: ORD01 menu

Set selection criteria for a list of supplemental orders

Use the Supplemental Order List screen, ORD167D-01, to specify criteria to limit the orders to include in the list.

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 - ORD167D-01

Fields	Description
From/To Supp Order Type (1,0):	Specify a range of values to limit the supplemental order types to include in the list.
From/To Identification (15,A):	Specify a range of values to limit the supplemental order IDs to include in the list.
From/To Day (2,0):	Specify a range of values to limit the days to include in the list. Note that the Day fields apply only to standing orders.
Record Status (1,0):	Specify 0 to include all orders or 1 to include only active orders in the list.
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 - ORD167D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order class maintenance, ORD170D

The Order Class Maintenance program, ORD170D, enables you to create order classes that meet your business needs. An order class defines the events an order must go through during processing and the documents that are created at each event. Infor LX delivers a number of pre-configured order class definitions. You can specify a default order class for each sold-to customer and order type with IDF Customer. For detailed information on Infor LX reserved order classes, see the Pre-configured Order Class information in this overview.

Infor LX also provides broad flexibility for you to determine which documents you want to print during a particular processing event. For example, you can choose to print bills of lading during order entry, pick release, or ship confirm. You can also save the key fields for each document to a common print control file.

Note that Infor LX does not define quotes and RMAs by order type. Therefore, you can only specify the default order classes for quotes and RMAs in Order Entry System Parameters, ORD820.

To create new user-defined order classes, copy the pre-configured order class records and modify them to meet your documentation requirements. Since order classes 001 through 099 are reserved by Infor LX, you must assign numbers 100 or greater to any new order classes. The Base Class field displays the pre-configured order class you are copying. This allows Infor LX to quickly verify that certain required events appear in an order class without reading through the Customer Order Class file, EOC.

Pre-Configured Order Class Definitions

Infor LX provides a number of pre-configured order class definitions. Order class records are stored in the Customer Order Class file, EOC. Document control options are stored in the Order Class Print Options file, EOP.

The following are pre-configured order classes with the events they include:

- 001 - Order Entry, Pick Confirm, Invoicing
- 002 - Order Entry, Pick Confirm, Ship Confirm, Invoicing
- 003 - RMA Entry, Order Entry, Invoicing
- 004 - Order Entry, Pick Release, Pick Confirm, Invoicing
- 005 - Order Entry, Pick Release, Pick Confirm, Ship Confirm, Invoicing
- 006 - Quote Entry

- 007 - Order Entry, Invoicing
- 008 - Order Entry, Invoicing
- 010 - RMS Order Entry, Pick Release, Pick Confirm, Ship Confirm
- 015 - Order Entry, Pick Release, Pick/Ship Confirm, Invoicing
- 020 - RMS Order Entry, Pick Release, Pick/Ship Confirm

Regular Warehouses

Picking documents for regular warehouses are listed in the following. They are defined for each order class in Order Class Maintenance, ORD170:

- Pick Slip
- Allocations Exceptions Report (produced with Pick Slip)
- Allocations Not Required and No Allocations Report (produced with Pick Slip if required)
- Batch Pull Report (available at user option from Pick Release only)

Managed Warehouses

Picking documents for managed warehouses are available only during Pick Release. Managed warehouse picking documents may include the following, as defined for each managed warehouse in Warehouse Master Maintenance, INV110:

- Pick List
- Pallet List
- Pallet Labels

Copy, maintain, or view order classes

Use the Order Class Maintenance screen, ORD170D1-01, to select order class records to copy, maintain, or display. You can only maintain user-defined order classes.

Field descriptions - ORD170D1-01

Fields	Description
Line actions	The following actions are available: **11=Print Options** Display the Order Class Print Option Select screen, ORD170D3-01. Use this screen to view and maintain the document print and control options for the selected order class.

14=Language Override

Display the Order Class Language Override screen, ORD171D-01. The list is positioned at the order class that you selected on ORD170D1-01. Select this order class, or another order class, and the language for translation.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

The following actions are available:

11=Print Options

Display the Order Class Print Option Select screen, ORD170D3-01. Use this screen to view and maintain the document print and control options for the selected order class.

14=Language Override

Display the Order Class Language Override screen, ORD171D-01. The list is positioned at the order class that you selected on ORD170D1-01. Select this order class, or another order class, and the language for translation.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Order Class:

Infor LX displays a list of existing order classes from the Customer Order Class file, EOC. You cannot modify or delete the reserved order classes (001 through 099), or an order class in use on an active Release Management contract.

Description:

Infor LX displays order class description from the Customer Order Class file, EOC.

Base Class:

Infor LX displays the base class from the Customer Order Class file, EOC.

Record Status:

Infor LX displays the record status from the Customer Order Class file, EOC.

Screen actions - ORD170D1-01

Commands	Description
F15=Toggle Language	Use F15=Toggle Language to switch between the order class description in the master file (base) language and in your language, assuming the description was translated into your language. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Maintain or view order class details

Use the Order Class Maintenance Detail screen, ORD170D2-01, to maintain or view order class details.

Field descriptions - ORD170D2-01

Fields	Description
Order Class (3,0):	Specify an order class number that is greater than 100 if you copied an order class to create a new one.
Description (30,A):	Specify an order class description.
Base Class:	If you copied an order class to create a new one, Infor LX displays the original base class.
Event Sequence:	Infor LX displays all possible processing events for the order class you selected to maintain. The event sequence is blank for order processing events which are not required for this order class.
Auto-Invoice at Pick Confirm (1,0):	The system displays this field only if LMP is installed. Specify Yes to allow Infor LX to auto-invoice order lines at Pick Confirm for selected Lean items. Otherwise, specify No. Only Lean items can have the Auto Invoice Cust Order flag turned on in IDF Enterprise Item. During pick confirm, for orders with an order class that specifies Auto-Invoice, all selected items that have the Item Master auto-invoice flag set to Yes are assigned consolidation numbers. The program prompts you to invoice automatically for each Consolidation number assigned. If you perform pick confirm in batch, auto invoicing must also occur in batch.

Screen actions - ORD170D2-01

Commands	Description
F21=Language Overrides	Display the Order Class Language Override screen, ORD171D-01. Select an order class description and the language for translation.
F22=Toggle Language	Use F22=Toggle Language to switch between the order class description in the master file (base) language and in your language, assuming the description was translated into your language. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Select order class print options

The Order Class Print Options screen, ORD170D3-01, lists the existing Order Class Print Options records defined for the selected order class. The records display in ascending sequence by document ID. Use this screen to select the document print control options you want to maintain.

Field descriptions - ORD170D3-01

Fields	Description
Order Class:	Infor LX displays the order class and description you selected.
Base Class:	Infor LX displays the original base class.
Document ID:	Infor LX displays a list of document IDs and descriptions that exist for the selected order class. For more information about the existing reserved documents, see the following reserved document information. Reserved Documents The following documents are currently reserved by Infor LX. This is only a partial list and does not reflect user-defined documents. LX BOL (Bill of Lading): If you do not have the OLM application installed, the only available processing event for this document is Ship Confirm. LX INVOICE (Regular Invoice): Regular invoices are available from the Invoicing processing event. This document uses the Sales Invoice History, SIH and Sales Invoice Line History,

SIL information and may consolidate if the Customer Master, RCM parameters and the underlying order/billing data allow invoice consolidation. At this point, Infor LX deletes the BBH and BBL records and you can no longer print proforma invoices. Invoice keys are prefix, document number, company, document ID, and document year.

LX MANIFEST:

This document is available only if you have installed the Outbound Logistics Management application.

LX PACK LIST (Packing List):

If you do not have the OLM application installed, the only available processing event for this document is Ship Confirm.

LX PROFORMA A (Proforma -Pre-shipment):

Proforma A invoices are available from the Order Entry and Pick Release processing events. This document uses the Customer Order Header, ECH, and the Customer Order Line Items, ECL, information and does not consolidate. The proforma key is Order Number.

LX PROFORMA B (Proforma -Post-shipment):

Proforma B invoices are available from the Pick Confirm and Ship Confirm processing events. This document uses the Billing Release Header, BBH, and the Billing Release Line Items, BBL, information and does not consolidate. The proforma key is Order Number.

LX PROFORMA C (Proforma -Invoicing):

Proforma C invoices are available from the Invoicing processing event. This document uses the Billing Release Header, BBH, and the Billing Release Line Items, BBL, information and may consolidate if the Customer Master parameters and the underlying order data allow for invoice consolidation. The proforma keys are prefix, document number, company, document ID, and document year.

Print Options: Infor LX displays the print options that are defined for the selected order class for each document ID.

Screen actions - ORD170D3-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Set order class print options

Use the Order Class Print Options screen, ORD170D4-01, to maintain document print control options for the selected order class and document ID.

Field descriptions - ORD170D4-01

Fields	Description
Order Class:	Infor LX displays the order class and description you selected on the first screen.
Document ID:	Infor LX displays the document ID and description you selected on the previous screen.
Event Sequence:	Infor LX displays the available events for the selected order class and document ID.
Print Options (1,0):	Specify the print options you want to apply to each available processing event for the selected document. The following values are valid:

0	None
1	Print
2	Save
3	Print and save

Screen actions - ORD170D4-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order class language override, ORD171D

Use this program to enter the translation for order class descriptions. The screen lists existing records in the Order Class MLS file, EOX. See Auto Create Language Record, SYS091D, and Mass Create Language Records, SYS092D, for more information.

If you use the auto create feature, the list of order classes on the ORD171D-01 screen includes changes made in Order Class Maintenance, ORD170D1. The new and updated records have status Review Required. When you translate the descriptions and press Enter, the status changes to Active.

If you did not auto-create the EOX records, use action 1=Create to create the records in this program. When you create a record in the language extension file, the system copies the record, in the master file (base) language, from the Order Class Master file, EOC, to the EOX file. The record is then available for translation.

If you use the Infor Development Framework (IDF) you must create a blank Language record in SYS091D for File 021 and Language Code ***. ORD170D2 automatically creates and maintains this record. The blank Language record is not listed on ORD171D-01 and you cannot revise or delete it. To display or copy the record, enter action 5=Display or 3=Copy, specify the order class code and leave the language field blank.

Access:

- Menu ORD01
- Action 14=Language Override from the Order Class Maintenance screen, ORD170D1-01
- F21=Language Override from the Order Class Maintenance screen, ORD170D2-01

Add or select an order class record

Use the Order Class Language Override screen, ORD171D-01, to add or select an order class record to translate.

Field descriptions - ORD171D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Order Class (3,A):	Specify the order class to create or copy.
Language (3,A):	Specify the language to use in the translation.

Screen actions - ORD171D-01

Commands	Description
F13 = Filters	Access the Filter Options screen to select from the following sequences: 1=Order Class/Language - Active 2=Order Class/Language - All 3=Only Review Required Records All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter options

Use the Filter Options screen to limit the list of order class records.

Field descriptions - Filter

Fields	Description
Filter Options (1,0):	Specify one of the following options to limit the list of records.

	1=Order Class/Language - Active 2=Order Class/Language - All 3=Only Review Required Records
Language (3,A):	Specify a language to display only records for that language.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Enter translated order class description

Use the Order Class - Language Maintenance screen, ORD171D-03, to enter the translated description for the order class that you selected on the previous screen.

The screen displays the order class description, in master file (base) language, from the Order Class master file, EOC. Enter the translation. When you press Enter, the system updates the Order Class MLS file, EOX.

Field descriptions - ORD171D-03

Fields	Description
Order Class (3,A):	If you are in Create or Copy mode, specify the order class code to create or copy.
Language Code (3,A):	If you are in Create or Copy mode, specify a language to use for translation.
Description (30,A):	Specify the order class description.

Screen actions - ORD171D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order class listing, ORD175D

Use the Order Class Listing program, ORD175D, to print a list of the existing order classes. This list includes the document IDs and print options.

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.

Select order classes to print

Use the Order Class Listing screen, ORD175D-01, to select the order classes you want to print on the listing.

Field descriptions - ORD175D-01

Fields	Description
From/To Order Class (3,A):	Specify a range of values to limit the order classes to include. For information on range fields, see the *Ranges* topic in the overview section of this document.
Record Status (1,0):	Specify the type of records you want to print, all records or active records only.
Override Print Option (1,0):	Use this field to specify the language or languages for the order class descriptions on the report. If you use the default print option 0, Infor LX prints the report in the master file (base) language. If you select option 1, but a language record does not exist, the system prints the information from the base master file. If you choose options 3 or 4, but a language record does not exist, the report does not include data for that record. Before you submit the job, verify that your printer supports the languages that you select for the report. 0=Print Base Description Print the descriptions in the master file (base) language.

	1=Print User Language Override for Description Print the descriptions in the language of the user who submits the job. The system prints the data in the language assigned to the user ID in Infor LX User Authorization Maintenance, SYS600D1. 3=Print Language Overrides in Specified Language If you choose option 3, you must specify a valid language code in the promptable field to the left of the option. The information prints in the specified language. 4=Print All Available Languages Print the descriptions from all the language (EOX) records.
Language (3,A):	Specify the language to use on the report.

Screen actions - ORD175D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order type maintenance, ORD180D1

The Order Type Maintenance program, ORD180D1, allows you to maintain order types. All Infor LX processing that is based on order type references the base type you define for each order type. You can define multiple order types to use with resupply orders, financial orders, and so on.

Access: ORD01 menu

Copy, maintain, or view order types

Use the Order Type Maintenance screen, ORD180D1-01, to select order type records to copy, maintain, or display. To create user-defined order types and default order classes, copy existing order type records, then modify the order type description and default order class.

Field descriptions - ORD180D1-01

Fields	Description
Order Type:	Infor LX displays the existing order type records. Order types 1-9 are reserved by Infor LX. For more information on reserved order types, see the following discussion of reserved order types. You cannot delete order types that are used on active Release Management contracts. Reserved Order Type Definitions Infor LX contains pre-defined order types and default order classes. Order types 1 through 9 are reserved by Infor LX. The following table shows the defined order types and their attributes. In the table, terms are shortened as follows: Type is the order type Description is a description of the order type Class is the default order class for that order type. The Affects column indicates whether this order type affects inventory, Inv, sales, Sls, or accounts receivable, Acr: NC means No charge C means there is a charge

Type	Description	Class	Affects ...
1	Regular order	004	Inv, Sls, Acr
2	Exchange	004	Inv, Sls,
3	Replacement , NC	004	Inv
4	Replacement , C	004	Inv, Acr
5	Special service, NC	008	
6	Special service, C	008	Acr
7	Credit/debit memo	008	Sls, Acr
8	Sales hist. correct.	008	Sls
9	Resupply Order	004	Inv

Q	Quote	006
R	RMA	003

Order Type Description:	Infor LX displays the existing order type descriptions from the Customer Order Type file, EOT.
Base Type:	Infor LX displays the existing base type records from the Customer Order Type file, EOT.
Record Status:	Infor LX displays the record status from the Customer Order Type file, EOT.

Screen actions - ORD180D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view order type details

Use the Order Type Maintenance Detail screen, ORD180D2-01, to add, maintain, or view order type details.

Field descriptions - ORD180D2-01

Fields	Description
Order Type (1,A):	Infor LX displays the order type you selected on the previous screen. Specify an order type to create a new record.
Base Order Type:	Infor LX displays the base order type for this order type. Order type processing and logic is based on the base order type, not the user-defined order type.
Order Type Description (30,A):	Infor LX displays the user-defined description of this order type. Specify an order type description for a new order type.
Default Order Class (3,0):	Infor LX displays the default order class for this order type if no customer-specific default order class is defined for the sold-to customer in IDF Customer.

	Default order classes for quotes and RMAs are defined in the Order Entry System Parameters, ORD820. Specify a default order class for a new record.
Inventory Reason Code (2,A):	(Optional) Specify a valid inventory reason code for this order type. The value you specify here defaults to the order header and order lines during order entry. If you do not specify an inventory reason code for the order type on this screen, Order Entry selects the lowest alphanumeric reason code that is defined in the Reason Code file and uses that reason code. The selection depends on the sorting sequence for your machine. You can override the defaults at both the header level and the individual line level. Infor LX validates your entry against inventory reason codes defined for the B transaction effect. You can define and maintain inventory reason codes in Reason Code Maintenance, INV140D1, in the Inventory application.

Screen actions - ORD180D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order type listing, ORD185D

Use the Order Type Listing program, ORD185D, to print a list of the existing order types.

Select order types to print

Use the Order Type Listing screen, ORD185D-01, to select the order types to print on the listing.

Field descriptions - ORD185D-01

Fields	Description
From/To Order Type (1,A):	Specify a range of values to limit the order types to include. For information on range fields, see the *Ranges* topic in the overview section of this document.
Record Status (1,0):	Specify the type of records you want to print, all records or active records only.

Screen actions - ORD185D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Intercompany Automation Maintenance, ORD188D

Intercompany automation is a special customer order process where the shipping warehouse company differs from the order transaction company. The accounting entries are automatically generated to first sell the stock from the shipping warehouse's company to the ordering company before recognizing revenue from the customer. Use the Intercompany Automation Maintenance program, ORD188D, to view and define intercompany automation records.

Access: ORD01 menu

Add, select, or maintain intercompany automation records

Use the Intercompany Automation Maintenance Selection screen, ORD188D-01, to add, select, delete a record.

The status field indicates whether the record is active or inactive.

Field descriptions - ORD188D-01

Fields	Description
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.
Line actions:	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Transaction Company (3,0):	Specify the transaction company. The transaction company created the sales order and requested the delivery of goods.
Shipping Warehouse (3,A):	Specify the shipping warehouse. This is the warehouse from which the ordered goods are shipped.
Drop Shipment Warehouse (3,A):	Specify the drop shipment warehouse. The drop shipment warehouse has specific items that can be shipped directly to the vendor.
Default Vendor (8,0):	Specify the default vendor. The default vendor for the receiving warehouse.
Status (6,A):	The system displays the status of the note type.
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.
Drop Shipment Warehouse (3,A):	Specify the drop shipment warehouse. The drop shipment warehouse has specific items that can be shipped directly to the vendor.
Default Vendor (8,0):	Specify the default vendor. The default vendor for the receiving warehouse.
Transaction Company (3,0):	Specify the transaction company. The transaction company created the sales order and requested the delivery of goods.
Shipping Warehouse (3,A):	Specify the shipping warehouse. This is the warehouse from which the ordered goods are shipped.

Screen actions - ORD188D-01

Commands	Description
F13=Filters	Access the Filter Options screen to change the order in which the list is sorted and to limit the list of records by status and language.

	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter intercompany automation records

Use this screen to sort or filter the list of records.

Field descriptions - ORD188D-02 FILTER

Fields	Description
Filter Options (1,0):	Specify an option to limit the list note type records. You can display a list of active records by note type, base note type or view all records. Valid options are: 1=Active records by Transaction Company and Shipping Warehouse 2=All records by Transaction Company and Shipping Warehouse 3=Active records by Drop Ship Warehouse and Default Vendor

Screen actions - ORD188D-02 FILTER

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Maintain intercompany automation detail, ORD188D03

Use the Intercompany Automation Maintenance screen to change or copy the intercompany automation information.

Field descriptions - ORD188D-03

Fields	Description
Transaction Company (3,0):	Specify the transaction company for this intercompany automation record. This field is only available in Create and Copy mode.
Base Currency (3,A):	This is the base currency for this company. The term Base Currency is an Infor LX term that indicates the currency in which a company maintains its set of books.
Shipping Warehouse (3,A):	Specify the shipping warehouse. This field is only available in Create and Copy mode.
Shipping Warehouse Company (3,0):	This is the company for the shipping warehouse.
Base Currency (3,A):	This is the base currency for the shipping warehouse company. The term Base Currency is an Infor LX term that indicates the currency in which a company maintains its set of books.
Warehouse Customer (8,0):	Specify the warehouse customer record for this intercompany automation order. This is between the shipping warehouse (selling customer) and the default vendor (purchasing company).
Customer Currency (3,A):	This is the base currency for the warehouse customer company. The term Base Currency is an Infor LX term that indicates the currency in which a company maintains its set of books.
Drop Shipment Warehouse (3,A):	Specify the drop shipment warehouse. The drop shipment warehouse has specific items that can be shipped directly to the vendor. This field is only available in Create and Copy mode.
Drop Shipping Warehouse Company (3,0):	This is the company for the drop shipment warehouse.
Base Currency (3,A):	This is the base currency for the warehouse customer company. The term Base Currency is an Infor LX term that indicates the currency in which a company maintains its set of books.
Default Vendor (8,0):	Specify the default vendor. The default vendor for the receiving warehouse.
Vendor Company (3,0):	This is the vendor company for the drop shipment warehouse.
Vendor Currency (3,A):	This is the vendor currency for the drop shipment warehouse.

Screen actions - ORD188D-03

Commands	Description
F22=Toggle Language	**Changed:** *MR81177 Changed F16 to F22 in the Functional Description* Use F22=Toggle Language to switch between the customer name and address in the master file (base) language and in your language, assuming the customer information was translated into your language.
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

CSR code maintenance, ORD190D1

The CSR Code Maintenance program, ORD190D1, allows you to process customer service representative code information for Infor LX.

Select CSR code information to add, maintain, or view

Use the CSR Master Selection screen, ORD190D1-01, to specify a Customer Service Representative (CSR) Code record to create, maintain or view.

Field descriptions - ORD190D1-01

Fields	Description
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.
CSR (10,A):	To create a new code, use action 1 and specify a new customer service representative code on the top line.
Name:	Infor LX displays the name of the CSR.
Status:	Infor LX displays whether the CSR record is Active or Inactive.

Screen actions - ORD190D1-01

Commands	Description
F13 = Filter	Display the filter options screen.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

CSR Maintenance, ORD190D2

Use CSR Maintenance, ORD190D2-01, to continue to work with a CSR code.

Add, maintain, or view CSR code information

Use the CSR Maintenance screen, ORD190D2-01, to create and revise Customer Service Representative (CSR) Code records.

Field descriptions - ORD190D2-01

Fields	Description
Customer Service Rep (CSR) Code:	Infor LX displays the CSR number you specified on the selection screen.
CSR Name (30,A):	Specify the name of the CSR.
CSR Location (50,A):	Specify the CSR's primary location.
CSR Phone (25,A):	Specify the CSR's telephone number.
CSR Fax (25,A):	Specify the CSR's fax number.
CSR E-Mail (50,A):	Specify the CSR's E-Mail Address.
Salesperson (6,0):	Specify the salesperson code to associate with the CSR. This value becomes the default primary salesperson for all orders that this CSR enters. It overrides any primary salespersons defined in IDF Customer, or Address Master Maintenance, ORD100.
Split Salesperson (6,0):	**Added:** *MR 12278 Added new field to the ORD190D2-01 program*

	Specify the split salesperson number to associate with the CSR. This value becomes the default split salesperson for all the orders created using the CSR. It overrides any split salesperson defined in IDF Customer or in Address Master Maintenance, ORD100.
Warehouse (3,A):	Specify the primary shipping warehouse to associate with the CSR.
User ID (10,A):	Specify the CSR's iSeries User ID. This is a required field.
Display warning for duplicate Customer PO:	Specify Yes (1) if you want a warning message to appear when a duplicate Customer Purchase Order number is used for a customer. Otherwise, specify No (0). This field defaults to Yes. The Responsible CSR field in ACR Customer Master Selection governs whether these messages are displayed.
Display warning for duplicate Item on order:	Specify Yes (1) if you want a warning message to appear when a duplicate item number is used on an order. Otherwise, specify No (0). This field defaults to Yes. The Responsible CSR field in ACR Customer Master Selection governs whether these messages are displayed.

Screen actions - ORD190D2-01

Commands	Description
F6=Accept	Accept the information on the screen and update the CSR master file with the new values. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

CSR listing, ORD195D

Use the CSR Listing program, ORD195D, to print a list of the existing CSR codes.

Print a CSR code list

Use the CSR Code Listing screen, ORD195D-01, to restrict the CSR codes to include in the listing.

Field descriptions - ORD195D-01

Fields	Description
From/To CSR Code (10,A):	Specify a range of values to limit the CSR codes to include in the list. For information on range fields, see the *Ranges* topic in the overview section of this document.
Record Status (1,0):	Specify the type of records you want to print, all records or active records only.
Run Time Parameter:	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 - ORD195D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

CSR code list, WINESRD

Use the CSR Code List program, WINESRD, to select a CSR code record.

Select a CSR code

Select a CSR code in the CSR Code List screen, WINESRD, to return the value to the processing screen. You can access WINESRD with the prompt in the CSR Code field in various Order Header and Order Line Detail screens.

Field descriptions - WINESRD

Fields	Description
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.
Customer Service Rep (CSR) Code:	Infor LX displays the CSR number from the CSR Master file.
CSR Name (30,A):	Infor LX displays the name of the CSR.

Screen actions - WINESRD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by customer, ORD200D

The Open Orders by Customer program, ORD200D, prints a listing of open customer orders, sequenced by customer number/order number. The information contained on this report can be limited by customer number range, warehouse range, and backorder status.

The report includes this information for each order:

- Customer number/customer name
- Order number
- Date order was entered
- Scheduled date from the Order Header
- Requested date from the Order Header
- Total lines on the order
- Total pieces ordered
- Total amount of the order
- Order status code
- Salesperson number
- Currency code
- Customer purchase order number
- Terms code
- Ship via

- Warehouse

The report shows monetary amounts of open orders subtotaled by currency and customer. The report expresses the total in base currency.

Access: ORD01 menu

Print information about open orders by customer

Use the Open Orders by Customer screen, ORD200D-01, to select open orders by customer or order 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 - ORD200D-01

Fields	Description
From Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
From Currency (3,A):	Specify a range of values to limit the currency codes to include in the report.
To Currency (3,A):	Specify a range of values to limit the currency codes to include in the report.
Back Orders Only? (1,A):	Specify N=No to print all open orders. Specify Y=Yes to print only backorders.
From Warehouse Number (3,A):	Specify a range of values to limit the warehouses to include in the report.
To Warehouse Number (3,A):	Specify a range of values to limit the warehouses to include in the report.

Screen actions - ORD200D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by control number, ORD205D

The Open Orders by Control Number program, ORD205D, allows you to print a report with information about open orders, filtered by control number, order number, and line number. Use this screen to specify the information that is printed on an Open Customer Orders report listing. The order lines on the report are listed in Control Number/Order/Line sequence for the control number range you specify.

Print information about open orders by control number

Use the Open Orders by Control Number screen, ORD205D-01, to specify the information to include in the report. You can limit the data included by control number range and warehouse.

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 - ORD205D-01

Fields	Description
Lower Control Number (10,A):	Specify a range of values to limit the control numbers to include in the list.
Upper Control Number (10,A):	Specify a range of values to limit the control numbers to include in the list.
Warehouse (10,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
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 - ORD205D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by item/date, ORD210D

The Open Orders by Item/Date program, ORD210D, prints a listing of open customer orders, sequenced alphanumerically by item number and then by requested ship date. This report is normally used by order personnel to identify and communicate the status of orders in various groupings. You can limit the information to include in this report by item number and requested shipping date ranges, warehouse, and backorder status.

The report includes this information for each order:

- Item number and Description
- Order number and Order Line number
- Item class
- Quantity ordered (in stocking unit of measure)
- (Stocking) Unit of measure
- Requested ship date
- Net price (in stocking unit of measure)
- Warehouse code
- Ordering Customer number
- Currency code
- Record I.D.
- Quantity shipped
- Scheduled ship date
- List price (in selling unit of measure)
- Receiving Dock
- Inbound Delivery Number
- Request Time
- Order Line Source
- Kanban Number

The Net Price and List Price totals are displayed only if the Infor LX Multiple Currencies application is listed as "not installed" ("N") in System Parameters Generation (SYS800D-01.

The record ID designates the type of order line and its status, active or inactive, for both regular and special lines.

The quantity of items ordered and the quantity of items shipped are totaled by item.

The information on the report is from the Order Line Detail file, ECL, and can be maintained through Order Maintenance, ORD.

Access: ORD01 menu

Print information about open orders by item and request date

Use the Open Orders by Item screen, ORD210D-01, to select orders to include in the report. You can filter by item number and shipping date, and you can also restrict the orders in the report to one warehouse.

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 - ORD210D-01

Fields	Description
From Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
From Shipping Date (8,0):	Specify a range of values to limit the shipping dates to include in the report for each warehouse included.
To Shipping Date (8,0):	Specify a range of values to limit the shipping dates to include in the report for each warehouse included.
Warehouse (3,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
Back Orders Only? (1,A):	Specify 0=No to print all open orders. Specify 1=Yes to print only backorders on the report.

Screen actions - ORD210D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by salesperson, ORD220D

The Open Orders by Salesperson program, ORD220D, prints a listing of open orders, sequenced by salesperson number, customer number, and order number. The report is based on the primary salesperson entered on an order, as opposed to a split salesperson. The primary salesperson number is entered first on an order. This report is normally used by sales personnel to identify and track sales by salesperson. You can limit the information to include in the report by salesperson number range.

The report shows the following information for each included order:

Salesperson number and name

Customer number and name

Order number

Ordered currency

Customer purchase order

Terms code

Ship via

Total pieces

Order entry date

Scheduled date

Request date

Total number of order lines

Total order amount

Order status

Receiving warehouse ID (warehouse code for resupply orders)

The number of orders is totaled by salesperson.

Access: ORD01 menu

Print information about open orders by primary salesperson

Use the Open Orders by Primary Salesperson screen, ORD220D-01, to select open orders by salesperson 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 - ORD220D-01

Fields	Description
From Salesperson Number (6,0):	Specify a range of values to limit the salesperson numbers to include in the report.
To Salesperson Number (6,0):	Specify a range of values to limit the salesperson numbers to include in the report.
Back Orders Only? (1,A):	Specify N=No to print all open orders. Specify Y=Yes to print only backorders on the report.

Screen actions - ORD220D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by warehouse/date, ORD230D

The Open Orders by Warehouse/Date program, ORD230D, prints a listing of open customer orders, sequenced alphanumerically by warehouse code and order date. This report is normally used by order processing and warehouse personnel for scheduling and inventory control. You can limit the information to include in this report by warehouse code and order date ranges.

The report shows this information for each order:

- Warehouse code and description
- Customer number
- Item number and description
- Order number/order line number
- Item class code

- Quantity ordered/quantity shipped
- Unit of measure
- Requested ship date/scheduled ship date
- Net price/list price/currency
- Record ID (Warehouse code-resupply orders only)
- Receiving Dock
- Inbound Delivery Number
- Kanban Number
- Request Time
- Order Line Source

The record ID designates the type of order line and its status, active or inactive, for both regular and special lines.

The quantity of items ordered and quantity of items shipped are totaled by warehouse.

Access: ORD01 menu

Print information about open orders by warehouse

Use the Open Orders by Warehouse screen, ORD230D-01, to select open orders by warehouse code and order request date.

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 - ORD230D-01

Fields	Description
From Warehouse Number (3,A):	Specify a range of values to limit the warehouses to include in the report.
To Warehouse Number (3,A):	Specify a range of values to limit the warehouses to include in the report.
From Requested Ship Date (8,0):	Specify a range of values to limit the requested ship dates to include in the report. These dates represent the request dates on the order.
To Requested Ship Date (8,0):	Specify a range of values to limit the requested ship dates to include in the report.

	These dates represent the request dates on the order.
Back Orders Only? (1,A):	Specify 0=No to print all open orders. Specify 1=Yes to print only backorders on the report.

Screen actions - ORD230D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by class/item, ORD240D

The Open Orders by Class/Item program, ORD240D, prints a listing of open customer orders, sequenced alphanumerically by item class and item number. This report is normally used for inventory planning and control. You can limit the information to include in the report by item class and item number ranges, warehouse, and backorder status.

The report shows this information for each order:

- Item class code
- Item number/item description
- Order number/order line number
- Customer number
- Quantity ordered/quantity shipped
- Unit of measure
- Warehouse code
- Requested ship date/scheduled ship date
- Net price/list price/currency

The program totals quantity ordered and quantity shipped by item class.

Access: ORD01 menu

Print information about open orders by class/item

Use the Open Orders by Class/Item screen, ORD240D-01, to select open orders by item class and 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 - ORD240D-01

Fields	Description
From Item Class (5,A):	Specify a range of values to limit the item class codes to include in the report.
To Item Class (5,A):	Specify a range of values to limit the item class codes to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
Warehouse (3,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
Backorders Only? (1,A):	Specify 0=No to print all open orders. Specify 1=Yes to print only backorders on the report.

Screen actions - ORD240D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card hold report, ORD244D

The Credit Card Hold Report program, ORD244D, prints a report of all orders on credit card hold that fall within the selection criteria you specify.

Access: ORD01 menu

Specify selection criteria for the credit card hold report

Use the Credit Card Hold Report screen, ORD244D-01, to specify selection criteria to limit the orders on credit card hold 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 - ORD244D-01

Fields	Description
From/To Company (3,0):	Specify a range of values to limit the orders to include in the report by company number.
From/To Customer Number (8,0):	Specify a range of values to limit the orders to include in the report by customer number.
From/To Customer Type (4,A):	Specify a range of values to limit the orders to include in the report by customer type.
From/To Request Date (8,0):	Specify a range of values to limit the orders to include in the report by shipping request date.
From/To Order Number (8,0):	Specify a range of values to limit the orders to include in the report by order number.
From/To Provider Code (2,A):	Specify a range of values to limit the orders to include in the report by provider code.
From/To Currency (3,A):	Specify a range of values to limit the orders to include in the report by transaction currency.
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 - ORD244D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by planner, ORD250D

The Open Orders by Planner program, ORD250D, prints a listing of open orders sequenced by planner code. This report is normally used by the inventory planner to schedule and plan inventory activity. The report shows this information for each order:

- Item Number and Description
- Order Number/Line
- Item Class
- Ordered and Shipped Quantities
- Requested and Scheduled ship dates
- Net and List Prices
- Warehouse
- Customer number
- Currency code
- Record ID
- Planner Code
- Receiving Dock
- Inbound Delivery Number
- Request Time
- Order Line Source
- Kanban Number

The Record ID designates the type of order line and its status: active or inactive, for both regular and special lines.

The information contained on this report can be limited by planner code, warehouse, request date range, and backorder status.

Access: ORD01 menu

Print information about open orders for a specific planner

Use the Open Orders by Planner screen, ORD250D-01, to limit the orders included in the report by planner code, warehouse, request date range, and backorder status.

Field descriptions - ORD250D-01

Fields	Description
Planner Code (3,A):	Specify the code of the planner for which to print the report. An open order report by planner allows you to review the most critical open orders controlled by the specific planner. This is a required field. You can only report on one planner at a time.
Warehouse (3,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
From Request Date (8,0):	Specify a range of values to limit the request dates to include in the report. These dates represent the request dates on the order.

	For information on range fields, see the Ranges topic in the overview section of this document.
To Request Date (8,0):	Specify a range of values to limit the request dates to include in the report. These dates represent the request dates on the order. For information on range fields, see the Ranges topic in the overview section of this document.
Back Orders Only? (1,A):	Specify 0=No to print all open orders. Specify 1=Yes to print only backorders on the report.

Screen actions - ORD250D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Quotes by customer, ORD260D

The Quotes By Customer program, ORD260D, prints a listing of customer quotes, sequenced by customer number. You can enter and maintain quotes through Order Entry.

The report shows the following information for each included quote:

Customer Number and Name

Quote Number

Date Entered

Scheduled Date

Request Date

Customer P.O. Number

Terms Code

Ship Via

Number of Lines on the Quote

Total Pieces

Total Amount

Primary Salesperson Number

Currency Code

You can limit the information to include in this report by customer number range.

Access: ORD01 menu

Print information about customer quotes by customer number

Use the Customer Quotes by Customer screen, ORD260D-01, to select customer quotes to include in the report by customer number.

Field descriptions - ORD260D-01

Fields	Description
From Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report. For information on range fields, see the Ranges topic in the overview section of this document.
To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

Screen actions - ORD260D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

RMAs by customer, ORD280D

The RMAs By Customer program, ORD280D, prints a listing of both open and/or closed customer RMAs, sequenced by customer number/RMA entry date. You can limit the information to include in the report by the customer number range, currency range, warehouse range, and selection of open and/or closed RMAs.

The following information is printed for each RMA included in the report:

Customer number/customer name

RMA number

Date RMA was entered

Scheduled date from the RMA Header

Requested date from the RMA Header

Total lines on the RMA

Warehouse code

Total pieces returned

Total amount of the RMA

RMA status code

Salesperson number

Currency code

Customer purchase order number

Terms code

Ship via

The monetary amounts of both open and closed RMAs are subtotaled by currency and by customer. The report total is expressed in base currency.

The information on the report is from the Order Header, ECH, and Order Line Detail, ECL files, member RETURN. You can maintain it through RMA Entry/Maintenance, ORD630.

Access: ORD02 menu

Print information about open RMAs by customer

Use the Open RMAs by Customer screen, ORD280D-01 to select open and/or closed RMAs by customer number and RMA entry date.

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 - ORD280D-01

Fields	Description
From/To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
From/To Currency (3,A):	Specify a range of values to limit the currency codes to include in the report.
From/To Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report.
Include Open (1,A):	Specify 1=Yes to include Closed and/or Open RMAs in the selection. You must include at least one of these.
Include Closed (1,A):	Specify 1=Yes to include Closed and/or Open RMAs in the selection. You must include at least one of these.
Run Time Parameter:	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 - ORD280D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

RMAs by item/date, ORD272D

The RMAs by Item/Date program, ORD272D, prints a listing of open and/or closed customer RMAs, sequenced alphanumerically by item number and then by requested ship date. You can limit the information on this report by item number range, entry date range, warehouse, and selection of open and/or closed RMAs.

The program prints the following information for each order included on the report:

Item number and Description

RMA number and RMA Line number

Item class

Quantity ordered (in stocking unit of measure)

Unit of measure (Stocking)

Requested ship date

Net price (in stocking unit of measure)

Warehouse code

Ordering Customer number

Currency code

Entry date

Quantity shipped

Scheduled ship date

List price (in selling unit of measure)

Note that Net Price and List Price totals appear only if the Infor LX Multiple Currencies application is listed as not installed (N) in System Parameters Generation, SYS800D-01. The quantity of items authorized for return and the quantity of items actually returned are totaled by item. The information on the report comes from the Order Line Detail file, ECL, member RETURN. You can maintain it through RMA Entry, ORD700.

Access: ORD02 menu

Print information about customer RMAs by item

Use the Customer RMAs by Item screen, ORD272D-01, to select open and/or closed RMAs by item number and requested ship date.

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 - ORD272D-01

Fields	Description
From Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
From Entry Date (8,0):	Specify a range of values to limit the entry dates to include in the report.
To Entry Date (8,0):	Specify a range of values to limit the entry dates to include in the report.

Warehouse (3,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
Include Open (1,A):	Specify 1=Yes to include Closed and/or Open RMAs in the selection. You must include at least one of these.
Include Closed (1,A):	Specify 1=Yes to include Closed and/or Open RMAs in the selection. You must include at least one of these.

Screen actions - ORD272D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open RMAs by reason code/date, ORD274D

The Open RMAs by Reason Code/Date program, ORD274D, prints a listing of open customer RMAs. They are sequenced by reason code, item number, order number, and line number. The report prints totals by reason code, and it also prints a reason code description when the reason code changes. A grand total of all reason codes is printed at the end of the report. You can limit the information on this report by reason code, reason code type, and entry date. The program prints the following information for each order included on the report:

Item number of the product being returned.

RMA number under which the product is scheduled to be returned.

Line Number of the RMA.

Open Quantity.

Unit of Measure.

Net Item Price.

Extended Price

Warehouse the product is being returned to.

Customer Number of customer returning the product.

Customer Name

The open RMAs included in the list come from the Order Header, ECH, and Order Line Detail, ECL, file, member RETURN.

Access: ORD02 menu

Print information about open RMAs by reason code by date

Use the Open RMAs by Reason Code by Date screen, ORD274D-01, to select open RMAs by reason code, item number, order number, and line 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 - ORD274D-01

Fields	Description
From/To Reason Code (2,A):	Specify a range of values to limit the user-defined reason codes to include in the list. The user-defined RMA reason codes are defined in Reason Code Maintenance, INV140, for Transaction Effect Code RM.
Reason Code Type (1/2/3) (1,A):	Specify a value to limit information to include by reason code type in the RMA record. Three user reason code fields are available. Type 1 includes reason codes in the first User field, type 2 includes reason codes in the second User field, and type 3 includes reason codes in the third User field.
From/To Request Date (8,0):	Specify a range of values to limit the RMA line request dates to include in the list for each warehouse.
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 - ORD274D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Closed RMAs by reason code/date, ORD276D

The Closed RMAs by Reason Code/Date program, ORD276D, prints a listing of closed customer RMAs, sequenced by reason code, item number, RMA number and line number. The report prints totals by reason code, and it prints a reason code description when the reason code changes. The report shows a grand total of all reason codes at the end. You can limit the information contained on this report by reason code, reason code type, and invoice entry date.

The report prints the following information for each included order:

Item number of the returned product

RMA number under which the product was scheduled to be returned

Line Number of the RMA

(Open) Quantity

Unit of Measure

Net Item Price invoiced

Extended Price

Warehouse to which the product was returned

Invoice Entered

Date the invoice was entered

Customer Number of customer who returned the product

Customer Name of customer who returned the product

The closed RMAs to list are selected from the Invoice Line History file, SIL.

Access: ORD02 menu

Print information about closed RMAs by reason code by date

Use the Closed RMAs by Reason Code by Date screen, ORD276D-01, to select closed RMAs by reason code, item number, order number, and line 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 - ORD276-01

Fields	Description
From/To Reason Code (2,A):	Specify a range of values to limit the user-defined reason codes to include in the list. The user-defined RMA reason codes are defined in Reason Code Maintenance, INV140, for Transaction Effect Code RM.
Reason Code Type (1/2/3) (1,A):	Specify a value to limit information included by reason code type in the RMA record. Three user reason code fields are available. Type 1 includes reason codes in the first User field, type 2 includes reason codes in the second User field, and type 3 includes reason codes in the third User field.
From/To Invoice Date (8,0):	Specify a range of values to limit the RMA invoice dates to include in the list.
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 - ORD276D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by x-reference item, ORD270D

The Open Orders by X-Reference Item program, ORD270D, prints a listing of open customer orders sequenced by customer item number. You can limit the information to include on this report by customer number range, item number range, shipping date range, warehouse, and backorder status. The listing includes the following information:

Customer item number and description

Order number

Line number

Quantity ordered

Quantity shipped

Unit of measure

Requested ship date

Scheduled ship date

Net price

List price

Warehouse

Customer Number

Currency

Internal product number and description

Item totals

Receiving Dock

Inbound Delivery Number

Request Time

Order Line Source

Kanban Number

Access: ORD02 menu

Print information about open orders by customer item

Use the Open Orders by Customer Item screen, ORD270D-01, to select open orders by customer item number to include in the listing.

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 - ORD270D-01

Fields	Description
From Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report. The item number refers to the customer item number, not the internal item number.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report. The item number refers to the customer item number, not the internal item number.
From Shipping Date (8,0):	Specify a range of values to limit the shipping dates to include in the report for each warehouse. These dates represent the request dates of the order.
To Shipping Date (8,0):	Specify a range of values to limit the shipping dates to include in the report for each warehouse. These dates represent the request dates of the order.
Warehouse (3,A):	Specify a warehouse to limit orders to include to a specific warehouse. Leave the field blank to allow all warehouses.
Back Orders Only (1,A):	Specify 0=No to print all open orders. Specify 1=Yes to print only backorders on 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 - ORD270D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Open orders by picker number, ORD290D

The Open Orders by Picker Number program, ORD290D, prints a listing of customer orders that have progressed to picking status.

Access: ORD01 menu

Print information about open orders by picker number

Use the Open Orders by Picker Number screen, ORD290D-01, to select open orders by picker number to include in the listing.

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 - ORD290D-01

Fields	Description
From/To Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report.
From/To Picker Number (6,0):	Specify a range of values to limit the picker 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 - ORD290D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order cancellation listing, ORD285D

The Order Cancellation Listing program, ORD285D, prints a listing of deleted or and partially deleted orders.

Access: ORD01 menu

Print information about cancelled orders

Use the Order Cancellation Listing screen, ORD285D-01, to select orders by customer number and cancellation date to include in the list.

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 - ORD285D-01

Fields	Description
From/To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
From/To Cancellation Date (8,0):	Specify a range of values to limit the cancellation dates of orders to include in the report.
Sequence by (1,A):	Specify the code that represents the sort sequence for the report. The following options are available: 1 Customer Number 2 Cancellation Reason Code 3 Cancellation Date

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 - ORD285D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Duplicate customer PO report, ORD287D

Use the Duplicate Customer PO Report program, ORD287D, to print a listing of customer purchase order numbers that are duplicates.

Access: ORD01 menu

Print information about duplicate customer purchase orders

Use the Duplicate Customer PO Report screen, ORD287D-01, to specify customers and order entry dates 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 - ORD287D-01

Fields	Description
From/To Customer Number (8,0):	Specify a range of values to limit the customer numbers to include in the report.
From/To Order Entry Date (8,0):	Specify a range of values to limit the order entry dates of orders to include in the report.
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 - ORD287D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order inquiry, ORD300D

The Order inquiry program, ORD300D, allows you to view open orders by customer, customer purchase order, salesperson, warehouse, item, or request date. Additional screens display promotions that are assigned to orders.

The initial screen displays a list of open orders by order number. You can re-sequence the display with screen action F13. You can sequence the records by customer number, salesperson number, customer purchase order number, request date, or warehouse code. Within each sort sequence, you can optionally include or exclude records to display all orders, open orders only, backorders only, or drop shipments only. From this initial screen, you can also position the list to specific orders.

Infor LX offers support for the use of alternate currencies, including the euro, if you have the Multiple Currencies application installed. If alternate currency support is enabled on your system, you can access information on the available currencies in some inquiry screens, whether you are looking at orders, quotes or RMAs.

Access: ORD, BIL, and DRP menus, and from within various display screens

Note to Time Conversion Users

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

Not all dates in the supply chain are converted as part of the time conversion process, because some are always stored as entered or displayed, printed, and stored in system time zone values. The following list shows the common conversions performed for typical date fields when time zone conversion is active. Exceptions are discussed in the help text for individual date fields in individual screens.

- Request Date: In order entry, this is the date on which the user expects shipment of the order line from the ship-from warehouse. This date is generally the date of the order line warehouse. In order inquiry screens, it can be called the Shipping Date. It affects pricing and promotion qualification, lot availability and expiration, MRP available-to-promise processing (it is the demand date), OLM load generation, and selection of records for display or processing in multiple other programs. The system displays this date to the user for the time zone of the warehouse.

- Entry Date and Entry Time: These are audit fields, and theEntry Date is also used in Order Entry as a promotion qualifier, as well as for other purposed. Entry Date and time are never converted. They are stored and displayed for the system date and time zone.
- Schedule Date and Time: Users generally use these these fields to record the date and time at which the customer wants to receive an order line. These dates are generally entered and displayed for the ship-to number time zone, or if there is no ship-to number, the time zone of the ship-to customer.
- Customer Requested Ship Dates and Dock Dates: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. Note that the Customer Requested Ship Date/Time is converted to the equivalent value in the warehouse time zone when it is passed to Cell Workbench Detail, LMP500D2.
- CTP Ship Date and CTP Dock Date: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. They are calculated values that indicate when you should ship a line from your warehouse. Therefore, they are converted based on the time zone of the line warehouse.
- Price Book Date: Order Entry uses this date for pricing and promotion qualification. Date ranges in the Price Book have no associated time or time zone. The are saved and displayed as entered with no time zone conversion. Store Date and Warehouse Date are variants of the Price Book Date. They are also stored and displayed without time zone conversion.
- User Date and Time 1 and 2: These fields are user definable and have no pre-defined usage. They are not associated with any regional time zones. The date and time values are stored and displayed as entered with no time zone conversion.
- Receipt Date/Time: These resupply order fields represent the planned receipt date and time (expected delivery date and time) at the To Warehouse. They are entered for the time zone of the ship-to warehouse and converted to the equivalent system date and time for storage, then converted back to ship-to warehouse time zone for on-screen display and printing in reports and inquiries.

Note that dates that are converted for time zone differences are only converted if the governing entity for the date and time, such as the ship-from warehouse or the ship-to number, contain a region code. If the governing entity has a blank region code, no conversion is performed. The date is stored, retrieved, printed, and displayed as entered on the screen.

Access: ORD, BIL, and DRP menus, and from within various display screens

Sort and select orders for inquiry

The initial Order Inquiry screen, ORD300D1-01, displays a list of all open orders. This screen also provides initial access to numerous other views of orders via the line and screen actions.

Field descriptions - ORD300D1

Fields	Description
Order Number (9,0):	Specify the number of the order to work with. You can prompt for a value in this field in the Order mode only.
Customer Number (8,0):	This is the sold-to customer number associated with the order.
Customer PO (23,A):	This is the customer purchase order associated with this order.
Salesperson (6,0):	This is the primary salesperson number associated with this order.
Request Date:	This is the request date assigned to the order line.
Warehouse (3,A):	This is the order warehouse assigned to the order.
Order Type:	This is the order type associated with this order.
Order Class:	This is the order class associated with this order.
Status:	This is the status of the order. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time. Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 = Ready for Invoicing Position 5 = Ready for Purge To view individual line statuses, use the line action 14 = Lines.
Customer Name (50,A):	This is the sold-to customer associated with the customer number.
Order Amount:	This is the order amount associated with this order. You can view either transaction currency or base currency amounts.

Currency: This is the currency code associated with this order. You can view either the transaction currency or base currency.

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.

The following line actions are available:

9=Pricing, Sales, Commissions

View the order pricing, sales, and commissions information.

10=Billing and Financial

View order billing and financial information.

11=Shipping

View order shipping information.

12=Inventory

View order inventory information.

13=Tax, Currency, Payment

View order tax, currency, and payment information.

14=Lines

View line information.

15=Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain notes.

16=Order, Quote, or RMA Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain notes.

17=Total Order Promotions

View total order promotions. This action is only available if you have the PRO application installed.

20=Track Cancellation

Access the Cancellation Reason Code screen, ORD747D-01, for information for deleted orders or order lines.

24=In Use Inquiry

Access the Order/Line In Use Inquiry screen, ORD314D, for information for the specified order, quote, or RMA.

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

Screen actions - ORD300D1

Commands	Description
F11=Fold	Fold the screen to display additional information.
F13=Filters	Access the filter window. The filter windows and sequence options change based on the type of record you are using for the inquiry. Select the filter option you want in the field next to the the sorting sequence you want and press Enter. If you access the filter screen from Order Inquiry, you can filter by any options except Quote or RMA. The default filter in Order Inquiry is Open Orders. If you access the filter screen from Quote Inquiry, you can only choose the Quote filter, and if you access the screen from RMA Inquiry, you can only choose the RMAs filter. Available filters: ■ 0=All Orders (all active and inactive customer orders included) ■ 1=Open Orders (only active customer orders included) ■ 2=Back Orders (only back orders included) ■ 3=Drop Ship Orders (only orders with open drop ship requests included) ■ 4=Quote (all open quotes included) ■ 5=RMAs (all open RMAs included) Available sorting sequences: ■ Order (available for Order, Quote, and RMA) ■ Customer/Currency/Request Date/Order (available for Order, Quote, and RMA) ■ Customer P.O./Customer/Order (available for Order only) ■ Salesperson/Order (available for Order only) ■ Request Date/Customer/Order (available for Order only)
F14=Order Inq. by Item	View the Order Inquiry by Item screen, ORD301D1-01. Order Inquiry by Item is available only for orders, not for quotes or RMAs.

F16=Mat Sts Inq	Access the Material Status Inquiry program, INV300, to inquire on an item's detail information.
F17=Sales Inq	Access the Sales Inquiry program, SAL300, from which you may inquire on detailed sales information by customer, item, salesperson, and warehouse.
F18=Promotion Inq.	This screen action appears only if you have the Promotions and Deals application installed. Access the Promotions and Deals Inquiry program, PRO300, to inquire on promotions by promotion number, item number, customer number, customer type, item class, or period/year.
F20=Base/Transaction Currency	Toggle between the transaction currency and the base currency.
F21=Item X-Ref Inq.	This screen action appears only if you have set the Allow Item X-Reference flag in **IDF Customer > Logistics > Shipping** tab, to 1, 2, 3, or 4. Use this screen action to access the Customer/Inventory Item Cross Reference program, ORD350, to inquire on the customer item number/internal item number cross reference.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Inquire about orders by item

Infor LX displays the Order Inquiry by Item screen, ORD301D1-01, if you request open orders by item. This screen displays order lines. You can select lines for additional detail. This screen does not show special lines.

Field descriptions - ORD301D1

Fields	Description
Item (35,A):	Specify an item code to review open orders of this item. This field displays the internal item number.
Currency:	Infor LX displays the currency code for this order line. The initial display shows the transaction currency. Use F13 to toggle between the transaction currency and the base currency.
Order Type:	Infor LX displays the order type associated with this order line.
Order Class:	Infor LX displays the order class associated with this order line.

Request Date (8,a): Specify the request date of the for the order line in the line warehouse.

Order Number (9,0): Specify the number for the record you wish to view.

Order Line Number (4,0): Specify the line number for the record you wish to view.

Customer Number (8,0): Specify the sold-to customer number associated with the order line.

Warehouse (3,A): Specify the order warehouse assigned to the order line.

Status: Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 - Ready for Invoicing

Position 5 = Ready for Purge

Order Quantity: Infor LX displays the ordered quantity in the selling unit of measure. To view the quantity in the stocking unit of measure, view the line detail screen.

Unit of Measure: Infor LX displays the selling unit of measure. To view the stocking unit of measure, view the line detail screen.

Price: Infor LX displays the net price in the selling unit of measure. Use F20 to toggle between the transaction currency price and the base currency price.

Act (Action) 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.

The following actions are available:

9=Pricing, Sales, Commissions

View the order pricing, sales, and commissions information.

10=Billing and Financial

View order billing and financial information.

11=Shipping

View order shipping information.

12=Inventory

View order inventory information.

13=Tax, Currency, Payment

View order tax, currency, and payment information.

14=Order Lines

View order line information for the order.

15=Item Lines

Access the Item Lines screen, ORD301D2-01, to view order lines that contain this item.

16=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

17=Line Promotions

View line promotions. This action is only available if you have the PRO application installed.

19=Allocations

Access Allocations, ORD308D-01, to view allocations for the line.

20=Line Detail

Access Line Operation Detail, ORD307D-01, to view detail information for the line.

22=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

23=Status

View the status of the line.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD301D1

Commands	Description
F11=Fold	Fold the screen to display additional information.
F13=Filters	Access the filter window. The filter windows and sequence options change based on the type of record you are using for the inquiry.
F14=Order Inq. by Order	View the Order Inquiry by Order screen, ORD300D1-01.
F16=Mat Sts Inq	Access the Material Status Inquiry program, INV300, to inquire on an item's detail information.
F17=Sales	Access the Sales Inquiry program, SAL300, from which you may inquire on detailed sales information by customer, item, salesperson, and warehouse.
F18=Promotion Inq.	This screen action appears only if you have the Promotions and Deals application installed. Access the Promotions and Deals Inquiry program, PRO300, to inquire on promotions by promotion number, item number, customer number, customer type, item class, or period/year.
F20=Base/Transaction Currency	Toggle between the transaction currency and the base currency.
F21=Item X-Ref Inq.	This screen action appears only if you have set the Display X-Reference flag in **IDF Customer > Logistics > Shipping** tab, to 1, 2, 3, or 4. Use this screen action to access the Customer/Inventory Item Cross Reference program, ORD350, to inquire on the customer item number/internal item number cross reference.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View order pricing, sales, commissions information

The Order Pricing, Sales, Commission screen, ORD303D-01, displays the sales and pricing information for the order.

Field descriptions - ORD303D-01

Fields	Description
Order Number:	Infor LX displays the selected record number.
Customer P.O.:	Infor LX displays the customer purchase order number associated with this order.
Order Status:	Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time. Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 - Ready for Invoicing Position 5 = Ready for Purge
Entry:	Infor LX displays the date you created the order, quote or return material authorization.
Sold-to Customer:	Infor LX displays the sold-to customer number and name associated with this order.
Order Type:	Infor LX displays the order type associated with this order line.
Order Class:	Infor LX displays the order class associated with this order line.
Request Date:	Infor LX displays the request date for this order.
Warehouse (3,A):	Infor LX displays the order warehouse assigned to the order line.
Discount Type (1,0):	Specify the Discount Type Code for this order based on whether you want Infor LX to allow or limit the application of promotions and allowances. The following are valid discount type codes: 0 Promotions and Allowances Allowed 1 Only Promotions Allowed

2	Only Allowances allowed
3	No Promotions or Allowances allowed

Book: Infor LX displays the book date for this order. Infor LX uses this date to determine list prices and special prices.

Pricing Customer: Infor LX displays the pricing customer from the sold-to customer. Infor LX uses the pricing customer's list price and special price records when you enter orders for the sold-to customer. This customer also determines whether margins are calculated. You cannot change the pricing customer number after an order line is priced.

Pricing Region: Infor LX displays the pricing region code for this order. Infor LX uses the pricing region to access list price records.

Price Source Code: Infor LX displays the code that identifies how the total order discount was derived. The following codes are valid for the order price source code:

00 - No Pricing Performed

01 - Failed Pricing

02 - Special Price

03 - Promotions and Deals

04 - No Discount Calculated for the Order

05 - Replenishment Order Not Priced

Contract (50,A:) If this order originated from a contract agreement between your company and the customer, Infor LX displays the contract number. This line contract number does not print on customer statements.

Pricing Facility: Infor LX displays the pricing facility.

Promotion Customer (8,0): Infor LX displays the promotions customer from the sold-to customer. You cannot change the promotion customer number after an order line is priced.

Region (6,a): Infor LX displays the promotion region for this order. Infor LX uses the promotion region to access promotion records.

Promotion Pay-To (8,0): Infor LX sends promotional payments to this customer for promotions on the sold-to customer's orders. Infor LX displays the promotion pay-to value from the sold-to customer.

Promotion Payment-to Number (4,0): Infor LX displays the promotion pay-to number associated with the promotion pay-to customer.

Promotion Pricing: Infor LX displays the code that determines whether promotional pricing is allowed. The value defaults from the promotion customer's Customer Master file, RCM. The values work as follows:

0	No promotional pricing is allowed
1	Only Line and total promotional pricing
2	Only bracket pricing
3	Line/bracket/total promo pricing

Margin Hold Reason: Infor LX displays the margin hold code for this order. This code indicates whether an order is on margin hold, or how the order was released from margin hold. The values work as follows:

00 - Order not on margin hold

01 - Margin hold at order level

02 - Margin hold at line level

03 - Margin hold at order and line

98 - System released order from hold

99 - Order Manually released from hold

Margin Percent: Infor LX displays the calculated order margin percent.

Sales History Customer (8,0): Infor LX displays the number and name of the customer to report in the sales history for orders you enter against the sold-to customer.

Primary Salesperson (6,0): Infor LX displays the primary salesperson number associated with this order.

Commission (2,A): Infor LX displays the primary salesperson's commission code.

Split Salesperson (6,0): If commissions are split, Infor LX displays the secondary salesperson's name and number.

Commission (2,A): Infor LX displays the secondary salesperson's commission code.

Screen actions - ORD303D01

Commands	Description
F14=Order Lines	Access Order Lines, ORD300D2-01, to view line information.
F16=Shipping	Access Order Shipping, ORD302D-01, to view order shipping information.
F17=Inventory	Access Order Inventory, ORD305D-01, to view order inventory information.
F18=Tax, Currency, Payment	Access Order Tax, Currency Payment, ORD306D-01, to view order tax, currency, and payment information.
F19=Order Promotions	Access Total Order Promotions, ORD309D-01, to view order promotions. This screen action is only available if you have the PRO application installed.
F20=Order Bracket Promotions	Access Bracket Promotion, ORD310D1-01, to view order bracket promotions. This screen action is only available if you have the PRO application installed.
F21=Order Inq. by Order	Access the Order Inquiry by Order screen, ORD300D1-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View billing and financial information for an order

The Order Billing and Financial screen, ORD304D-01, displays billing and financial information for the order.

Two totals fields display order-level discount information for the order. The Order Total Discount Offered field shows the total discount amount applied to the order. The Order Total Discount Billed field is set to zero until you bill one or more lines. After billing, it shows the amount of the discount that has been applied to the invoices.

Field descriptions - ORD304D-01

Fields	Description
Order Number:	Infor LX displays the selected record number.
Customer P.O.:	Infor LX displays the customer purchase order number associated with this order.

Order Status: Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 - Ready for Invoicing

Position 5 = Ready for Purge

Entry: Infor LX displays the date you created the order, quote, or return material authorization.

Sold-to Customer: Infor LX displays the sold-to customer number and name associated with this order.

Order Type: Infor LX displays the order type associated with this order line.

Request Date: Infor LX displays the request date for this order.

Warehouse (3,A): Specify the order warehouse assigned to the order line.

Order Class: Infor LX displays the order class associated with this order line.

Book: Infor LX displays the book date for this order. Infor LX uses this date to determine list prices and special prices.

A/R Customer (8,0): Infor LX displays the number and name of the accounts receivable customer to bill for this order.

Terms Code (2,A): Infor LX displays the customer terms code associated with this order.

Terms Desc (15,A): Infor LX displays the customer terms code description associated with this order.

Document Prefix/Number (2,A): If this document is a credit or debit memo, or if the terms require prepayment, Infor LX displays the original invoice number. If you do not require document prefixing in your system parameters, Infor LX displays only the invoice number.

Valuation (8,0): Infor LX displays the date used to calculate the document and discount due dates for post-ship orders. Countries that do not use the document date to calculate the due date require the invoice value date.

Company (3,0): Infor LX displays the company number defined for this sold-to customer.

Invoice-to Customer (8,0): Infor LX displays the customer number and name to which to send the invoice. For address and contact information, use F2=Address to call the Invoice to Customer Address screen.

Invoice-to Number (4,0): Infor LX displays the invoice-to number associated with this customer.

Attention To: This field shows the customer name and the Attention To name from IDF Customer.

Lock box-to Customer (8,0): Infor LX displays the customer number to which to send credit payments for the current customer.

Lock box-to Number (4,0): Infor LX displays the lock box-to number associated with this customer.

Credit Hold (2,A): Infor LX displays the credit hold code for this order. This code indicates whether an order is on credit hold, or how the order was released from credit hold. Infor LX determines the credit status using the A/R customer. The following values are valid for the credit hold field:

00 - Order not on credit hold

01 - Order on credit hold

98 - System released order from hold

99 - Order manually released from hold

Customer Hold (2,0): Infor LX displays the customer hold code for this order. This code indicates whether an order is on customer hold, or how the order was released from customer hold. Infor LX uses the sold-to customer to determine the customer hold status. The following values are valid for the customer hold field:

00 - Order not on customer hold

01 - Order on customer hold

98 - System released order from hold

99 - Order manually released from hold

User Hold Code (2,A): Infor LX displays the user hold code for this order. This code indicates whether an order is on user hold, or how the order was released from user hold. The following values are valid for the user hold field:

00 - Order not on user hold

01 - Order on user hold

98 - System released order from hold

99 - Order manually released from hold

Document Prefix (2,A): This field displays only if you activated the Company/Prefix Document sequencing field in the Billing System Parameters. Infor LX displays the company-specific prefix code to retrieve the invoice number from the Document Sequence Numbering file, RDS. The document prefix defaults from the A/R customer.

G/L Reason (5,A): Reason codes describe the activity you perform. Infor LX displays the default reason code that applies to this transaction.

Billing Selection Flag: This field shows the billing selection flag you specified in the IDF Customer.

RMA: If you created this order from an RMA, Infor LX displays the RMA number.

Self Bill Flag (1,0): Infor LX displays this flag to indicate whether the customer can use self-billing functionality.

Screen actions - ORD304D-01

Commands	Description
F2=Address	View specific address and contact information for this invoice-to customer.
F9=CSR Codes	View CSR Code information for the order.
F13=Order Inq by Item	Access the Order Inquiry by Item screen, ORD301D1-01.
F14=Order Lines	Access Order Lines, ORD300D2-01, to view line information.
F18=Tax, Currency, Payment	Access Order Tax, Currency Payment, ORD306D-01, to view order tax, currency, and payment information.
F19=Order Promotions	Access Total Order Promotions, ORD309D-01, to view order promotions. This screen action is only available if you have the PRO application installed.

F20=Order Bracket Promotions	Access Bracket Promotion, ORD310D1-01, to view order bracket promotions. This screen action is only available if you have the PRO application installed.
F21=Order Inq. by Order	Access the Order Inquiry by Order screen, ORD300D1-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View shipping information

The Order Shipping screen, ORD302D-01, displays shipping information for the order.

Field descriptions - ORD302D-01

Fields	Description
Order Number:	Infor LX displays the selected record number.
Customer P.O.:	Infor LX displays the customer purchase order number associated with this order.
Order Status:	Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time. Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 - Ready for Invoicing Position 5 = Ready for Purge
Entry:	Infor LX displays the date you created the order, quote or return material authorization.
Sold-to Customer:	Infor LX displays the sold-to customer number and name associated with this order.
Order Type:	Infor LX displays the order type associated with this order line.

Request Date:	Infor LX displays the request date for this order.
Warehouse (3,A):	Specify the order warehouse assigned to the order line.
Order Class:	Infor LX displays the order class associated with this order line.
Book:	Infor LX displays the book date for this order. Infor LX uses this date to determine list prices and special prices.
Transaction Currency Code	The three-character code displayed represents the transaction currency of this order.
Transaction Currency Code	The three-character code displayed represents the transaction currency of this order.
Currency Description:	This field contains a description of the transaction currency of this order.
Ship-to (8,0):	Infor LX displays the customer number to which you want to ship this order.
Ship-to Number (4,0):	Infor LX displays the ship-to number associated with the ship-to customer.
Store (5,0):	Infor LX displays the store number associated with the ship-to address.
Name (50,A):	Infor LX displays the ship-to name for the ship-to address. For address detail information, use F2=Address to call the Ship To Customer Address screen.
Carrier (6,A):	Infor LX displays the carrier that delivers this order.
Route (6,A):	Infor LX displays the route code associated with this order.
Destination (4,A):	Infor LX displays the country of ultimate destination for this order.
Scheduled:	Infor LX displays the date the order is scheduled to ship.
Means (4,A):	Infor LX displays the means of transportation for this order.
Zone (5,A):	Infor LX displays the zone or area to which to deliver this order.
Freight Terms (3,A):	Infor LX displays the freight terms for this order.
Weight:	Infor LX displays the calculated order weight of this order based on line item weights. The program expresses this value in stocking units of measure and includes free goods.
Volume:	Infor LX displays the calculated order volume of this order based on line item volumes. The program expresses this value in stocking units of measure and includes free goods.

Pallets:	Infor LX displays the calculated total pallets for this order based on line item pallets. The program expresses this value in stocking units of measure and includes free goods.
Shipping Weight (11,3):	Infor LX displays the approximate shipping weight you specified for this order.
Shipping Charges (15,2):	Infor LX displays the freight/order charges for this order.
Shipper Name (30,A):	Infor LX displays the name of the shipper for this order.
Estimated Packaging Deposit (15,2):	Infor LX displays the estimated packaging deposit amount for this order. Infor LX only displays this field if you have OLM installed.
Resupply Warehouse (3,A):	Infor LX displays the resupply receipt warehouse.
Receipt:	Infor LX displays the expected receipt date for this resupply order.
Return Warehouse:	Infor LX displays the return-to warehouse.
Attention To:	Infor LX displays the Attention To name from the Customer Master program.

Screen actions - ORD302D

Commands	**Description**
F2=Address	Access the Ship To Customer Address screen to display specific address and contact information.
F13=Order Inq by Item	Access the Order Inquiry by Item screen, ORD301D1-01.
F14=Order Lines	Access Order Lines, ORD300D2-01, to view line information.
F15=Pricing, Sales, Comm	Access the Order Pricing, Sales, Commission screen, ORD303D-01, to view sales and pricing information.
F16=Billing and Financial	Access the Order Billing and Financial screen, ORD304D-01, to view. billing and financial information.
F17=Inventory	Access Order Inventory, ORD305D-01, to view order inventory information.
F19=Order Promotions	Access Total Order Promotions, ORD309D-01, to view order promotions. This screen action is only available if you have the PRO application installed.

F20=Order Bracket Promotions	Access Bracket Promotion, ORD310D1-01, to view order bracket promotions. This screen action is only available if you have the PRO application installed.
F21=Order Inq. by Order	Access the Order Inquiry by Order screen, ORD300D1-01. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View order inventory information

The Order Inventory screen, ORD305D-01, displays order inventory information.

Field descriptions - ORD305D

Fields	Description
Order Number:	Infor LX displays the selected record number.
Customer P.O.:	Infor LX displays the customer purchase order number associated with this order.
Order Status:	Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time. Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 - Ready for Invoicing Position 5 = Ready for Purge
Entry:	Infor LX displays the date you created the order, quote or return material authorization.
Sold-to Customer:	Infor LX displays the sold-to customer number and name associated with this order.
Order Type:	Infor LX displays the order type associated with this order line.

Request Date: Infor LX displays the request date for this order.

Warehouse (3,A): Infor LX displays the order warehouse assigned to the order line.

Order Class: Infor LX displays the order class associated with this order line.

Book: Infor LX displays the book date for this order line. Infor LX uses this date to determine list prices and special prices.

Item X-Ref Customer (8,0): Infor LX displays the item cross reference customer number for the sold-to customer.

Inventory Reason Code (2,A): Infor LX displays the inventory reason code for this transaction.

User 1 Reason Code (2,A): Infor LX displays the first user-defined reason code for this transaction.

User 2 Reason Code (2,A): Infor LX displays the second user-defined reason code for this transaction.

User 3 Reason Code (2,A): Infor LX displays the third user-defined reason code for this transaction.

Customer Reason Code (2,A): Infor LX displays the default customer reason code for this return.

Disposition Reason Code (2,A): Infor LX displays the disposition of the returned item.

Q/C Reason Code (2,A): Infor LX displays the quality control reason for this return.

User Defined 1 (8,0): Infor LX displays the headings for the additional order date options you defined in the Order Entry System Parameters, followed by the dates. Both dates default from the order header.

User Defined 2 (8,0): Infor LX displays the headings for the additional order date options you defined in the Order Entry System Parameters, followed by the dates. Both dates default from the order header.

Backorder Code (1,0): Infor LX displays the backorder code for this customer.

Allocation Priority (2,0): Infor LX displays the allocation priority for this order. High priority = 99, and low priority = 01.

Usage Code (1,A): Infor LX displays the usage code associated with this order. Usage codes are user-defined reference values only.

Source (3,A):	Infor LX displays the user-defined source code for this order.
Contact (25,A):	Infor LX displays the contact phone number for this order. Infor LX uses the sold-to customer phone number as the default. This line contact number does not appear on customer statements.
Customer Requested Ship Date (6,0):	Infor LX displays the date the customer wants you to ship this order. This field is updated from the Customer Order Header file.
Customer Requested Ship Time (4,0):	Infor LX displays the time on the date specified in the preceding field at which the customer wants you to ship this order.
Customer Requested Dock Date (6,0):	Infor LX displays the date on which the customer wants the order to arrive at its receiving location.
Customer Requested Dock Time (4,0):	Infor LX displays the time on the specified date at which the customer wants the order to arrive at its receiving location.
Original Customer Requested Ship Date (6,0):	Infor LX displays the Customer Requested Ship Date value that you entered when you first created the order.
Original Customer Requested Ship Time (4,0):	Infor LX displays the Customer Requested Ship Time value (on the date displayed in the preceding field) that you entered when you first created the order.
CTP Ship Date (6,0):	Display only. This field displays the latest Capable to Promise Ship Date from the Customer Order Header work file for all lines of the order.
CTP Ship Time (4,0):	Infor LX displays the latest Capable to Promise Ship Time for all lines of the order on the date in the preceding field. The time is retrieved from the Customer Order Header work file.
CTP Dock Date (6,0):	Infor LX displays the latest Capable to Promise Dock Date from the Customer Order Header file for all lines of the order
CTP Dock Time (4,0):	Infor LX displays the latest Capable to Promise Dock Time for all lines of the order on the date in the preceding field. The time is retrieved from the Customer Order Header file.

Screen actions - ORD305D

Commands	Description
F13=Order Inq by Item	Access the Order Inquiry by Item screen, ORD301D1-01.
F14=Order Lines	Access Order Lines, ORD300D2-01, to view line information.
F15=Pricing, Sales, Comm	Access the Order Pricing, Sales, Commission screen, ORD303D-01, to view sales and pricing information.
F16=Billing and Financial	Access the Order Billing and Financial screen, ORD304D-01, to view. billing and financial information.
F17=Shipping	Access Order Shipping, ORD302D-01, to view order shipping information.
F18=Tax, Currency, Payment	Access Order Tax, Currency Payment, ORD306D-01, to view order tax, currency, and payment information.
F19=Order Promotions	Access Total Order Promotions, ORD309D-01, to view order promotions. This screen action is only available if you have the PRO application installed.
F20=Order Bracket Promotions	Access Bracket Promotion, ORD310D1-01, to view order bracket promotions. This screen action is only available if you have the PRO application installed.
F21=Order Inq. by Order	Access the Order Inquiry by Order screen, ORD300D1-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View information about tax, currency, and payments for an order

Use the Order Tax, Currency, Payment screen, ORD306D-01, to view tax, currency, and payment information for the order.

Field descriptions - ORD306D

Fields	Description
Order Number:	Infor LX displays the selected record number.
Customer P.O.:	Infor LX displays the customer purchase order number associated with this order.

Order Status:	Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time. Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 - Ready for Invoicing Position 5 = Ready for Purge
Entry:	Infor LX displays the date you created the order, quote, or return material authorization.
Sold-to Customer:	Infor LX displays the sold-to customer number and name associated with this order.
Order Type:	Infor LX displays the order type associated with this order line.
Request Date:	Infor LX displays the request date for this order.
Warehouse (3,A):	Infor LX displays the order warehouse assigned to the order line.
Order Class:	Infor LX displays the order class associated with this order line.
Book:	Infor LX displays the book date for this order line. Infor LX uses this date to determine list prices and special prices.
Copy from Prefix (2,A):	Infor LX displays the prefix of the document values were copied from. Note: The prefix only appears when you copy an invoice to an RMA and the RMA to a credit order.
Copy from Document (9,0):	Infor LX displays the number of the document from which it copied the values.
Company:	Infor LX displays the company associated with this sold-to customer.
Order Currency (3,A):	Infor LX displays the order currency from the sold-to customer master. This field displays only if you have the Multiple Currencies application installed.

Recognition (8,0): Infor LX display the date it uses to retrieve the exchange (spot) rate for this order. This field displays only if you have the Multiple Currencies application installed.

Exchange Rate (15,7): If your system is not euro enabled, Infor LX displays the exchange rate to use to convert this order from transaction to base currency. Infor LX displays the default spot rate with the order currency as the from currency, the base currency as the to currency, and the recognition date. This field appears only if you have the Multiple Currencies application installed.

If your system is euro enabled in Multi-Currency System Parameters, MLT800, the multiplier exchange rate appears in this field. To see additional exchange rate information, use F2=Exchange Rate to call the Override Exchange Rate screen, MLT940D. You cannot maintain this rate information from an inquiry screen, but you can view the applicable currencies and exchange rates.

Foreign Exch Reservation (10,A): Infor LX displays the foreign exchange (FOREX) reservation code from which the system retrieves a pre-defined, reserved exchange rate for this transaction (order).

Tax Code (5,A): Infor LX displays the customer tax code for this order. This tax code, combined with the item tax code on each order line and (optionally) the warehouse code on each order line, determines the tax rate applied to the order line.

Country Code (2,A): Infor LX displays the country code for the customer's member or non-member state. The registration number and country code combine to form the EC VAT number.

Registration (25,A): Infor LX displays the customer's member or non-member registration number. The registration number and country code combine to form the EC VAT number.

Bank (3,A): Infor LX displays the code of the bank that handles any payment agreements between you and your customer, or foreign exchange reservations between you and the bank itself.

Payment (1,A): Infor LX displays the payment type code associated with this order. The payment type defaults from the A/R customer. This code designates the method of payment (check, wire transfer, etc.) for this order.

Screen actions - ORD306D

Commands	Description
F2=Exchange Rate	This function key appears if the Multiple Currencies application is installed and turned on for Order Entry and Billing, and euro support is enabled in Multi-Currency System Parameters, MLT800. Use this function to call the Override Exchange Rate window, MLT940D, in which you can see additional exchange rate information. You cannot maintain this rate information from an inquiry screen, but you can view the applicable currencies and exchange rates.
F13=Order Inq by Item	Access the Order Inquiry by Item screen, ORD301D1-01.
F14=Order Lines	Access Order Lines, ORD300D2-01, to view line information.
F15=Pricing, Sales, Comm	Access the Order Pricing, Sales, Commission screen, ORD303D-01, to view sales and pricing information.
F16=Billing and Financial	Access the Order Billing and Financial screen, ORD304D-01, to view. billing and financial information.
F17=Shipping	Access Order Shipping, ORD302D-01, to view order shipping information.
F18=Inventory	Access Order Inventory, ORD305D-01, to view order inventory information.
F19=Order Promotions	Access Total Order Promotions, ORD309D-01, to view order promotions. This screen action is only available if you have the PRO application installed.
F20=Order Bracket Promotions	Access Bracket Promotion, ORD310D1-01, to view order bracket promotions. This screen action is only available if you have the PRO application installed.
F21=Order Inq. by Order	Access the Order Inquiry by Order screen, ORD300D1-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View order lines

The Order Lines screen, ORD300D2-01, displays all the active order lines for the selected order. Infor LX initially displays all quantities and units of measure in selling units. You can use F21 to view either the selling or stocking units. Infor LX displays the order amount in the transaction currency. Use F22 to view either the transaction or base currency.

Field descriptions - ORD300D2-01

Fields	Description
Currency (mode)	This is the mode in which the currency appears. If the Multiple Currencies application is installed and the A/R customer is enabled for Alternate currency, you will be able to use the F20 function key to toggle among the display of amount and cost values in Transaction, Base, and Alternate currencies. Otherwise, you will only have a choice of Transaction or Base currency.
Currency (code)	This code represents the order currency in which the amount and cost values appear on this screen.
Currency Description	This is the description of the currency in which the amount and cost values appear on this screen.
Amount	This is the amount of the order in the currency displayed.
Cost	This is the cost of the order in the currency displayed.
Order Number:	Infor LX displays the selected record number.
Order Type:	Infor LX displays the order type associated with this order line.
Order Class:	Infor LX displays the order class associated with this order line.
Sold-to Customer:	Infor LX displays the sold-to customer number and name associated with this order.
Order Currency (3,A):	This code represents the order currency in which the amount and cost values appear on this screen.
Order Line:	Infor LX displays the selected record number.
Item:	Infor LX displays the ordered line item. This value is the internal item number.
Reference Item:	Infor LX displays the customer item number or item alias.
Quantity Ordered:	Infor LX displays the ordered quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.
Quantity Shipped:	Infor LX displays the shipped quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.
Quantity Pick Released:	Infor LX displays the pick released quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.

Unit of Measure: Infor LX displays the selling unit of measure. Use F21 to view the stocking unit of measure.

Warehouse (3,A): Infor LX displays the order warehouse assigned to the order line.

Order Status: Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 - Ready for Invoicing

Position 5 = Ready for Purge

Act (Action) 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.

13=Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain notes.

14=Line Promotions

View order line promotions. This action is only available if you have PRO installed.

16=Allocations

View allocations for the selected line. This action is only valid for orders, not for quotes or RMAs.

17=Line Detail

View detail information for the selected line.

19=Material Status Inquiry

View inventory status information.

20=Track Cancellation

Access the Cancellation Reason Code screen, ORD747D-01, for information for deleted orders or order lines.

23=Status

View the current status of the line.

24=In Use Inquiry

Access the Order/Line In Use Inquiry screen, ORD314D, for information for the specified order, quote, or RMA.

26=Configurator

For configurable items, view configuration information for the item on this line.

29=Line Operational Detail

Access the Line Operational Detail screen, ORD307D-01.

30=Line Financial Detail

Access the Line Financial Detail screen, ORD307D-03.

31=Line Pricing Detail

Access the Line Pricing Detail screen, ORD307D-06.

32=Lean Detail

This action code is only displayed if the Lean Manufacturing Process application (LMP) is installed. If the item you selected is a Lean item, access the Lean Detail screen, ORD307D-04, to view details for the selected line.

33=Shipping Detail

Access the Line Shipping Detail screen, ORD307D-05, to view the shipping details for the order line.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD300D2-01

Commands	Description
F14=Pricing, Sales, Comm	Access the Order Pricing, Sales, Commission screen, ORD303D-01, to view sales and pricing information.
F15=Billing and Financial	Access the Order Billing and Financial screen, ORD304D-01, to view. billing and financial information.
F16=Shipping	Access Order Shipping, ORD302D-01, to view order shipping information.
F17=Inventory	Access Order Inventory, ORD305D-01, to view order inventory information.
F18=Tax, Currency, Payment	Access Order Tax, Currency Payment, ORD306D-01, to view order tax, currency, and payment information.
F19=Item X-Reference	If you have an item cross-reference record, toggle between display of the internal item number and the customer item number.
F20=Base Currency	Toggle between display of base and transaction currencies.
F21=Stocking/Selling UOM	Toggle between display of the selling or stocking unit of measure. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View item lines information

The Item Lines screen, ORD301D2-01, displays all the order lines on which the selected item appears. The header fields are specific to the selected item and come from the Item Master file.

Field descriptions - ORD301D2-01

Fields	Description
Global:	This field appears if the Multiple Currencies application is installed. The three-character code represents the global currency of your system.
Cur Description:	This field appears if the Multiple Currencies application is installed. It contains a description of the global currency of your system.
Item:	Infor LX displays the selected item number and description.

Item Class: Infor LX displays the selected item class.

Stocking Unit of Measure: Infor LX displays the stocking unit of measure as defined on the Item Master.

MTD Sales: Infor LX displays the month-to-date sales of the selected item in global currency.

YTD Sales: Infor LX displays the year-to-date sales of the selected item in global currency.

Customer Allocation: Infor LX displays the quantity in stocking units of measure that is allocated to customer and resupply orders.

On Order: Infor LX displays the calculated quantity on order in stocking units of measure. This value includes purchase orders, shop orders, and resupply orders.

Order Number: Infor LX displays the selected record number.

Order Line: Infor LX displays the selected record line number.

Quantity Ordered: Infor LX displays the ordered quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.

Quantity Pick Released: Infor LX displays the pick released quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.

Quantity Shipped: Infor LX displays the shipped quantity of the item in the selling unit of measure. Use F21 to view the stocking unit of measure.

Unit of Measure: Infor LX displays the selling unit of measure. Use F21 to view the stocking unit of measure.

Warehouse (3,A): Infor LX displays the order warehouse assigned to the order line.

Order Status:

Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 or 1 display in each of the five positions of the status. The positions represent the following statuses and header fields:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

	Position 4 - Ready for Invoicing Position 5 = Ready for Purge
Act (Action)	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. **13=Notes** Access the Note Mode Selection (SYS255D) screen to view or maintain notes. **14=Line Promotions** View order line promotions. This action is only available if you have PRO installed. **16=Allocations** View allocations for the selected line. This action is only valid for orders, not for quotes or RMAs. **17=Line Detail** View detail information for the selected line. **20=Track Cancellation** Access the Cancellation Reason Code screen, ORD747D-01, for information for deleted orders or order lines. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD301D2-01

Commands	Description
F14=Pricing, Sales, Comm	Access the Order Pricing, Sales, Commission screen, ORD303D-01, to view sales and pricing information.
F15=Billing and Financial	Access the Order Billing and Financial screen, ORD304D-01, to view. billing and financial information.
F16=Shipping	Access Order Shipping, ORD302D-01, to view order shipping information.
F17=Inventory	Access Order Inventory, ORD305D-01, to view order inventory information.

F18=Tax, Currency, Payment	Access Order Tax, Currency Payment, ORD306D-01, to view order tax, currency, and payment information.
F19=Item X-Reference	If you have an item cross-reference record, toggle between display of the internal item number and the customer item number.
F20=Base Currency	Toggle between display of base and transaction currencies.
F21=Stocking/Selling UOM	Toggle between display of the selling or stocking unit of measure. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View order total promotions

Use the Order Total Promotions screen, ORD309D-01, to view the total order promotions assigned to the selected order. Infor LX retrieves the total order promotion information from the PDA file by order number. Infor LX displays all values in transaction currency and stocking unit of measure.

This screen applies only if you have the PRO application installed.

Field descriptions - ORD309D

Fields	Description
Order Number:	Infor LX displays the selected order number.
Total Order Incentive:	Infor LX displays the calculated total order incentive. This value equals the sum of the off-invoice amount and the bill-back amount.
Off Invoice Amount:	Infor LX displays the calculated off-invoice amount.
Bill Back Amount:	Infor LX displays the calculated bill-back amount.
Promotion:	Infor LX displays the number of promotions assigned to the selected order.
Term:	Infor LX displays the promotion terms for this order.
CF (Contract Flag):	Infor LX displays the contract flag for this promotion line.
Discount:	Infor LX displays the discount amount for this promotion line. For Amount type total order discounts, this field shows the Discount Amount you define in the Promotion Master setup. If you view promotion details for a

	return or RMA, the actual discount amount to credit for a partial return or partial RMA may be a calculated portion of the full discount amount defined for the promotion.
Method:	Infor LX displays the discount method for this promotion line. Price Method The amount displayed in the Discount field is the actual price used in the promotion. Example: If the promotion price basis 100, and the discount price is 90, the Discount field shows "90.000" (actual net price. Amount Method The amount displayed in the Discount field is the discount amount off promotion price basis value. Example: 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 Method The amount displayed in the Discount field is a percentage of the promotion price basis value. Example: 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).
Total Discount:	Infor LX displays the calculated total discount.
Split:	Infor LX displays the Off Invoice and Bill Back split discounts. The Discount Method field (price, amount, or percent) applies to both fields.
FG or CV Item (35,A):	Infor LX displays the Free Goods or Cash Value item number. For Free Goods promotions, this is 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 - ORD309D-01

Commands	Description
F11=Fold	View additional fields on the folded screen.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View bracket promotions for an order

The Bracket Promotion screen, ORD310D1-01, displays the bracket promotions assigned to the order. All values are in the transaction currency and stocking unit of measure. This screen is not available if PRO is not installed.

In the header area, Infor LX displays the following fields:

Order number

Promotion Region

Promotion Customer

Ship-to Customer

Ship-to Name

Customer Type

Discount Code

In the detail area, Infor LX displays the following fields:

Promotion number and line number

Order line number

Promotion terms code

Promotion Method

Net Price

Extended Amount

Screen actions - ORD310D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View line promotions

The Order Line Promotions screen, ORD312D-01, displays the line-level promotions assigned to the selected order and line. Infor LX displays all values in transaction currency and stocking unit of measure.

Note: DWM items have costs and prices entered in the DWM unit of measure rather than the Infor LX stocking unit of measure. To calculate price extensions on DWM items, the system uses the quantity, dual unit of measure value, and unit price.

This screen is not available if you do not have PRO installed.

In the header area, Infor LX displays the following fields:

Order number

Line number

Item number and description

Promotion price basis

Net price

Quantity ordered

Bill-back amount

Total extended amount

In the detail area, Infor LX displays the following fields:

Promotion number and line number

Promotion terms code

Contract flag

Discount per unit

Discount method (Amount or Percent)

Total Discount amount

Split

FG or CV Item

Infor LX displays the split amounts on the fold line.

Screen actions - ORD312D-01

Commands	Description
F11=Fold	View additional fields on the folded screen.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View in-use information for the order/line

The Order/Line In Use Inquiry screen, ORD314D-01, displays all the In Use fields for the order, quote, or RMA, and line you specify. The Date and Time values are the system date and time on which the record was put in use. Access this screen from the Order Inquiry program, ORD300D1, or the Order Lines program, ORD300D2.

Field descriptions - ORD314D

Fields	Description
Order Number:	Infor LX displays the selected order/quote/RMA number.
Line:	Infor LX displays the selected order/quote/RMA line number.
Flag:	Infor LX displays the value of the In-Use flag for the order/quote/RMA record.
User ID:	Infor LX displays the unique code that identifies the person who locked the order/quote/RMA record.
Program ID:	Infor LX displays the program that locked the order/quote/RMA record.
Workstation:	Infor LX displays the code that identifies the workstation that locked the order/quote/RMA record.
Date:	Infor LX displays the date the order/quote/RMA record was locked (In Use).
Time:	Infor LX displays the time the order/quote/RMA record was locked (In Use).

Screen actions - ORD314D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View line allocations

Use the Allocations screen, ORD308D-01, to view the allocations for the selected line item. Infor LX retrieves the allocation information from the ELA file. Infor LX displays all quantities in the stocking unit of measure.

Field descriptions - ORD308D-01

Fields	Description
Order:	Infor LX displays the selected order number.
Line:	Infor LX displays the selected order line number.
Request Date:	Infor LX displays the request date assigned to the order line.
Item:	Infor LX displays the ordered item number and description.
Warehouse:	Infor LX displays the ship-from warehouse assigned to the order line.
Remaining:	Infor LX calculates the remaining ship-to quantity of the item.
Allocated:	Infor LX displays the total quantity allocated to the order line.
Sequence:	Infor LX displays the allocation sequence number.
Lot:	Infor LX displays the lot number for the lot-controlled items.
Location:	Infor LX displays the existing inventory location. For container-controlled items, this is the location of goods in the container.
Pallet/Container:	Infor LX displays the pallet number for managed warehouses and the container number for non-managed warehouses.

Screen actions - ORD308D-01

Commands	Description
F15=Material Status Inquiry	Access the Material Status Inquiry program, INV300D, to view inventory information for items you specify.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View line details

The Line Detail screens, ORD307D-01 through ORD307D-06, display detail information for the selected order line. Access it from the Order Lines screen, ORD300D2-01, with action 17=Line Detail. Standard lines access screen Line Operational Detail, ORD307D-01. Special lines access screen Line Detail, ORD307D-02. From Line Operational Detail, you can access a Line Financial Detail screen, ORD307D-03 (and from this screen, the Line Pricing Detail screen, ORD307D-06), and the Order Line Lean Detail screen, ORD307D-04, in addition to other order-related programs. Fields displayed in each screen are listed below.

If the Multiple Currencies application is installed, euro is enabled in Multi-Currency System Parameters, and the A/R customer is enabled for alternate currency, you will be able to use the F20 function key to toggle among the display of monetary values in Transaction, Base and Alternate currencies. Otherwise, you will only have a choice of Transaction or Base currency. The function key description at the bottom of your screen indicates which currency will appear next if you use the F20 toggle again.

The Order Line Operational Detail screen, ORD307D-01, displays the following fields:

Order (order number)

Line (line number in the order)

Type (order type)

Class (order class)

Currency (currency associated with the order and order line)

Line Status (next step in the order processing cycle)

Item (line item)

Charge (charge code if this is a special line)

Reference Item (customer cross-reference item number)

Entry Date and Time

Schedule Date and Time

Two user-defined date/time fields

Warehouse (allocatable ship-from warehouse for this line)

Selling Unit of Measure

Alloc Required (whether allocations are required for this line)

Drop (indicates whether you want to drop this line after the first shipment)

Reason Codes

Inventory

User 1

User 2

User 3

Weight

Volume

Pallets

Control Number

Parent BOM/RTG Method

APS Order Promising Status

Times Back Ordered

The program displays an alternate Line Detail screen, ORD307D-02, for a special line. It shows only the fields listed above that are relevant to special lines. It also displays the following fields:

Reference Line Number

Charge/Allowance Code

Note to Time Conversion Users Concerning Special Lines

Request Date is generally entered and displayed in the time zone of the line warehouse. However, special lines have no request time associated with them. Since conversion requires that a date have a time associated with it, no conversion is performed for the special line. The date is stored directly as input with no conversion.

The Line Financial Detail screen, ORD307D-03, shows the following fields not found on the preceding screen. Some of the fields listed also appear on the Line Pricing Detail screen, ORD307-06:

Book Date and Time

Billing Selection flag

Contract (contract number, if applicable)

Salesperson

Commission Code

Program ID (used by trade funds management to update a commitment with the amount of this order line.)

Spend Type (used by trade funds management to update a commitment with the amount of this order line.)

Order (quantity of the line item on order)

Pick Rel (quantity of the line pick released)

Alloc (quantity of the line allocated to customer and resupply orders)

Ship (quantity of the line already shipped)

Receive (quantity of the order line received)

Invoice (quantity of the order line invoiced)

The Order Line Lean Detail screen, ORD307D-04, displays the following additional fields, which are relevant to Lean line items if the LMP application is installed:

Default Cell

Customer Requested Dock Date and Time

Customer Requested Ship Date and Time

Original Customer Requested Ship Date and Time

Capable to Promise Dock Date and Time

Capable to Promise Ship Date and Time.

This screen also displays purchase order details for non-manufactured Lean items or shop order details for manufactured Lean items.

The Line Shipping Detail screen, ORD307D-05, shows shipping information for the selected line. The following are unique fields on this screen:

Contract

Receiving Dock

Shipping Group Code

Kanban Required

Forecast Type

Inbound Delivery Number

Bid ID Contract Line Number

Estimated Packaging Deposit

Purchase Order

The Line Pricing Detail screen, ORD307-06, shows pricing information for the selected line. Some of the fields also appear on the Line Financial Detail screen, ORD307-03.

Book Date and Time

Price (transaction)

Net Price Source

Margin Hold code

Extended Amount

Currency (displayed on this screen)

List Price Source

Margin Percent (calculated line margin percent)

Pricing Quantity

Pricing Unit

Tax Code (used to calculate VAT and sales tax)

Tax Only (indicates whether you are only charging tax on this line, and who is paying it)

Tax Basis (if this is a tax-only line, amount on which tax will be based)

Order (quantity of the line item on order)

Pick Rel (quantity of the line pick released)

Alloc (quantity of the line allocated to customer and resupply orders)

Ship (quantity of the line already shipped)

Receive (quantity of the order line received)

Invoice (quantity of the order line invoiced)

Pricing Facility

Price Options

Manual Price Override Reason Code

Field descriptions - ORD307D01/02/03/04/05/06

Fields	Description
Currency mode	This is the type of currency in which monetary values appear. If the Multiple Currencies application is installed and the A/R customer is enabled for Alternate currency, you will be able to use the F20 function key to toggle among

the display of monetary values in Transaction, Base and Alternate currencies. Otherwise, you will only have a choice of Transaction or Base currency.

Currency code This field appears if the Multiple Currencies application is installed. The code represents the currency in which monetary values appear on this screen.

Currency Description This field displays the description of the currency in which the monetary values appear on this screen if the Multiple Currencies application is installed.

Discount Type (1,0): Specify the Discount Type Code for this order based on whether you want Infor LX to allow or limit the application of promotions and allowances.

Valid Discount Type Codes:

0	Promotions and Allowances Allowed
1	Only Promotions Allowed
2	Only Allowances allowed
3	No Promotions or Allowances allowed

Estimated Packaging Deposit (15,2): Infor LX displays the estimated packaging deposit amount for this order. Infor LX only displays this field if you have OLM installed.

Self Bill Ref Number (35,A): (Reference only) Infor LX displays the Self Billing Reference Number for this Customer and Order. Infor LX only displays this field if the customer is a Self Billing customer.

Reference Line Number (4,0): Infor LX displays the line number that the special line is linked to. If the special line is defined at the order level, the linked line number is zero.

Pricing Facility: Infor LX displays the pricing facility.

Charge/Allowance Code: Infor LX displays the charge/allowance code. Maintain these codes in the Shipment Charge program, OLM162. They are assigned in the Charge/Allowance Assignment program, PRO190.

Price Options: Infor LX displays the price option. Price Options are defined in the Code Master table PRCOPT (maintained in SYS105.

Screen actions - ORD307D-01/02/03/04/05/06

Commands	Description
F13=Cell Workbench (varies by screen)	Access Cell Workbench Detail, LMP500D, to view information relating to the cell in which this lean line item is manufactured.
F13=DWM Switch (varies by screen)	If the item is a DWM item, use this function to toggle between display of quantities or dual unit of measure values.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes.
F15=Line Promotions	Access Order Line Promotions, ORD312D-01, to view promotions for this order line.
F16=Order Bracket Promotions	Access Bracket Promotions, ORD310D1-01, to view order bracket promotions for this order.
F17=Allocations	Access the Allocations screen, ORD308D-01, to view allocation information for this order line.
F18=Line Financial Detail/Line Pricing Detail/ Line Operational Detail (varies by screen)	The label for this screen action varies, depending on the screen you are in. Access the screen indicated by the label.
F19=Line Financial Detail (varies by screen)	Access the Line Financial Detail, ORD307D-03, to view financial specifics for this order line.
F19=Lean Detail (varies by screen)	Access the Order Line Lean Detail screen, ORD307D-04, to view additional fields that apply to lean items when the LMP application is installed.
F20=Base/Transaction/ (Alternate) Currency	Toggle among transaction, base, and alternate currency, if that function is enabled. The function key description at the bottom of your screen indicates which currency will appear next if you use the F20 toggle again.
F21=Stocking/Selling UOM	Toggle between stocking and selling units of measure. The field name of the UOM field tells you which UOM is currently displayed.
F22=Line Shipping (varies by screen)	Access the Shipping Detail screen, ORD307-05.
F22=Line Operation (varies by screen)	Access the Line Operational Details screen, ORD307D-01, to view order line details.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View order line lean detail information

The Order Line Lean Detail screen, ORD307D-04, displays general line detail information plus additional fields which are relevant to Lean line items when the LMP application is installed.

Field descriptions - ORD307D-04

Fields	Description
CTP Date Used	The CTP Date Used flag indicates whether cell capacity was used to calculate CTP dates and whether the Lean capable-to-promise date was used to replace the order line request and schedule dates and times. The following values are valid: 0 Never 1 Always 2 Only if after Request Date A value of 0 means that the system did not override the request and schedule dates and times with CTP dates and it did no capacity checking to calculate CTP dates. However, variables that the Lean date calculations still use are shipping lead-time, dispatch time, and possibly OLM dock scheduling dates. A value of 1 means that the system overrode request date and schedule date with CTP dates and considered cell capacity to calculate CTP dates. It also considers the shipping lead-time, dispatch time, and possibly the OLM dock scheduling dates. A value of 2 means that the system may have overridden request and schedule dates with CTP dates, but only if the CTP dates were later than the original request and schedule dates. The system did check capacity and also considered shipping lead-time, dispatch time, and possibly OLM dock scheduling in the calculations. Caution: An order that is created through a batch process such as RMS or DRP is created using the Lean parameters for CTP Date Used and OLM Dock Scheduling from the facility or contract, and it assumes that the CTP Usage Mode is 1 (always call Lean scheduler date calculations). An order you enter or maintain in Order Entry, ORD700, is governed instead by the User Prefer-

	ences settings for CTP Usage Mode and CTP Date Used flag, and it uses the OLM Dock Scheduling flag from the facility. The CTP Usage Mode could be set differently in the User Preferences and not call CTP calculations at all.
Dock Scheduling Date Used	The Dock Scheduling Date Used value indicates whether the dates entered in Dock Scheduling Maintenance, OLM150, were used in CTP ship date calculations. Value are 0=No or 1=Yes. If the value is 0, the system did not consider the dates from Dock Scheduling Maintenance in Lean calculations. If the value is 1, the system used the dates entered in Dock Scheduling Maintenance as dock scheduling dates in Lean calculations. Example: A customer-requested ship date falls on a Thursday, but our Dock Scheduling dates specify that we only ship on Mondays. The Lean scheduler considers that we have to ship on the Monday prior to the customer's requested ship date to complete the delivery on time. Similarly, after Lean capacity calculations determine the CTP shipping date, the scheduler looks for the next OLM Dock Scheduling date as the next possible shipment date. See the help text for the CTP Date Used field for a caution note about RMS and batch orders.

Screen actions - ORD307D-04

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order status code, WINSTSD

Use the Order Status Code program, WINSTSD, to view information about the status of an order.

View order status information

Use the Order Status Code screen, WINSTSD, to view a description of the order status code.

The status codes allow order lines to exist in any stage of the order process, while the order header status reflects the position of the order in the ordering/shipping/billing cycle.

Order status codes descriptions

The following table summarizes the meaning of each order status code:

Headings are shortened as follows:

Stat, Status

PartInv, Partially Invoiced?

PartShip, Partially Shipped?

PartPick, Partially Picked?

QtyRem, Quantity Remaining?

Stat	PartInv	PartShip	PartPick	QtyRem
1	Yes	Yes	Yes	Yes
2	Yes	Yes	Yes	No
3	Yes	Yes	No	Yes
4	Yes	Yes	No	No
5	Yes	No	Yes	Yes
6	Yes	No	Yes	No
7	Yes	No	No	Yes
8	Yes	No	No	No
9	No	Yes	Yes	Yes
A	No	Yes	Yes	No
B	No	Yes	No	Yes
C	No	Yes	No	No
D	No	No	Yes	Yes
E	No	No	No	Yes
F	No	No	Yes	No
G	No	No	No	No
H	No	No	No	Yes

Status code E designates an Entered order. Status code H is reserved for orders on credit hold. Status code G is not used. And asterisk indicates that an order is deleted.

Back Ordered:

The field displays the number of times this order has been backordered.

Screen actions - WINSTSD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Batch order allocation, ORD400D

The Batch Order Allocation program, ORD400D, allocates available inventory to backordered customer order line items. The program also allocates inventory for any open order that is not invoiced, billed or canceled, if the order type affects inventory (base order types 1, 2, 3, 4, 9). Infor LX allocates available inventory at the selected warehouse on a detail lot/location level, and it sequences the allocation by date for the order line items within the selected request date range.

Note that single-issue lot-controlled items to ensure control of the lot-controlled components. Kits and assortments must also be single issued.

The program also prints the Re-allocated Pickable Orders Audit Report, in which it lists all orders that have been picked for which the ordered quantity is greater than the allocated quantity.

Allocations generated by this program are the same as allocations generated during Pick Release. You can maintain them manually in the Customer Order Allocations program.

Note that this program bypasses Drop Ship lines and other lines that do not require allocations without processing them.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Fair share allocation

Fair share allocation functionality allows you to distribute available inventory of fair-share allocation items among eligible order lines if inventory is insufficient to fill all orders lines. The process allocates the stock so that each eligible line receives an equal percentage of its requirement, properly rounded. After the program performs these fair share calculations, the regular allocation process must perform the actual allocations. It can happen that the program cannot allocate the full expected quantity of stock for a particular line, for example, for lot-controlled items. In this case, the program allocates the quantity of appropriate stock that it finds and moves on to the next line. The program also creates a record in the Fair Share Allocation Work file, EFS, for each fair share line. The record includes the line quantity that is eligible for allocation, the calculated fair share quantity, and the actual quantity allocated.

Note that RMS order lines and kit allocations receive stock before lines that receive fair share allocation percentages. Also, batch order allocation fulfillment percentages, which set minimum percentage fill requirements, take precedence over the fair share allocation calculations.

Access: ORD menu

Set ranges to select backordered lines to include in batch inventory allocation

Use the Batch Allocation - Order Selection screen, ORD400D-01, to select order lines to allocate in batch. Use this screen to limit the lines to include by ranges of values.

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 - ORD400D-01

Fields	Description
Warehouse to Allocate (3,A):	Specify the code of the warehouse from which to allocate the ordered goods.
From/To Sold To Customer (8,A):	Specify a range of values to limit order lines to include in the batch order allocation by sold-to customer.
From/To Ship To Number (4,A):	Specify a range of values to limit order lines to include in the batch order allocation by ship-to number.
From/To Customer Type (4,A):	Specify a range of values to limit order lines to include in the batch order allocation by customer type codes.
From/To Order Class (3,0):	Specify a range of values to limit order lines to include in the batch order allocation by order class.
From/To Order Number (9,A):	Specify a range of values to limit order lines to include in the batch order allocation by order number.
From Request Date (6,0):	Specify a range of values to limit order lines to include in the batch order allocation by request date in the line warehouse.
To Request Date (6,0):	Specify a range of values to limit order lines to include in the batch order allocation by request date in the line warehouse.

From/To Schedule Date (6,0):	Specify a range of values to limit order lines to include in the batch order allocation by schedule dates of the ship to number or ship-to customer.
From/To Requested Delivery Date (6,0):	Specify a range of values to limit order lines to include in the batch order allocation by requested delivery dates. This filter is reserved for a future service pack.
From/To Item Number (8,A):	Specify a range of values to limit order lines to include in the batch order allocation by item number.
From/To Back Order Code (1,0):	Specify a range of values to limit order lines to include in the batch order allocation by back order code.
From/To Route (6,A):	Specify a range of values to limit order lines to include in the batch order allocation by route. This filter is reserved for a future service pack.
From/To Carrier (6,A):	Specify a range of values to limit order lines to include in the batch order allocation by carrier. This filter is reserved for a future service pack.

Screen actions - ORD400D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Limit lines to include in batch inventory allocation by category of lines

Use the Batch Order Allocation screen, ORD400D-02, to further restrict the lines to include in the batch allocation. You can also choose to lock the order lines you select against future batch allocation attempts.

Field descriptions - ORD400D-02

Fields	Description
Back Orders Only (1,A):	Specify No if you want to include all open orders lines in this batch order allocation. Specify Yes if you want to include only back ordered lines.
Include Picked Lines (1,A):	Specify Yes if you want to include picked lines in this batch order allocation. Otherwise, specify No. For a type 5 (WMS-controlled) warehouse, you cannot set this value to 1=Yes.

Include Lines on Loads (1,A):	Specify Yes if you want to include lines already assigned to OLM loads in this batch order allocation. Otherwise, specify No.
Lock Selected Order Lines (1,A):	Specify Yes if you want to lock order lines selected for inclusion in this batch order allocation against future batch allocation attempts. Otherwise, specify No. The default is No.
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 - ORD400D-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order exception report, ORD410D

The Order Exception Report program, ORD410D, prints all order lines that do not have full allocation of inventory, limited by date and warehouse ranges. The report prints information in date sequence within the warehouse. The information on the report includes the order and order line numbers, customer number, customer name, item, item description, quantity to ship, and quantity not allocated. Use this report in conjunction with the Batch Order Allocation program, ORD400D, to control backorders and provide visibility on future orders.

Run this report after the Batch Order Allocation program to highlight the orders that cannot be picked for the given dates. You can use the on-line allocation maintenance program to de-allocate and allocate specific orders for picking and confirmation.

Note that this program bypasses Drop Ship lines without processing them.

Access: ORD01 menu

Print a report that shows backorder and future order exceptions

Use the Back/Future Order Exception Report screen, ORD410D-01, to select 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 - ORD410D-01

Fields	Description
From Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report.
From Request Date (8,0):	Specify a range of values to limit the order request dates to include in the report.
To Request Date (8,0):	Specify a range of values to limit the order request dates to include in the report.

Screen actions - ORD410D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pickable customer orders report, ORD420D

The Pickable Orders Report program, ORD420D, prints all orders that are pickable for a given warehouse within a given request date range.

For each line on pickable, partially pickable and non-pickable orders, the summary report prints the order number, purchase order number, customer number and name, ship-to name, entry date, salesperson, monetary order total, item number, description, picking priority, request date, schedule date, open quantity, quantity allocated, and quantity not allocated.

For each line on pickable and partially pickable orders, the detail report prints lot, location, quantity, and container detail in addition to previously listed fields. For each line on non-pickable orders, the detail report prints only the summary information. An order is considered pickable only if all unshipped lines on the order are pickable because every open quantity already has inventory allocated to it.

The orders on the summary report appear in order number sequence. If the entire order (within request date limits) has been allocated, the program prints the word "Pickable" with no detail information. If any lines are not allocated, then each line's detail is printed.

Use this report in conjunction with Batch Order Allocation, ORD400D, and the Order Exception Report, ORD410D, to control backorders and future orders.

Run this report after the Batch Order Allocation program to highlight the orders that cannot be picked for the given dates. You can go to the Customer Order Allocations program, ORD720D, to de-allocate and allocate specific orders for picking and confirmation.

Print this report before you use the Pick Release program, ORD550.

Note that this program bypasses Drop Ship lines without processing them.

Access: ORD01 menu

Print pickable customer order information in summary or detail

Use the Pickable Customer Orders screen, ORD420D-01, to specify the type of report, Summary or Detail, and to limit the orders to include by warehouse and order request dates.

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 - ORD420D-01

Fields	Description
Report Type (1,0):	Specify 0 to print detail information or 1 to print summary information.
Warehouse To Pick (3,A):	Specify the code of the warehouse from which to pick goods for order allocation. Leave the field blank to include all warehouses.
From Request Date (8,0):	Specify a range of values to limit the order request dates to include in the report.
To Request Date (8,0):	Specify a range of values to limit the order request dates to include in the report.

Screen actions - ORD420D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Fair share allocations report, ORD430D

The Fair Share Allocations Report program, ORD430D, lists open (unshipped) customer order lines that have locked allocations. Use the program to track these orders.

Print customer order lines with locked allocations

Use the Fair Share Allocation Report Prompt screen, ORD430D-01, to specify selection criteria for customer order lines with locked allocations to print on 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 - ORD430D-01

Fields	Description
From/To Warehouse (3,A):	Specify a range of values to limit the warehouses 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 Request Date (8,0):	Specify a range of values to limit the order request dates to include in the report.
Held Orders Only (1,0):	Specify Yes to limit your selections to orders that are on credit hold, margin hold, or user hold. Otherwise, specify No.

Screen actions - ORD430D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Shopping list rebuild, ORD490D

If you support shopping lists in your environment, use the Shopping List Rebuild program, ORD490D, to automatically create or update shopping lists within selection criteria you specify on the display screen.

The program checks the Customer Master file, RCM, for information within the range you specify. It deletes all information from the Supplemental Order Detail file, ESD, for inactive customers if the supplemental order type is 1, standing order, or 2, shopping list.

The program also deletes ESD information for active customers that have the supplemental order type set to 2, shopping lists, if the item lock is set to unlocked. Note that the program also deletes Supplemental Order Header, ESO, information if no ESD records remain.

Next, the program makes selections for the shopping lists as follows:

- For each active customer that supports shopping lists, the program finds the number of best sellers and periods to use from the Customer Master, RCM, or the system parameters for supplemental orders, ORD820D-08.
- The program finds the sales history customer.
- The program reads the sales history detail for the specified number of periods and ranks the items sold in descending order of their sales value.
- The program selects the specified number of best sellers.
- The program creates an ESD record for each item, unless one already exists.
- After the program creates all needed ESD records, it creates Supplemental Order Header information unless it already exists.

Access: ORD01 menu

Set selection criteria to automatically build shopping lists

Use the Shopping List Rebuild screen, ORD490D-01, to set criteria to limit the shopping list orders to build.

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.

Access: ORD01 menu

Field descriptions - ORD490D-01

Fields	Description
From/To Customer (8,0):	Specify a range of values to limit the customers to include in the shopping list build.
From/To Customer Type (4,A):	Specify a range of values to limit the customer types to include in the shopping list build.
From/To Company (3,0):	Specify a range of values to limit the companies to include in the shopping list build.
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.

Field descriptions - ORD490D-01

Commands	Description
F6=Accept	Accept the values on this screen and process the shopping lists. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick release, ORD550D

The Pick Release program, ORD550D, allows you to release open orders, allocate inventory, and print picking documents. You cannot release orders that are on credit hold or have been fully shipped. Infor LX makes allocations at the lot and location level within the warehouse of the customer line item. These detailed allocations print on the picking documents. Any allocations you make through the on-line allocation program are preserved.

This program also produces the Back Order Code Audit Trail Report.

Infor LX provides pick release options in several areas, as described below.

Partial Picks

Any order line is eligible for partial release. To perform a partial release, reduce the quantity to pick on the Pick Release by Line screen, ORD550D2.

Warehouses

For regular warehouses, the order class assigned to each customer order determines the pick slip print options. If defined on the order class, all released lines print on the pick slips, regardless of the backorder code or inventory availability. Completely or partially allocated quantities print if available. For managed warehouses, you can produce additional picking documents in the same manner as for regular warehouses. You can also specify which picking documents to print for individual managed warehouses. Most other selection parameters, actions, and functions are available for both types of warehouses.

Allocations

Infor LX does not automatically batch allocate orders when you print pick slips for released orders. Also, you can lock existing order line allocations against further batch allocation processing. For more information on locking allocations, see the Allocation Locking topic in this overview.

Print Options

For each pick release run, you can print a batch pull report for selected orders/order lines.

Container-Controlled Items in Managed Warehouses

When you pick container-controlled items in managed warehouses, Infor LX picks only whole containers and does not split the quantity of a container. For example, you may want to set up multiple picking locations for container-controlled items that are used in various quantities. Set up the default picking container types for multiple picking locations from larger to smaller so that as Infor LX picks the order, larger containers are picked first and smaller containers are available for any remaining quantities to pick. If you need less than a full container, the system picks the full container and sends it to a consolidation (type 9) location. You must re-containerize: Put the stock to ship in a different container so that you can ship it.

Note that this program bypasses Drop Ship lines without processing them.

Allocation Locking

The Pick Release program allows you to lock order lines against further batch allocations. Locked allocations allow partial or fair-share allocations of available inventory and protect existing allocated inventory from changes during later allocation runs. After you exit Pick Release, you cannot make changes to the allocations that you assigned to the order line without specific intervention with the Customer Order Allocations program, ORD720. The Customer Order Allocations program allows you to view, maintain, or delete locked allocations.

You cannot lock allocations for order lines that have backorder codes that require complete shipment of the order or order line.

Back Order Processing automatically unlocks locked order lines during pick confirmation. Any remaining backorder quantity on the order line is eligible for the next event after order entry.

Release Management System functions are integrated into order processing as described in the following topics.

Load Build

RMS Conversion begins the load build process as follows:

- Analyzes release data transmitted by the customer
- Overlays the release with the JIT where transmitted

- Automatically creates an order for each customer, ship-to, item, and contract whose multiple orders represent on-going demand

The number of requirements and the complexity of reconciling each item usually prohibit consolidation of all items onto a single order for each customer ship-to. Therefore, Infor LX creates an order for each item. Infor LX picks multiple order lines from one or more orders to create a physical shipment of more than one item. RMS requires the resulting shipment documentation, ASN, and invoice to be analogous. However, the consolidation methodology that standard Infor LX uses to create loads and invoices for such shipments makes it impossible to guarantee that shipment documentation, ASNs, and invoices are analogous.

The OLM application allows you to add shipment-level data that applies to all orders in a shipment. The Customer Master - Shipping Policy (ACR) and Address Master - Shipping Policy (ORD) screens provide additional parameters that allow you define the Load Build Policy for creating these shipments during pick release.

Load Consolidation

If the load consolidation fields for loads built during pick release are not consistent for all orders selected for consolidation, the Pick Release program further increases the number of loads generated by the number of variations for the load consolidation fields.

Add to Packing Group

Unless otherwise specified, Infor LX creates a new shipment each time lines are picked for a given customer and ship-to. Infor LX also allows you to enter additional requirements to an existing packing group.

Advanced RMS functions add the following fields that print on the pick slip:

- Ship Date and Time
- Inbound Delivery Number
- Kanban Number

Advanced RMS functions also add the following fields to the batch pull report:

- Warehouse
- Carrier
- Load Number
- Ship Date and Time
- Inbound Delivery Number
- Kanban Number

Access: ORD menu, WHM menu

Select open orders for pick release

The Pick Release Selection Filter screen, ORD550D1-01, allows you to select open orders for release. The screen provides numerous selection options.

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.

After you complete the fields on this screen, press Enter to proceed to Pick Release Selection Options,ORD550D1-02, to further filter open orders.

Field descriptions - ORD550D1-01

Fields	Description
Warehouse (3,A):	Specify the regular or managed warehouse from which to select orders at the line item level. Use Sequenced Pick Release for sequenced warehouses.
Pick Area (1,0):	If this is a managed warehouse, specify the warehouse areas to pick from: 0 Pick from all areas 1 Pick from defined picking locations 2 Pick from defined main storage locs
From/To Order Class (3,0):	Specify a range of values to limit the order classes to include in the selection of orders available for picking.
From/To Picking Select Code (1,0):	This field appears only if the Warehouse Management (WHM) application is installed. Specify a range of values to limit the picking select codes to include in the selection of orders available for picking.
From/To Zone (3,A):	Zone range fields are not used for report record selection. For non-managed warehouses, Infor LX prints the batch pull report for the specified range of zones. Pick slips and the batch pull report are produced for all records which meet other selection parameters. Note: For Warehouse Type 4 = Warehouse Management BOSS- and Type 5 = Infor WM-controlled warehouses, you must retain the Zone defaults. Note that, for non-managed warehouses, the Pick Slip print option is based on the settings defined for each order class. The Batch Pull Report print option is based on your entry on this screen. For managed warehouses, Infor LX performs allocations and picking routines only for the specified zones. If you specify a zone range, records are selected only if allocations can be made to locations within that range. If allocations cannot be made, the record is not selected. You can prompt to retrieve the Warehouse Zone List if the WHM application is installed and the warehouse is managed. If the selected warehouse is not managed, an error message indicates that you cannot prompt for that particular warehouse in the Zone fields. If WHM is not installed, the error message indicates only that you are not in a promptable field.

From/To Item (35,A): Specify a range of values to limit the items to include in the selection of orders/ order lines available for picking.

If you include a kit parent item for processing because it is within the From/ To Item range, Infor LX automatically includes all component lines for that kit, regardless of whether the components are within the range.

From/To Customer Order (9,0): Specify a range of values to limit the customer orders to include in the selection.

From/To Load Number (9,0): Specify a range of values to limit the load numbers to include in the selection of orders available for picking.

This field is not supported for Warehouse Type 4 = Warehouse Management BOSS-controlled warehouses.

From Route (6,A): Specify a range of values to limit the routes to include in the selection of orders available for picking.

To Route (6,A): Specify a range of values to limit the routes to include in the selection of orders available for picking.

From Carrier (6,A): Specify a range of values to limit the carriers to include in the selection of orders available for picking.

To Carrier (6,A): Specify a range of values to limit the carriers to include in the selection of orders available for picking.

From Request Date (6,0): Specify a range of values to limit the request dates to include in the selection of orders available for picking.

To Request Date (6,0): Specify a range of values to limit the request dates to include in the selection of orders available for picking.

From Request Time (4,0): Specify a range of values to limit the request times to include in the selection of orders available for picking.

To Request Time (4,0): Specify a range of values to limit the request times to include in the selection of orders available for picking.

From Scheduled date: Specify a range of values to limit the scheduled dates for shipping orders to include in the selection of orders available for picking.

To Scheduled date: Specify a range of values to limit the scheduled dates for shipping orders to include in the selection of orders available for picking.

From Scheduled time: Specify a range of values to limit the scheduled times for shipping orders to include in the selection of orders available for picking.

To Scheduled time: Specify a range of values to limit the scheduled times for shipping orders to include in the selection of orders available for picking.

From/To Customer Type (4,A): Specify a range of values to limit the customer types to include in the selection of orders available for picking.

From Customer Number (8,0): Specify a range of values to limit the customer numbers to include in the selection of orders available for picking.

To Customer Number (8,0): Specify a range of values to limit the customer numbers to include in the selection of orders available for picking.

From Ship-To Number (4,0): Specify a range of values to limit the customer ship-to numbers to include in the selection of orders available for picking.

To Ship-To Number (4,0): Specify a range of values to limit the customer ship-to numbers to include in the selection of orders available for picking.

From Inbound Delivery Number (17,A): Specify a range of values to limit the inbound delivery numbers to include in the selection of orders available for picking.

This field is not supported for Warehouse Type 4 = Warehouse Management BOSS-controlled warehouses.

To Inbound Delivery Number (17,A): Specify a range of values to limit the inbound delivery numbers to include in the selection of orders available for picking.

This field is not supported for Warehouse Type 4 = Warehouse Management BOSS-controlled warehouses.

From/To Back Order Code (1,0): Specify a range of values to limit the backorder codes to include in the selection of orders available for picking.

Consolidate (1,0): Specify Yes to consolidate the selected order or order lines. Accept the default of No if you do not want to consolidate the selected order or order lines. Infor LX assigns a consolidation number to all selected order lines and a separate consolidation number to each warehouse.

This value must be set to 0=No for Warehouse Type 4 = Warehouse Management BOSS- and Warehouse Type 5 = Infor WM-controlled warehouses.

From/To RMS Source (1 A): Specify a range of values to limit the RMS source codes to include in the selection of orders available for picking.

Infor LX displays these fields if RMS is installed.

Screen actions - ORD550D1-01

Commands	Description
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify additional pick release selection options

Use the Pick Release Selection Options screen, ORD550D1-02, to further filter open orders for release. After you complete the fields on this screen, you have several possibilities.

Release order lines individually by pressing F15=Release by Line and proceeding to the Pick Release by Line screen, ORD550D2-01, or

Release entire orders by pressing F14=Release by Order and proceeding to the Pick Release by Order screen, ORD550D3-01.

Field descriptions - ORD550D1-02

Fields	Description
User ID (10,A):	Specify a user identification number to release orders entered by a specific user.
Responsible CSR (10,A):	Specify a valid Responsible CSR code to use as a selection criterion. If you enter a valid CSR code in this field, the selection of lines for pick release is limited to only lines for sold-to customers that are defined in the Customer Master with this Responsible CSR and that meet the other selection criteria. Leave the field blank to exclude Responsible CSR as a selection criterion. Note that the value you enter must be a valid ESR record in the CSR table, but it can be an active or inactive record.

Ship Date (8,0):

To perform pick release for multiple request dates but place those order lines on a single load, enter the expected shipment date for the requirements to pick release.

When you generate loads during Pick Release, Outbound Logistics Management designates that a separate load must be generated for each request date. However, the expected shipment date you specify here overrides the original request date.

Ship Time (4,0):

Specify the expected shipment time for the requirements to pick release. You must specify a valid ship date to use this field.

Allocate (1,0):

Specify Yes to perform batch allocations on the order lines you selected for pick release, otherwise, specify No. Batch allocations take place under the following conditions:

You enter 1 (Yes) in this field.

Allocation is required for the selected order line and some stock is still required to complete the allocation.

Allocations are not locked.

Allocated Orders Only (1,0):

Changed: *MR53106 Modified the help text for the Allocated Orders Only field in ORD550D1-02-01*

Specify 0=No, if you do not want to limit pick release to allocated orders. Specify 1=Yes to limit the records to pick release to order lines that are already allocated or do not require allocations. Specify 2=Full, if you want to limit the records to pick release to order lines that are fully allocated or do not require allocations.

Pick Release Quantity Default (1,0):

Added: *MR53106 Added the new field for the Pick Release Quantity Defaullt in ORD550D1-02-01*

This option controls the quantity that will be suggested for picking.

- Specify 1=Open (default), for the open quantity available for picking to be the default quantity to be processed by Pick Release.
- Specify 2=Allocated, for the allocated quantity to be the default quantity to be processed by Pick Release.

Batch Pull Report (1,0):

Specify Yes to print a batch pull document for all orders and order lines for which you produce pick slips. Specify No if you do not want a batch pull report. You cannot create this report for managed warehouses.

You must set this value to No for Warehouse Type 4 = Warehouse Management BOSS- and Type 5 = Infor WM-controlled warehouses.

Add to Packing Group Number (8,0):

Specify the packing group number to pick additional requirements. If you leave this field blank, OLM may create new shipments for these requirements.

Validation ensures that the packing group number you specify exists for the warehouse, customer range, and ship-to range specified on the filter screen, and that it has not yet been released. If the packing group meets all other consolidation conditions, Pick Release adds the new order line to that packing group and updates the appropriate load.

If you add to an existing packing group, the ship date for that packing group takes precedence over the request date for the order lines. If an order line qualifies for addition to an existing packing group, existing load rules regarding request date do not force the selected line to a different load.

If you specify a packing group number, OLM automatically adds the selections to that packing group, if possible. See valid combinations below.

Combination 1:

Order number exists on requested packing group

Order line number exists on requested packing group

Load Status is not yet released or dispatched

Combination 2:

Order number exists on requested packing group.

Load Status is not yet released.

Load Build Policy = 1.

Match Packing Group Invoice No. = 0 or 1.

Warehouse is same as warehouse defined for load.

Combination 3:

Order number does not exist on load.

Load Status is not yet released.

Load Build Policy: = 1

Match Packing Group Invoice No. = 0

Load Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Customer Number, Ship-to Number, Carrier, Route, Means of Transportation, Freight Terms, Shipping Zone, Delivery Terms, and Warehouse.

Additional fields must be identical to those of the first order on the packing group.

Fields:

Order Class and Load Status.

Combination 4:

Order number does not exist on load.

Load Status is not yet released.

Load Build Policy = 1

Match Packing Group Invoice No. = 1

Load Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Customer Number, Ship-to Number, Carrier, Route, Means of Transportation, Freight Terms, Shipping Zone, Delivery Terms, and Warehouse.

Additional fields must be identical to those of the first order on the packing group.

Fields:

Order Class and Load Status.

Invoice Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Transaction Currency, Reason Code, A/R Customer, Payment. Type, User Order Type, Document. Prefix, Invoice-to Customer, Invoice-to Number, Exchange Rate, Global Exchange Rate, and Customer Exchange Rate.

Combination 5:

Order number exists on requested packing group.

Load Status is not yet released.

Load Build Policy: = 2

Match Packing Group Invoice No.: = 0 or 1

Warehouse is the same as the warehouse defined for the load.

Dock is the same as the dock defined for the load.

Combination 6:

Order number does not exist on load.

Load Status is not yet released.

Load Build Policy: = 2

Match Packing Group Invoice No. = 0

Load Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Customer Number, Ship-to Number, Carrier, Route, Means of Transportation, Freight Terms, Shipping Zone, Delivery Terms, Warehouse, and Receiving Dock.

Additional fields must be identical to those of the first

order on the packing group.

Fields:

Order Class and Load Status.

Combination 7:

Order number does not exist on load.

Load Status is not yet released.

Load Build Policy = 1.

Match Packing Group Invoice No.= 1.

Load Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Customer Number, Ship-to Number, Carrier, Route, Means of Transportation, Freight Terms, Shipping Zone, Delivery Terms, Warehouse, and Receiving Dock.

Additional fields must be identical to those of the first

order on the packing group.

Fields:

Order Class and Load Status.

Invoice Consolidation fields must be identical to those of the first order on the packing group.

Fields:

Transaction Currency, Reason Code, A/R Customer, Payment. Type, User Order Type, Document. Prefix, Invoice-to Customer, Invoice-to Number, Exchange Rate, Global Exchange Rate, and Customer Exchange Rate

Combination 8:

Order number exists on requested packing group.

Item number for requested line exists on load.

Load Status is not yet released

Load Build Policy = 3.

Match Packing Group Invoice No. = 0 or 1.

Warehouse is the same as the warehouse defined for the load.

Lock Selected Order Lines (1,0):

Specify 1=Yes to prevent changes to allocations by batch allocation processing. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 1=Yes. Accept the default, 0=No, to allow changes to allocations by batch allocation processing.

Process Pick Confirm (1,A):

Specify whether to execute the Pick Confirm program automatically when the Pick Release process completes. The following options values are valid:

0=No

Infor LX does not start the Pick Confirm process

1=Batch

Infor LX starts the Pick Confirm process as a separate job

2=Interactive

Infor LX starts the Pick Confirm process as part of the current job

Note that you cannot run Pick Confirm interactively if you are submit Pick Release to batch.

Firm Lines Only (1,0):

Specify Yes to only select firm RMS order lines, otherwise, specify No. This field only appears if RMS is installed.

OLM Load Generation Option (1,0):

Specify whether this Pick Release job should automatically create OLM loads for the order lines that are selected for processing. You cannot create loads if the customer setup does not allow load creation.The valid options are to create loads during Pick Release if requested in the customer or ship-to setup, or to defer load creation until a later time.

	If 0=No, then OLM loads are not generated during Pick Release. The 0=No option skips auto load generation at this time. Loads will be generated during Pick Confirm if they were not previously created. If 1=Load Build Policy, then the system creates OLM loads according to the Load Build Policy defined for each customer or ship-to. If Load Build Policy is 0, then no loads are built.
Print Run Parameter (1,0):	Specify Yes to print this document interactively. Specify No print in batch mode.

Screen actions - ORD550D1-02

Commands	Description
F6=Accept	Accept the pick release filters you set on this screen and return to the Pick Release Selection Filter screen.
F12=Cancel	Retain the values you entered on this screen and return to the Pick Release Selection Filter screen.
F14=Release by Order	Access Pick Release by Order, ORD550D3-01, to view all non-released orders that meet the selection criteria and continue with order release.
F15=Release by Line	Access Pick Release by Line, ORD550D2-01, to view all non-released order lines that meet the selection criteria and continue with order release by line. If the warehouse specified on the order line differs from the warehouse on the order header, you must perform multiple releases to completely release the customer order.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F20=Carrier Override	Access the Pick Release Carrier Override program, ORD550D1-03. For more information, refer to the discussion of the Pick Release Carrier Override program in this document.
F22=Orders Not Selected Rpt	Print the Orders Not Selected Report, ORD952B, which produces a listing of orders that qualified for selection but were excluded because the In Use flag was on, or the order had a credit, margin, user, or customer hold.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Override carrier values during pick release

The Pick Release Carrier Override screen, ORD550D1-03, allows you to override default carrier values or provide details to update the load to generate when you have carrier information at the time that you run picking and you run picking for a specific load. Infor LX uses this information to update load details in the Outbound Logistics Management application. This screen is only available if you have OLM installed.

Field descriptions - ORD550D1-03

Fields	Description
Carrier (6,A):	Specify the transportation carrier code for the carrier to deliver this order.
Means of Transportation (4,A):	Specify the code for the means of transportation that is used for shipments to this customer ship-to location. You can maintain the means of transportation codes in the Means Of Transportation Maintenance program, OLM110D.
AETC Authorization (30,A):	Specify the customer-supplied Alternate Emergency Transport Code (AETC), which ensures acceptance of this shipment. If you specify a value, the program uses it to update the AETC Authorization field for the first load Infor LX generates. All other loads are generated with blanks.
AETC Reason Code (2,A):	Specify the locally defined Alternate Emergency Transport Code that indicates the reason for requesting special or emergency transportation for the load. If you specify a value, the program uses it to update the AETC Reason Code field for the first load Infor LX generates. All other loads are generated with blanks.
AETC Responsibility (1,A):	Specify the locally defined code that indicates the entity responsible to pay any additional transport costs incurred by this use of emergency transport. If you specify a value, the program uses it to update the AETC Responsibility field for the first load Infor LX generates. All other loads are generated with blanks.
Seal Number (30,A):	Specify the Seal Number the customer issued for shipment security purposes. If you specify a value, it is used to update the Seal Number field for the first load Infor LX generates. All other loads are generated with blanks.

Airbill Number (35,A):	Specify the Airbill Number to associate with the load Infor LX generates. If you specify a value, the program uses it to update the Airbill Number field for the first load Infor LX generates. All other loads are generated with blanks.
Trailer Initials (4,A):	Specify the alphanumeric code that further identifies the equipment.
Trailer Serial Number (20,A):	Specify the serial identifier of the trailer. If you specify a value, the program uses it to update the Trailer Serial Number field for the first load Infor LX generates. All other loads are generated with blanks.
Supplier (17,A):	Specify the Supplier code for this customer. If you specify a value, the program uses it to update the Supplier field for the first load Infor LX generates. All other loads are generated with blanks.
Pool/Location (10,A):	Specify the Pool Point Location to associate with the load Infor LX generates. If you specify a value, the program uses it to update the Pool Point Location field for the first load Infor LX generates. All other loads are generated with blanks.

Screen actions - ORD550D1-03

Commands	Description
F6=Accept	Validate and accept the override information you enter and return to the Pick Release Selection Options screen, ORD550D1-02.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick release or allocate inventory to individual lines

The Pick Release by Line screen, ORD550D2-01, displays all non-released order lines that are ready for pick release within the limits you specified.

Picking from a Managed Warehouse

When you pick orders or order lines, Infor LX creates partial pick records (IPP file) and performs an on-line allocation to ensure that sufficient stock exists in the defined locations. Infor LX uses the range of zone values you specified on the selection filter screen for the allocations. This transaction reduces the quantity to pick value to the quantity found at the required storage levels and prints it on the picking documents.

If there is insufficient inventory in the picking locations, but available inventory exists in the main storage locations (assuming you did not limit the record selection to picking locations only), Infor LX automatically generates a replenishment movement. The Pick Transfer Confirm program, WHM540, then confirms the movement and hard allocation before Infor LX updates the pick release quantity and pick status. Infor LX performs this process regardless of whether or not you require pick transfer confirm for this managed warehouse in the Warehouse Master Maintenance program, INV110.

If this item requires full pallet picking and the full quantity is not available, you cannot pick directly from main storage. Instead, generate replenishments to picking locations after you confirm the partially available quantity. If there is not enough inventory to generate replenishments to lower picking levels, you must perform a manual movement or manual replenishment to make the inventory available for picking.

Field descriptions - ORD550D2-01

Fields	Description
Warehouse (3,A):	Infor LX displays the warehouse code and description from the selection screen.
Back Order Code (1,0):	Infor LX displays the range of backorder codes from the selection screen.
Pick Area (1,0):	Infor LX displays the pick area from the selection screen.
Customer (8,0):	Infor LX displays the range of customer numbers from the selection screen.
Ship (4,0):	Infor LX displays the range of ship-to numbers from the selection screen.
Request (6,0):	Infor LX displays the range of request dates from the selection screen.
Route (6,A):	Infor LX displays the range of route numbers from the selection screen.
Carrier (6,A):	Infor LX displays the range of carrier numbers from the selection screen.
Order (9,0):	Infor LX displays the range of order numbers from the selection screen.
Zone (3,A):	Infor LX displays the range of zone numbers from the selection screen.
Picking Select Code (1,0):	The screen displays this field only if you have the Warehouse Management application installed. Infor LX displays the range of picking select codes you specified on the selection screen.
Weight (11,3):	Infor LX calculates the total weight for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses, and from the Item Warehouse file, IIW, for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Volume (11,3): Infor LX calculates the total volume for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses, and from the Item Warehouse file, IIW, for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Pallet (11,3): (Non-managed warehouses only) Infor LX calculates the total pallets for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Units (11,3): (Managed warehouses only) Infor LX calculates the total units for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Warehouse file, IIW.

Destination Location (10,A): (Managed warehouses only) Infor LX displays the default shipping (dispatch) location from the Item Warehouse file. To override this value, specify a valid ship location (type 6) or consolidation location (type 9) for the managed warehouse you selected in the previous screen.

If you specify any location other than a valid location type 6 or type 9 for the selected warehouse, the program displays an Invalid Location message. The following situations generate this error:

You specified an incorrect location code.

You specified a valid type 6 or 9 location, but for the wrong warehouse.

You specified a location in the selected warehouse that is not a location type 6 or 9.

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.

Order number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Customer number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Request date: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Schedule Date (6,0): The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Line number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Item number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Unit of Measure (2,A): Infor LX displays the stocking unit of measure for each order line.

Quantity to Pick (11,3): Infor LX displays the quantity of the item that is available to pick release. The Quantity to Pick = Ordered Quantity - Shipped Quantity - previously Picked Quantity. You can override this field, but you cannot specify a quantity that is greater than the default value.

To perform a partial pick on a particular order line, decrease this value before you select the line for release. The Quantity to Pick cannot be zero or negative.

If you have OLM is installed and you defined the load build policy to generate loads at Pick Release, line splitting can result if you reduce the quantity to pick. For example, a partial pick may cause Infor LX to reduce the order line to the order quantity picked and create a new order line for the balance. Existing allocations and promotions remain on the original line. Infor LX processes the original line and updates the line for picking, load generation and status. The new order line for the balance remains ready for Pick Release and has no allocations or promotions. Infor LX does not process the new order line until you select the line in a later Pick Release run.

If the backorder code is 4, or 0 with the Drop Flag set to Yes, Infor LX automatically cancels any remaining quantity in excess of the quantity to pick if you defined the load build policy to generate loads at Pick Release.

This field is display only if you accessed the screen from the Pick Release by Order screen.

Forecast Type (1,0): (Reference Only) This field indicates the forecast type of the requirement for the line. The following values are valid:

0	Not known or not available
1	Firm
2	Authorized for Production
3	Authorized for Material Purchase
4	Forecast

Status (7,x): Infor LX displays the selection status of each order.

Asterisk (*)	Selected lines
Dash (-)	Deselected lines
Blank	Unselected lines

Infor LX displays kit component lines with the same selection status as their parent lines.

Line actions:

The following line actions are available:

10=Order Detail

Access the Pick Release Order Detail screen to view order detail information.

11=Pick

Add the selected order line to the list of pick release records. Infor LX updates the status and the weight, volume, and pallet totals.

12=Allocate

Perform on-line allocations. Infor LX displays the Customer Order Allocations program, ORD720. You can perform on-line allocations for the selected order line.

13=De-Select

Remove the selected order line from the list of pick release records. Infor LX updates the status and the weight, volume, and pallet totals.

14=Select/Allocate

Select the order line for pick release and automatically allocate it. If allocations are required, the system allocates available inventory to the line and processes the quantity requested for pick release. If the item does not have inventory or if allocations are not required, Infor LX still selects the line for pick release but does not allocate it.

Note that, for managed warehouses, selection includes an automatic allocation. This action is not available for managed warehouses.

15=Lock Allocation

Select the Batch Allocation Lock field for the selected line to prevent further batch allocation processing.

16=Unlock

Deselect the Batch Allocation Lock field for the selected line to allow batch allocation processing.

17=Auto Allocate and Lock

Allocate and lock the selected order lines. This action is not available for managed warehouses.

18=Line Detail

Access the Pick Release Order Detail screen to view order line detail information.

19=Pick and Change Destination Location

Access the Override Default Ship Location window and specify a new destination location for the line being picked. This applies to managed warehouses only.

21=Quantity Detail

Access the Line Quantity Detail screen to view order line quantity detail information.

22=Consignment List Window

Access the Consignment List Window screen to view consignment information. This action is available only if you have the Outbound Logistics Management application installed.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

24=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

25=Spread Pick Quantity

Access the Pick Release - Spread Pick Quantity screen, ORD550D2-02. You can specify a total quantity to pick for an RMS order. For example, assume that RMS Order 123456 has several lines that specify item ITEMNUMBERONE. You can use this Spread Pick Quantity screen to specify that you want to pick a total of 1000 ITEMNUMBERONE for the order. This applies only if you have RMS installed.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD550D2-01

Commands	Description
F6=Accept	Accept the pick release filters you set on this screen and return to the Pick Release Selection Filter screen.
F13=Filters	Access a filter screen to re-sequence the orders by the hierarchy you select.
F14=Select All	Select all displayed orders for pick release.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Spread pick quantity over multiple RMS order lines

The Pick Release Spread Pick Quantity screen, ORD550D2-02, allows you to specify a total quantity to pick for an RMS order. Next, Infor LX automatically spreads the quantity over all of the RMS Order lines it can. The following conditions must be met before Infor LX can spread the quantity you specify over multiple lines:

You selected the RMS Order for this Pick Release run.

The line is available to pick.

The specified quantity of the item is available to pick.

Infor LX applies the spread quantity you specify from the first line to the last (it populates the quantity field and selects each line) until either the quantity or the available lines are exhausted. If Infor LX applies a partial quantity to the last line of the spread, it can trigger line splitting. This depends on your Load Build Policy codes.

Field descriptions - ORD550D2-02

Fields	Description
Order:	Infor LX displays the selected record number.
Item Number:	Infor LX displays the item number and description.
Quantity to be Picked (11,3)	Specify the quantity to spread over the RMS Order lines for the selected item.

Screen actions - ORD550D2-02

Commands	Description
F6=Accept	Validate and accept the Pick Spread Quantity you enter and return to the Pick Release by Line screen, ORD550D2-01. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick release by order

Use the Pick Release by Order screen, ORD550D3-01, to display orders that are ready for pick release that meet the selection criteria you specified on the selection screen.

Picking from a Managed Warehouse

When you pick orders or order lines, Infor LX creates partial pick records (IPP file) and performs an on-line allocation to ensure that sufficient stock exists in the defined locations. Infor LX uses the range of zone values you specified on the selection filter screen for the allocations. This transaction reduces the quantity to pick value to the quantity found at the required storage levels and prints it on the picking documents.

If there is insufficient inventory in the picking locations, but available inventory exists in the main storage locations (assuming you did not limit the record selection to picking locations only), Infor LX automatically generates a replenishment movement. The Pick Transfer Confirm program, WHM540, then confirms the movement and hard allocation before Infor LX updates the pick release quantity and pick status. Infor LX performs this process regardless of whether or not you require pick transfer confirm for this managed warehouse in the Warehouse Master Maintenance program, INV110.

If this item requires full pallet picking and the full quantity is not available, you cannot pick directly from main storage. Instead, generate replenishments to picking locations after you confirm the partially available quantity. If there is not enough inventory to generate replenishments to lower picking levels, you must perform a manual movement or manual replenishment to make the inventory available for picking.

Field descriptions - ORD550D3-01

Fields	Description
Warehouse (3,A):	Infor LX displays the warehouse code and description from the selection screen.
Back Order Code (1,0):	Infor LX displays the range of backorder codes from the selection screen.
Pick Area (1,0):	Infor LX displays the pick area from the selection screen.
Customer (8,0):	Infor LX displays the range of customer numbers you specified on the selection screen.
Ship (4,0):	Infor LX displays the range of ship-to numbers you specified on the selection screen.
Request (6,0):	Infor LX displays the range of request dates from the selection screen.
Route (6,A):	Infor LX displays the range of route numbers from the selection screen.
Carrier (6,A):	Infor LX displays the range of carrier numbers from the selection screen.
Order (9,0):	Infor LX displays the range of order numbers from the selection screen.
Zone (3,A):	Infor LX displays the range of zone numbers from the selection screen.
Picking Select Code (1,0):	The screen displays this field only if you have the Warehouse Management application installed. Infor LX displays the range of picking select codes you specified on the selection screen.
Weight (11,3):	Infor LX calculates the total weight for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses, and from the Item Warehouse file, IIW, for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.
Volume (11,3):	Infor LX calculates the total volume for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses, and from the Item Warehouse file, IIW, for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Pallet (11,3): (Non-managed warehouses only) Infor LX calculates the total pallets for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Master file, IIM, for regular warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Units (11,3): (Managed warehouses only) Infor LX calculates the total units for all selected orders (if you select by order) or all selected line items (if you select by order line). Infor LX uses order information from the Item Warehouse file, IIW.

Destination Location (10,A): (Managed warehouses only) Infor LX displays the default shipping (dispatch) location from the Item Warehouse file. To override this value, specify a valid ship location (type 6) or consolidation location (type 9) for the managed warehouse you selected in the previous screen.

If you specify any location other than a valid location type 6 or type 9 for the selected warehouse, the program displays an Invalid Location message. The following situations generate this error:

You specified an incorrect location code.

You specified a valid type 6 or 9 location, but for the wrong warehouse.

You specified a location in the selected warehouse that is not a location type 6 or 9.

Customer number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Ship-to number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Order number: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Lines: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Request date: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Schedule date: The screen displays this field for each order that is ready to pick, according to the criteria entered on the first screen.

Allocation Priority: Infor LX displays the shipping priority code.

Back Order Code: Infor LX displays the backorder code.

Quantity to Pick (11,3): Infor LX displays the total pick quantity for all eligible lines of the order.

Order Quantity (11,3): Infor LX displays the total order quantity for all eligible lines of the order.

Status (1,A):

Infor LX displays the selection status of each order.

Asterisk (*)	Selected lines
Dash (-)	Deselected lines
Blank	Unselected lines

Infor LX displays kit component lines with the same selection status as their parent lines.

Line actions:

The following line actions are available:

10=Order Detail

Access the Pick Release Order Detail screen to view order detail information.

11=Pick

Add the selected order line to the list of pick release records. Infor LX updates the status and the weight, volume, and pallet totals.

12=Adjust

Access the Pick Release by Line screen to allocate and pick order lines for the selected order.

13=De-Select

Remove the selected order from the list of pick release records. Infor LX updates the status and the weight, volume, and pallet totals.

19=Pick and Change Destination Location

Access the Override Default Ship Location window and specify a new destination location for the line being picked. This applies to managed warehouses only.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD550D3-01

Commands	Description
F6=Accept	Accept the values entered on this screen and return to the Pick Release Selection Filter screen.
F14=Select All	Select all displayed orders for pick release.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Change destination location

If you enter Action 19, Pick and Change Destination Location, in the Act field for any order line on the Pick Release by Line or Pick Release by Order screens for a managed warehouse, Infor LX displays the Change Destination Location screen, ORD550D4-01. Use this screen to change the destination (ship-to) location to an interim or consolidation location to pick items or containers from a pallet rather than shipping the entire contents of the pallet.

Field descriptions - Change Destination Location

Fields	Description
Warehouse:	Infor LX displays the warehouse for the order line.
Customer:	Infor LX displays the customer for the order line.
Ship To:	Infor LX displays the ship-to number for the order line.
Order	Infor LX displays the order number and line.

Line:	Infor LX displays the order line number if you accessed the screen from the Pick Release by Line screen, or it displays the number of lines on the order if you accessed it from the Pick Release by Order screen.
Item:	(This field appears only if you accessed this window from the Pick Release by Line screen.) Infor LX displays the item from the order line.
Quantity:	If you accessed this screen from the Pick Release by Line screen, Infor LX displays the quantity of the line being picked. If you accessed this screen from the Pick Release by Order screen, Infor LX displays the total order quantity being picked.
Destination Location (10,A):	Infor LX displays the destination location from the previous screen. You can override this value with a valid ship location (type 6) or consolidation location (type 9) for the managed warehouse on the initial screen.

Screen actions - ORD550D4-01

Commands	**Description**
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Customer address master list prompt

Changed: *MR81177 Changed the Panel level Help Text content in Panel Group and added the Field identifiers to the field descriptions appropriately*

If requested for a ship-to address, this window lists ship-to numbers defined for the requested ship-to customer number.

If requested for an invoice-to address, this window lists invoice-to numbers defined for the requested invoice-to customer number.

If requested for a promotion pay-to address, this window lists promotion pay-to numbers defined for the requested promotion pay-to customer number.

If requested for a lock box-to address, this window lists lock box-to numbers defined for the requested lock box-to customer number.

If requested as a general ship-to lookup, this window lists all Address Master records of all types that have been defined for the requested customer number.

Field descriptions - WINESTD

Fields	Description
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 LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Customer Number (8,0):	Infor LX displays the customer number requested from the calling screen.
Ship-To Number (4,0):	Infor LX displays the ship-to numbers for the requested customer.
Description (30,A):	Infor LX displays the description of the ship-to number.

Screen actions - WINESTD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick release order/line detail, ORD371D - ORD374D

The Pick Release Order and Line Detail programs, ORD371D through ORD374D, display detailed information about the order and order lines you selected for pick release. Access these programs with the Order Detail or Line Detail line actions in the Order or Line screens of the Pick Release program.

Note to Time Conversion Users

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

Not all dates in the supply chain are converted as part of the time conversion process, because some are always stored as entered or displayed, printed, and stored in system time zone values. The following list shows the common conversions performed for typical date fields when time zone conversion is active. Exceptions are discussed in the help text for individual date fields in individual screens.

- Request Date: In order entry, this is the date on which the user expects shipment of the order line from the ship-from warehouse. This date is generally the date of the order line warehouse. In order inquiry screens, it can be called the Shipping Date. It affects pricing and promotion qualification, lot availability and expiration, MRP available-to-promise processing (it is the demand date), OLM load generation, and selection of records for display or processing in multiple other programs. The system displays this date to the user for the time zone of the warehouse.
- Entry Date and Entry Time: These are audit fields, and theEntry Date is also used in Order Entry as a promotion qualifier, as well as for other purposed. Entry Date and time are never converted. They are stored and displayed for the system date and time zone.
- Schedule Date and Time: Users generally use these these fields to record the date and time at which the customer wants to receive an order line. These dates are generally entered and displayed for the ship-to number time zone, or if there is no ship-to number, the time zone of the ship-to customer.
- Price Book Date: Order Entry uses this date for pricing and promotion qualification. Date ranges in the Price Book have no associated time or time zone. The are saved and displayed as entered with no time zone conversion. Store Date and Warehouse Date are variants of the Price Book Date. They are also stored and displayed without time zone conversion.
- User Date and Time 1 and 2: These fields are user definable and have no pre-defined usage. They are not associated with any regional time zones. The date and time values are stored and displayed as entered with no time zone conversion.
- Receipt Date/Time: These resupply order fields represent the planned receipt date and time (expected delivery date and time) at the To Warehouse. They are entered for the time zone of the ship-to warehouse and converted to the equivalent system date and time for storage, then converted back to ship-to warehouse time zone for on-screen display and printing in reports and inquiries.

Note that dates that are converted for time zone differences are only converted if the governing entity for the date and time, such as the ship-from warehouse or the ship-to number, contain a region code. If the governing entity has a blank region code, no conversion is performed. The date is stored, retrieved, printed, and displayed as entered on the screen.

View pick release order detail information

Use Pick Release Order Detail, ORD371D, to view detail information for the selected order.

Field descriptions - ORD371D

Fields	Description
Order Number:	Infor LX displays the order number you selected for detail information.
Order Class:	Infor LX displays the order class and description from the Customer Order Class file, EOC.
Customer Number:	Infor LX displays the sold-to customer number and name from the Customer Master file.
Ship-to:	Infor LX displays the ship-to number and name from the Customer Order Header file.
Ship-from Warehouse:	Infor LX displays the ship-from warehouse and description from the Warehouse Master file, IWM.
Ship-to Warehouse:	Infor LX displays the ship-to warehouse and description from the Warehouse Master file, IWM. This field displays for resupply orders only.
Carrier:	Infor LX displays the carrier code and description from the Carrier Master file, LCM.
Back Order Code:	Infor LX displays the backorder code and description from the Code Master file, ZCC.
Pick Release Fill Rate	Infor LX displays the pick release fill rate (percentage) for the total of eligible order lines in an order from the Customer Master Maintenance - Shipping screen.
Back Order Counter:	Infor LX displays the backorder counter for this order.
Request date:	Infor LX displays the requested ship date for this order from the Customer Order Header, ECH file. The request date may vary for order lines.
Schedule date:	Infor LX displays the scheduled ship date for this order from the Customer Order Header, ECH file. The request date may vary for order lines.
DATE1:	Infor LX displays the first user-defined date from the Customer Order Header, ECH file. This date may vary for order lines. You can define this field in the Order Entry System Parameters, ORD820.
DATE2:	Infor LX displays the second user-defined date from the Customer Order Header, ECH file. This date may vary for order lines. You can define this field in the Order Entry System Parameters, ORD820.

Number of Lines:	Infor LX displays the number of lines on this order.
Allocation Priority:	Infor LX displays the allocation priority from the Customer Order Line Items file, ECL.
Allocation Fill Rate	Infor LX displays the allocation fill rate percentage for an order line from the Customer Master Maintenance - Shipping screen.
Weight:	Infor LX displays the total weight of all the order lines that you selected for release from this order.
Volume:	Infor LX displays the total volume of all the order lines that you selected for release from this order.
Pallets/Units:	Infor LX displays the total pallets/units on all the order lines that you selected for release from this order.

Screen actions - ORD371D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View pick release order line details

Use Pick Release Order Lines Detail, ORD372D, to view detail information for the selected order.

All field values default from the Customer Order Line Items file, ECL, unless otherwise indicated.

Field descriptions - ORD372D

Fields	Description
Order Number:	Infor LX displays the order number.
Line Number:	Infor LX displays the order line number you selected for detail information.
Item Number:	Infor LX displays the item number and description.
Customer Item:	Infor LX displays the customer cross-reference item number.
Carrier:	Infor LX displays the carrier number.

Dock:	Infor LX displays the receiving dock defined for the customer order line.
Back Order Code:	Infor LX displays the backorder code and description.
Drop Code:	Infor LX displays the drop code.
Request Date:	Infor LX displays the request date for the order line.
Request Time:	Infor LX displays the request time for the order line.
Source:	Infor LX displays the source of the requirement for this order line. Requirements can originate from the customer order, an RMS release, or an RMS JIT.
Schedule Date:	Infor LX displays the schedule date for the order line.
DATE1:	Infor LX displays the first user-defined date from the Customer Order Header, ECH file. This date may vary for order lines. You can define this field in the Order Entry System Parameters, ORD820.
DATE2:	Infor LX displays the first user-defined date from the Customer Order Header, ECH file. This date may vary for order lines. You can define this field in the Order Entry System Parameters, ORD820.
Ship-from Warehouse:	Infor LX displays the ship-from warehouse. This field displays for resupply orders only.
Ship-to Warehouse:	Infor LX displays the ship-to warehouse. This field displays for resupply orders only.
Destination Location:	Infor LX displays the destination location for a managed warehouse order line when you access the screen from the Pick Release by Line screen.
Inbound Delivery Number:	Infor LX displays the inbound delivery number for the order line.
Kanban Number:	Infor LX displays the Kanban number for the order line.
Route:	Infor LX displays the route number.
Allocation Priority:	Infor LX displays the allocation priority.
Allocation Lock:	If this field is selected, the order line is locked to further batch allocations.
Weight:	Infor LX displays the total weight of this order line.
Volume:	Infor LX displays the total volume of this order line.

Pallets/Units:	For regular warehouses, Infor LX displays the quantity to pick from the Pick Release by Line screen, ORD550D2-01, divided by the units per pallet in the Item Master file, IIM. For managed warehouses, Infor LX displays the quantity to pick from the screen.
Times Back Ordered (3,0):	This field displays a count of back order attempts for this line. This field applies only to orders, not quotes or RMAs.

Screen actions - ORD372D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View pick release order line quantity detail information

Use the Pick Release Order Line Detail quantity screen, ORD373D, to view quantity detail information for the selected order line.

Field descriptions - ORD373D

Fields	Description
Order Number:	Infor LX displays the order number.
Line Number:	Infor LX displays the order line number you selected for detail information.
Item Number:	Infor LX displays the item number and description.
Line Quantities:	Infor LX displays the line quantities in the stocking unit of measure from the Item Master file.
Quantity Ordered:	Infor LX displays the order quantity of the item in the stocking unit of measure.
Quantity Allocated:	Infor LX displays the allocated quantity of the item in the stocking unit of measure. If this is a partially picked line, this value may include allocations that exist on partial line quantities that have already been released but not confirmed.

To Be Picked:	Infor LX displays the quantity of the item available for picking that you specified on the Pick Release by Line screen, ORD550D2. This value is displayed in the stocking unit of measure.
Pick Released:	Infor LX displays the quantity of the item that has already been released for picking and confirmed. This value does not include the picked quantity on this release.
Shipped:	Infor LX displays the shipped or pick confirmed quantity of the item.
Invoiced:	Infor LX displays the invoiced quantity of the item.
Received:	Infor LX displays the received quantity of the item. This field displays for re-supply orders only.

Screen actions - ORD373D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Consignment list

The Consignment List screen, ORD374D-01, displays a list of possible consignments for the selected order line. In most cases there is only one consignment for a particular order line. It is possible, however, for an order line to be distributed over several consignments. To see further consignment details, select one of the consignments shown on this screen. Infor LX then displays the Load Inquiry screen, OLM352D-03, in the Outbound Logistics Management application.

This screen is available only if you have the OLM application installed.

Field descriptions - ORD374D-01

Fields	Description
Order Number:	Infor LX displays the order number.
Line Number:	Infor LX displays the order line number you selected for consignment information on the previous screen.
Customer Number:	Infor LX displays the sold-to customer number and name from the Customer Master, RCM file.

Ship-to:	Infor LX displays the ship-to number and name from the Customer Order Header, ECH file.
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. **1=Select** Access the Load Inquiry screen, OLM352D-03, to view more detail about the selected consignment.
Consignment (8,0):	Infor LX displays the consignments for the order line that you selected on the previous screen.
Ship Date (6,0):	Infor LX displays the date the consignment shipped.
Warehouse (3,A):	Infor LX displays the warehouse code for the warehouse that shipped the consignment.
Load (9,0):	Infor LX displays the load number that includes the consignment.
Shipment 3,0):	Infor LX displays the shipment number for the shipment that includes the consignment.
Carrier Code (6,A):	Infor LX displays the OLM code that uniquely identifies the carrier for the consignment.

Screen actions - ORD374D

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick confirm, ORD570D1

The Pick Confirm program, ORD570D1, allows you to confirm the actual quantity, lot, and location of shipped inventory (instead of the picked quantity) as closely as possible to the physical movement of the inventory. After you release an order and print picking documents, the warehouse performs routine inventory pulling. During this process, it updates the released customer order to reflect any changes that occurred after you took the original order. The process next updates the inventory status with the appropriate quantity, location, and lot.

Pick Confirm does not include orders with base class of 15 or 20 unless you specifically include them by setting the Include Auto Ship Confirm Orders option to 1=Yes in the Pick Confirmations Selection Filter, ORD570D1-02.

When you confirm resupply orders to an in-transit warehouse, Infor LX creates B and IR transactions. The B transaction posts the shipment of inventory from the supplying warehouse. The IR transaction updates an in-transit warehouse location at the container/lot/location level. To perform this type of confirmation, you must have the DRP application installed, and you must have an existing in-transit warehouse.

For Warehouse Management BOSS and Infor WM users:

In-transit processing is not supported for warehouse types 4 and 5.

You cannot directly pick confirm an order in a warehouse type 4 or 5. This processing is performed in the external advanced warehouse management system.

See the user documentation for the Warehouse Management BOSS integration or the Infor WM integration for further details.

You can use the Pick Confirm program to consolidate orders. Infor LX automatically assigns consolidation numbers.

Note that, if you set the print option in Item X-Reference Maintenance to print only the customer item number and description, some picking and shipping documents show only the customer item number and description.

Release Management and Pick Confirmation

Sequenced Shipment Orders - Pick Confirm allows you to delete sequenced cartons from the shipment to revise the confirmed and/or allocated quantity. After you do this, RMS automatically adjusts the confirmed quantity and respective allocations for all the items associated with the deleted carton. After this, Pick Confirm prohibits you from entering confirmed quantities and allocating quantities for that order line.

After you delete the carton, RMS calculates the net and gross weights and the number of packs for the relevant shipment lines and shipment header. Infor LX deletes the sequenced pack from the shipment as follows:

Resets the ship status from 5=Selected for Shipping to 3=Packed

Clears the load number, shipment number, shipment date, packing group number, and carton ID

Next, Pick Confirm calls RMS to reset the status of its confirmed sequenced shipments from 5=Selected for Shipping to 6=Shipped. Also, Pick Confirm clears the inventory location fields (warehouse, location, lot, and center) because the sequenced pack is no longer in inventory.

Ship Date - To record the date of shipment, enter the confirmation date on the Pick Confirm Selection/Filter screen. Infor LX requires this field to perform retroactive billing based on the invoice date or shipment date.

Invoice Suppression - Pick Confirm uses the Skip Invoicing flag to suppress invoicing for order lines that do not go through billing. For orders with no billing event, Infor LX invoices special lines, but it does not invoice regular lines.

Infor LX does not generate a contract header for shipments that have no invoicing event. If this is not a resupply order, Pick Confirm creates B transactions for the stock to ship, but it does not create Billing Release Line Item (BBL) records or Invoiced Lot (EIL) records for that order line. If this is a resupply order, normal resupply processing continues for the stock to ship, but Infor LX does not create BBL or EIL records.

If the order in progress has a contract header, pick confirm processing creates pairs of T Transaction History (ITH) transactions, instead of the normal B ITH inventory transactions, to transfer the inventory that is pick confirmed. Infor LX builds the From T transaction from the order allocation record. Infor LX builds the To T transaction from the To Warehouse and Default Ship Location that uses the same Item Number, Lot Number, and Allocated Quantity defined on the allocation record. For container-controlled items whose containers are only partially shipped, Infor LX offsets the quantity in the picked container by the quantity allocated, and it creates a new container. The new container, located in the To Warehouse and Location, details the original lot number where applicable for the quantity transferred. The receipt for the T transaction references the original container number for your reference. Pick Confirm builds a pair of T transactions for each allocation against the pick confirmed order line.

Packaging - When address or customer parameters indicate that Infor LX should relieve inventory for the packaging, the system determines the packaging for the entire load when the last requirement for the load is pick confirmed. This is immediately prior to setting the Load Status to 2 to allow dispatching to take place. Outbound Logistics Management determines the number of pack types associated with each load and packing group. Infor LX also determines the corresponding item number. OLM then calls Order Entry to create an order line for each pack type and the associated quantity and it determines price using standard pricing logic. Infor LX then sets the Allocation Required, regardless of the value retrieved from the Item Master, Warehouse Master, or other files. Infor LX then automatically allocates this order line and creates Pick Confirmation work file records as if you had selected the line for pick confirm and it was processed as usual.

You must select the Auto Create Packaging Flag on the Address Master Shipping Policy screen to turn on any other packaging flags. This is the basic flag for all other packaging options. Packaging flags are only meaningful if you have OLM installed.

Pick Confirm sets the Skip Invoicing flag based on the address/customer parameter Invoice Packaging. If invoicing is required, Pick Confirm sets the Skip Invoicing flag to 0=No and copies any pre-assigned invoice details to the Pick Confirmation Work file, EWR. If invoicing is not required, Pick Confirm sets this flag to 1=Yes. This occurs during inventory update and before potential creation of BBL and EIL records.

The amount fields that this program calculates or displays are consistently rounded based on the currency rounding method and the round-to position you selected. Depending upon the Infor LX applications you have installed, you select a rounding method and round-to position in one of two places, the Currency Code Maintenance screen, CLD107D2-01, in the Multiple Currencies application or the Currency program in the Configurable Enterprise Accounting application.

This rounding process affects calculated amount totals such as Invoice Total, Taxes Total, and Amounts in Journals. It does not affect Unit Cost or Unit Selling Prices.

PLC considerations

If you are using the Product Lifecycle Control code feature, warning and/or error messages will be presented if the item, item/warehouse or item/facility is set up to restrict shipments. For resupply orders, both the From and To warehouses are checked for PLC restrictions, therefore, it is possible to have two PLC messages presented for the same order line.

Access: ORD menu

Select picked orders or order lines for confirmation

Use the Pick Confirmation Selection Filter, ORD570D1-01, to select picked orders or order lines for confirmation.

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 - ORD570D1-01

Fields	Description
Warehouse (3,A):	Specify the warehouse code to select records for pick confirmation from a specific warehouse at the line item level. The Release Management system uses this field to allow selection of a sequenced shipment warehouse, which by default is non-allocatable.
Consolidation Number (6,0):	Specify a consolidation number to perform pick confirmations for consolidated order lines.
From/To Customer Type (4,A):	Specify a range of values to limit the customer types to include in the selection of orders available for pick confirm.
From/To Order Class (3,0):	Specify a range of values to limit the order classes to include in the selection of orders available for pick confirm.
From/To Customer Order (9,0):	Specify a range of values to limit the customer orders to include in the selection available for pick confirm. You cannot enter an order number in this field if you have entered a consolidation number.
From/To Item (35,A):	Specify a range of values to limit the item numbers to include in the selection of orders available for pick confirm. If a kit parent item or features and options parent item is included for processing because it is within the From/To Item range, Infor LX automatically includes all component lines for that kit or features and options parent, regardless of whether the components are within the range.

From/To Load Number (9,0): Specify a range of values to limit the load numbers to include in the selection of orders available for pick confirm.

This field applies only if you have OLM installed.

From/To Consignment Number Specify a range of values to limit the consignment numbers to include in the selection of orders available for pick confirm.

This field applies only if you have OLM installed.

From/To Packing Group Number (8,0): Specify a range of values to limit the packing group numbers to include in the selection of orders available for pick confirm.

From/To Picker Number (6,0): Specify a range of values to limit the picker numbers to include in the selection of orders available for pick confirm.

From/To Pick Suffix (3,0): Specify a range of values to limit the pick suffixes to include in the selection of orders available for pick confirm.

From/To Route (6,A): Specify a range of values to limit the routes to include in the selection of orders available for pick confirm.

From/To Carrier (6,A): Specify a range of values to limit the carriers to include in the selection of orders available for pick confirm.

From/To Request Date (6,0): Specify a range of values to limit the request dates to include in the selection of orders available for pick confirm.

Both fields must contain valid dates.

From/To Ship Date (6,0): Specify a range of values to limit the ship dates to include in the selection of orders available for pick confirm.

Both fields must contain valid dates.

From/To Customer Number (8,0): Specify a range of values to limit the customer numbers to include in the selection of orders available for pick confirm.

From /To Ship-To Number (4,0): Specify a range of values to limit the ship-to numbers to include in the selection of orders available for pick confirm.

From/To Back Order Code (1,0): Specify a range of values to limit the backorder codes to include in the selection of orders available for pick confirm.

Backorder codes are defined as follows:

0

Any order or order line may be backordered for this customer. May be picked by order or by line. Pick slips are printed for all items, even if the allocated quantity is 0, if configured to do so.

1

No backordering allowed for this customer. All order lines must be allocatable. May be pick released by order or by line to allow partial picks to the staging location. In Pick Confirmation, all lines of the order must be selected and must be complete (fully allocated and fully confirmed) or Infor LX automatically de-selects the order and performs no processing. Partially allocated quantities remain, and all lines of the order remain in their existing statuses. Allocations or inventory confirmation must be performed at the line level during Pick Confirm.

2

Ship any completely allocatable lines. Infor LX backorders only incomplete lines selected for processing in Pick Confirm. May be picked by order or by line. Incomplete lines processed in Pick Confirm are backordered. Full or partial allocations remain.

3

Ship any complete lines, cancel incomplete order lines, and consider the order complete. Can Pick Release by order or by line in varying quantities for different lines. Infor LX cancels only incomplete lines selected for processing in Pick Confirm. Can Pick Confirm by line or by order. If you Pick Confirm by order, Infor LX cancels only the incomplete lines that are ready for Pick Confirm.

4

Ship available inventory, cancel remainder of partial lines, and consider the order line complete. You can Pick Confirm by order. Remaining selected partial lines are canceled during Pick Confirm in this application.

Consolidate (1,0): Specify Yes to consolidate this order or order line, otherwise specify No. If you choose to consolidate orders or order lines, Infor LX assigns a consolidation number to all selected order lines. Consolidation numbers are incremented from a counter in Order Entry System Parameters, ORD820D.

Consolidation Number: If you choose to consolidate orders or order lines, Infor LX displays the new consolidation number.

Screen actions - ORD570D1-01

Commands	Description
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify additional pick confirmation selection options

Use the second Pick Confirmation Selection Filter screen, ORD570D1-02, to specify additional pick confirmation options.

Field descriptions - ORD570D1-02

Fields	Description
User ID (10,A):	Specify a user identification number to pick confirm orders entered by a specific user.
Allocated Orders Only (1,0):	Specify Yes to limit the records to pick release to order lines that are already allocated or do not require allocations. Specify No if you do not want to limit pick release to allocated orders. Allocated lines are selected under the following conditions: The order line requires allocations and the allocated quantity is greater than zero or The order line does not require allocations.
Confirmation Date (8,0):	Specify the date you want to apply to the selected pick confirmations. If you have the Time Zone Conversion system parameter set to 0=No or 1=Corporate Clock, Infor LX displays the system date as the default. If you have that parameter set to 2=Regional Clock, it converts the current system date with the default time to the equivalent date for the warehouse and uses that value as the default. Regardless of the source of the default value in this field, or whether you retain the default or override it, the program stores this date exactly as it appears

on the screen when you write the record. No conversion occurs. Infor ERP LX uses this value as the confirmation date to build Inventory History Transaction records, ITH.

Include Auto Ship Confirm Orders (1,A):	Specify Yes to select Auto Ship Confirm Orders for processing. These are orders with Base Order Class 015 and 020. Otherwise, specify No.
Use Load Consolidation and Invoice Preassignment Options (1,A):	Specify whether this Pick Confirm job should use Load Build Policy and Invoice Preassignment options when creating new loads during Pick Confirm. Normally these options apply only when creating new loads during Pick Release. If 0=NO, OLM571B creates new loads in the normal manner. There is no Invoice Preassignment function. If 1=YES, OLM579B is called to create loads using the applicable Load Build Policy code for each order, and may consolidate orders or lines from different orders onto a single load. Also, loads built by OLM579B retrieve the applicable Invoice Preassignment flag, and may preassign invoice numbers to new loads generated during the Pick Confirm jobstream. This field is displayed only if OLM is installed.
Print Run Parameter (1,0):	Specify Yes to print this document interactively. Specify No print in batch mode.

Screen actions - ORD570D1-02

Commands	Description
F6=Accept	Accept the pick confirm filters you set on this screen and return to the Pick Confirmation Selection Filter screen.
F14=Confirm Orders	Access Pick Confirmation by Order, ORD570D3-01, to view all orders available for confirmation that meet the selection criteria.
F15=Confirm Lines	Access Pick Confirm by Line, ORD570D2-01, to view all orders lines available for confirmation that meet the selection criteria.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F19=Confirm by Pick	Access Pick Confirm by Pick Number, ORD570D7-01, to view all the picker numbers available for confirmation within the specified limits. You can confirm lines in this screen.

F20=Pick Confirm Load Gen Override	Access Pick Confirm Load Gen Override screen, ORD570D1-03, to override load generation values.
F22=Orders Not Selected Rpt	Print the Orders Not Selected Report, ORD952B, which produces a listing of orders that qualified for selection but were excluded because the In Use flag was on, or the order had a credit, margin, user, or customer hold.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Override load generation values

The Pick Confirm Load Gen Override screen, ORD570D1-03, allows you to override load generation values or provide details to update the load to generate. Infor LX uses this information to update load details in the Outbound Logistics Management application. This screen is only available if you have OLM installed.

Field descriptions - ORD570D1-03

Fields	Description
Carrier (6,A):	Specify the transportation carrier code for the carrier to deliver this order.
Means of Transportation (4,A):	Specify the code for the means of transportation that is used for shipments to this customer ship-to location. You can maintain the means of transportation codes in the Means Of Transportation Maintenance program, OLM110D.
AETC Authorization (30,A):	Specify the customer-supplied Alternate Emergency Transport Code (AETC), which ensures acceptance of this shipment. If you specify a value, the program uses it to update the AETC Authorization field for the first load Infor LX generates. All other loads are generated with blanks.
AETC Reason Code (2,A):	Specify the locally defined Alternate Emergency Transport Code that indicates the reason for requesting special or emergency transportation for the load. If you specify a value, the program uses it to update the AETC Reason Code field for the first load Infor LX generates. All other loads are generated with blanks.
AETC Responsibility (1,A):	Specify the locally defined code that indicates the entity responsible to pay any additional transport costs incurred by this use of emergency transport. If you specify a value, the program uses it to update the AETC Responsibility field for the first load Infor LX generates. All other loads are generated with blanks.

Seal Number (30,A):	Specify the Seal Number the customer issued for shipment security purposes. If you specify a value, it is used to update the Seal Number field for the first load Infor LX generates. All other loads are generated with blanks.
Airbill Number (35,A):	Specify the Airbill Number to associate with the load Infor LX generates. If you specify a value, the program uses it to update the Airbill Number field for the first load Infor LX generates. All other loads are generated with blanks.
Trailer Initials (4,A):	Specify the alphanumeric code that further identifies the equipment.
Trailer Serial Number (20,A):	Specify the serial identifier of the trailer. If you specify a value, the program uses it to update the Trailer Serial Number field for the first load that Infor LX generates. All other loads are generated with blanks.
Supplier (17,A):	Specify the Supplier code for this customer. If you specify a value, the program uses it to update the Supplier field for the first load Infor LX generates. All other loads are generated with blanks.
Pool/Location (10,A):	Specify the Pool Point Location to associate with the load Infor LX generates. If you specify a value, the program uses it to update the Pool Point Location field for the first load Infor LX generates. All other loads are generated with blanks.
Working License Number (10,A):	Specify a working license number, if available. This field is not validated.

Screen actions - ORD570D1-03

Commands	**Description**
F6=Accept	Validate and accept the override information you enter and return to the Pick Release Selection Options screen, ORD570D1-02.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick confirm by order line

Use the Pick Confirm by Line screen, ORD570D2-01, to view all picked order lines that meet the selection criteria and pick confirm them selectively.

In the header fields Infor LX displays the warehouse code, consolidation number, route, carrier, customer, ship-to numbers, request dates, order numbers, and backorder code ranges you selected on the Pick Confirmation Selection Filter screen.

Special Considerations

Process customer orders that include Features and Options item type 5 through Final Assembly (FAS) and confirm them in line mode for the parent item.

If you set the Packaging Required flag to Yes in the Address Master Shipping Policy screen, ORD100D2-04, Infor LX searches for Load Carton Header and Line information, LCH and LLC files, created during the load generation process in Outbound Logistics Management. Infor LX creates these records only if you set the Auto Create Packaging flag to Yes in the Address Master-Shipping Policy screen. You must have OLM installed for the packaging flags to be meaningful.

Infor LX excludes orders with base order class 015 and 020 from pick confirm processing unless you set the Include Auto Ship Confirm Orders flag on the Pick Confirmations Selection Filter, ORD570D1-02, to 1=Yes.

The Scanned Shipment file, ISS, is used with DWM items to store scanned product information, because customers often scan items as they load them into a truck. DWM customers often do not allocate stock because they move product directly off the production line into a truck for shipping. They tell the system what they picked, rather than pick what the system tells them.

If you allocate dynamic DWM items during the pick release process, the system assumes the weight or other defined dual measure unit for DWM dynamic items to be the average actual dual measure value from the Item Master record. The system uses this until it can determine the actual picked item's dual measure value from the scanned information in the Scanned Shipment file. DWM standard items always use the standard dual measure value from the Item Master and do not require an entry. However, the system uses allocations, not the ISS file, to relieve inventory balances and the allocated weight is based on an assumed average, not the actual dual measure value of the picked item. The Allocations file, ELA, and the Scanned Shipment file must match one another to ensure that what is on the truck is what is relieved from inventory, based on the allocations file. If all other data (warehouse, location, quantity, lot, and container) match in the two files except the dual measure value, the value from the ISS overrides the value in the ELA. If these two files do not match in all other data, you get error messages.

From pick confirm, you can use line action 19=DWM Maint to access the records in the scanned shipment (ISS) file from pick confirm.

PLC considerations

If you are using the Product Lifecycle Control code feature, warning and/or error messages will be presented if the item, item/warehouse or item/facility is set up to restrict shipments. For resupply orders, both the From and To warehouses are checked for PLC restrictions, therefore, it is possible to have two PLC messages presented for the same order line.

Field descriptions - ORD570D2-01

Fields	Description
Weight:	Infor LX calculates the total weight for the selected order lines. Weight is calculated as the weight specified for this item in Item Master Maintenance multiplied by the confirmed quantity.

For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line that you process on this screen.

Volume:

Infor LX calculates the total volume for the selected order lines. Volume is calculated as the volume specified for this item in IDF Enterprise Item, multiplied by the confirmed quantity.

For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.

Pallet:

This field name displays as Units if you select a managed warehouse. Infor LX calculates the total pallets for all selected orders if you select by order or all selected line items if you select by order line. Infor LX uses order information from the Item Master file for regular warehouses and from the Item Warehouse file for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Note that the calculated totals include kit parent items and Features and Options components. Kit components and FAS parent lines are excluded from calculations.

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.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

Order (9,0): Infor LX displays the order number for each line.

Customer (8,0): Infor LX displays the sold-to customer number for each order line.

Ship To: Infor LX displays the ship-to number for each order line.

Line (4,0): Infor LX displays the order line number for each record.

Request (8,0): Infor LX displays the request date for each line.

Item Number (35,A): Infor LX displays the item number for each line.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

Unit of Measure: Infor LX displays the stocking unit of measure for each item. You can view the selling unit of measure on the Order Line Detail window.

Shipping Group Code: Infor LX displays the shipping group code for each record. Infor LX performs pick confirmation on order lines that have the same group code only if all the lines on that order are selected for pick confirm, and all those lines can be successfully pick confirmed. Otherwise, Infor LX does not pick confirm any line on the order.

Confirm Qty (11,3): Infor LX displays the original quantity ordered unless the line is partially shipped. For partially shipped lines, the field displays the remaining quantity. You can override this value.

The maximum quantity that you can confirm is the allocated quantity for this line. For a regular warehouse, you can specify a confirmation quantity greater than the quantity allocated. If you do this, Infor LX displays the Customer Order Allocations screen to allow you to perform additional allocations. You cannot change the confirmation quantity after the line is selected. Deselect the confirmed line, then change the value. This field is not available for sequenced order lines.

If the quantity to confirm is zero, the order line is already on a load, and the line must be backordered, the order class determines whether the order line remains on that load or is removed. For order classes which have a ship confirm event (base order classes 002 and 005), the order line confirmed at zero remains on the load and must be removed manually. For order classes which have no ship confirm event (base order classes 001 and 004), the backordered line is automatically removed from the load. For all RMS order lines (base order class 010), backordered lines are removed from the load.

For more information about entering a confirmed quantity, refer to the following Confirmed Quantity topic below.

Confirmed Quantity

Partial Shipments - To accomplish a partial shipment, decrease the confirmed quantity of order lines before you select them. The quantity must remain greater than zero. Then select the line to update the weight, volume, and pallet quantities based on the confirm quantity. Backorder/cancellation logic applies to the unconfirmed remainder, based on the backorder and drop codes for the order line.

Multiple Pick Slips - If multiple, active pick slips exist for the order line, the Pick Confirm by Picker Number screen displays when you decrease the confirmed quantity. This screen shows all the partial pick (IPP) records for the selected order line. Use this screen to allocate the short quantity among the several partial picks. Only unique picker numbers display. If an order line is assigned to more than one picker number, it is not displayed on ORD570D7 and must be confirmed by order or by line. A record displays for selection only if there is a single picker for a given order line.

Overshipments - To accomplish an overshipment in a regular warehouse, increase the confirmed quantity of order lines before you select them. If allocations are required, or if allocations already exist, the Customer Order Allocation Detail screen, ORD720D2-01, appears. You must manually create allocations for the additional quantity. You can make allocations to any defined allocatable location in the requesting warehouse. This requirement applies to regular and managed warehouses. Negative stock levels can exist in a regular (non-managed) warehouse only. If allocations are not required and no allocations exist, the ORD570D5-01 screen appears as usual, and you can specify locations and quantities from which inventory has been taken. Overshipment is not allowed for kits.

Resupply Orders - For resupply orders, Infor LX updates the ordered quantity to the over-confirmed quantity, but the original ordered quantity is not affected by the over-confirmation. If you confirm a container-controlled item on a resupply order with an in-transit warehouse, you must process the full quantity in that container.

Kits - If you specify a confirm quantity for a kit parent, inventory for the kit parent ships from the location/lot/container and quantity you specified, regardless of stocking levels for the parent item. You can validate the parent or component inventory levels or issue transactions for kit components, in two ways. You can perform batch or manual allocations for the kit parent items, or you can select the Allocation Required field in Item Master Maintenance (INV) or Item/Facility Data Maintenance (MRP/DRP). Kit component lines cannot have separate confirm quantities. We recommend that you require allocations for kit parent items in the Item Master.

Features and Options - If you specify a confirm quantity for a Features and Options parent item, inventory for the parent ships from the location/lot/container in the quantity you specified, regardless of stocking levels for the parent item. If you want to validate the parent or component inventory levels with resulting issue transactions for component items or creation of parent items, perform manual allocations for Features and Options parent items and include the receipt to the parent as part of the component issue transaction when you post in Inventory Transactions, INV500. You can also select the Allocation Required field in Item Master Maintenance (INV)or Item/Facility Data Maintenance (MRP/DRP). Features and Options component lines cannot have separate confirm quantities. We recommend that you require allocations for Features and Options parent items in the Item Master.

Sequenced Warehouses - Sequenced warehouses are, by default, non-allocatable. Therefore, you cannot pick confirm sequenced order lines from this screen. Use the Pick Confirm by Picker screen, ORD570D7-01, to pick confirm sequenced order lines.

Drp (Drop code) (1,A): Infor LX displays the drop code for each order line. This code defines the disposition of any remaining quantity after a partial confirmation. This value defaults from the Customer Order Line Items file, but you can override it here. Infor LX ignores drop code overrides unless the Back Order Code is 0. If the Drop Code is set to Y, the program drops or cancels any remaining quantity during Pick Confirm processing. If the Drop Code is set to N, Infor LX backorders any remaining quantity.

Status (5,A): This field displays the shipping status for each line selected for shipping. Infor LX displays selected lines with an asterisk (*). Previously selected records that you de-selected are indicated with a hyphen (-). Unselected records are blank. Partially confirmed records are indicated with an X.

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.

10=Order Detail

Access the Pick Confirm Order Detail screen to view order detail information.

11=Confirm

Add the selected order line to the records waiting to be processed for pick confirm. Infor LX adds the weight and volume for this order line to the Weight and Volume totals displayed at the top of the screen. The order line status changes from blank to an asterisk, which indicates that it is selected.

Infor LX cannot confirm order lines where the pack quantity does not equal the allocated quantity or where pack mismatches exist.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

12=Allocate

Allocate a picked order line. This option is not available for sequenced warehouses, which by default are non-allocatable.

13=De-Select

Remove the selected order line from the list of previously selected lines. Infor LX updates the status and the weight, volume, and pallet totals.

15=Lock Allocation

Lock the order line against further batch allocations. If you exit the screen without processing, Infor LX still retains the changes you made to the lock allocation field.

16=Unlock

Unlock the order line for further batch allocations. If you exit the screen without processing, Infor LX still retains the changes you made to the lock allocation field.

18=Line Detail

Access the Order Line Detail screen, ORD372D, to view line detail information.

19=DWM Maint

Call Dynamic Weights and Measures Maintenance,ORD727D-01, to access the records of DWM dynamic items in the Scanned Shipments file from pick confirm.

20=Pack Details

Access Load Line Carton Selection, OLM522D3-01, to select load line cartons.

21=Quantity Detail

Access the Order Line Quantity Detail screen, ORD373D, to view order line quantity detail information.

22=Consignment List

Access the Consignment List screen, ORD374D-01, to view consignment information.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

24=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

25=Load Retention Options

Access the Load Retention Options screen, OLM574D-01, to view the load retention options. You can override system settings for deleting load lines if zero quantity is confirmed from this screen.

26=ASN Details

Added: *MR77783 Added the new screen action access the ASN Details*

If the selected order line is on a load, you can access the ASN Details panel (OLM525D-01) in Load Maintenance to update shipment references such as ASN Number, PRO Number or license plate. You can also use this option to identify a load number.

If the requested order line is not on an open load, the user remains on the Pick Confirm panel.

27=Load Maintenance

Access Load Maintenance, OLM510D1-01, to create a load or to view and maintain an existing load. This action code is available if OLM is installed.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD570D2-01

Commands	Description
F6=Accept	Accept the values entered on this screen. Order lines selected for confirmation are confirmed.
F14=Confirm All	Select all displayed order lines for pick confirm. Infor LX adds the weight and volume for this order line to the Weight and Volume totals displayed at the top of the screen. Order lines whose pack quantity does not equal the allocated quantity or where pack mismatches exist cannot be pick confirmed.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.

F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F22=Validate Packaging	Validate packaging. Infor LX checks the allocated and pack quantities for the records you select. If the quantities differ, Infor LX displays the Packaging Exceptions screen, OLM526D. You can view all records with exceptions and correct the differences. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick confirm by order

Use the Pick Confirm by Order screen, ORD570D3-01, to pick confirm individual orders, view additional information about them, or pick confirm all orders that meet the selection criteria you specify on the selection screens.

The screen displays the warehouse code, consolidation number, order number, backorder code, route, carrier, customer, ship-to, and request date ranges you selected on screen ORD570D1-01.

Packaging Consideration

If you set the Packaging Required flag to Yes in the Address Master Shipping Policy screen, ORD100D2-04, Infor LX searches for Load Carton Header and Line information, LCH and LLC files, that was created during the load generation process in Outbound Logistics Management. Infor LX creates these records only if you set the Auto Create Packaging flag to Yes in the Address Master-Shipping Policy screen. You must have OLM installed for the packaging flags to be meaningful.

PLC considerations

If you are using the Product Lifecycle Control code feature, warning and/or error messages will be presented if the item, item/warehouse or item/facility is set up to restrict shipments. For resupply orders, both the From and To warehouses are checked for PLC restrictions, therefore, it is possible to have two PLC messages presented for the same order line.

Field descriptions - ORD570D3-01

Fields	Description
Weight:	Infor LX calculates the total weight for this order. Weight is calculated as the weight specified for all items picked or confirmed for this order, as defined in Item Master Maintenance, multiplied by the remaining order quantity for each item.
Volume:	Infor LX calculates the total volume for this order. Volume is calculated as the volume specified for all items picked or confirmed for this order, as defined

in Item Master Maintenance, multiplied by the remaining order quantity for each item.

For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.

Pallet: This field name displays as Units if you select a managed warehouse. Infor LX calculates the total pallets for all selected orders if you select by order or all selected line items if you select by order line. Infor LX uses order information from the Item Master file for regular warehouses and from the Item Warehouse file for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.

Note that the calculated totals include kit parent items and Features and Options components. Kit components and FAS parent lines are excluded from calculations.

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.

Order (9,0): Infor LX displays the order number if at least one line on the order is eligible for pick confirm.

Customer (8,0): Infor LX displays the sold-to customer number for each order line.

Ship-To (4,0): Infor LX displays the ship-to number for each order line.

Request Date (8,0): Infor LX displays the request date for each order line.

BO (Back Order Code): Infor LX displays the backorder code for each record.

PR (Allocation Priority): Infor LX displays the allocation priority code for the first selected line of the order. This value defaults from the Customer Order Line Items, ECL file.

Lines (4,0): Infor LX displays the line number of order lines that are available to confirm.

Order Qty (11,3): Infor LX calculates the remaining order quantity for this order as you process pick confirmations.

Confirm Qty (11,3): Infor LX calculates the confirm quantity for this order as you process pick confirmations. The confirmation quantity equals the quantity allocated for all order lines available for confirmation for this order.

Status (5,A): This field displays the shipping status for each line selected for shipping. Infor LX displays selected lines with an asterisk (*). Previously selected records that you de-selected are indicated with a hyphen (-). Unselected records are blank. Partially confirmed records are indicated with an X.

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.

10=Order Detail

Access the Pick Confirm Order Detail screen to view order detail information.

11=Confirm

Add the selected order line to the records waiting for pick confirm processing. Infor LX adds the weight and volume for this order line to the Weight and Volume totals displayed at the top of the screen. The order line status changes from PICK to CONF.

Infor LX cannot confirm order lines if the pack quantity does not equal the allocated quantity or if pack mismatches exist.

12=Adjust

Access the Pick Confirm by Line screen, ORD570D2-01, to allocate order lines for the selected order, or to view line details.

13=De-Select

Remove the selected order line from the list of previously selected lines. Infor LX updates the status and the weight, volume, and pallet totals.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

27=Load Maintenance

Access Load Maintenance, OLM510D1-01, to create a load or to view and maintain an existing load. This action code is available if OLM is installed.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD570D3-01

Commands	Description
F6=Accept	Accept the values entered on this screen. Order lines selected for confirmation are confirmed.
F14=Confirm All	Select all displayed order lines for pick confirm. Infor LX adds the weight and volume for this order line to the Weight and Volume totals displayed at the top of the screen. Order lines whose pack quantity does not equal the allocated quantity or where pack mismatches exist cannot be pick confirmed.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F22=Validate Packaging	Validate packaging. Infor LX checks the allocated and pack quantities for the records you select. If the quantities differ, Infor LX displays the Packaging Exceptions screen, OLM526D. You can view all records with exceptions and correct the differences. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick confirm unallocated lines with inventory confirmation

The Pick Confirm Inventory Confirmation screen, ORD570D5-01, displays all order lines you selected for confirmation for which no allocation is required and no allocation exists. You can enter location, lot, container, and confirm quantity information for each order line to complete a shipment. After you accept the entries on this screen, Infor LX reduces the inventory and builds B shipment transactions in the Inventory History Transaction, ITH.

If you require more than one location, lot, or container for picking, use the Inventory Confirmation Detail screen, ORD570D6-01, to confirm quantities from additional locations, lots, or containers.

For DWM Items, a dual unit of measure field <Weight> complements the quantity fields. Scanned Shipment records default from the Scanned Shipments file, ISS, into this screen for inventory confirmation. The screen only appears in the confirmation process for DWM items under the following circumstances:

The Allocations Required flag in the Item Master is set to No.

No allocations were created prior to Pick Confirm.

ISS records exist.

This screen appears if the user selects the Confirm action on the Pick Confirm by Line screen to confirm a line, next uses F6=Accept. Infor LX displays the Scanned Shipment record, which you can maintain with line action 19, DWM Maintenance. If you accept the current Scanned Shipment record, Infor LX copies it to allocations and uses it to relieve inventory.

Note that non-inventory items (Item Type 6), special lines, and lines of orders which do not affect inventory (Base Order Type 5, 6, 7 or 8) are never eligible for display or processing on Inventory Confirmation screens.

Field descriptions - ORD570D5-01

Fields	Description
Order:	Infor LX displays the order numbers that are eligible for pick confirmation.
Line:	Infor LX displays the order line numbers that are eligible for pick confirmation. These order lines do not require allocations and no allocations currently exist.
Item:	For each order line, Infor LX displays the item number to allocate.
Back Order Code:	Infor LX displays the backorder code for each order line.
Drop Code:	This option displays the drop code for each order line from the Pick Confirm by Line screen.
Confirm Quantity (11,3):	Specify the quantity eligible for confirmation. The default value is the quantity to confirm from the Pick Confirm by Line screen. For post-ship orders, the quantity to confirm is the ordered quantity. If you decrease the confirm quantity, the order line splits and the system processes only the confirm quantity. Only that confirmed portion of the ordered quantity is then eligible for the next order event.
<Weight> (11,4):	If you have Dynamic Weights and Measures functionality activated in your environment (Order Entry System Parameters) and this is a DWM item, this field displays the dual unit of measure value from the Scanned Shipments file. This value is equivalent to the quantity that is eligible for confirmation. You can maintain the ISS record with action 19=DWM Maint on the order line.
Location (10,A):	If the full confirm quantity is available from this single location, specify a valid location in this warehouse. If the full confirm quantity must be shipped from multiple locations in this warehouse, you must select the order line and specify Multiple to display the Inventory Confirmation Detail screen, ORD570D6-01. You can use the Inventory Confirmation screen to select inventory from multiple locations, lots, and containers.

When you return from the Inventory Confirmation Detail screen, this field shows *MULT to indicate that shipments have occurred or will occur from multiple locations/lots/containers. *MULT is displayed if the last allocation sequence number for the order and line number is greater than 1.

Lot/QMS (25,A):

If the full confirm quantity is available in a single location and lot or QMS sequence number, you can enter the lot or QMS sequence number. If the Confirm Quantity is required from more than one lot/QMS sequence number or location, you must specify Multiple and select inventory from multiple lots or QMS sequence numbers on the Inventory Confirmation Detail screen.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment and this is an item under QMS processing.

Container (10,A):

If the full confirm quantity is available in a single location and container (or from a single location, lot, and container if the item is both lot controlled and container controlled), specify the container ID. If the confirm quantity is required from more than one container, you must choose Multiple and select inventory from multiple containers on the Inventory Confirmation Detail screen.

Status:

Infor LX displays selected records with an asterisk (*). Previously selected records that you de-selected are indicated with a hyphen (-). Unselected records are blank. Partially confirmed records are indicated with an X.

All records are automatically selected when you open this screen. You can de-select and re-select records.

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.

10=Order Detail

Access the Order Detail screen to view order detail information.

11=Multiple

Access the Inventory Confirmation Detail screen, ORD570D6-01, to confirm multiple quantities of inventory.

18=Line Detail

Access the Order Line Detail screen to view line detail information.

19=DWM Maint

Call Dynamic Weights and Measures Maintenance,ORD727D-01, to access the records of DWM dynamic items in the Scanned Shipments file from pick confirm.

21=Quantity Detail

Access the Order Line Quantity Detail screen to view order line quantity detail information.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD570D5-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify inventory quantities from multiple locations

Use the Inventory Confirmation Detail screen, ORD570D6-01, to enter additional inventory quantities for an order line if shipments are required from more than one location, lot or QMS sequence number, or container. This screen also appears automatically if you enter post-ship order lines that do not require allocations and do not have existing allocations.

Use the Customer Order Allocations/Inquiry program, ORD720, to manually perform optional allocations for order lines that do not require allocations, and for required allocations where the confirm quantity exceeds the allocated quantity.

Field descriptions - ORD570D6-01

Fields	Description
Order:	Infor LX displays the order number you selected on the previous screen.
Line:	Infor LX displays the order line number you selected on the previous screen.
Warehouse:	Infor LX displays the warehouse code you selected on the previous screen.

Item: Infor LX displays the item number and description you selected on the previous screen.

BO (Backorder Code): Infor LX displays the backorder code that applies to this order line.

Ordered: Infor LX displays the original order quantity for the selected item.

Qty to Allocate: Infor LX displays the quantity of this item to allocate.

Remaining: Infor LX calculates the remaining quantity of the item that is available to confirm. The Remaining Quantity to Confirm = Ordered Quantity - Shipped Quantity - Quantity Allocated. As the program validates each line, the remaining quantity to confirm decreases by the confirmed quantity. You can get a negative value if you over-ship or over-confirm.

Lot/QMS Sequence (25,A): Specify the lot from which shipments are made. This option displays only for items which are lot-controlled items or non-lot-controlled QMS items for which QMS processing is not yet complete.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment and this is an item under QMS processing.

Status: Infor LX displays the status of this lot. Valid statuses are active and inactive.

Location (10,A): Specify the location from which shipments are made.

Shipping Group Code: Infor LX displays the shipping group code for each record. Infor LX performs pick confirmation on order lines that have the same Group Code only if all the lines on that order are selected for pick confirm, and all those lines can be successfully pick confirmed. Otherwise, Infor LX does not pick confirm any line on the order.

Container (10,A): Specify the container from which shipments are made. This option displays for container-controlled items only.

Available: Infor LX displays the quantity from this lot available for confirmation.

Confirm Qty (11,3): Specify the quantity of the item that you want to confirm. When you enter and validate these quantities, the remaining Quantity to Confirm option decreases.

If you confirm a container-controlled item on a resupply order with an in-transit warehouse, the full quantity in the container must be processed. In other words, the confirm quantity for each container must equal the on-hand balance for that container.

<Weight> (11,4): If you have Dynamic Weights and Measures functionality activated in your environment (Order Entry System Parameters) and this is a DWM item, this

	field displays the dual unit of measure value from the Scanned Shipments file. This value is equivalent to the quantity that is eligible for confirmation.
Allocated:	Infor LX displays the quantity in this lot that is allocated.
On Hand:	Infor LX displays the on-hand quantity of this item.
Lot Expiration Date:	Infor LX displays the lot expiration date if the item is lot-controlled. You can ship inventory from expired lots, but you may see error and warning messages.
Lot QA Date:	Infor LX displays the date on which quality assurance was performed on this lot.
Lot Status:	Infor LX displays the status of this lot, active or inactive.
Lot Potency:	Infor LX displays the potency code associated with this lot.
Lot Reference:	Infor LX displays the reference code associated with this lot.

Screen actions - ORD570D6-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View and confirm picking information by picker number

Use the Pick Confirm by Pick Number screen, ORD570D7-01, to confirm shipments that are based on the quantities that warehouse personnel enter using the picking documents. Infor LX displays the warehouse code, consolidation number, picker number, route, carrier, customer, ship-to numbers, request dates, order numbers, and backorder code ranges you selected on the initial screen.

Orders with no backorders allowed do not display and are not processed on this screen.

PLC considerations

If you are using the Product Lifecycle Control code feature, warning and/or error messages will be presented if the item, item/warehouse or item/facility is set up to restrict shipments. For resupply orders, both the From and To warehouses are checked for PLC restrictions, therefore, it is possible to have two PLC messages presented for the same order line.

Field descriptions - ORD570D7-01

Fields	Description
Weight:	Infor LX displays the total weight for the selected order lines. Weight is calculated as the weight specified for this item in Item Master Maintenance multiplied by the confirmed quantity. For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.
Volume:	Infor LX calculates the total volume for the selected order lines. Volume is calculated as the volume specified for this item in IDF Enterprise Item, multiplied by the confirmed quantity. For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.
Pallet:	This field name displays as Units if you select a managed warehouse. Infor LX calculates the total pallets for all selected orders if you select by order or all selected line items if you select by order line. Infor LX uses order information from the Item Master file for regular warehouses and from the Item Warehouse file for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded.
Picker Number:	Infor LX displays a list of picker numbers for lines available for confirmation. Note that the key structure is warehouse plus picker number.
Order Number:	Infor LX displays the order number for each record.
Line Number:	Infor LX displays the order line number for each record.
Item Number:	Infor LX displays the item number for each record. View the item description on the Item Detail screen. For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.
Back Order Code:	Infor LX displays the backorder code for each record.

Shipping Group Code: Infor LX displays the shipping group code for each record. Infor LX performs pick confirmation on order lines that have the same Group Code only if all the lines on that order are selected for pick confirm, and all those lines can be successfully pick confirmed. Otherwise, Infor LX does not pick confirm any line on the order.

Drop Code (1,A): Infor LX displays the drop code for each line. You can view the drop code description on the Item Detail screen. To override this value, specify a different drop code.

Qty to Confirm: Infor LX displays the original pick quantity from the Picking Work file, IPP. This value represents the quantity eligible for confirmation.

Confirm Qty (11,3): Infor LX displays the original quantity ordered unless the line is partially shipped. If this is the case, Infor LX displays the remaining quantity not shipped. You can override this value.

The maximum quantity that you can confirm is the allocated quantity for this line. If you specify a confirmation quantity greater than the quantity allocated, Infor LX displays the Customer Order Allocations screen, where you can perform additional allocations.

You cannot change the confirmation quantity after the line is selected. De-select the confirmed line, then change the value.

If the quantity to confirm is zero, the order line is already on a load, and the line must be backordered, the order class governs whether the order line remains on that load or is removed. For order classes that have a ship confirm event (base order classes 002, 005, and 015), the order line confirmed at zero remains on the load and must be removed manually. For order classes that have no ship confirm event (base order classes 001 and 004), the back-ordered line is automatically removed from the load. For all RMS orders (base order class 010 and 020), lines are removed from the load.

This field is not available for sequenced order lines.

Sts (Status): Infor LX displays selected records with an asterisk (*). Previously selected records that have been de-selected are indicated with a hyphen (-). Unselected records are blank. Partially confirmed records are indicated with an X.

Line actions The following line actions are available:

10=Order Detail

Access the Order Detail screen to view order detail information.

11=Confirm

Add the selected order line to the records waiting to processed for pick confirm. Infor LX adds the weight and volume for this order to the Weight and Volume totals displayed at the top of the screen. The order status changes to * (selected).

Infor LX cannot confirm order lines where the pack quantity does not equal the allocated quantity or where pack mismatches exist.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

12=Allocate

Allocate an order line. Infor LX does not allocate sequenced warehouse order lines, which by default are non-allocatable.

13=De-Select

De-select a picked order line. Infor LX updates the status and the weight and volume totals.

18=Line Detail

Access the Pick Confirm Order Line Detail screen to view order line detail information.

19=DWM Maint

Call Dynamic Weights and Measures Maintenance,ORD727D-01, to access the records of DWM dynamic items in the Scanned Shipments file from pick confirm.

20=Pack Details

Access Load Line Carton Selection, OLM522D3-01, to select load line cartons.

21=Quantity Detail

Access the Order Line Quantity Detail screen, ORD373D, to view order line quantity detail information.

22=Consignment List

Access the Consignment List screen, ORD374D-01, to view consignment information.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

24=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

25=Load Retention Options

Access the Load Retention Options screen, OLM574D-01, to view the load retention options. You can override system settings for deleting load lines if zero quantity is confirmed from this screen.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

26=ASN Details

Added: *MR77783 Added the new screen action access the ASN Details*

If the selected order line is on a load, you can access the ASN Details panel (OLM525D-01) in Load Maintenance to update shipment references such as ASN Number, PRO Number or license plate. You can also use this option to identify a load number.

If the requested order line is not on an open load, the user remains on the Pick Confirm panel.

27=Load Maintenance

Access Load Maintenance, OLM510D1-01, to create a load or to view and maintain an existing load. This action code is available if OLM is installed.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD570D7-01

Commands	Description
F6=Accept	Accept the values entered on this screen. Order lines selected for confirmation are confirmed.
F14=Confirm All	Select all displayed orders for pick confirm.

F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F22=Validate Packaging	Validate packaging. Infor LX checks the allocated and pack quantities for the records you select. If the quantities differ, Infor LX displays the Packaging Exceptions screen, OLM526D. You can view all records with exceptions and correct the differences.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick/ship confirm, ORD573D1

The Pick/Ship Confirm program, ORD573D1, allows you to select picked orders or order lines for the combined Pick/Ship confirm process.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Access: ORD menu

Select picked orders or order lines for pick/ship confirmation

The Pick/Ship Confirm Selection Range screen, ORD573D1-01, allows you to select picked orders or order lines that are available for Pick and Ship Confirm.

Note that you can enter overrides in the Carrier/Means/ASN Overrides program, OLM926D. Override values you enter are applied to the loads after pick confirm processing finishes. The system uses any override values in the validation for pick confirm selection. To prevent pick confirmation of loads that do not ship confirm, it applies load overrides to loads built during pick confirm and loads that existed prior to pick confirm. Loads that are created at pick confirm may not be selected for ship confirm if overrides have been applied.

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 - ORD573D1-01

Fields	Description
Warehouse (3,A):	Specify the warehouse code to select records for the pick/ship confirm process. Leave this field blank to include all warehouses.
Customer Order (9,0):	Specify a range of values to limit the customer orders to include in the selection available for pick/ship confirm.
Customer Order (9,0):	Specify a range of values to limit the customer orders to include in the selection available for pick/ship confirm.
Load Number (9,0):	Specify a range of values to limit the load numbers to include in the selection of orders available for pick/ship confirm. This field applies only if you have OLM installed.
Load Number (9,0):	Specify a range of values to limit the load numbers to include in the selection of orders available for pick/ship confirm. This field applies only if you have OLM installed.
Consignment Number (8,0):	Specify a range of values to limit the consignment numbers to include in the selection of orders available for pick/ship confirm. This field applies only if you have OLM installed.
Consignment Number (8,0):	Specify a range of values to limit the consignment numbers to include in the selection of orders available for pick/ship confirm. This field applies only if you have OLM installed.
Packing Group Number (8,0):	Specify a range of values to limit the packing group numbers to include in the selection of orders available for pick/ship confirm.
Packing Group (8,0):	Specify a range of values to limit the packing group numbers to include in the selection of orders available for pick/ship confirm.
Route (6,A):	Specify a range of values to limit the routes to include in the selection of orders available for pick/ship confirm.
Route (6,A):	Specify a range of values to limit the routes to include in the selection of orders available for pick/ship confirm.

Carrier (6,A): Specify a range of values to limit the carriers to include in the selection of orders available for pick/ship confirm.

Carrier (6,A): Specify a range of values to limit the carriers to include in the selection of orders available for pick/ship confirm.

Means (4,A): Specify a range of values to limit the means of transportation to include in the selection of orders available for pick/ship confirm.

Means (4,A): Specify a range of values to limit the means of transportation to include in the selection of orders available for pick/ship confirm.

Request Date (8,0): Specify a range of values to limit the request dates to include in the selection of orders available for pick/ship confirm.

Both fields must contain valid dates.

Request Date (8,0): Specify a range of values to limit the request dates to include in the selection of orders available for pick/ship confirm.

Both fields must contain valid dates.

Customer (8,0): Specify a range of values to limit the customer numbers to include in the selection of orders available for pick/ship confirm.

Customer (8,0): Specify a range of values to limit the customer numbers to include in the selection of orders available for pick/ship confirm.

Ship-to (4,0): Specify a range of values to limit the ship-to numbers to include in the selection of orders available for pick/ship confirm.

Ship-to (4,0): Specify a range of values to limit the ship-to numbers to include in the selection of orders available for pick/ship confirm.

Inbound Delivery Number (17,A): Specify a range of values to limit the inbound delivery numbers to include in the selection of order lines available for pick/ship confirm.

Inbound Delivery Number (17,A): Specify a range of values to limit the inbound delivery numbers to include in the selection of order lines available for pick/ship confirm.

Screen actions - ORD573D1-01

Commands	Description
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify additional pick/ship confirmation selection options

Use the Pick/Ship Confirm Selection Options screen, ORD573D1-02, to enter additional selection options for Pick/Ship Confirm processing.

Field descriptions - ORD573D1-02

Fields	Description
Confirmation Date (8,0):	Specify the date you want to apply to the selected pick confirmations. If you have the Time Zone Conversion system parameter set to 0=No or 1=Corporate Clock, Infor LX displays the system date as the default. If you have that parameter set to 2=Regional Clock, it converts the current system date with the default time to the equivalent date for the warehouse and uses that value as the default. Regardless of the source of the default value in this field, or whether you retain the default or override it, the program stores this date exactly as it appears on the screen when you write the record. No conversion occurs. Infor ERP LX uses this value as the confirmation date to build Inventory History Transaction records, ITH. If the Update Ship Date at Pick Confirm parameter in the OLM Freight Parameter Generation screen, OLM820D-01 is set to Yes, Infor LX uses this date to update the ship date of each load it processes by pick confirm.
Require freight calc before ship confirm (1,A):	Specify Yes to require freight calculation prior to ship confirmation. Otherwise, specify No. If you specify Yes, Infor LX only processes loads for which freight calculation has been performed.
Override Ship Date (1,A):	Specify Yes if the shipment to confirm was shipped on a different date from the current system date. The assumption is that ship confirm is performed on the same day as the shipment and the override allows you to confirm shipments that are already made. If you set this field to Yes, the ship date of each load that you ship confirm (or dispatch) is updated with the date in the New Ship Date field.
New Ship Date (8,0):	Specify the new ship date when you override the date to use as ship date to something other than the current system date. Use the new ship date when

	the pick confirmation and ship confirmation events occur on different dates. This field is required if you set Override Ship Date to Yes.
Print Run Parameter (1,A):	Specify Yes to print this document interactively. Specify No print in batch mode.

Screen actions - ORD573D1-02

Commands	Description
F15=Confirm Lines	Access Pick/Ship Confirm by Line, ORD573D2-01, to view all orders lines available for confirmation that meet the selection criteria.
F20=Carrier Override	Access the Carrier/Means/ASN Override screen, OLM926D, and enter values to override the system parameters.
F22=Orders Not Selected Rpt	Print the Orders Not Selected Report, ORD952B, which produces a listing of orders that qualified for selection but were excluded because the In Use flag was on, or the order had a credit, margin, user, or customer hold.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Pick/ship confirm by order line

Use F15=Confirm Lines on the selection screen to access the Pick/Ship Confirm by Line screen, ORD573D2-01, view all picked order lines that meet the selection criteria, and pick/ship confirm them selectively.

In the header fields, Infor LX displays the warehouse code, consolidation number, route, carrier, customer, ship-to numbers, request dates, order numbers, and backorder code ranges you selected on the Pick/Ship Confirm Selection Range screen, ORD573D1-01.

Special Considerations

Process customer orders that include Features and Options item type 5 through Final Assembly (FAS) and confirm them in line mode for the parent item.

If you have the Auto Create Packaging flag set to Yes in the Address Master Shipping Policy screen, ORD100D2-04, Infor LX searches for Load Carton Header and Line information, LCH and LLC files, created during the load generation process in Outbound Logistics Management. You must have OLM installed for the packaging flags to be meaningful.

Field descriptions - ORD573D2-01

Fields	Description
Weight:	Infor LX calculates the total weight for the selected order lines. It calculates weight as the weight specified for this item in Item Master Maintenance multiplied by the confirmed quantity. For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.
Volume:	Infor LX calculates the total volume for the selected order lines. It calculates volume as the volume specified for this item in IDF Enterprise Item, multiplied by the confirmed quantity. For managed warehouses, the weight and volume are based on the weight, volume (or length x width x height) and unit of measure figures that are defined for each item and warehouse in Item Warehouse Maintenance, WHM150D, multiplied by the Quantity to Confirm for each line you process on this screen.
Pallet:	This field name displays as Units if you select a managed warehouse. Infor LX calculates the total pallets for all selected orders if you select by order or all selected line items if you select by order line. Infor LX uses order information from the Item Master file for regular warehouses and from the Item Warehouse file for managed warehouses. Values for kits reflect parent item and quantity only. Kit component items are excluded. Note that the calculated totals include kit parent items and Features and Options components. Kit components and FAS parent lines are excluded from calculations.
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.
Order (9,0):	Infor LX displays the order number for each line.
Customer (8,0):	Infor LX displays the sold-to customer number for each order line.
Ship:	Infor LX displays the ship-to number for each order line.
Line (4,0):	Infor LX displays the order line number for each record.
Request (8,0):	Infor LX displays the request date for each line.

Item (35,A): Infor LX displays the item number for each line.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

Unit of Measure: Infor LX displays the stocking unit of measure for each item. You can view the selling unit of measure on the Order Line Detail screen.

Shipping Group Code: Infor LX displays the shipping group code for each record. Infor LX performs pick confirmation on order lines that have the same Group Code only if all the lines on that order are selected for pick confirm, and all those lines can be successfully pick confirmed. Otherwise, Infor LX does not pick confirm any line on the order.

Confirm Qty (11,3): Specify the quantity to confirm. For Pick/ship confirm this is restricted to the load quantity or zero. A zero confirmed line must be removed from the load in order for ship confirmation to complete. The load quantity is allowed to permit the partial shipping of an order line.

Drp (Drop code) (1,A): Infor LX displays the drop code for each order line. You cannot maintain this field because if you drop a line, it affects the associated load.

Status (5,A): This field displays the shipping status for each line selected for shipping. Infor LX displays selected lines with an asterisk (*). Previously selected records that you de-selected are indicated with a hyphen (-). Unselected records are blank. Partially confirmed records are indicated with an X.

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.

10=Order Detail

Access the Order Detail screen to view order detail information.

11=Confirm

Add the selected order line to the records waiting for pick/ship confirm processing. Infor LX adds the weight and volume for this order line to the Weight and Volume totals displayed at the top of the screen. The order line status changes from PICK to CONF.

Infor LX cannot confirm order lines where the pack quantity does not equal the allocated quantity or where pack mismatches exist.

For Product Lifecycle Control restrictions on a Resupply order, the Act field is highlighted for a From warehouse message. The Item Number field is highlighted for a To warehouse message.

12=Allocate

Allocate a picked order line. This option is not available for sequenced warehouses, which by default are non-allocatable.

13=De-Select

Remove the selected order line from the list of previously selected lines. Infor LX updates the status and the weight, and volume totals.

15=Lock Allocation

Lock the order line against further batch allocations. If you exit the screen without processing, Infor LX still retains the changes you made to the lock allocation field.

16=Unlock

Unlock the order line for further batch allocations. If you exit the screen without processing, Infor LX still retains the changes you made to the lock allocation field.

18=Line Detail

Access the Order Line Detail screen, ORD372D, to view line detail information.

20=Pack Details

Access Load Line Carton Selection, OLM522D3-01, to select load line cartons.

21=Quantity Detail

Access the Order Line Quantity Detail screen, ORD373D, to view order line quantity detail information.

22=Consignment List

Access the Consignment List screen, ORD374D-01, to view consignment information.

23=Order Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain order notes.

24=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

26=RMS Release Notes

Access the Notes Detail Maintenance screen, SYS181D3-01, screen to view RMS notes.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD573D2-01

Commands	Description
F6=Accept	Accept the values entered on this screen. Order lines selected for confirmation are confirmed.
F13=Filters	Access the Order Sequence Filter screen to specify a sorting sequence for the lines.
F17=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F18=Open Order Inquiry	Access Order Inquiry, ORD300D1, to view information about open orders.
F22=Validate Packaging	Validate packaging. Infor LX checks the allocated and pack quantities for the records you select. If the quantities differ, Infor LX displays the Packaging Exceptions screen, OLM526D. You can view all records with exceptions and correct the differences.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Packing group list, WINLPGD

The Packing Group List screen, WINLPGD, displays a list of valid packing groups.

Access: Prompt in the Packing Group field in various Pick Confirm and Invoice Selection screens.

Select packing group

Use the Packing Group List screen, WINLPGD, to view valid packing groups and select a packing group to return to the Packing Group field.

Field descriptions - WINLPGD

Fields	Description
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.
Packing Group (8,0)	Infor LX displays a list of packing group numbers.
Consignment (8,0)	Infor LX displays the consignment number associated with the packing group, warehouse, load, shipment, and intermodal.
Warehouse (3,A)	Infor LX displays the warehouse code associated with this record.
Load (9,0)	Infor LX displays the load number associated with this record.
Status (1,A)	Infor LX displays the current load header status associated with this record.

Screen actions - WINLPGD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order hold manual release, ORD580D1

The Order Hold Manual Release program, ORD580D1, allows you to manually release customer orders from hold.

The amount fields that this program calculates or displays are consistently rounded based on the currency rounding method and the round-to position you selected. Depending upon the Infor LX applications you have installed, you select a rounding method and round-to position in one of two places, the Currency Code Maintenance screen, CLD107D2-01, in the Multiple Currencies application or the Currency program in the Configurable Enterprise Accounting application.

This rounding process affects calculated amount totals such as Invoice Total, Taxes Total, and Amounts in Journals. However, it does not affect Unit Cost or Unit Selling Prices.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Access: ORD menu

Select orders on hold for manual release

Use the Order Hold Manual Release Selection screen, ORD580D1-01, to select customer orders to manually release from hold. You must use this program to override a hold on an order that violates hold criteria.

This screen displays a list of all customers that have one or more orders on hold. Information is sequenced by customer number and displays an asterisk (*) in the appropriate column to indicate the reason for the order hold.

Note: You must release orders on credit card hold individually because order amount must be authorized. To proceed with an order on credit card hold, use line action 17=Orders.

Field descriptions - ORD580D1-01

Fields	Description
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.
Customer (8,0):	Infor LX displays a list of customer numbers and descriptions. Specify an action for the customer whose orders you want to release from hold.
Line actions	The following line actions are available: **11=Release Customer Hold** Release all the selected customer's orders from customer hold. **12=Release Credit Hold** Release all the selected customer's orders from credit hold. **13=Release Margin Hold** Release all the selected customer's orders from margin hold. **14=Release User Hold** Release all the selected customer's orders from user hold.

15=Release ALL Hold

This line action is available if credit card processing is not enabled in your environment. Release all of the selected customer's orders from any type of hold.

15=Release ALL Non-Credit Card Hold

This line action is available if credit card processing is enabled in your environment. Release all of the selected customer's orders from any type of hold except credit card hold.

16=De-select Hold Release

Return the customer's orders to their original hold status.

17=Orders

Display the Order Hold Manual Release customer screen, ORD580D2-01.

18=Customer Credit

Display the Order Hold Manual Release Customer Credit Information screen, ORD580D3-01.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD580D1-01

Commands	Description
F6=Accept	Accept the entries made on this screen and perform the order hold releases.
F13=Filters	Limit the display or orders to specific types of order hold. Position a specific customer at the top of the list.
F21=Account Inquiry	Access the Customer Account Inquiry program, ACR300, to view detailed account information for any customer you specify. This function does not apply if you use Infor Financial Management.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View and release orders on hold for a specific customer

Use the Order Hold Manual Release - customer screen, ORD580D2-01, to view and release all or selected orders on hold for a specific customer. Records display in order number sequence.

Field descriptions - ORD580D2-01

Fields	Description
Line actions	The following line actions are specific to this screen. **8=Position To** Position to a specific customer order. You must press F13=Filter to enter the order number. **11=Release Customer Hold** Release the order from customer hold. **12=Release Credit Hold** Release the order from credit hold. **13=Release Margin Hold** Release the order from margin hold. **14=Release User Hold** Release all displayed orders from user hold. **15=Release ALL Hold** This line action is available if credit card processing is not enabled in your environment. Release all displayed orders from any type of hold. **15=Release ALL Non-Credit Card Hold** This line action is available if credit card processing is enabled in your environment. Release all the selected customer's orders from any type of hold except credit card hold. **16=De-Select Hold Release** Return the selected orders to their original hold status.

17=Order Line

Margin hold only. Displays the Order Line Hold Manual Release Detail screen, ORD580D4-01.

18=Order Detail

Display the Order Detail screen, ORD580D5-01. This screen shows detail information for the selected order.

19=Credit Card Detail

Display the Credit Card Information screen, ORD503D2-01, to view details of the credit card used for the order.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Customer: Infor LX displays the number and name of the customer you selected.

Order (9,0): Infor LX displays a list of order numbers for the selected customer.

Request Date (8,0): Infor LX displays the date that the order is scheduled to leave the warehouse.

Total Amount (15,2): Infor LX displays the total amount of the order.

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.

8=Position To

Position to a specific customer order. You must press F13=Filter to enter the order number.

11=Release Customer Hold

Release the order from customer hold.

12=Release Credit Hold

Release the order from credit hold.

13=Release Margin Hold

Release the order from margin hold.

14=Release User Hold

Release all displayed orders from user hold.

15=Release ALL Hold

This line action is available if credit card processing is not enabled in your environment. Release all displayed orders from any type of hold.

15=Release ALL Non-Credit Card Hold

This line action is available if credit card processing is enabled in your environment. Release all the selected customer's orders from any type of hold except credit card hold.

16=De-Select Hold Release

Return the selected orders to their original hold status.

17=Order Line

Margin hold only. Displays the Order Line Hold Manual Release Detail screen, ORD580D4-01.

18=Order Detail

Display the Order Detail screen, ORD580D5-01. This screen shows detail information for the selected order.

19=Credit Card Detail

Display the Credit Card Information screen, ORD503D2-01, to view details of the credit card used for the order.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD580D2-01

Commands	Description
F14=Release Customer	Release all the selected customer's orders from customer hold.
F15=Release Credit	Release all the selected customer's order from credit hold.
F16=Release Margin	Release all the selected customer's orders from margin hold.
F17=Release User	Release all the selected customer's orders from user hold.
F18=Release All Hold	Release all the selected customer's orders from any type of hold.

F20=Customer Credit	Display the Order Hold Manual Release Credit screen, ORD580D3-01, to view credit information for the customer.
F21=Account Inquiry	Access the Customer Account Inquiry program, ACR300, to view detailed account information for any customer you specify. This function does not apply if you are using Infor Financial Management. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View sales, credit, and AR information for a selected customer

Use the Order Hold Manual Release Credit screen, ORD580D3-01, to view the sales, credit, and accounts receivable information for the customer you selected.

Field descriptions - ORD580D3-01

Fields	Description
Customer:	Infor LX displays the number and name of the customer you selected.
Customer Hold:	Infor LX displays the customer hold code.
MTD Sales Amount:	Infor LX displays the month-to-date sales amount for the customer.
YTD Sales Amount:	Infor LX displays the sum of the month-to-date and year-to-date sales for the customer.
Last YTD Sales Amount:	Infor LX displays the year-to-date sales for the previous year for the customer.
A/R Customer Number/ Name:	Infor LX displays the accounts receivable customer number and name.
Total A/R Due:	Infor LX displays the total amount due for the accounts receivable customer.
Open Order Amount:	Infor LX displays the open order amount for the accounts receivable customer.
Open Draft Amount:	Infor LX displays the amount of the outstanding drafts for the accounts receivable customer.
Credit Limit:	Infor LX displays the credit limit amount for the accounts receivable customer.

Amount Over Limit:	Infor LX displays the accounts receivable customer's amount over credit limit. It calculates this as follows: (Total Accounts Receivable Due + Open Order Amount + Open Draft Amount) - Credit Limit.
Last Transaction Date:	Infor LX displays the date of the last transaction for the accounts receivable customer.
Credit Days:	Infor LX displays the number of days the accounts receivable customer can have an open invoice before it violates the credit parameters.
Oldest Unpaid Invoice:	Infor LX displays the date of the oldest open invoice for the accounts receivable customer.
Days Over Limit:	Infor LX displays the number of days the accounts receivable customer has exceeded its credit limit.
Average Invoice Size:	Infor LX displays the accounts receivable customer's average invoice size.
Average Payment Days:	Infor LX displays the accounts receivable customer's average payment days.
Pricing Customer Number/Name:	Infor LX displays the pricing customer number and name. You cannot change the pricing customer number once an order line has been priced.
Lower Margin Percent:	Infor LX displays the lower margin percent for the pricing customer.
Upper Margin Percent:	Infor LX displays the upper margin percent for the pricing customer.

Screen actions - ORD580D3-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View and release order lines from margin hold

Use the Order Line Hold Release screen, ORD580D4-01, to view the order lines in margin violation for the order you selected on the previous screen and to release individual order lines from margin hold.

Field descriptions - ORD580D4-01

Fields	Description
Customer Number/ Name:	Infor LX displays the number and name of the customer you selected on the initial screen.
Order Number:	Infor LX displays the number of the order you selected on the previous.
Order Line Number:	Infor LX displays a list of order line sequence numbers for the order.
Item:	Infor LX displays the number of the item ordered.
Line Amount:	Infor LX displays the line amount. It calculates this as quantity ordered multiplied by net selling price.
Line Cost:	Infor LX displays the current cost of the line. This cost may differ from the cost used during order entry.
Margin Percent:	Infor LX displays the line margin percent from the Order Line file, ECL file.
Line Actions	The following line actions are available: **13=Release Margin Hold** Release the selected line from margin hold. **16=De-Select Hold Release** Return the record to its original hold status. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD580D4-01

Commands	Description
F6=Accept	Accept the entries made on this screen and perform the order hold releases.
F13=Filters	Specify an order line to position to the top of the list.
F16=Release Margin	Release all order lines for this order from margin hold.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View relevant details about an order on hold

Use the Order Detail screen, ORD580D5-01, view additional details about the selected order that is on hold.

Field descriptions - ORD580D5-01

Fields	Description
Customer Number/ Name:	Infor LX displays the number and name of the customer for the order you selected.
Order Number:	Infor LX displays the order number you selected on the previous screen.
A/R Customer:	Infor LX displays the accounts receivable customer number from the Order Header file, ECH.
Pricing Customer:	Infor LX displays the pricing customer number from the Order Header file, ECH.
Salesperson Number/ Name:	Infor LX displays the number and name of the primary salesperson for the order.
Terms Code/Description:	Infor LX displays the payment terms code and description from the Customer Terms Code file, RTM.
Customer P.O.:	Infor LX displays the customer purchase order number from the Order Header file, ECH.
Contract Number:	Infor LX displays the contract number for this customer and order from the Order Header file, ECH. The header contract number will not default to the order lines.
Order Cost:	Infor LX displays the current cost of the order. This may differ from the cost calculated during order entry.
Margin Percent:	Infor LX displays the order margin percent for the order from the Order Header file, ECH.

Screen actions - ORD580D5-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order hold mass update, ORD582D1

The Order Hold Mass Update program, ORD582D1, allows you to review all open orders for a customer and to place all or selected orders on customer or user hold, or both. Orders that you place on hold with this program can be released from hold with the regular hold release programs, Order Hold Manual Release, ORD580D1, and Order Hold Mass Release, ORD680D.

Note that orders that meet the selection criteria but are in use at the time that you run this program cannot be selected and updated here, though they will be noted as skipped in the audit trail. When it is critical to catch all open orders for a particular customer, Infor recommends that you proceed as follows:

1. Run Order Hold Mass Update.
2. Check the audit trail to see a list of orders that were skipped because they were in use.
3. Manually place the skipped orders on hold or rerun this program to perform another mass update.

Access: ORD menu

Specify a customer for which to place orders on hold

Use the Order Hold Mass Update Prompt screen, ORD582D1-01, to specify a customer for which to review orders and selectively place them on hold. You can choose to select orders by the AR Customer or the Sold-to Customer. Use this screen to initially set all open orders for this customer on Customer Hold, User Hold, or both. You can also choose to include or exclude from selection any orders that have previously been released from the selected types of hold.

If you use F6=Accept on this screen, all orders that meet the selection criteria are placed on the specified types of hold and you return to the menu. Alternatively, you can use F15=Select Orders to display the selected orders in a second screen, Order Hold Mass Update Selection, ORD582D2-01, for further review and selection.

Field descriptions - ORD582D1-01

Fields	Description
Sold To Customer (8,0):	**Changed:** *MR81177 to remove the GuiRef tag* Specify the number of the Sold To Customer for which you want to place orders on hold. You must specify a valid value in this field or the A/R Customer field.
A/R Customer (8,0):	Specify the number of the A/R Customer for which you want to place orders on hold. You must specify a valid value in this field or the Sold To Customer field.
Update Customer Hold (1,0):	Specify 1=Yes to place open orders for the specified customer on customer hold. Otherwise, specify 0=No.
Update User Hold (1,0):	Specify 1=Yes to place open orders for the specified customer on user hold. Otherwise, specify 0=No.
Include Released Orders (1,0):	Specify 1=Yes to include in the selection open orders that have previously been released from the types of hold you request in the preceding fields. Specify 0=No to exclude those previously held orders from the selection.

Screen actions - ORD582D1-01

Commands	Description
F6=Accept	Place the orders that meet the selection criteria on hold and return to the menu.
F15=Select Orders	Call the Order Hold Mass Update Selection screen, ORD582D2-01, to review selected orders and place all or some of them on hold. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Review selected orders to include or exclude them from hold

Use the Order Hold Mass Update Selection screen, ORD582D2-01, to review orders for the specified customer that you placed on hold with the first screen. All orders that appear on this screen are on hold by default. You can de-select and re-select individual orders on this screen, and you can review details of the orders. You can also choose to sort the information by order number or order amount, and you can switch the display between transaction currency and base currency.

Field descriptions - ORD582D2-01

Fields	Description
Action (2,A):	Specify the number for the line action to perform and press Enter.
Line actions:	The following line actions are specific to this screen: **11=Select** Re-select an order that you previously de-selected. **13=De-Select** De-select an order that is currently selected for hold. **15=Detail** Call Order Inquiry, ORD300, to view additional details of an order. **23=Status** View definitions of the status codes.

Screen actions - ORD581D2-01

Commands	Description
F6=Accept	Accept the entries made on this screen and place the selected orders on hold.
F11=Fold	Fold the screen to display additional informational fields.
F13=Sequence	Switch the sorting of the screen between descending order number and descending order amount.
F14=Select All	If you have de-selected some of the orders, use this function to re-select all orders.
F19=Transaction Currency/Base Currency	Toggle between display of the order amount in transaction and base currency. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Update Q/C reason code, ORD635D

The Update Q/C Reason Code program, ORD635D, allows quality control personnel to update the Quality Control reason code for RMA returns. The program updates the Q/C reason code on the Sales History Detail file, SIL. This function does not allow you to add or delete records in this file. Invoice header information remains unchanged.

Access: ORD02 menu

Update quality control reason codes

Use the Quality Control Update of Reason Code screen, ORD635D-01, only on return material authorizations that were processed through the Post Ship Billing Cycle. Use the RMA Entry application to update return material authorizations that have not been processed through the Post Ship Billing Cycle. There are three reason code buckets stored in the SIL file, as described in the following:

The first is the reason code given by the customer during RMA entry.

The second is the disposition reason code that tells what happens to the returned items. You can enter the second reason code during RMA entry.

The third is the quality control reason code that you enter after you inspect the returned items. Use this screen to update the reason code after the RMA is closed.

The fields displayed depend on how you set the Company/Prefix Document Sequencing flag in the Billing System Parameters. If you set it to 1, an extra field, Document Prefix, displays. You must enter either the RMA invoice details or an RMA number.

Field descriptions - ORD635-01

Fields	Description
Customer Number (8,0):	Specify the RMA customer number.
RMA Invoice Number (8,0):	Specify the RMA invoice number.
Document Prefix and Invoice Number (2,A and 8,0):	Specify the RMA document prefix and invoice number.
Invoice Line (4,0):	If you know the particular RMA credit memo/line number that you want to work with, specify the details. The RMA Invoice Number may be a simple invoice number (8,0) or the combination of a document prefix (2,A) and number

	(8,0). If your entries are valid, the system displays the Quality Control Update of Reason Code detail screen, ORD635D-03.
RMA Number (9,0):	If you do not know the particular RMA credit memo/line number that you want to work with you can enter the RMA number. The related RMA credit memo lines are displayed for selection on the Quality Control Update of Reason Code RMA line screen, ORD635D-02.

Screen actions - ORD635D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View and select an RMA line to update the QC reason code

If you invoiced an RMA across multiple credit memos and you specified only the RMA number on the initial screen, the program displays the Quality Control Update of Reason Code RMA line screen, ORD635-02. The screen displays the lines of the RMA. Select a line to update the QC reason code.

Field descriptions - ORD635D-02

Fields	Description
Sel (1,0):	Type 9 in front of an invoice line to select it for update. displays.

Screen actions - ORD635D-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Update the QC reason code for an RMA line

The program displays the Quality Control Update of Reason Code detail screen, ORD635D-03, if you specified a valid invoice and line number on the initial screen or if you selected an RMA invoice line from the line screen.

If the selected line is not an RMA invoice line, the program returns you to the initial screen with the error message "No RMA invoice found for the invoice details entered."

If there are multiple sales records in the SIL that have identical Customer, Prefix, Invoice, and Line Numbers, the program calls the Customer/Document screen. This screen allows you to select the desired record for Quality Control reason code update.

Field descriptions - ORD635D-03

Fields	Description
Q/C Reason Code (2,A):	Specify the new Q/C reason code for the line. It is validated against the System Parameters file, ZPA, where reason codes are stored for the RMA RM transaction effect code.

Screen actions - ORD635D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card batch authorization, ORD650D1

The Credit Card Batch Authorization program, ORD650D1, allows you to submit orders with a credit card payment term to a batch process that performs authorization of the transaction amounts to pay. The program selects orders that have validated cards and that fall within the time fence you set up in Order Entry System Parameters, ORD820D-09. The time fence is a period before the order request date. The program also checks back orders for partially shipped orders if the authorization expired. The original authorization expires if the previously shipped amount is settled.

You can also use the Credit Card Batch Authorization program to re-authorize orders for which the authorization expired. You can set a range of dates to include in the re-authorization.

You cannot select orders that were previously declined and placed on credit card hold on the Credit Card Batch Authorization screen. You must release those orders with the Order Hold Manual Release program, ORD580D1. This program calls ORD650B with the unique ID, called the handle, that was initially provided by the credit card manager application, the total remaining monetary amount of the order, and the transaction currency. If the program obtains authorization, the system removes the order from credit card hold. If authorization again fails, the order remains on credit card hold.

You can only use ORD650D for Batch Authorization, Re-authorization and Settlement if your middleware applications also support these functions. Infor LX does not store the original credit card number.

ORD650D passes parameters such as handle and order number to middleware. These parameters are used to perform Batch Re-Authorization and Settlement if the payment application (middleware) supports these transactions.

Access: ORD01 menu

Specify selection criteria for credit card orders to authorize

Use the Credit Card Batch Authorization screen, ORD650D1-01, to limit the credit card orders to select for batch authorization.

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 - ORD650D1-01

Fields	Description
From/To Company (3,0):	Specify a range of values to limit the orders to include in the batch authorization by company number.
From/To Customer Type (4,A):	Specify a range of values to limit the orders to include in the batch authorization by customer type.
From/To Customer Number (8,0):	Specify a range of values to limit the orders to include in the batch authorization by customer number.
From/To Request Date (6,0):	Specify a range of values to limit the orders to include in the batch authorization by shipping request date.
From/To Expired Authorization Date (6,0):	Specify a range of values to limit the orders to include in the batch authorization by expired authorization date. Use this field range to re-authorize orders that have expired amount authorizations.
From/To Order Number (9,0):	Specify a range of values to limit the orders to include in the batch authorization by order number.
From/To Currency (3,A):	Specify a range of values to limit the orders to include in the batch authorization by transaction currency.
From/To Terms Code (2,A):	Specify a range of values to limit the orders to include in the batch authorization by payment terms code. The program selects all terms codes within the specified range that are defined for method 3, credit card payment.
Billing Selection Flag (1,A):	Specify a range of values to limit the orders to include in the batch authorization by billing selection flag. The billing selection flag is a user-defined code that

	you can set up in the Customer Master file, RCM, to categorize types of orders to bill. You can change this value during order entry.
Validation Option (1,0):	Specify 0=Validated to limit the batch authorization to orders that have been validated. Specify 1=Expired to limit the batch authorization to orders for which authorization has expired. Specify 2=Settle to limit the batch settlement to orders that have been invoiced. This selects orders that have a credit credit card transaction detail status of 3. After batch settlement is run, the orders selected update credit card transaction detail to a status of 4. Specify 3=All to include all credit card orders that meet the other selection criteria.
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 - ORD650D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order hold mass release, ORD680D

The Order Hold Mass Release program, ORD680D, allows you to release the hold on orders you select that no longer violate hold criteria in a batch process.

If you release the user hold, the system removes the user hold from all orders you select and updates the user hold field in the Order Header file, ECH.

Order Hold Description

Customer Hold - If you set the Customer Hold field in the Customer Master program to 1=Yes, all orders entered for this customer are placed on hold.

Credit Hold - You can set a credit limit for a customer and also specify when you want the system to perform a credit check in IDF Customer. If an order exceeds the customer's credit limit at the time credit is checked because the total amount due (open accounts receivable and open order amount) plus the outstanding draft amount exceeds the customer's credit limit, or the oldest unpaid invoice exceeds the credit limit days, the order has credit hold status.

Margin Hold - The order has margin hold status if the order total or order line violates the margins you set in the Customer Master file, RCM, or the Item Class file, IIC. Infor LX divides the profit by the cost of the item to determine a margin violation.

User Hold - You can manually put an order on hold during order entry. This order has user hold status.

An order line can be on hold for a more than one reason; for example, for both credit and margin violations.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Specify selection criteria to release customer orders from order hold in batch

Use the Order Hold Mass Release selection screen, ORD680D-01, to specify selection criteria for orders to include in the batch release or order hold.

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 - ORD680D-01

Fields	Description
From/To Company (3,0):	Specify a range of values to limit the companies to include in the selection of orders to release from hold.
From/To Customer Number (8,0):	Specify a range of values to limit the customers to include in the selection of orders to release from hold.
From/To Request Date (6,0):	Specify a range of values to limit the order request dates to include in the selection of orders to release from hold.
From/To Order Number (8,0):	Specify a range of values to limit the order numbers to include in the selection for release from hold.
Release Customer/ Credit/Margin/User Hold (1,0):	Select the appropriate fields to release orders from customer, credit, margin, and/or user hold.

Screen actions - ORD680D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order hold report, ORD685D

The Order Hold Report program, ORD685D, prints a list of all orders that are on hold for any reason. Infor LX prints this report automatically as the audit train from Pick Release, ORD550D, Order Hold Batch Release, ORD680D, and Order Hold Manual Release, ORD580D, for orders you put on or take off hold during any of these processes. But you can also run the program at any time from the menu.

Access: ORD01 menu

Specify information to limit orders to include in the order hold report

Use the Order Hold Report selection screen, ORD685D-01, to select orders 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 - ORD685D-01

Fields	Description
From/To Company:	Specify a range of values to limit the companies to include in the selection of orders to include in the report.
From/To Customer:	Specify a range of values to limit the customers to include in the selection of orders to include in the report.
From/To Request Date:	Specify a range of values to limit the order request dates to include in the selection of orders to include in the report.
From/To Order Number:	Specify a range of values to limit the order numbers to include in the report.
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 - ORD685D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order entry overview

The order entry programs in Infor LX allow you to create and maintain all order types, including quotes and RMAs, from a single order entry and maintenance function, which consists of multiple screens. Not all fields documented in these sections are appropriate for all order classes, and those are noted in the field definitions.

Infor LX primarily uses the main order screen. You can access all other order information screens from this screen using actions and function keys.

Infor LX Order Management groups order header information by functional purpose and allows you to maintain the information on several screens. The functional areas are defined by the type of information viewed, entered or maintained. You can enter or maintain selected header information from the main order screen.

Order Entry prints an Order Acknowledgment, which contains the following information:

- Shipping Information
- Sold-to and Ship-to customer numbers, names, and addresses,
- Bill-to and Invoice-to customer numbers
- Warehouse
- Salesperson
- Order entry date
- Request date
- Schedule date
- Book dates
- Order Number and Description
- Back Order Code
- Zone
- Order Type
- Means of Transportation
- Freight Terms
- Company Registration
- Priority code
- Country of Ultimate Destination
- Pricing Information

- Price and Promotion Registration numbers
- Currency code
- Company and Customer Registration descriptions
- Contract description
- Line Item Information
- Line item/description
- Warehouse
- Order quantity
- Ship quantity
- unit of measure
- Tax only code
- Tax basis code
- Price
- Extended amount
- RMS Information
- Request Date and Time
- Receiving Dock
- Inbound Delivery Number
- Kanban Number
- Billing Information
- Promotion number
- Incentive discount
- Split-off invoice incentive discount
- Split bill back incentive discount
- Subtotal amount
- Freight charge
- Order discount
- Tax Information
- Total taxes
- Tax summary
- Tax rate
- Tax amount

Note to Time Zone Conversion Users

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

Not all dates in the supply chain are converted as part of the time conversion process, because some are always stored as entered or displayed, printed, and stored in system time zone values. The following list shows the common conversions performed for typical date fields when time zone conversion is active. Exceptions are discussed in the help text for individual date fields in individual screens.

- Request Date: In order entry, this is the date on which the user expects shipment of the order line from the ship-from warehouse. This date is generally the date of the order line warehouse. In order inquiry screens, it can be called the Shipping Date. It affects pricing and promotion qualification, lot availability and expiration, MRP available-to-promise processing (it is the demand date), OLM load generation, and selection of records for display or processing in multiple other programs. The system displays this date to the user for the time zone of the warehouse.
- Entry Date and Entry Time: These are audit fields, and the Entry Date is also used in Order Entry as a promotion qualifier, as well as for other purposed. Entry Date and time are never converted. They are stored and displayed for the system date and time zone.
- Schedule Date and Time: Users generally use these these fields to record the date and time at which the customer wants to receive an order line. These dates are generally entered and displayed for the ship-to number time zone, or if there is no ship-to number, the time zone of the ship-to customer.
- Customer Requested Ship Dates and Dock Dates: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. Note that the Customer Requested Ship Date/Time is converted to the equivalent value in the warehouse time zone when it is passed to Cell Workbench Detail, LMP500D2.
- CTP Ship Date and CTP Dock Date: These dates apply to lean items only. They are converted based on the line ship-to or customer ship-to time zone. They are calculated values that indicate when you should ship a line from your warehouse. Therefore, they are converted based on the time zone of the line warehouse.
- Price Book Date: Order Entry uses this date for pricing and promotion qualification. Date ranges in the Price Book have no associated time or time zone. The are saved and displayed as entered with no time zone conversion. Store Date and Warehouse Date are variants of the Price Book Date. They are also stored and displayed without time zone conversion.
- User Date and Time 1 and 2: These fields are user definable and have no pre-defined usage. They are not associated with any regional time zones. The date and time values are stored and displayed as entered with no time zone conversion.
- Receipt Date/Time: These resupply order fields represent the planned receipt date and time (expected delivery date and time) at the To Warehouse. They are entered for the time zone of the ship-to warehouse and converted to the equivalent system date and time for storage, then converted back to ship-to warehouse time zone for on-screen display and printing in reports and inquiries.

Note that dates that are converted for time zone differences are only converted if the governing entity for the date and time, such as the ship-from warehouse or the ship-to number, contain a region code. If the governing entity has a blank region code, no conversion is performed. The date is stored, retrieved, printed, and displayed as entered on the screen.

Considerations for Managed Warehouses

If you process returned inventory for a managed warehouse, use the following rules applied to lot-controlled and palletized stock. For return of a containerized item, the container must exist in the warehouse and location you specify if the container is not empty. If the container is empty, Infor LX moves the container (and pallet, if the stock is palletized and the pallet is transferable) to the return location. If you specify a pallet number for a returned item/lot, the pallet must exist in the location and it must be designated for the item/lot that is returned.

If you use either the Infor LX integration with Infor Warehouse Management BOSS or the integration with Infor Warehouse Management Module, refer to the user documentation for the integration for additional information.

Create or select an order

Use the Order Directory, ORD700D1-01, to create a new order, quote, or return material authorization (RMA). The screen title changes to Quote Directory, RMA Directory, or Order Directory, depending on the filters you select on the Filter Options screen. Press F13 to access the Filter Options screen.

In addition to the fields on the initial display, Infor LX displays the Customer Name field if you press F11 to fold the screen. You can find a description of this additional field in the help text for the F11=Fold function key.

Note: For security reasons, the security officer must authorize users to perform order entry and to use specific companies and warehouses. The security officer sets up authorization for users in the Security Master program, SYS600D, in the System Parameters application.

Access: ORD menu

Order entry, ORD700D1

Use the Order Entry program to enter and maintain customer orders, quotes and RMAs.

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

View the order directory screen

Use the initial screen, Order Directory, ORD700D1-01 to begin the order entry process for customer orders, quotes and RMAs. You can create new orders or select an existing order to maintain. You can also set filter options and user preferences from this screen.

If you are creating an order for a Type 5 (Infor WM-controlled) warehouse and you are using the WMA 2.0 interface, you cannot create an Order Class 3 (RMA) order. This restriction does not apply if you are using later versions of the interface.

Field descriptions - ORD700D1-01

Fields	Description
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.
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document. You can enter multiple action codes on the same screen for the Revise, Copy, and Delete actions. After processing for the first order in the list finishes, the next order to process appears. You cannot use multiple action codes on more than one screen at a time.
Order (9,0):	Specify the order number to display or maintain. If you create a new order, Infor LX automatically assigns this number. You can prompt on this field only in Order mode. The prompt function does not operate in Quote or RMA mode.
Cust (Customer Number) (8,0):	Specify the number of the customer for which you want to maintain the order. If you create a new order and do not specify a customer number, Infor LX presents a Create window where you can supply this and other order header information.
Customer PO (Purchase Order) (23,A):	Specify the customer purchase order associated with this order.
Request (6,0):	Infor LX displays the request date assigned to the order. Individual order line request dates may differ from this. This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing. Note: If Entry Date is included among the filter parameters, this field name will be Entry instead. You cannot change the entry date.

Wh (Warehouse) (3,A):	Infor LX displays the warehouse assigned to the order.
T (Order Type) (1,A):	Infor LX displays the order type associated with this order.
Cls (Order Class) (3,0):	Infor LX displays the order class associated with this order.
Order Amt (Amount) (15,2):	Infor LX displays the total amount of the order.
Curr (Currency) (3,A):	Infor LX displays the currency code associated with this order. You can toggle between transaction currency or base currency with F20=Transaction/Base. You can prompt on this field only in Order mode.
Slsprsn (Salesperson) (6,0):	Infor LX displays the primary salesperson number associated with this order.
Stat (Status):	Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time. Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 = Ready for Invoicing Position 5 = Ready for Purge To view the status of individual order lines, use action 14=Order Lines. Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Screen actions - ORD700D1-01

Commands	Description
F11=Fold	Display the folded screen. The following field appears on the folded screen:

	Cust Name - Customer Name. Infor LX displays the name of the customer associated with the customer number.
F13=Filters	Display the filters screen to specify a sorting sequence for the order directory lines and to limit the orders displayed by order type. You can select all records or records with a specific order type sorted in several different ways. Type the selection option number in the space in front of the option you prefer.
F15=User Preferences	Access the User Preferences screen to set your user preferences for screen processing and directory display. These settings remain in effect for your user ID whenever you access the program until you change them.
F16=Material Status	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F20=Transaction/Base Currency	Toggle between display of the base currency and the transaction currency of this order.
F21=Item X-Ref Inq.	Access Customer Item X-Reference Inquiry, ORD350B-01to look up the customer item number that corresponds to your internal item number.
F22=Customer Alpha Search	Access the Customer Alpha Lookup screen, ACR310D-01, to find a customer using an alpha key and select it for the Customer field of a new order. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter Options

Use the Filter Options screen to select all records or records with a specific order type and to specify how to sort them in the order directory.

Field descriptions - ORD700D1 Filter Options

Fields	**Description**
Sort options (1,0):	Specify the option number for the records to include in the list. ■ 0=All Orders (all active and inactive customer orders included) ■ 1=Open Orders (only active customer orders included) ■ 2=Back Orders (only back orders included) ■ 3=Drop Ship Orders (only orders with open drop ship requests included)

- 4=Quotes (all open quotes included)
- 5=RMAs (all open RMAs included)

The default for Order Entry is Open Orders. For Quote Entry, the only available filter is Quotes. For RMA Entry, the only available filter is RMAs.

Sequence options (1,0): Specify the sequence option you prefer in the Sequence options field.

- 0=Order Number (available for Order, Quote, and RMA)
- 1=Customer/Currency/Request Date/Order (available for Order, Quote, and RMA)
- 2=Customer P.O./Customer/Order (available for Order only)
- 3=Request Date/Customer/Order (available for Order only)
- 4=Descending Entry Date/Order (available for Order only)

The default is Descending Entry Date/Order for Order Entry. The default for Quote Entry and RMA Entry is Order Number.

Screen actions- ORD700D1 Filter Options

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Copy order

You can copy an existing order, quote or RMA and enter new information as necessary to create a new order, quote or RMA. The screen title changes to Copy Quote, Copy RMA, or Copy Order according to the filters you selected on the Filter Options screen.

Caution: While Infor LX allows you to create orders of up to 9999 lines, creating a large number of extremely long orders can negatively impact system performance.

When you first select an order, quote or RMA to copy, Infor LX displays the selection in the Order Maintenance screen, ORD700D2-01, in copy mode. In this screen, you can choose to select or deselect individual lines to carry over into your new order, quote or RMA. When you press Enter, the Copy Order screen appears. Here you can specify defaults for the new order.

The following description indicates which entities can be copied to which other entities.

Copy an order to an order or post-ship order.

Copy a quote to an order, quote (subject to conditions), or post-ship order.

Copy a post-ship order to another post-ship order (subject to conditions).

Copy an RMA to a post-ship order.

Copy an invoice to an RMA.

Note on Time Zone Conversion for Copied Orders

If you copy an order, you can change or retain the Request Date, Price Book Date, and Customer. Any of the various possible changes can affect the time zones assumed to apply to dates in copied order lines. Be sure to review dates and times for your order lines to make sure they have the intended values when you copy an order. You can manually update the lines as needed.

For a detailed discussion of time zone conversion in ORD, including how various date types are handled, see the Note to Time Zone Conversion Users in the Order Entry Overview help text for ORD700D1.

Field descriptions - Copy screen

Fields	Description
Order Number to Copy (9,0):	Infor LX displays the order, quote or return material authorization number of the order, quote or RMA you copy.
Copy to Customer Number (8,0):	Infor LX displays the Sold-To Customer Number of the original order, quote or RMA you selected to copy on the Directory screen. You can change this value. If you change the Sold-To Customer number, Infor LX automatically reprices the new order, regardless of your entry in the Reprice field.
Copy to Customer PO (23,A):	Infor LX displays the Customer Purchase Order Number of the original order, quote or RMA you selected to copy on the Directory screen. You can change this value to any new one, including blanks. However, you cannot use blanks for a customer that requires a customer PO number.
Copy to Order Type:	Infor LX displays the Order Type of the original order, quote or RMA you chose to copy on the Directory screen. You can change this value to any valid order type with the exceptions noted in the following paragraphs. The order type and order class must be compatible according to the same validation rules that apply anywhere in order entry. In RMA mode, if the order type of the original invoice did not affect Accounts Receivable, then the RMA and subsequent post-ship order cannot affect Accounts Receivable.
Copy to Order Class (3,0):	Infor LX displays the Order Class of the original order, quote or RMA you chose to copy on the Directory screen. You can change this value to any valid order class with the exceptions noted in the following paragraphs.

If you copy to a quote, the base order class or the selected order class must be 006.

If you copy to an RMA, the base order class or the selected order class must be 003.

If you copy from an RMA, the new record must be an order (the new order class cannot be 003 or 006).

If you are using WMA 2.0, you cannot copy RMA lines for a Type 5 warehouse to create an order. If you are using a higher version of the Infor LX and Infor WM integration, you can copy RMA lines for a Type 5 warehouse, but you can only create an order class 8 order (a financial order that has no inventory effects).

If you copy to a post-ship order or RMA, the underlying order cannot contain kits, Features and Options items, or configured items.

If you have a shipping Warehouse or a Resupply Receiving Warehouse Type 4= Warehouse Management BOSS or 5= Infor WM, the base Order Class must be 004 or 005.

If you copy to a resupply order (base order type of 9), the base order class cannot be 003, 007, or 008.

Request Date (8,0): Infor LX displays the header request date for the order you copy from. If you accept the date in this field, or if you specify a different valid date, that date is copied back to the header and all the lines of your new order, quote or RMA. To retain the same dates found in the original order, quote or RMA, you must enter 00/00/00 in the Request Date field.

Price Book Date (8,0): Infor LX displays the header price book date entered for the order you are copying. If you accept the date in this field, or if you specify a different valid date, that date will be copied back to the header and all the lines of your new order, quote or RMA. To retain the same price book dates found in the original order, quote or RMA header and lines, you must enter 00/00/00 in the Price Book Date field.

Reprice: Specify Yes if you want to reprice the new order, quote or RMA. Specify No if you do not want to reprice the new order, quote or RMA.

If you change the Copy To customer number or price book date, or if there are promotions on the Copy From record, the line is repriced regardless of this setting.

Copy Notes **Added:** *MR14010 Added new field to copy the notes to the new transactions when copying the orders*

This field is used to copy the notes when copying the orders, quotes, or RMAs to create new transactions.

Specify 1 to copy the notes associated with the order header, order line, and special line from the Copy From order, quote, or RMA to the new transaction. You can add, modify, or delete the notes for the new transaction at any level.

Specify 0 to skip copying the notes. You can add notes for the new transaction at any level.

Screen actions - Copy screen

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Set order processing and directory display preferences

Use the User Preferences screens, ORD700D4-01/02, to define your order entry processing and directory display preferences. Your preferences are retained with your User ID until you change them.

Field descriptions - ORD700D4-01/2

Fields	Description
User ID (10,A):	This field displays your current user ID.
Display Address Panel (1,A):	Specify 1=Yes to automatically see the Shipping Information screen, ORD700D9-02, to verify or change address information as part of the Order, Quote, or RMA Entry process. In Order or Quote mode, specify 2=Create/ Copy to automatically see the Shipping Information screen, ORD700D9-02, to verify or change address information as part of both the Entry and Copy processes. For options 1 and 2, the Shipping Information screen appears automatically before the Maintenance screen for line entry, ORD700D2-01. Specify 0=No if you do not want automatic display of the Shipping Information screen before the Maintenance screen for line entry. Note that you can set a different value for the Display Address panel field in User Preferences for Orders, Quotes, and RMAs. Regardless of the value you specify in this field, you can use a screen action, F16=Shipping, to call the header Shipping Information screen manually from other header screens during Order, Quote, or RMA entry and maintenance activities.

Display Promotions:

The system displays this field only if you installed the Promotions and Deals application. If the application is not installed, you must specify no.

Specify yes to display the promotion screens during order entry. Specify no to prevent the display of the promotion screens during order entry.

The system uses this field in conjunction with the system parameter values for automatic assignment of promotions. The value in the Batch Price field overrides this field. If you select batch pricing, the system does not automatically display the promotion assignment screens.

This field does not apply to RMAs. You must specify no for user preference records created for RMA mode.

This field also does not apply in Revise mode. When you revise orders, you must reprice them before they can be accepted.

Default Line Entry Panel:

Added: *MR80331 Added the new Default Line Entry Panel field in ORD700D1*

Specify a value to indicate the type of panel that must be displayed when creating order, quote, or RMA lines. Infor LX provides different types of panels to create order, quote and RMA lines.

Specify 0 (default) to display the Line Entry panel (ORD700D2-01).

Specify 1 to display the Fast Line Entry panel (ORD700DA-01). Fast Line Entry provides more lines and is optimized for batch entry of basic data, such as item and order quantity.

You can select either of the options as a default value, and switch between panels when creating or modifying the lines.

Batch Price (1,0):

Specify whether to price a new order interactively at the time of entry or in batch after you accept the order. This value overrides the Reprice and the Display Promotions fields.

Return material authorizations, post ship orders (base order class 007), and financial orders (base order class 008) are always priced interactively regardless of your entry in this field. Also, in Revise mode, all orders are priced interactively.

Post Mode (1,0):

Specify 0=Interactive to post orders interactively. Specify 1=Batch to post orders in batch mode. Select 2=Parallel to post orders using the Data Queue Manager that helps your system process the optimal number of jobs at a time. This last option uses the settings you specify in Order Entry System Parameters, ORD820D-06.

Print Mode (1,0):

Specify 0=Interactive to print documents interactively. Specify 1=Batch to print documents in batch mode.

Note: This field works in conjunction with the Post Mode option. Printing occurs in batch if Batch or Parallel posting is selected.

Auto Billing Option (1,0):

This field does not apply to Quote or RMA user preferences. The following options are available:

0	No
1	Post-ship
2	Post-ship and financial

This value changes the way F6=Accept works on post-ship orders and financial orders.

If you set this field to 1 and the Post Mode field to 0, when you post a post-ship order (base order class 007), the system passes the order number you post directly to Customer Document Release, BIL500B, for billing selection. This operates the same as if you enter the post-ship order number as the from/to order number range on the Invoice Release screen, BIL500D. It calls the Customer Document Detail screen, BIL501D1-01, which shows the current post-ship order.

If you set this field to 1 and the Post Mode field to 1, when you post a post-ship order (base order class 007), the system passes the order number you post to Customer Document Release, BIL500B, for billing selection in batch mode. This operates the same as if you enter the post-ship order number as the from/to order number range on Invoice Release, BIL500D, and used F6=Accept to submit the billing request to batch.

If you set this field to 2, the same logic described for settings 0 and 1 applies for both post-ship orders (base order class 007) and financial orders (base order class 008.

Customer (8,0):

Specify the lower and upper values in the range of sold-to customers whose orders you want to select for display in the directory. To display all orders, leave these fields blank.

Customer PO (23,A):

Type a full or partial customer purchase order number to determine which orders to display in the directory. The system displays all orders whose customer purchase order number contains the exact string you type. The asterisk (*) functions as a wildcard that represents all values or a random part of a value string:

Example:

If you type only an asterisk in this field, the list displays orders with any value in the Customer PO field.

Value A* includes all customer pos. that begin with A.

If you leave this field blank, only orders with a blank Customer PO display in the list.

Show directory list at startup (1,0): Specify yes to retrieve and display a list of the records available for selection as specified on this screen when you start the Order Entry program. If you specify no, the system displays the input-capable fields and provides access to all actions and functions in the directory screen but does not display a list of selections.

Internal Item Numbers: Specify yes to display the internal item number with the ordered items. Specify no to display the customer's cross-reference item number, which is the external item number or alias as defined in Customer X-Reference Item Maintenance. This field does not govern whether to use or allow internal or customer item numbers, merely which of these the Order Lines screen displays to the user after validation.

Entering CSR: Specify the CSR to associate with the orders.

Perform Quantity Edits (1,0): Specify whether to allow quantity edits for orders or order lines. This field does not apply to RMAs.

Validation Mode (1,0): Specify how to perform line validation.

Totaling Option (1,0): Set this value to 0=interactive to total amount, quantity, weight, and pallet fields interactively. Set 1=batch to total these fields only when the system posts the order, quote, or RMA.

ATP (Available to Promise) Mode (1,0): Specify the appropriate option to control calculation of the available-to-promise date for order lines. The available to promise calculation applies only to orders. For quotes and RMAs, the only valid option is 0=Manual. The following are valid options for orders:

0=Manual

Select this option if you do not want Infor LX to calculate an available-to-promise date.

1=On Validate

Select this option to calculate the available-to-promise date during validation.

2=On Request

Select this option to call the Available to Promise screen from the Order Maintenance screen to calculate the available-to-promise date.

If you specify a calculation method for ATP dating, you must also specify one of the options in the ATP Date Used field to control when to use the ATP date. The system does not use this value if you do not install the MRP application.

ATP (Available to Promise) Date Used:

Specify when to use the ATP date. The following options are available:

0=Never

Select this option if you never want Infor LX to use the ATP date instead of the line request date for order entry.

1=Always

Select this option if you want Infor LX to always use the ATP date instead of the line request date for order entry.

2=If After Request Date:

Select this option if you want Infor LX to use the ATP date only when it occurs later than the line request date.

This field applies to orders only. The value for Quote and RMA modes must always be 0=Never.

The system does not use this value if you do not install the MRP application.

CTP (Capable to Promise) Mode (1,0):

Specify the appropriate option to control calculation of the capable-to-promise date for order lines. The capable-to-promise calculation applies only to orders. For quotes and RMAs, the only valid option is 0=Manual. The following are valid options for orders:

0=Manual

Select this option if you do not want Infor LX to calculate a capable-to-promise date.

1=On Validate

Select this option to calculate the capable-to-promise date during validation.

2=On Request

Select this option to call the Cell Workbench Detail screen from the Order Maintenance screen to calculate the capable-to-promise date.

If you specify a calculation method for CTP dating, you must also specify one of the options in the CTP Date Used field to control when to use the CTP date.

CTP (Capable to Promise) Date Used:

Specify when to use the CTP date. The following options are available:

0=Never

	Select this option if you never want Infor LX to use the CTP date instead of the line request date for order entry. 1=Always Select this option if you want Infor LX to always use the CTP date instead of the line request date for order entry. 2=If After Request Date: Select this option if you want Infor LX to use the CTP date only when it occurs later than the line request date. This field applies to orders only. The default for Quote and RMA modes must always be 0=Never.

Screen actions - ORD700D4-01/2

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add header information for a new order

In Create mode, if you do not specify a customer number, when you press Enter, the system displays the Create Order screen. Add relevant header-related information in this screen before you continue with the line entry screen.

Field descriptions - Create Order screen

Fields	Description
Customer Number (8,0):	Specify the sold-to customer number for the new order, quote, or RMA. This field is required.
Prefix (2,A):	RMA mode. Specify the document prefix to use to create this return material authorization.
Document Number (8,0):	RMA mode. Specify the document number to use to create this return material authorization.

If you specify a document number and prefix, and the program finds more than one document with this combination, it displays the Customer Document list screen to allow you to select the correct invoice.

The sold-to customer number must match the sold-to customer on the copied invoice.

ASN Shipment ID (35,A): This field appears only in RMA mode and only if OLM is installed.

Specify the ASN number to use to create this RMA.

You can enter an ASN from an outbound shipment (similar to the Prefix + Document Number for an outbound invoice), or from an inbound message that you expect to use for a separate return of packaging items.

Customer PO Number (23,A): Specify the customer purchase order number for the new order, quote, or RMA. Blanks are valid unless the customer requires customer purchase order numbers.

Order Type (1,A): Specify the order type for the new order, quote, or RMA. If you leave this field blank, the order type default is based on the Sold To Customer or system value.

The order type and order class must be compatible according to the same validation rules that apply anywhere in order entry.

Note: In RMA mode, if the order type of the original invoice did not affect Accounts Receivable, then the RMA and subsequent post ship order cannot affect Accounts Receivable.

Order Class (3,0): Specify the order class for the new order, quote, or RMA.

Note: If you use a ship-from warehouse of Warehouse Type 4= Warehouse Management BOSS or Type 5= Infor WM, the base Order Class cannot be 007 (post ship).

If you are creating an order for a Type 5 warehouse and you are using the WMA 2.0 interface, you cannot create an Order Class 3 (RMA) order. This restriction does not apply to higher versions of the Infor LX and Infor WM interface.

If you leave this field blank, the order class default comes from the customer, order type or system value.

Request Date (8,0): Specify the header request date for the new order, quote, or RMA.

Price Book Date (8,0):: Specify the header price book date for the new order, quote, or RMA.

Copy Notes

Added: *MR14010 Added new field to copy the notes when copying an invoice to create an RMA*

This field is used to copy the notes when copying an invoice to create an RMA.

Specify 1 (default) to copy the order, order line and special line notes that are defined for the orders in the referenced invoice. For consolidated invoices, order notes are copied only for the first order in the consolidation. Line notes are copied for all lines that are copied from the invoice. Order level special line notes are copied, if the order level special line is copied. Line level special line notes are copied, if the referenced regular line is copied. You can add, modify, or delete notes for the new transaction at any level.

Specify 0 to skip copying the notes. The RMA Entry user can add notes for the new RMA at any level.

Reprice Option

Added: *MR77458 Added new field for the reprice option for RMAs copied from the invoices*

Changed: *MR81177 Allow repricing of RMAs copied from invoices," changed to "of" instead of "on."*

Specify the option for the repricing of RMAs copied from invoices.

- For option 0 = Standard (default), the invoice prices are copied, including all the promotions applied to the original order line or total order. Price overrides are not allowed, and the original promotions are reversed or credited.
- For option 1=Override, the invoice details are referenced to copy Item Number, Order Quantity and related fields, but the various price fields are not copied from the invoice. The RMA is priced as an independent transaction. The RMA can be manually repriced, if required. This option is allowed only if the ORD820D-01, Order Entry System Parameter, “Allow repricing of RMAs copied from invoices” is set to YES. If this option is not allowed, the user override is not applicable and the Invoice Copy function uses the option, 0=Standard.
- For option 2=Copy Only, the invoice details are referenced to copy Item Number, Order Quantity and related fields, including all Price fields and the related details. While the original invoice pricing is copied to the RMA as a default, the RMA can be manually repriced, if required. This option is allowed only if the ORD820D-01, Order Entry System Parameter “Allow repricing of RMAs copied from invoices” is set to YES. If this option is not allowed, the user override is not applicable and the Invoice Copy function uses the option, 0=Standard.

Screen actions - Create Order screen

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order entry maintenance, ORD700D2/ORD700D9

After you select the order, quote or return material authorizations to maintain, Infor LX calls the first screen of the Order Entry Maintenance programs, ORD700D2 and ORD700D9. The programs include multiple screens for entry and maintenance of order-level information. The initial screen allows you to enter new order lines, maintain existing order lines, and access other order entry screens.

Screen titles vary, depending on your mode, to reference orders, quotes, or RMAs. Use these programs to enter or change information for the order you selected or created on the selection screen. Any changes that you make to the record header information affects only new lines, not existing lines.

Caution: Infor LX allows you to create orders of up to 9999 lines, but if you create a large number of extremely long orders, this can negatively impact system performance.

Note about batch pricing: If you set up the order to use credit card processing (it has a credit card payment term), pricing cannot be performed in batch, even if your user preference is set in the User Preferences screen to price orders in a batch process.

You cannot delete existing orders if any of the following situations apply:

- Any order lines have been shipped.
- Shop orders exist for any order lines.
- Any order lines have a drop ship type other than 0 (not drop ship), 1 (drop ship request not accepted in Purchasing) or 7 (cancel drop ships).
- Any order lines have been pick-released to Warehouse BOSS or WMS-4000.

Infor LX copies only the following information when you copy an existing order to create a new one:

- Active order lines
- Shipped order lines
- Invoiced order lines
- Open Special order lines
- Invoiced Special order lines

Infor LX does not copy the following order lines:

- Deleted regular order lines
- Special order lines without charge codes

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Add, maintain, or view order header and line information

Use the Order Maintenance screen, ORD700D2-01, to add or maintain order header information and to add order lines or select existing lines for maintenance. This screen provides access to most of the order header and order line screens within the order entry process.

In addition to the fields in the initial display, Infor LX also displays the Item Description, Charge Code, Drop, Tax Only, Tax Code, Tax Basis ,and Extended Amount fields when you use F11 to fold the screen.

DWM Item Considerations

Note that the presentation on this screen is different for DWM items. The unit price field contains the unit price per DWM unit of measure, so it will not appear as a straight quantity multiplied by price = extended amount.

Example:

You may see a qty of 10 CS (selling unit of measure CASE), a unit price of 8.99 (price per LB) and an extended amount of $449.50, because each case weighs 5 LBs. If the selling unit of measure is different from the stocking unit of measure, or if there is an alternate selling unit of measure, there is an additional calculation, because the DWM weight is by stocking unit of measure. The logic for calculating the extended amount follows:

Convert selling unit of measure to stocking unit of measure.

Multiply stocking unit of measure by average actual weight

Multiply the result by unit price (per DWM unit of measure).

Action code 39=DWM Entry accesses the program Dynamic Weights and Measures Entry, ORD750D, which allows entry of weights for DWM price adjustment orders. The only orders valid for this type of entry are base order class 008 orders. You can enter the item, qty and price on this Order Maintenance screen, ORD700D2-01. If the item is a DWM dynamic weight entry and the order has a base order class 008, the Dynamic Weights and Measures Entry screen appears automatically and allows you to enter the quantity, weight, and price. The new screen also displays the extended amount. This feature allows you to adjust prices based on weight rather than quantity. Any change in quantity or price on the original line automatically calls the DWM screen. Action code 39 allows you to manually re-enter the DWM program for maintenance or inquiry.

Field descriptions - ORD700D2-01

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the mode you selected on the initial screen.
Customer (8,0):	Infor LX displays the number of the sold-to customer for whom this order is being maintained. If you are in Create mode, it displays the sold-to customer number you specified in the initial screen or in the Order Create window. This field is not enterable on this screen.
P.O.(Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order number associated with this order, if any was entered in earlier screens. The field is optional unless the sold-to customer you have specified requires a customer P.O.
Whse (Warehouse) (3,A):	Defaults from the Ship-To or Sold-To Customer record. Any user who does not have security officer status must have authorization to the requested warehouse. In Create mode, this header value defaults to new lines when no other line-level warehouse is provided from the hierarchy. (For detail on the hierarchy, see the help text for the line warehouse.) Note that Infor LX checks for authorization to each line-level warehouse which differs from this value when you validate the order.
Type (1,0):	**Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2* In Create mode, you can only maintain (enter or select) this value until you validate the order. Validation checks the match between order type and order class as indicated in the tables below. Thereafter, the field is protected. The field is display-only in other modes. Infor LX contains pre-defined order types and default order classes. Order types 1 through 9 are reserved by Infor LX. A table of these appears below. Use the Order Type Listing program, ORD185D) to print a list of all existing order types. In the table, Type is the order type, Base is the base order type, Description is a description of the order type, and Class is the order class. NC means there is no charge, and C means there is a charge.

Type	Base	Description	Class
1	1	Regular Order	4
2	2	Exchange	4
3	3	Replacement, NC	4
4	4	Replacement, C	4

5	5	Special Service, NC	8
6	6	Special Service, C	8
7	7	Credit/Debit Memo	8
8	8	Sales Hist. Correction	8
9	9	Resupply Order	4

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

For more detail on order type/order class validation, see the field help for the Order Class field.

Class (3,0):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Specify the order class associated with the order type.

In Create mode, you can only modify this value until you validate the order. Validation checks the match between order type and order class as described in the following paragraphs. Thereafter, the field is protected. The field is display-only in other modes.

The Order Type/Order Class validation rules follow: All references are to base order types and classes.

Post-ship orders (Order Class 007) are not valid for resupply orders (Order Type 9) and order types that do not affect inventory (5, 6, 7 and 8).

Financial orders (Order Class 008) are not valid for order types that affect inventory (order types 1, 2, 3, 4 and 9.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Order types which do not affect inventory (5, 6, 7 and 8) require Order Class 008.

Order Class 010 is valid only with Order Type 3. You can only create this through RMS.

Resupply orders (Order Type 9) are allowed with quotes (Order Class 006); but this is an unlikely usage.

Note: If a shipping warehouse or a resupply receiving is a Warehouse Type=4 or Type=5, the base Order Class must be 004 or 005.

Summary by Type

In the following table, Inv? means Affects Inventory?, Sales? means Affects Sales?, and AR/GL? means Affects Accounts Receivable and the General Ledger?

Type	Inv?	Sales?	AR/GL?	Valid Classes
1	Y	Y	Y	001 through 007
2	Y	Y	N	001 through 007
3	Y	N	N	001through 007 and 010
4	Y	N	Y	001 through 007
5	N	N	N	003,006,008
6	N	N	Y	003,006,008
7	N	Y	Y	003,006,008
8	N	Y	N	003,006,008
9	Y	N	N	001,002,004,005

Regular Warehouses

Picking documents for regular warehouses consist of the following, as defined for each order class in Order Class Maintenance in this application:

Pick Slip

Allocations Exceptions Report (produced with Pick Slip)

Allocations Not Required and No Allocations Report (produced with Pick Slip if required)

Batch Pull Report (available at user option from Pick Release only)

Managed Warehouses

Picking documents for managed warehouses are available only during Pick Release. Managed warehouse picking documents may include the following, as defined for each managed warehouse in Warehouse Master Maintenance in the Inventory Management application:

Pick List

Pallet List

Pallet Labels

Amount (15,2): Infor LX displays the total monetary charge for all of the lines on this order. This total is rounded according to the rounding rules specified for the transaction currency. The total may also include some components, such as extended amounts for each line, special line amounts, calculated taxes, and discounts, which are assumed to be properly rounded by the rules that apply to them and therefore may not require separate rounding. This field may have a value of 0.00 until you validate the order or until it is priced.

Quantity (11,3): Infor LX displays the total item quantity for all of the regular lines on this order in the selling unit of measure. The figure includes line quantities for kit parents but not for kit components, and it includes line quantities for FAS components but not FAS parents.

Note that, if individual lines have different selling units of measure, this value is not meaningful. For example, a line with 2 items at UOM Each and a line with 1 item at UOM Dozen returns a Quantity field value of 3.

Template (15,A): Specify the ID of the template order to display. Next, press Enter to call the Supplemental Order Selection screen, ORD760D-01, to view and select items from the template to copy to your customer order. Note that you cannot use a template order if the sold-to customer requires the use of customer items from the Customer X-Ref file. You can use this field in both Create and Revise modes.

Line Actions: The following line actions are available:

3=Copy (copy mode)

View the new order with the detail lines from the original order pre-selected in Order Maintenance, ORD700D2-11. You can deselect all lines with F18, then individually re-select individual lines using this action.

4=Delete (copy mode)

Exclude specific lines of the copied order from your new order.

4=Delete Line

Delete a line from the order.

Considerations

You cannot delete lines with promotions assigned. Any promotions applied to the order line must also be deleted at the same time.

You cannot delete Free Goods lines directly. If you try to do so, the Order Line Promotions screen, ORD740D2-01) appears. To delete a free goods line, delete the line-level or total-order promotion that generated the free goods line.

You cannot delete lines that have shop orders assigned to them.

You cannot delete lines that have open drop shipment purchase orders after they have been accepted in Purchasing. Before you can delete these lines, you must first delete the drop shipment purchase order or cancel the drop shipment request.

10=Special Prices

Apply a special price to the line, if one is available. This action code is available in Order, Quote, and RMA modes.

11=Reprice

Reprice the line. If you previously repriced the line manually, there may be a value stored in the Manual Price Override Reason Code field. Repricing with line action 11 clears that field.

To reprice the entire order, use Action 11=Reprice on the top line (that is, for “Line Number Zero”). This action reprices all the lines that are eligible for standard repricing using a direct 11=Reprice, including taxes and any resulting bracket level or order level promotions. Infor LX does not display any message related to the lines that are not eligible for repricing.

13=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

14=Line Promotions

Display promotions associated with this line of the order.

You must have Promotions and Deals installed to use this action.

15=Alternate Items

Display a screen that lists alternate items for the internal item on the selected line. For orders, you can select the alternate items from the list to replace the item in your line. Define alternate items in Alternate Item Maintenance, INV180D.

You can use this line action for any customer, regardless of the setting of the Allow Item Substitution flag for the Sold-To Customer in Customer Master Maintenance. That flag governs only whether item substitution occurs automatically.

Note: Automatic item substitution functionality applies to orders only, not quotes or RMAs.

No manual item substitution is allowed if Track Cancellation is active for the sold-to customer.

16=Allocations

Access the Customer Order Allocation Detail screen ORD725D-01 for the selected line. The action is available only in Order mode, and it is not available for the following situations:

Order types which do not affect inventory (types 5, 6, 7 or 8)

Non-inventory items

Kit or FAS components

Special lines

Drop shipment lines (these cannot be allocated)

Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

17=Special Charges

For item classes that are eligible for special charges, access the Item Class List (WINIICD) screen to select a charge code.

18=Warehouse Inventory

For regular lines, access the Warehouse Inventory Lookup screen, ORD746D, to view the quantities on hand, allocated, and available for that item in various warehouses. You can select a warehouse from the list for this order line.

19=Material Status Inquiry

For regular lines, access the Material Status Inquiry screen, INV300D-02, for the item number on the selected order line.

20=Sales History

Access the Sales History Lookup screen, ORD742D-01. If you select an item and specify a quantity for it on that screen, it is filled in to the next available (blank) line of your order.

21=Features and Options

Access the Assortments, Features and Options screen, ORD745D-01, to select items in an assortment. This action is available only in Order and Quote modes. It does not apply to financial, post-ship, or resupply orders. You must have the Manufacturing Data Management application installed.

In Create mode, the screen contains the suggested planning bill components as defined in Planning Bill Maintenance, BOM600.

22=Drop Shipments

For regular orders only (no quotes, RMAs, post-ships or financial orders). If drop shipments are allowed for the customer, the item, and the selected order type and order class, this action calls the Drop Shipment screen. Note that, if an alternate item has been substituted in the order line, that item must allow drop shipments.

Drop shipments are not allowed for managed warehouses

You must have the Purchasing application installed to perform drop shipments.

23=Item Lookup

Access Item Lookup, ORD744D-01, to select an item to add to the order on a blank line in Create mode, or, on an existing line, to replace the previous item. You cannot replace items that already have shipments or lines that have bracket promotions assigned to them.

This action is not valid for existing special lines.

You cannot use this action for existing FAS or kit component lines because these lines are treated as a set and you cannot affect them individually.

24=ATP/CTP

If you set the Available to Promise option in User Preferences to 0=Manual, this action calls the Available to Promise Inquiry screen, MRP310D-02. This program performs Available To Promise calculation for the selected order line, if it is enabled. You cannot select values from this screen, but you can view the data to determine whether you need to make manual changes to the order or order line.

If the User Preference was set to 1=On Validate, this action will have no effect. With that setting, Infor LX performs the ATP calculation automatically as each line is validated.

If the User Preference was set to 2=On Request, and the Item Master ATP Allowed flag is turned on, the ATP calculation is performed when you use line action 24 on a specific order line. If that flag is turned off, Action 24 will call the Available To Promise Inquiry screen, MRP310D-02.

Available To Promise applies only to orders, not quotes or RMAs.

This action code is only available if the MRP application is installed.

Available To Promise calculation is not be performed when any of the following conditions apply:

The order type does not affect inventory (order types 5, 6, 7 or 8)

The item type does not affect inventory (item type = 6)

The line is for FAS parent items (item type = 5)

The line is for FAS components

The line is for Kit parents (IIM.IITYP Item Type = 4)

The line is for Kit components

The line is for a post-ship order (base order class = 007)

The line is for a phantom (item type = 0)

The line is for a configurator item (manufacturing mode = 6 or 7)

The line is for drop shipment (drop ship order type is not 0 = not a drop ship request or 7 = drop ship request canceled)

The item is defined to disallow ATP calculation (ATP allowed field set to 0=No)

The line is for an RMS order. ATP is not calculated if the current order number is open on an active DHS contract header record.

Users should not perform ATP calculations or override request dates for RMS orders. These changes should be made in the RMS contract based on agreed-upon changes in demand or delivery schedule from the RMS customer, then converted to the order.

This is a special line (executed as any order line where there is no Item Master record)

Note: If the line is for a Lean item, Infor LX calls the Cell Workbench Detail screen, LMP500D2-01, to show the result of the CTP calculation for this order line. The setting in User Preferences for CTP mode causes the CTP calculation to be triggered in the same way that ATP is triggered for non-Lean items.

25=Line Quantity Detail

Access the Order Line Quantity Detail screen, ORD700D3-01. This action does not apply to quotes.

The Line Quantity Detail screen does not appear for special lines. If you request this action in a special line, the Special Line Detail screen, ORD700D3-02, appears.

26=Configurator

Access the configurator's Option Selection screen, CFG700D1, to reconfigure configured items. This screen appears automatically in Create mode for configurable items.

Note: Configured items can only be reconfigured if they have not had shipments yet.

This action does not apply to RMAs.

27=Line Inventory Detail

Access the Order Line Inventory screen, ORD700D3-04.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

28=Line Pricing/Financial

Access the Line Financial Detail screen, ORD700D3-03.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

29=Line Dates

Access the Order Line Dates screen, ORD700D3-05.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

30=Line Shipping

Access the Order Line Shipping screen, ORD700D3-06.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

31=Status

Access the Order Status screen, WINSTSD, for the selected line.

32=Lean Detail

Access the Lean Detail screen, ORD700D3-07, to display details for the selected line. This line action is only valid if the Lean Manufacturing Process application, LMP is installed and the item is a Lean item.

33=Cell Workbench

Access the Cell Workbench Detail screen, LMP500D2-01, to display details for the selected line's cell. This line action is only valid if the Lean Manufacturing Process application, LMP is installed and the item is a Lean item.

34=Lock Promotion

Lock the order line out of promotion calculations. If you use this action code, Infor LX displays the Discount Type screen, WINZCCD, so you can select the appropriate discount type.

35=Return Packaging

Create detailed returned packaging order lines for a parent returned packaging item you enter. Infor LX searches for the packaging item you enter and creates additional order lines for each packaging item in that setup. Infor LX automatically creates these lines with negative quantities based on a relative quantity from the line you enter. These are default quantities that you can change. You can also delete generated lines to match the actual packaging return. This line action applies only during RMA Entry and for post-ship orders when OLM is installed.

36=Estimate Packaging Deposit

Calculate an estimated packaging deposit amount. Use this line action on the blank line to perform the calculation for the entire order or use the action on an order line to calculate the estimated packaging deposit for that line only. This line action applies only during RMA Entry and for post-ship orders when OLM is installed.

37=Calculate Shipping Charges

Check whether charges/allowances apply to this line and calculate them if they do. This line action checks for all the following conditions:

OLM is installed.

The order is active.

The Apply Charges flag in **IDF Customer > Sales > Pricing Data** tab, is set to Yes.

Batch pricing is off.

Pickup allowances apply.

Freight charges apply.

Other charges or allowances apply.

38=Link Packaging to Purchase Order

Access the Order Line Purchase Order Reference screen, ORD700D7-01, to enter the purchase order for this line. This action applies only to packaging items. This action is allowed if shipments have occurred on a line. This action is not allowed for the following situations:

Kits or FAS components

Drop shipments

Order types that do not affect inventory

Resupply orders

RMAs

Quotes

Consignment order classes

39=DWM Maintenance

Access Dynamic Weights and Measures Entry, ORD750D, to enter weights for DWM price adjustment orders.

41=UPC Lookup

If you know an item's UPC code but do not know the item number, specify 41=UPC Lookup in the Act field and specify the UPC code in the Item Number field. When you press Enter, the system displays a list of all the items with that UPC code.

42=Intercompany Automation Detail

Access the Order Line Intercompany Automation Detail screen, ORD748D-01, for the selected line.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Line (4,0): This field displays the line number of each order line. New line numbers are generated sequentially by the program. You can add data in any blank line, but when you validate, Infor LX will move the data to the top blank line available and assign it the next line number in sequence.

Item (35,A): Specify the item to order. You can specify a valid Infor LX internal item number. If you specify a kit or FAS parent, or if free goods promotions apply, the system may automatically create additional lines. If the item is an assortment parent, the system displays the Assortments/Features/Options screen. After you select assortment components on that screen, the system replaces the original assortment parent item number with lines for the selected components.

Note: If you ship from a warehouse type 4 (Warehouse BOSS) or type 5 (WMS-4000), you cannot ship items of the following types:

- Type 0=Phantom
- Type 3=Assortment
- Type 4=Kit (prohibited for warehouse type 4 only)
- Type 5=Planning Bill
- Type 6=non-Balancing
- Container-Controlled Item

Or, you can enter the customer item number that you define in Customer X-Reference Item Maintenance, ORD150.

After validation, the user preference you set governs whether the system displays the customer item number or the internal item number.

For special lines, leave this field blank. After validation, Infor LX displays the value *SPECIAL.

If you change an existing item number here, the system deletes the original item and creates a new one with the value you specify unless the item is not available for deletion. An item is not available for deletion if any of the following conditions apply:

- Shipments have occurred
- Allocations exist for the line
- Item number is for kit or FAS components
- Item is a planning bill item
- Open drop-ship request exists
- Promotions have been applied to this line

Order Qty (Quantity) (11,3): Specify the quantity of the item to order in the selling unit of measure. To change the order quantity, you can change the quantity in the line or change the unit of measure. This field value does not change as you make shipments and partial shipments against the line. The system tracks those changes in the Open Order Quantity and Shipped Quantity fields.

The following restrictions and conditions apply to this field:

A non-zero value is required. Orders cannot be accepted with line quantity of zero. For returns, RMAs, the ordered quantity must be negative.

In revise mode, you cannot reduce the ordered quantity to less than the shipped quantity.

You cannot update this field for kit component lines and FAS component lines.

If promotions exist, you cannot change the item, price, and quantity.

The system may automatically change the order quantity changed after validation if automatic or manual item substitution occurs.

You cannot reduce the ordered quantity to less than the allocated quantity.

If you activate Quantity Edits in User Preferences and a minimum quantity for an item exists in the Item Master or Item Cross-Reference files, the system validates the line quantity against that minimum. If the ordered quantity in the line does not meet the criteria that exists, use F6 to update the quantity.

If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Price (15,5):

The system displays the net selling price in the selling unit of measure from the Item Master list price, special prices, promotions, other system prices, or the system copies the net selling price from the original invoice, order, quote, or RMA. You can override this field.

This field is not available if you select the Tax Only field for this order line or if you invoiced the line. The price cannot be changed if you have already invoiced the line.

If promotions apply to this line or the entire order, you must delete the promotions before you can change item, quantity or price.

Under some conditions, the system expects a net price of zero, for example in create mode if you select Batch Pricing, for free goods assigned through Promotions and Deals, or for kit components. If you want a zero price for a regular order line, you must first perform normal pricing routines to determine a valid list price and net price. You can then override the net price with zero.

For Dynamic Weights and Measures, DWM, items, the system displays the net price in the DWM pricing unit of measure.

UM (Unit of Measure) (2,A):

This field applies to regular lines only. Specify the selling unit of measure for this item. If you leave this field blank, the system searches for the selling unit of measure based on the following hierarchy:

Unit of Measure Conversion file, UIM, for the item and sold-to customer

Unit of Measure Conversion file, UIM, for the item and ship-from warehouse

Item Master file, IIM

You can override this value with a different valid selling unit of measure.

You cannot change this field if one of the following conditions exists:

The system has processed shipments for the line.

The line is a Kit or FAS component.

Promotions exist for the line. -You must first delete the promotions. When promotions apply, you cannot change item, price, or quantity.

If you use Warehouse BOSS, (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Wh (Warehouse) (3,A):

Specify the allocatable ship-from warehouse for this order line. If you are maintaining an order line, you cannot change the warehouse if the order line has been shipped, or if allocations exist for this line. The warehouse hierarchy includes:

Item Master, IIM, default ship-from warehouse

Item/Ship-to Customer/Ship-to number specific, EIX

Item/Ship-to customer specific, EIX

Order header warehouse

Note: If you are using a warehouse type 4 (Warehouse BOSS) or type 5 (WMS-4000), see the Considerations for your advanced warehouse.

Request (8,0):

The system displays the request date you specified when you created the order, quote, or return material authorization.

In create mode, the system displays the current date. In copy mode, you specify this date on the Copy screen.

Changes to this field do not affect existing line request dates.

Price Book Date (8,0):

Infor LX displays the price book date entered for the order. The program uses this date to retrieve list prices and special prices.

In Create mode, this field defaults to the current date. In Copy mode, provide this date in the Copy screen.

Changes to this field do not affect existing line price book dates.

Weight (11,3):

Infor LX displays the calculated order weight of this order, based on line item weights. This value always displays in stocking units of measure and includes free goods.

Infor LX recalculates the value in this field as each order line is validated during create, modified during maintenance, or deleted.

Pallets (11,3):

Infor LX displays the calculated order pallets of this order based on line item pallets. This value always appears in stocking units of measure and includes free goods.

Infor LX recalculates the value in this field as each order line is validated during create, modified during maintenance, or deleted.

Screen actions - ORD700D2-01

Commands	Description
F5=Remove deleted lines	Revise Mode. Remove logically deleted order lines. The system does not physically remove deleted lines for a Type 5 warehouse if the line has been picked. The system needs the order line number and the detail in the ELX file to send a BOD message to notify the Type 5 warehouse of the deletion.
F6=Accept	Accept (post) the order. If you did not validate, this function validates before it posts the order. You return to the Order Directory screen after posting.
F9=Bracket Promotions	Display the bracket promotions available for the current order. From the Bracket Promotions screen, you can see promotion details, assign promotions, or delete promotions. This function applies only if you have the Promotions and Deals application installed.
F11=Fold	Display the folded screen. The following additional fields appear on the folded screen: Request Date (8,0): Specify the request date for this order line. The request date and time for this line item default from the order header. You can override this value with any valid date unless shipments have been made for this order line. Price Book (8,0):

Specify the price book date for this order line. The book date for this line defaults from the order header. You can override this date with any valid date.

Inventory Reason Code (2,A):

Specify the inventory reason code for this transaction. Infor LX defaults to the inventory reason code on the order header. You can override the default with any valid value.

Note that Infor LX validates your entry against inventory reason codes defined for the B transaction effect. Define and maintain inventory reason codes in Reason Code Maintenance in the Inventory application.

Item Description (50,A):

Regular lines: Infor LX displays the item description based on the following hierarchy:

Language-specific description

Item Master description

You can override this value. You can input 50 characters, and the system stores them, but only 30 characters are significant for regular items, since positions 31-50 do not appear on reports and inquiries.

Special lines:

The value defaults in from the Item Class (Charge Code) description. You can enter 50 characters of special line description. In Revise mode, no change can be made to the special line if it has been invoiced or if a Billing work record exists for it.

Extended Amount (15,2):

Regular lines: Infor LX calculates this field after you enter an item and quantity and press Enter to validate. Any manual entry you make in this field is ignored, and the correct calculated value appears.

The extended amount is calculated as follows:

Quantity in Selling U/M is multiplied by the Price in Selling U/M. Rounding follows the rounding rules for the transaction currency.

For DWM items, the extended amount is calculated differently, as follows:

Quantity in Selling U/M is converted to Quantity in Stocking U/M

Quantity in Stocking U/M is multiplied by the DWM dual measure unit from the Item Master record.

The total value expressed in the DWM dual measure unit is multiplied by the DWM unit price.

Special lines: You can specify a special line amount if you know it (you can also enter or modify it during the billing process).

In Revise mode, no change can be made to the special line if invoicing has occurred, or if a Billing work record exists for it.

Note that negative line amounts are only allowed for RMAs, post-ships, and financial orders, unless you activate Allow Negative Special Lines in Regular Orders in Order Entry System Parameters, ORD820D. This parameter gives you the ability to provide a one-time discount in a customer order.

Salesperson (6,0):

Specify the number of the salesperson associated with this order line only if commissions are set for payment at the line level in the system parameters. You can maintain salesperson numbers in Salesperson Master Maintenance in the Sales and Commission Analysis application.

Commission Code (2,A):

Specify the salesperson commission code to use to calculate commissions on this order only if commissions are paid at the line level. Infor LX combines the commission with the item's default commission code from the Item Master and the customer's default commission code from the Customer Master to retrieve the correct commission rate. Commission rates are maintained in Commission Rates program, SAL120D1.

Nature of Transaction (2,0):

Specify the nature of transaction code that applies to this item. You can define nature of transaction codes in System Table Maintenance, SYS105D1. If you use Intrastat reporting you must make an entry in this field. The default in this field is 10=Default Sale if the order line quantity is positive or 16=Default Credit if the order line quantity is negative (RMA). This field does not apply to special lines.

Charge (5,A):

Specify the charge code (item class) if this is a special line. The charge code associates the correct revenue account and/or tax code with the special line. This charge code must be a valid item class. You can maintain item class codes in Item Class Maintenance in the Inventory Management application.

In Revise mode, you cannot modify the special line if invoicing has occurred, or if a Billing work record exists for it.

This field does not apply to regular lines.

Drop (1,0):

Specify Y if you want to delete (drop) this line after its first shipment. Otherwise, specify N. If you specify N=No, the line prints on all invoices and backorders.

You can change this drop code entry at billing time. You cannot drop order lines from a managed warehouse.

In Create mode, the default is Y for post-ship orders, financial orders, non-inventory items, and special lines. The default is N for other lines.

The backorder code defined for this order overrides the drop code you specify for an order line. Drop codes are intended for use on special lines and orders with backorder code of 0=back-ordering allowed.

For regular lines, you can change this value from Y to N if the backorder code = 0, the order line is open, and it is not a post-ship or financial order. You can change this value N to Y if the backorder code = 0 and the order line is open.

For special lines, you can change this value from Y to N only if there is an open regular line elsewhere on the order. If the last regular line is deleted but a special line remains open, you must also delete the special line before the order can be stored.

You cannot change the drop flag individually for kit or FAS component lines. These are updated automatically with the same value as the Drop flag for their parent lines.

TxO (Tax Only Code) (1,0):

Specify the tax only code. Valid values are:

Blank Normal line, not a tax-only line

1 Tax-only line, payable by the customer, produces an invoice

2 Tax-only line, payable by the company, no invoice produced

For zero-price items, including free goods, this field indicates who is responsible for paying the taxes on the value of the line.

Infor LX bases the tax calculation on the normal selling price unless you override the Tax Basis field. This field is not available if you specify a net selling price for this order line.

Tax Code (5,A):

Specify the item tax code to use to calculate the tax for this line . Infor LX uses this item tax code with the customer's default tax code to yield the tax rate for this line. Infor LX calculates taxes during Invoice Print in the Billing application. You can maintain tax codes in Tax Rate Code Maintenance, SYS140D1.

This value must be a valid tax code, and it must result in a valid tax rate combination when used with the header tax code to determine tax rates.

If you do not specify a tax code in Create mode, Infor LX retrieves this line's default tax code from the Item Master file for regular lines or the Item Class Tax Code for special lines.

Tax Basis (13,3):

This field applies to zero-price items, including free goods. Specify the amount on which the tax is calculated if this line item is free. This amount in this field together with the value in the Tax Only field determines the tax amount for the line.

F12=Cancel	Cancel maintenance of this order. Cancel is available only in Revise mode. You must then press Enter to complete the exit. If you use F12 again, you cancel the Cancel request. The program does not save changes you made to the order if you exit with F12 rather than F6=Accept. However, changes that you made through called programs, such as Configurator, Notes, and Line Notes, are not lost when you use F12.
F13=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.
F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.
F16 in Copy Mode=Select All	Select all lines of the copied order to include in the new order.
F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F18=ATP/CTP	Perform the Available To Promise or Capable to Promise calculation for all lines of the order. For non-Lean items, Infor LX runs the ATP calculation. This function also updates any request dates which require modification according to the results of the calculation. This function key does not appear in Quote or RMA mode. It is available in Order mode only if MRP is installed. Note: For Lean items, the Capable to Promise calculation runs. This function is only available when the CTP Mode in User Preferences is set to On request.

F18 in Copy Mode=Deselect All	In Copy mode only, Deselect all lines of the copied order, excluding them from the new order. You can use line action 3 to select individual lines to include. You must select at least one line from the copied order to include in the new order.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information.
F20=Total Order Promotions	Display the Total Order Promotions screen, ORD740D1, to view total order promotion assignments. This function is available only if the Promotions and Deals application is installed.
F21=Delete	Delete the order.
F22=Customer Alpha Search	Perform Customer Alpha Search. This action calls the Customer Alpha Lookup screen, ACR310D-01.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain order shipping information

Use the Shipping Information and Additional Shipping Information screens, ORD700D9-02/ORD700D6-01, to create or maintain order shippinginformation. Use F16 in the initial Shipping screen to access the additional fields.

Field descriptions - ORD700D9-02/ORD700D6-01

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Warehouse (3,A):	Specify the order warehouse code. You must be authorized to this warehouse.

If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Description:

Infor LX displays the description of the warehouse you selected.

Stat (Status):

Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

To view the status of individual order lines, use action 14=Order Lines.

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Type (1,A):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order type code associated with this order. The order type code determines the types of information posted to accounts for inventory movement valuation, accounts receivable, and revenue amount (sales statistics).

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Class (3,A):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order class associated with the order type. The order class specifies which common events must occur for an order to successfully process it.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Entry (6,0): Infor LX displays the date you entered the order, quote, or return material authorization.

Rqst (Request Date) (6,0): Infor LX displays the requested shipping date you specified when you created the order, quote, or return material authorization. You can change this on any order header screen. The program saves the change to a work file after you validate the screen with Enter.

In Create mode, the default is the order entry date.

Book (Price Book Date) (6,0): Infor LX displays the date the order was booked (price book date). The program uses this date to retrieve and qualify the order for list prices, special prices, and promotions. In Create mode, the default is the current date. You can override this date.

Request Time (6,0): (Optional) Specify the time shipping of the order is requested. This time is critical in the system because order picking is based on this time. Material Requirements Planning also uses this field (as the Material Requirements Planning due time) for planning and projection purposes. In Create mode, the default time is zeroes. In Revise mode, it defaults from the Order Header file. If you change the requested time on a header screen when you update an order, Infor LX will not change the individual times for existing line items.

Schedule Ship Time (8,0): Specify the time the order is scheduled to be shipped. This field is used for reference only.

Ship-to (Customer) (8,0): Specify the number of the customer to which to ship this order. The ship-to customer number must exist within the sales hierarchy of the ordering customer. The default is the value from the Customer Master file. If the ship-to customer value is blank in that file, the default is the sold-to customer. The program uses this value to validate and retrieve the ship-to number.

Ship-to Alternate Address (4,0):	Specify the code for the customer's alternate address to which you want to ship this order. Use this field if the customer has several possible ship-to addresses.
Store (5,A):	Specify the store number associated with the ship-to address. The default value comes from the ship-to customer address record in the Address Master file, EST.
Ship-To Name (30,A):	Infor LX displays the name associated with the Ship-To Number. You can override the value manually. It is not validated for content.
Ship-To Address Lines 1-6 (50,A):	Specify any additional address information you want to include in the shipping address, such as a contact person's name or a department. You can update all lines manually. The data is saved to the order header work file when you validate the screen.
Ste (State) (3,A):	Specify the ship-to state for this order.
Country (4,A):	Specify the customer country code (ship-to country) for this order.
Post (Postal) (9,A):	Specify the ship-to postal code for this order.
Shipper Name (50,A):	Specify the name of the shipper for this order. This field is for reference only.
Shipping Weight (11,3):	Manually enter the approximate shipping weight for this order. This field is not populated from a master file. It is saved to the order or quote header file. Note that weights cannot be entered with negative values.
Shipping Charges (15,2):	Manually enter the freight/order charges for this order. Shipping charges cannot be negative values for regular orders and quotes. However, shipping charges can be negative for RMAs, post-shipment orders, and financial orders.
Estimated Packaging Deposit (15,2):	Infor LX displays an estimate of the packaging deposit amount for this order. It is the sum of all line level estimates. Infor LX only displays this field if you have OLM installed.
Mark For (35,A):	Specify the freight/order marking the customer requested for this ship-to address, for example the name of a receiving clerk.
Shp to Dept (30,A):	Specify the name of the ship-to department for this order. The system does not validate this name, but it saves it to the order or quote header file.
Contact Phone Number (15,A)	Specify the phone number of the contact person at the ship-to location.
Carrier (6,A):	Specify the transportation carrier code for the carrier to deliver this order.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms.

Route (6,A): Specify the route code associated with this order.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms.

Intrastat (Country Code) (2,A): Specify the country code of the country where the shipment originates. The Intrastat Report in the Inventory Management application uses the Intrastat country code.

This field is required only if you have the Intrastat option turned on in the Inventory Management system parameters.

Destination (4,A): Specify the country of ultimate destination for this order.

This field is required only if you have the Intrastat option turned on in the Inventory Management system parameters.

Schedule Date (6,0): Specify the date to schedule the order to ship. In create mode, the system displays the order entry date, but you can change it.

Means (4,A): (Optional) Specify the means of transportation for this order.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms.

Zone (5,A): Specify the zone or area to which to ship this order. If OLM is installed, Infor LX uses the postal code associated with this ship-to customer to determine the zone. You can change this value.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms. This field is required if you have OLM installed.

Freight Terms (3,A): Specify the freight terms for this order.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms.

Weight (11,3): Infor LX displays the calculated order weight (not the remaining weight) of this order, based on line item weights. This value always appears in stocking units of measure and it includes free goods.

Volume (11,3):	Infor LX displays the calculated order volume (not the remaining volume) of this order, based on line item volumes. This value always appears in stocking units of measure and it includes free goods.
Pallets (11,3):	Infor LX displays the calculated total pallets (not remaining pallets) for this order, based on line item pallets. This value always appears in stocking units of measure and it includes free goods.
Containers (11,3)	Infor LX displays the calculated total containers (not remaining containers) for this order, based on line item containers. This value always appears in stocking units of measure and includes free goods.
Back Ordered (2,0):	Infor LX displays the number of times this order was backordered.
Return Warehouse (3,A):	Optional. The default value comes from the header From Warehouse for orders, post ship orders, and RMAs. Note: If you specify a return warehouse on the customer order, that warehouse's address fields print as the address for returns on the Order Acknowledgment. For RMAs, that warehouse's address prints as the return address on the RMA Acknowledgment.
Email Address	**Added:** *MR56084 Added a new field Email Address* Specify the e-mail address that must be associated with the order address.

Screen actions - ORD700D9-02/ORD700D6-01

Commands	Description
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F9=Return Freight	Call the Return Freight Details screen, ORD700D5-01. This function key is only available during RMA entry (base order class 003) and when you copy RMAs to post-ship orders (base order class 007).
F10=Language Overrides	Display the Customer Order/Quote/RMA Language Override screen, ORD765D-01. Select an order, quote, or RMA and the language for translation.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.

F16=Additional Shipping Information	Access the Additional Shipping Information screen, ORD700D6-01, to view, create, or maintain the Shipper Name, Mark For and Header Ship-to Department fields for the order.
F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information.
F20=Update Lines	Access the Copy Header Fields screen, ORD700D2-12, to specify values for the Warehouse, Requested Date, Price Book Date, Schedule Date and Receipt (Resupply) fields to copy to the order lines. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain order information for pricing, sales, and commissions

Use the Pricing, Sales, Commission screen, ORD700D9-03, to create or maintain order pricing information.

Field descriptions - ORD700D9-03

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Warehouse (3,A):	Specify the order warehouse code. You must be authorized to this warehouse. If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.
Description:	Infor LX displays the description of the warehouse you selected.

Stat (Status):

Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Type (1,A):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order type code associated with this order. The order type code determines the types of information posted to accounts for inventory movement valuation, accounts receivable, and revenue amount (sales statistics).

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Class (3,A):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order class associated with the order type. The order class specifies which common events must occur for an order to successfully process it.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Entry (8,0)(6,0): Infor LX displays the date you entered the order, quote, or return material authorization.

Rqst (Request Date) (6,0): Infor LX displays the requested shipping date you specified when you created the order, quote, or return material authorization. You can change this on any order header screen. The program saves the change to a work file after you validate the screen with Enter.

In Create mode, the default is the order entry date.

Book (Price Book Date) (6,0): Infor LX displays the date the order was booked (price book date). The program uses this date to retrieve and qualify the order for list prices, special prices, and promotions. In Create mode, the default is the current date. You can override this date.

Pricing Customer (8,A): By default, the system uses the pricing customer from the sold-to customer. To override this value, specify a pricing customer number that is within the current customer's corporate hierarchy. You cannot change the pricing customer number after you price an order line. The system uses the pricing customer's list price and special price data when you specify orders for the sold-to customer. This value also determines whether the system calculates margins. You can also specify the region code for this pricing customer.

Customer Description: Infor LX displays a description of the customer. The description follows each customer number on the screen.

Customer Description: Infor LX displays a description of the customer. The description follows each customer number on the screen.

Region (6,A): Specify the pricing region code for this order. The system uses the pricing region to access list price records.

Pricing Facility (3,A): The system displays this field only if you specify yes in the Promotions Defined by Pricing Facility field in the Promotions and Deals system Parameters program. In create mode, the system displays the value from the owning facility of the header warehouse. In copy mode, the system displays the value from the original record. In revise mode, you cannot change the pricing facility if the system invoiced any line of the order. If you change the pricing facility, you must use F9 to reprice the order, quote, or RMA based on the new pricing facility.

Source Code (2,A): Infor LX displays the price source code that identifies how the total order was priced. The following codes are valid for the order price source code:

00	No Pricing Performed
01	Failed Pricing
02	Special Price
03	Promotions and Deals
04	No Discount Calculated for the Order
05	Replenishment Order Not Priced

Contract (50,A:) If this order originates from a contract agreement between your company and the customer, specify the contract number. The system prints this contract number on your customer statements.

Promotion Customer (8,0): By default, the system uses the promotion customer from the sold-to customer in the Customer Master file. To override this value, specify a promotion customer that is within the sold-to customer's corporate hierarchy. You cannot change the promotion customer number after you price an order line. The system enters promotions against this customer in the Promotion Master, PDM, file.

Promotion Region (6,A): Specify a promotion region for the order. Infor LX uses the promotion region to access promotion records.

Promotion Pay-To Customer (8,0): By default, the system uses the value in the sold-to customer's Customer Master record. To override this value, specify a promotion customer that is within the sold-to customer's corporate hierarchy. The system sends promotional payments to this customer for promotions on the sold-to customer's orders.

Promotion Pay-To Number (4,0): Specify the promotion pay-to number associated with the promotion pay-to customer. This number must be valid for the promotion pay-to customer as defined in the Address Master file.

Promotion Pricing (1,0): Specify the code to determine whether the system allows promotional pricing, and what types it allows. By default, the system uses the value from the promotion customer's Customer Master file, RCM. This field does not apply to RMAs. Choose from one of the following values:

0	No promotional pricing allowed
1	Only line and total promotion
2	Only bracket pricing allowed
3	Line, bracket, and total promotion

Margin Hold Reason (2,A): Infor LX displays the margin hold reason code for this order. This code indicates whether an order is on margin hold, or, in Revise mode, how the order was released from margin hold. The margin hold reason code values are defined as follows:

00	Order not on margin hold
01	Margin hold at order level
02	Margin hold at line level
03	Margin hold at both order and line
98	System released order from hold
99	Order manually released from hold

Margin Percent (5,2): Infor LX displays the calculated order margin percent. This field does not apply to RMAs.

Sales History Customer (8,0): Specify the number of the customer who the system reports in the sales history for orders entered against the sold-to customer. This customer must exist in the sales hierarchy of the sold-to customer. When you invoice the order, the system enters this customer number in the Invoice History, SIH, Sales Detail, SSD, and Sales History, SSH, files.

Primary Salesperson (6,0): Specify the primary salesperson number to associate with this order. The system uses the following hierarchy:

Responsible CSR from Customer Master

Ship-To Customer/Number from Address Master: Type 1, Ship To

Ship-To Customer/Number from Address Master, Type 0, Global

Ship-To Customer from Customer Master

Sold-To Customer from Customer Master

Salesperson Description	Infor LX displays a description of the salesperson.
Comm Code (primary salesperson) (2,A):	Specify the commission code for the primary salesperson.
Split Salesperson (6,0):	For split commissions, specify the secondary salesperson name and number to associate with this order.
Comm Code (split salesperson) (2,A):	Specify the commission code for the secondary salesperson.
Discount Type (1,0):	Specify the discount type code to determine whether to allow or limit the application of promotions and allowances. Choose from the following values:

0	Allow promotions and allowances
1	Only promotions allowed
2	Only allowances allowed
3	Neither promotions nor allowances

Store Date (8,0):	If you do not use the store date as a pricing qualifier, this field is for information only. If you change this date and the store date is a pricing qualifier, the system reprices the line. You can add or remove promotions based on this field.
Warehouse Date (8,0):	If you do not use the warehouse date as a pricing qualifier, this is for information only. If you change this date and the warehouse date is a pricing qualifier, the system reprices the line. You can add or remove promotions based on this field.

Screen actions - ORD700D9-03

Commands	Description
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F9=Retrieve	Reprice all eligible lines if you changed the pricing facility.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.

F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.
F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information.
F20=Update Discount Type Code	Update the order lines with the new Discount Type code. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain billing and financial order information

Use the Billing and Financial Information screen, ORD700D9-04, to create or maintain billing and miscellaneous financial information for the order.

Two totals fields display order-level discount information for the order. The Order Total Discount Offered field shows the total discount amount applied to the order. The Order Total Discount Billed field is set to zero until you bill one or more lines. After billing, it shows the amount of the discount that has been applied to the invoices.

Field descriptions - ORD700D9-04

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Warehouse (3,A):	Specify the order warehouse code. You must be authorized to this warehouse. If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Description: Infor LX displays the description of the warehouse you selected.

Stat (Status): Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Type (1,A): **Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order type code associated with this order. The order type code determines the types of information posted to accounts for inventory movement valuation, accounts receivable, and revenue amount (sales statistics).

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Class (3,A): **Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order class associated with the order type. The order class specifies which common events must occur for an order to successfully process it.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Entry (6,0): Infor LX displays the date you entered the order, quote, or return material authorization.

Rqst (Request Date) (6,0): Infor LX displays the requested shipping date you specified when you created the order, quote, or return material authorization. You can change this on any order header screen. The program saves the change to a work file after you validate the screen with Enter.

In create mode, the default is the order entry date.

Book (Price Book Date) (6,0): Infor LX displays the date the order was booked (price book date). The program uses this date to retrieve and qualify the order for list prices, special prices, and promotions. In Create mode, the default is the current date. You can override this date.

A/R (Customer/Name) (8,0/50,A): Specify the number and name of the accounts receivable customer to bill for this order. After you accept this order for invoicing, Infor LX uses this customer number as the corporate/billing customer in the Accounts Receivable file, RAR, and the Invoice History file, SIL. The amount of this invoice is added to the customer's total amount due and is subtracted from the open order amount.

Customer Description: Infor LX displays a description of the customer. The description follows each customer number on the screen.

Terms (2,A): Specify the customer terms code to associate with this order. The default value is the terms code from the Customer Master file, RCM, for the A/R customer. Infor LX generates invoice due and discount due dates and percentages from this code. See the on-line help for the Terms Code Maintenance application in the Accounts Receivable application for additional information.

If you change the terms code, the financial discount is not applied at order entry until you press Enter or until you access the screen again with the overridden terms code.

You can override the value in this field during billing.

Note that you can only change this value to or from a credit card payment term if no part of the order is ship confirmed.

Terms Description (15,A): The system displays the terms description after you specify a terms code.

Document (Prefix/Number) (2,A/8,0):

If this document is a credit memo or debit memo or if the terms require prepayment, the system displays the document prefix and original invoice number. If you did not request document prefixes in your system parameters, the system displays only the invoice number.

The system displays the Prefix field only if you select the Company/Prefix Document sequencing field in the Billing System Parameters. Specify the company-specific prefix code to retrieve the invoice number from the Document Sequence Numbering file, RDS. By default, the system uses the document prefix from the A/R customer.

Note: No document prefix and number is allowed on a credit or post-ship order that you copy from an RMA if the original order you copied was of a type that did not affect Accounts Receivable. An example of this is an exchange. If a value appears in the Document Number field of this type of order, you will get an error message when you try to post the order. To continue, clear the Document Number field.

When you attempt to create an RMA or copy an RMA to an order, Infor LX validates prefix number, document number, date, order type, and order class.

Valuation (8,0):

Specify the date used to calculate the document and discount due dates for post-ship (type 1, class 7) orders. Default in Create mode is the date you enter the order. Countries that do not use the document date to calculate the due date require the invoice value date. The valuation date cannot be earlier than the document date.

You can only maintain this field for post-ship orders.

Company (3,0):

The default in this field is the company number defined for this sold-to customer. You can override the value before you validate any order lines. After that, you can no longer maintain the field.

Note: If you change this value and press Enter to validate, the Bank Code, Currency Code, and Document Prefix are confirmed for the new company. Access the Tax, Currency, Payment screen to fix the bank and currency codes to match the new company.

Invoice-to Customer (8,0):

This is the customer number and name to whom the invoice is sent. Specify the number of the customer to invoice. It must be a valid customer number within the corporate hierarchy of the ordering customer.

If you change the Invoice-to number, use the F2=Address key to display the address for the new Invoice-to number. Review the information that appears on the address screen to validate or update the address information.

Note: If you specify a reserved Invoice-to Customer (as defined in Customer Master), Order Entry invoices all associated orders for tax purposes only and creates no accounts receivable records.

Alternate Invoice-to Number (4,0): Specify the code for the customer's alternate address to which you want to bill this order. Use this field if the customer has several possible invoice-to addresses.

State (3,A): Specify the invoice-to state for this order.

Country (4,A): Specify the invoice-to country for this order.

Post (Postal) (9,A): Specify the invoice-to postal code for this order.

Lock box-to Customer (8,0): Specify the customer number to which to send credit payments for the Sold-To customer. It must be a valid customer number that exists within the corporate hierarchy of the Sold-To customer.

(Lock box-to Number) (4,0): Specify the lock box-to number of the address for this Lock box-to customer.

Credit Hold: Specify the credit hold code for this order. This code indicates whether an order is on credit hold or how the order was released from credit hold. The system uses the A/R customer to determine the credit status. Choose from the following values:

00	Order not on credit hold
01	Order on credit hold
02	Order on manual credit hold
98	System released order from hold
99	Order manually released from hold

If the order is not on hold, it can be put on hold if the order type affects accounts receivable. To do this, enter 01 in the field. If this field is already 01, you cannot change it to 00 here to release it.

You can release orders from credit hold with Order Hold Manual Release, ORD580D, and Order Hold Mass Release, ORD680D.

This field does not apply to post-ship (type 1, class 7) or financial (class 8) orders.

Credit Hold does not affect quotes or RMAs. However, if a quote is copied to a regular order, the new order is subject to credit check and credit hold.

Customer Hold (2,0):

Specify the customer hold code for this order. This code indicates whether an order is on customer hold or how the order was released from customer hold. The system uses the sold-to customer to determine the customer hold status. This field does not apply to quotes or RMAs.

The following are the values for the customer hold field:

00	Order not on customer hold
01	Order on customer hold
98	System released order from hold
99	Order manually released from hold

You can release orders from credit hold with Order Hold Manual Release, ORD580D, and Order Hold Mass Release, ORD680D.

User Hold Code (2,0):

Specify the user hold code for this order. This code indicates whether an order is on user hold or how the order was released from user hold. Choose from the following values:

00	Order not on user hold
01	Order on user hold
98	System released order from hold
99	Order manually released from hold

You can place an order on user hold during order entry only. Therefore, the system allows only a value of 01 here. You cannot remove orders from user hold during order entry. To release orders from user hold, use Order Hold Manual Release, ORD580D, or Order Hold Mass Release, ORD680D.

This field does not apply to quotes, RMAs or post ship (Type 1 Class 7) or financial (Type 8) orders.

CC Hold:

The system displays the credit card hold status of the order. This code indicates whether the order is on credit card hold or whether the system released it from credit card hold. Valid values are described below:

00	Order not on credit card hold
01	Order on credit card hold
98	System released order from hold

Document Prefix (2,A): Specify the company-specific prefix code to retrieve the invoice number from the Document Sequence Numbering file, RDS. In Create mode, the document prefix defaults from the A/R customer.

This field is required only if you selected the Company/Prefix Document sequencing option in Billing System Parameters. When Infor LX generates the invoice/credit/debit for the order, it uses the document prefix entered here to retrieve the document number.

You cannot maintain this field if document sequencing is turned off in Billing system Parameters, BIL820.

G/L Reason (General Ledger Reason) (5,A): Infor LX displays the reason code which defaults from the General Parameters (ZPA) file. The default reason code is based on the combination of the subsystem event and the last two digits of the base order class. The G/L Reason Codes are set up in Configurable Ledger, SYS170, and they determine the ledger effects based on the model.

You can prompt in this field to retrieve the Reason Code list. The Validate G/L Reason Code program, SYS704B, validates this field if Advanced Transaction Processing is installed.

RMA: Reference only. If you are viewing information for an order copied from a return material authorization, Infor LX displays the return material authorization line number.

Billing Selection Flag (1,A): Specify a value for this category of customers. When you invoice orders, you can enter the selection flag on the Customer Document release screen to select all customers with the same value. If you do not specify a value in this field, Infor LX defaults to the billing selection flag from the Customer Master for the sold-to customer.

Self Bill Flag (1,0): Infor LX displays this flag to indicate whether the customer can use Self Bill functionality.

Financial Discount The screen displays the calculated financial discount based on the total extended amount and the uninvoiced order quantity. This is a dynamic value that is based on the order quantity.

Total Amount Less Financial Discount The screen displays the order amount less the calculated financial discount. This is a dynamic value based on the order quantity.

Screen actions - ORD700D9-04

Commands	Description
F2=Address	Access the Invoice To Customer Address screen to display specific address and contact information.
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F9=CSR Codes	Display the CSR Code information display screen for the order.
F10=Language Override	If the Invoice To field is blank, display the Customer Master Language Override screen, ACR101D-01. If the Invoice To field is not blank, display the Address Master Language Override screen, ORD101D-01. You can display the invoice address information but you cannot translate it.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Credit Card	Access Credit Card Entry, ORD503D2-01, to enter credit card information.
F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.
F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain inventory information for the order

Use the Inventory Information screen, ORD700D9-05, to create or maintain order inventory information.

Field descriptions - ORD700D9-05

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Warehouse (3,A):	Specify the order warehouse code. You must be authorized to this warehouse. If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.
Description:	Infor LX displays the description of the warehouse you selected.
Stat (Status):	Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time. Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 = Ready for Invoicing Position 5 = Ready for Purge Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.
Type (1,A):	**Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2* Infor LX displays the order type code associated with this order. The order type code determines the types of information posted to accounts for inventory

movement valuation, accounts receivable, and revenue amount (sales statistics).

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Class (3,A):

Added: *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order class associated with the order type. The order class specifies which common events must occur for an order to successfully process it.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Entry (8,0): Infor LX displays the date you entered the order, quote, or return material authorization.

Rqst (Request Date) (8,0): Infor LX displays the requested shipping date you specified when you created the order, quote, or return material authorization. You can change this on any order header screen. The program saves the change to a work file after you validate the screen with Enter.

In Create mode, the default is the order entry date.

Book (Price Book Date) (8,0): Infor LX displays the date the order was booked (price book date). The program uses this date to retrieve and qualify the order for list prices, special prices, and promotions. In Create mode, the default is the current date. You can override this date.

Item X-Ref Customer (8,0): Specify the item cross reference customer number for the sold-to customer. This value must be a valid customer number that exists within the sales organization hierarchy of the sold-to customer.

Resupply Warehouse (3,0):

This field displays the receiving warehouse code for this order. The system requires a value in this field only for resupply orders, base Order Type 9. In create mode, specify the desired warehouse code. Infor recommends that you not change this value when you maintain a resupply order.

If this is a type 4 warehouse, Warehouse BOSS controlled warehouse, or type 5 warehouse, WMS4000-controlled warehouse, the base order class must 004 or 005.

Receipt (8,0):

Specify the scheduled receipt date for this resupply order. This field is required only for resupply orders, base Order Type 9.

Affect Pricing (1,0):

This field applies to resupply orders only. The system initially displays the default value specified in the Order Entry System Parameters. In create mode, if you specify 1, yes, the system prices resupply orders. If you specify 0, no, the system does not price resupply orders. In revise mode, you cannot override this value for system-generated resupply orders.

Affect A/R (1,0):

This field applies to resupply orders only. The system initially displays the default value specified in the Order Entry System Parameters. In create mode, if you specify 1, yes, the system allows resupply orders to affect accounts receivable. If you specify 0, no, the system does not allow resupply orders to affect accounts receivable. In revise mode, you cannot override this value for system-generated resupply orders.

Affect Sales History (1,0):

This field applies to resupply orders only. The system initially displays the default value specified in the Order Entry System Parameters. In create mode, if you specify 1, yes, the system allows resupply orders to affect sales history. If you specify 0, no, the system does not allow resupply orders to affect sales history. In revise mode, you cannot override this value for system-generated resupply orders.

Cancel by Date (6,0):

Added: *MR 66738 Added new field to implement cancel date for quotes and RMAs*

Specify the date when the quote or return material authorization (RMA) can be canceled. A quote or RMA without this value can be used as long as it is defined in the system.

Note

This must be greater than request date, if specified.

Inventory Reason Code (2,A):

As a rule, the system displays reason code RM for an RMA and B for regular orders. The system uses this reason code to determine the ledger effects for the cost of sale transaction. You can override this value.

You can define and maintain inventory reason codes in Reason Code Maintenance, INV140D1.

User 1 Reason Code/ Customer Reason Code (2,A): Specify the user-defined reason codes for this transaction. The system uses the B transaction effect in order or quote mode to validate the code, or it uses the RM transaction effect if you are in RMA mode.

These fields are not meaningful for financial orders. But if you do enter values for these orders, they will be validated based on the B transaction effect and they will be stored.

User 2 Reason Code/ Disposition Reason Code (2,A): Specify the user-defined reason codes for this transaction. The system uses the B transaction effect in order or quote mode to validate the code, or it uses the RM transaction effect if you are in RMA mode.

These fields are not meaningful for financial orders. But if you do enter values for these orders, they will be validated based on the B transaction effect and they will be stored.

User 3 Reason Code/Q/ C Reason Code (2,A): Specify the user-defined reason codes for this transaction. The system uses the B transaction effect in order or quote mode to validate the code, or it uses the RM transaction effect if you are in RMA mode.

These fields are not meaningful for financial orders. But if you do enter values for these orders, they will be validated based on the B transaction effect and they will be stored.

User Date 1 (6,0): Specify a date for the user-defined reference field. The system displays the field names you specified in Order Entry System Parameters. You can, for example, define one of these fields as the previous date you received an order from this customer and the other as the date you first shipped to this customer.

User Date 2 (6,0): Specify a date for the user-defined reference field. The system displays the field names you specified in Order Entry System Parameters. You can, for example, define one of these fields as the previous date you received an order from this customer and the other as the date you first shipped to this customer.

Back Order Code (1,0): The system displays the back order code for this customer. The system places the order header back order status on any order or line that can be back ordered. You can maintain back-order codes in Code Master Table Maintenance in the SYS application and override them on the Order Header and when you maintain the Ship-To information. You cannot maintain back order codes in line detail screens.

Note that backorder code 1 is not available if any line in the order has a type 5 (WMS-controlled) warehouse.

Valid choices

- **0, You can back order any order or line.**

  You can back order any order or order line for this customer. You can pick by order or by line. The system prints Pick slips print for all items, even if the allocated quantity is 0.

- **1, Do not allow back orders.**

  Do not allow any back orders for this customer. All order lines must be allocatable. You can pick release by order or by line to allow partial picks to the staging location. You can only pick confirm by order. In Pick Confirmation you must select all lines of the order and the lines must be complete (fully allocated and fully confirmed) or the system automatically de-selects the order and performs no processing. Partially allocated quantities remain, and all lines of the order remain in their existing statuses. You must perform allocations or inventory confirmation at the line level during the Pick Confirm process. This option is not available if any line in the order has a type 5 (WMS-controlled) warehouse.

- **2, Ship complete lines and back order incomplete lines.**

  Ship any completely allocatable lines. Infor LX back orders only incomplete lines selected for processing in Pick Confirm. You can pick by order or by line. Incomplete lines processed in Pick Confirm are back ordered. Full or partial allocations remain.

- **3, Ship complete lines and cancel incomplete lines.**

  Ship any complete lines, cancel incomplete order lines, and consider the order complete. You can Pick Release by order or by line in varying quantities for different lines. The system cancels only incomplete lines you select for processing in Pick Confirm. You can Pick Confirm by line or by order. If you Pick Confirm by order, the system cancels only the incomplete lines that are ready for Pick Confirm.

- **4, Ship available inventory and cancel remainder of selected partial lines.**

  Ship available inventory, cancel the remainder of partial lines and consider the order line complete. You must pick by line. You can Pick Confirm by order. The system cancels the remaining selected partial lines during Pick Confirm in this application.

Priority (2,0):

Specify the allocation priority code for this order. High priority=99, low priority=01. Infor LX allocates inventory based on allocation priority, then request date.

In Create mode, this value defaults from the Sold-To Customer Master record.

Source (3,A):	Specify the user-defined source code for this order. This field is for reference only. You can maintain source codes in Code Master Tables, SYS105D1.
Usage Code (1,A):	Specify the usage code associated with this order. This field is for reference only. You can maintain source codes in Code Master Tables, SYS105D1.
Customer Requested Dock Date (6,0):	Reference only. Specify the date on which the customer wants the order to arrive at its receiving location.
Customer Requested Dock Time (4,0):	Reference only. Specify the time on the specified date at which the customer wants the order to arrive at its receiving location.
Customer Requested Ship Date (6,0):	Reference only. Specify the date the customer requested that you ship this order. This field updates the Customer Order Header files.
Customer Requested Ship Time (4,0):	Reference only. Specify the time on the date specified in the preceding field at which the customer requests you ship this order.
Original Customer Requested Ship Date (6,0):	Display only. This field displays the Customer Requested Ship Date value that you entered when you first created the order.
Original Customer Requested Ship Time (4,0):	Display only. This field displays the Customer Requested Ship Time value on the date displayed in the preceding field that you entered when you first created the order.
CTP Dock Date (6,0):	Display only. This field displays the latest Capable to Promise Dock Date from the Customer Order Header work file for all lines of the order.
CTP Dock Time (4,0):	Display only. This field displays the latest Capable to Promise Dock Time from the Customer Order Header work file for all lines of the order.
CTP Ship Date (6,0):	Display only. This field displays the latest Capable to Promise Ship Date from the Customer Order Header work file for all lines of the order.
CTP Ship Time (4,0):	Display only. This field displays the latest Capable to Promise Ship Time from the Customer Order Header work file for all lines of the order.

Screen actions - ORD700D9-05

Commands	Description
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.
F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add or maintain tax, currency and payment information for the order

Use the Tax, Currency, Payment screen, ORD700D9-06, to create or maintain order tax, currency, and payment information.

Field descriptions - ORD700D9-06

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Warehouse (3,A):	Specify the order warehouse code. You must be authorized to this warehouse.

If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Description: Infor LX displays the description of the warehouse you selected.

Stat (Status): Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Type (1,A): **Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order type code associated with this order. The order type code determines the types of information posted to accounts for inventory movement valuation, accounts receivable, and revenue amount (sales statistics).

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Class (3,A): **Added:** *MR81290 Add HT for the ability to delete new lines in order -ORD700D2*

Infor LX displays the order class associated with the order type. The order class specifies which common events must occur for an order to successfully process it.

The ability to delete new lines in order to correct the User Order Type or User Order Class applies only if the current order type affects inventory. If the current Base Order Type is a financial order (ECHW.HDTYP = ‘5’, ‘6’, ‘7’ or ‘8’), deleting existing lines must not allow modification of the User Order Type or User Order Class. If a user has already started entering lines for a financial order and needs to correct the order type or order class, the user must delete the current transaction and create a new transaction with the correct order type and order class.

Entry (6,0): Infor LX displays the date you entered the order, quote, or return material authorization.

Rqst (Request Date) (6,0): Infor LX displays the requested shipping date you specified when you created the order, quote, or return material authorization. You can change this on any order header screen. The program saves the change to a work file after you validate the screen with Enter.

In Create mode, the default is the order entry date.

Book (Price Book Date) (8,0): Infor LX displays the date the order was booked (price book date). The program uses this date to retrieve and qualify the order for list prices, special prices, and promotions. In Create mode, the default is the current date. You can override this date.

Company (3,A): By default, the system displays the company number defined for this sold-to customer. You can override this value before you validate any order lines. After you validate order lines, you cannot change this value. If you change this value and press Enter to validate, the system confirms the bank code, currency code, and document prefix for the new company.

After you use F6 to accept this screen, return to the Tax, Currency, Payment screen to fix the bank and currency codes to match the new company.

Currency (3,A): By default, the system displays the value from the sold-to customer master. You can specify the currency code to use for this order before you enter any lines. This becomes the currency for the entire order. In RMA mode, if you enter a credit/debit memo and refer to an invoice, the system uses the default from the invoice.

If you override the default currency code, the system automatically refreshes the recognition rate when you press Enter to validate the screen. The system displays this field only if you use the Multiple Currencies application.

Recognition (6,0):

Specify the recognition date of this transaction (order) before you enter any lines. The system uses this date to retrieve the exchange rate, also called spot rate, for this order. The system displays this field only if you use the Multiple Currencies application.

The source of the value in this field can vary, depending on factors such as the use of time zone conversion, the use of prepayment cash term Cash With Order, the use of Cash With Order if Infor FM is installed, and other factors. If you use time zone conversion, regardless of the source of the value in this field, the value on the screen is accepted directly without conversion.

Recognition Rate (15,7):

If your system is not euro enabled, specify the recognition exchange rate to use to convert this order from transaction to base currency. Infor LX displays the default spot rate with the order currency as the From currency and the base currency as the To currency, and the recognition date. This field appears only if you have the Multiple Currencies application installed.

If you set the Multi-Currency System Parameter in the System Parameters application to use the exchange rate at order entry, Infor LX uses this field to create the base company journal entry when you bill the order, regardless of any changes that are made to the exchange rate during billing. Infor LX does not use this field if the Multi-Currency System Parameter is set to use the exchange rate at billing.

The exchange rate on the order header has no effect on pricing. You can define foreign currency prices in List Price Maintenance in the Multi-Currency application or in Special Price Maintenance or Promotion Master Maintenance in the Promotions and Deals application. If Infor LX does not find a price, it applies the default spot rate conversion to the Item Master list price to derive a foreign currency price.

If your system is euro enabled in Multi-Currency System Parameters, the multiplier exchange rate appears in this field. The exchange rate cannot be maintained on this screen. Instead, press F2=Exchange Rate to call the Override Exchange Rate screen, MLT940D, where overrides to the appropriate multiplier or divisor exchange rate may be allowed. You can only maintain exchange rates between national currencies of countries that are not participating in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro.

If you want to automatically retrieve a new exchange rate when a recognition date is changed, clear out the recognition exchange rate field.

Foreign Exchange Reservation (10,A):

Specify the foreign exchange (FOREX) reservation code from which the system retrieves a pre-defined, reserved exchange rate for this transaction (order). You can maintain these reservations in Foreign Exchange Reservation Maintenance in the Multiple Currencies application. If the reservation is in effect (the transaction date is on or between the start date and the end date), the exchange rate associated with the reservation takes precedence over any spot rate in effect.

You cannot change this code after you enter order lines.

Bank (3,A): Specify the code of the bank that handles payment agreements between you and your customer, or foreign exchange reservations between you and the bank itself. You maintain bank codes in Bank Account Master Maintenance in the Accounts Payable application.

Pay Type (Payment Type) (1,A): Specify the payment type code to associate with this order. By default, the system displays the payment type from the A/R customer.

This code indicates the method of payment, for example check, wire transfer, and so on, for this order. If you use a draft payment type, a valid payment agreement must exist between your company and the customer in the order currency. You maintain payment agreements in the Draft Management application.

Tax Code (5,A): Specify the customer tax code for this order. This tax code, combined with the item tax code on each order line and, optionally, the warehouse code on each order line, determines the tax rate applied to the order line. You can define tax rate codes in Tax Rate Code Maintenance in the System Parameters application and assign them to customers in Customer Master Maintenance in the Accounts Receivable application. Customer tax codes are associated with item tax codes and, optionally, warehouses in Tax Rate Table Maintenance in the System Parameters application, where the system determines the actual tax rates.

In Create mode, the default value is retrieved according to the following hierarchy:

Ship-To Customer/Number from Address Master: Type 1 (Ship To)

Ship-To Customer/Number from Address Master Type 0 (Global)

Ship-To Customer from Customer Master

Sold-To Customer from Customer Master.

You can override the default tax rate codes only by selecting the Override Tax Rate Code from the Customer Declaration field on the Tax Rate Table Maintenance screen in System Parameters.

Country Code (2,A): Specify the customer's member or non-member state country code. The registration number and country code combine to form the EC VAT number. If you use Intrastat reporting, you must specify a value in this field.

Tax Basis Exemption Order Amount (15,2):	Specify the total amount of the tax basis exemption for this order.
Registration Number (25,A):	Specify the customer's member or non-member registration number. The registration number and country code combine to form the EC VAT number. If you use Intrastat reporting, you must specify a value in this field.
Exemption Declaration Reference (10,A):	Specify a Customer Declaration Reference. If you selected the system assignment options in both Customer Master Maintenance and Customer Tax Exemption Maintenance, Order Entry accepts the default declaration. Otherwise, specify a Declaration Reference.
Exemption Declaration Date (6,0):	Infor LX displays the date you specified or selected this tax exemption declaration for the A/R Customer Master record.

Screen actions - ORD700D9-06

Commands	Description
F2=Exchange Rate	Call the Override Exchange Rate window. This function key only appears if you have the MLT application installed and activated for Order Entry and Billing, and euro support is enabled in Multi-Currency System Parameters. In this case, the Exchange Rate field on the screen is protected. This function calls the Override Exchange Rate screen, MLT940D, in which you maintain the exchange rate between national currencies of countries which are not participating in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro.
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.
F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.
F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F18=Copy Test Case	Call a screen to enter a configurator test case and test case line to copy to your order. If validation proceeds without error, the configured end item is

copied to the next line number in the Customer Order Line Items Work file, ECLW, and any free-standing items are added to this file.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View margin hold information

Infor LX displays the Margin Hold screen, ORD700D2-07, automatically during pricing or repricing of an order line if the customer is defined to perform margin calculations and the calculated margin percent falls outside the defined range. You can specify a password to override the margin hold, or you can choose to cancel out of the screen, return to the order entry screen, and change the prices to correct the margin error.

Margin Management

Infor LX uses the following information to calculate the margin when you price an order:

Whether Infor LX performs a margin check depends on the flag (Yes or No) you set on the Customer Master in the Accounts Receivable application.

The upper and lower margin limit percents you set on **IDF Customer > Sales > Pricing Data** tab, in the Accounts Receivable application and the Item Class Maintenance screen, INV160D2-01, in the Inventory Management application determine the margin limits.

The cost set Infor LX uses to calculate margins depends on the value you specified in the cost set for profit margin field on the Billing System Parameters - Invoices screen

Note that Margins are not calculated for free goods order lines, and the free goods costs are not included in the order total margin calculations.

(regular lines extended amount - unit cost) x quantity shipped gives you profit before discounts. Subtract total order discounts from this value to get the profit. The margin calculation is (profit / item transaction amount) x 100. These calculations do not include freight charges or special line charges.

If an order or order line fails margins, Infor LX presents the Margin Hold screen that allows you to enter a password to override the hold.

You cannot place a margin hold on post ship orders with a base class of 7 or 8. The screen action F6=Accept does not appear for this type of order.

Field descriptions - ORD700D2-07

Fields	Description
Order/Quote Number (9,0):	Infor LX displays the number of the order or quote on margin hold.
Order/Quote Line Number (4,0):	Infor LX displays the number of the order or quote line on margin hold. This field appears only if the line margin calculation is violated. It does not appear for total order margin hold.
Margin Percent (5,2):	Infor LX displays the calculated margin percent for this order or order line.
Lower Margin Percent (5,2):	For line holds, Infor LX displays the lower margin percent set on the Item Class Master for the item class of this line item. For order holds, Infor LX displays the lower margin percent set on the Customer Master.
Upper Margin Percent (5,2):	For line holds, Infor LX displays the upper margin percent set on the Item Class Master for the item class of this line item. For order holds, Infor LX displays the upper margin percent set on the Customer Master.
Margin Hold Code (2,A):	Infor LX displays the margin hold code for this order or order line. This code indicates whether an order is on margin hold, or how the order was released from margin hold. The codes are defined as follows:

00	Order not on margin hold
01	Margin hold at order level
02	Margin hold at line level
03	Margin hold at order and line level
98	System released order from hold
99	Order manually released from hold

Margin Hold Code Description (30,A):	Infor LX displays the description of the margin hold code which appears in the preceding field.
Password (8,A):	This field appears only if you set a password requirement on the Order Entry System Parameters - General screen. To override the margin hold, enter your password.

Screen actions - ORD700D2-07

Commands	Description
F6=Accept	Accept the order or order line on margin hold. If lines of the order exceed the margin limits, Infor LX displays each line number in turn that exceeds the limits. You must release the order, line, or lines from hold before they can progress through the order processing job stream.
F14=Override	Override the margin hold. This function overrides the margin hold and accepts the order or order line in a not-on-hold status. This means that no further pricing or margin processing is required before it can continue through the order processing job stream. If you set a system parameter to require a password to override margin hold, you must enter that password to use this function.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View customer hold information for an order

When you create an order, Infor LX checks the sold-to customer hold status and displays the Customer Hold screen, ORD700D2-08, for orders on customer hold.

You cannot place a customer hold on post ship orders with a base class of 7 or 8.

Field descriptions - ORD700D2-08

Fields	Description
Order Number:	Infor LX displays the number of the order on customer hold.
Customer Number:	Infor LX displays the sold-to customer number.
Customer Name:	Infor LX displays the sold-to customer name.
Customer Hold Code:	Infor LX displays the customer hold code and description.
Order Status	Infor LX displays the customer hold status of the order. The following are valid values for customer hold status.

00	Order not on customer hold
01	Order on customer hold
98	System released order from hold
99	Order manually released from hold

Password (8,A): If you set the system parameter to require a password to release orders from customer hold, you must enter the customer hold password here.

Screen actions - ORD700D2-08

Commands	Description
F6=Accept	Accept the order on customer hold. You must release the order from hold before it can progress through the order processing job stream.
F14=Override	Override the hold and accept the order. You must first enter the correct password if one is required.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Alter the status of a drop shipment line

Use the Drop Shipment screen, ORD700D2-09, to create or maintain requests to the purchasing department to alter the status of a drop shipment line. The purchasing department manipulates the purchase order according to this request. You cannot create drop shipment requests for return material authorization lines, resupply order lines, or orders that do not require a pick confirmation step. This program cannot be used for Warehouse BOSS controlled warehouses (warehouse type = 4) or WMS-4000-controlled warehouses (warehouse type = 5.

This screen is not available under the following conditions:

The order type does not affect inventory.

The sold-to customer does not allow drop shipments.

The line ship-from warehouse is a managed warehouse.

The item cannot be drop shipped.

Field descriptions - ORD700D2-09

Fields	Description
Item/Item Description (35,A/50,A):	Infor LX displays the item number and description for the order line.
Drop Ship Type (1,0):	Specify the drop ship order type. You can only use drop ship types 0, 1, 3, and 6. The system reserves the other types to display status feedback information. In create mode, the system uses 1, Create PO Request, as the default. In revise mode, you can type 3, Change PO Quantity or Date, and 6, Cancel PO Request. Type code 6 does not actually cancel the drop shipment PO, but it informs the Purchasing subsystem that the request was made. Operational considerations govern whether the system can honor this request. The system displays 7 as a confirmation that it honored the request and canceled the PO. Note: For quotes, the only valid entry is 1=Create PO Request. The drop ship types are defined as follows: 0, Not a drop shipment Acknowledge PO Cancellation Specify 0 to change a line from a drop shipment request to a non-drop shipment line. You can do this only if the drop shipment type is 1 or 7. 1, Create PO Request The Drop Ship Release program uses this value to create a purchase order for it. By default, the system uses Drop Ship type 1 for new orders. You can specify 1 here only if the type is 0 or 7. This is the only valid entry for quotes. 2, Drop Ship PO Created This order type means the Drop Ship Release program in the Purchasing application successfully created a purchase order. 3, Change PO Quantity or Date You can change or deny the drop ship PO from here. The Drop Ship Release program uses this when you change an order line quantity or a requested shipment date. 4, Last Change Confirmed This order type means the Drop Ship Release program in the Purchasing application successfully changed a purchase order. 5, Last Change Denied

This order type means the Drop Ship Release program in the Purchasing application denied a request to change the purchase order.

6, Cancel PO Request

The Drop Ship Release program in the Purchasing application uses this value as a request to cancel the purchase order.

7, PO Cancel Confirmed

This order type means the Drop Ship Release program or the PO Entry/ Maintenance program in the Purchasing application canceled a purchase order.

8, PO Cancel Denied

This order type means the Drop Ship Release program in the Purchasing application denied a cancel purchase order request.

Vendor (8,0): Specify a vendor number from the Vendor Master file, AVM, only if a purchase order does not exist for this line, which is indicated by Drop Ship Type 0 or 7. You can leave this field blank, or at 0, and specify a value during Drop Shipment Release when the system converts the request to an actual purchase order. If a purchase order already exists for the order line, the system displays the current purchase order vendor number.

Vendor Name (50,A): Infor LX displays the name associated with the Vendor number.

Comments (30,A): Type any comments (two lines available) you want to display in the Drop Ship P.O. Release program in the Purchasing application.

Note: If you want to write text that is longer than the available two lines, you can also create order line notes that Drop Ship P.O. Release can access.

Customer Order (9,0): Infor LX displays the customer order number.

Line (4,0): Infor LX displays the customer order line number.

Status (5,0): Infor LX displays the customer order line status.

U/M (Unit of Measure) (2,A): Infor LX displays the customer order selling unit of measure.

Unit of Measure Description (30,A): Infor LX displays the description of the customer order selling unit of measure.

Ordered Quantity (11,3): Infor LX displays the original ordered item quantity or the revised order quantity for this customer order in the selling unit of measure.

Shipped Quantity (11,3):	Infor LX displays the shipped item quantity for this customer order in the selling unit of measure.
Invoiced Quantity (11,3):	Infor LX displays the invoiced item quantity for this customer order in the selling unit of measure.
Request Date (8,0):	Infor LX displays the original request date or the revised request date for this customer order.
Purchase Order (9,0):	Infor LX displays the Infor LX purchase order number.
Line (4,0):	Infor LX displays the purchase order line number.
Status (5,0):	Infor LX displays the purchase order line status.
U/M (Unit of Measure) (2,A):	Infor LX displays the purchase order unit of measure.
Unit of Measure Description (30,A):	Infor LX displays the description of the purchasing unit of measure.
Ordered Quantity (11,3):	Infor LX displays the ordered item quantity for this purchase order in the purchasing unit of measure.
Received Quantity (11,3):	Infor LX displays the received item quantity for this purchase order in the purchasing unit of measure.
Costed Quantity (11,3):	Infor LX displays the costed item quantity for this purchase order in the purchasing unit of measure.

Screen actions - ORD700D2-09

Commands	**Description**
Enter	Validate the screen and display any messages.
F6=Accept	Accept the screen, validate if necessary, and post the drop shipment request or changes.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View ATP request date warning screen

The ATP Request Date screen, ORD700D2-10, appears when you request ATP calculation only if you have your user preferences set to perform ATP calculations on request and to use the ATP date only if it is later than the current request date. The screen reports lines in the order that do not permit ATP date calculation (for example, maybe no purchase orders exist for an item that already shows insufficient inventory). Use the information in this screen to note problematic inventory situations. You can issue purchase orders where required or change the warehouse to correct the problem.

Field descriptions - ORD700D2-10

Fields	Description
Line:	Infor LX displays each line number for which it could not calculate an ATP date.
Item:	Infor LX displays the item number in each line for which it could not calculate an ATP date.
Quantity	Infor LX displays the quantity ordered in each line for which it could not calculate an ATP date.
Warehouse	Infor LX displays the warehouse in each line number for which it could not calculate and ATP date.

Screen actions - ORD700D2-10

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Copy header field information to the order line file

Use the Copy Header Fields screen, ORD700D2-12, to copy field values to the order lines file. You can copy the Warehouse, Request Date, Price Book Date, Schedule Date and Receipt (resupply order). Infor LX displays the current header values in the From column. Select or enter the values you want to copy to the order lines in the To column.

The following prohibitions exist:

You cannot change the line Warehouse if there are shipments on the line, or if load, allocations, ship orders, active drop shipment requests or open picks reference that line.

You cannot change a line request date if there are shipments on the line, loads, ship orders or drop shipments, or if you have invoiced any of the order lines.

You cannot change a price book date if you have invoiced any of the order lines.

You cannot change request date or price book date for any lines if allocations exist for the lines or if there is a free goods promotion.

Field descriptions - ORD700D2-12

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
P.O. (Customer Purchase Order) (23,A):	Infor LX displays the customer purchase order associated with this order if one exists.
Status:	Infor LX displays the status of this order. This value represents the next step or steps in the order processing cycle that any line on the order is ready to complete. A single order line may have several statuses associated with it at any time. Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows: Position 1 = Ready for Pick Release Position 2 = Ready for Pick Confirm Position 3 = Ready for Ship Confirm Position 4 = Ready for Invoicing Position 5 = Ready for Purge Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.
Sold-To (8,0):	Infor LX displays the number of the sold-to customer for the order.
Order Type:	Infor LX displays the order type code associated with this order.
Order Class:	Infor LX displays the order class associated with the order type.

Warehouse (3,A):

Specify the warehouse to copy to the order lines. The order line warehouse cannot change if the order line has been shipped, or if allocations exist for the line.

Note: After the update, verify that dates and times at the line level are what you intend for each transaction.

Request (8,0):

Specify the request date to copy to the order lines.

Note: After the update, verify that dates and times at the line level are what you intend for each transaction.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX has invoiced an order line, the request date value is protected against modification after invoicing.

For resupply orders, the request Date cannot be later than the Schedule date.

Price Book Date (8,0):

Specify the book date to copy to order lines. Infor LX uses this date to determine list prices and special prices.

Note: After the update, verify that dates and times at the line level are what you intend for each transaction.

Schedule Date (8,0):

Specify the date to copy to the order lines that represents when you expect the lines to be available. This date is for reference only except when you use it for resupply orders. Infor LX uses this date as a selection parameter in Pick Release, Pick Confirm, OLM and other areas.

Note: After the update, verify that dates and times at the line level are what you intend for each transaction.

Receipt (8,0):

Specify the receipt date to copy to the order lines. This field appears only for resupply orders.

Note: After the update, verify that dates and times at the line level are what you intend for each transaction.

Pricing Facility (3,A):

Specify a pricing facility to copy to. In Revise mode, you cannot change the Pricing Facility if invoicing has already occurred on any line of the order.

If you change the pricing facility, you must reprice the order, quote, or RMA based on the new pricing facility.

Pricing facility does not apply to special lines.

	This field appears only if you set the Promotions Defined by Pricing Facility option in the Promotions and Deals system parameters program to Yes.
Price Options (1,A):	Specify a price option to lines at once. In Revise mode, you cannot update an order line if shipments have occurred. If you change the price options, you must reprice. You must specify a valid value defined in the Code Master table PRCOPT

Screen actions - ORD700D2-12

Commands	Description
F6=Accept	To accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns you to the Shipping Information screen, ORD700D9-02.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View customer service representative information

Use the CSR Codes screen, ORD700D2-13, while editing an order to display the Customer Service Representative (CSR) who entered the order and the CSR who is responsible.

Field descriptions - ORD700D2-13

Fields	Description
Customer:	Infor LX displays the customer number that you specified on the initial order entry screen.
Order Number:	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen.
Responsible CSR:	Infor LX displays the code for the CSR who is responsible for this customer's account. This code is specified on the **IDF Customer > Definition** tab.
Entering CSR:	Infor LX displays the code for the CSR who enters the orders for your user ID. This is the CSR Code you specify on the User Preferences screen.

Screen actions - ORD700D2-13

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Copy a configured item to the order from a test case

The Copy Test Case screen, ORD700D2-14, appears if you use the Copy Test Case function from the Tax, Currency, Payment screen. Use this screen to specify a test case and test case line to copy from Test Case Maintenance in the Configuration Management application. Infor LX validates your input and copies the configured end item to the next line number in the Customer Order Line Item Work file, ECLW. Any free-standing items are added to this file.

Field descriptions - ORD700D2-14

Fields	Description
Test Case to Copy (9,0):	Specify the configurator test case you to copy. If validation succeeds, Infor LX copies the configured end item to the next line number in the Customer Order Line Items Work file, ECLW, and any free-standing items are added to this file.
Test Case Line to Copy (4,0):	Specify the configurator test case line you want to copy. If validation succeeds, Infor LX copies the configured end item to the next line number in the Customer Order Line Items Work file, ECLW, and any free-standing items are added to this file.

Screen actions - ORD700D2-14

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Fast Line Entry, ORD700DA

The Fast Line Entry window provides a quick and efficient way to create or maintain the order, quote or return material authorizations in Infor LX.

You cannot delete existing orders if any of the following situations apply:

- Any order lines have been shipped.
- Shop orders exist for any order lines.
- Any order lines have a drop ship type other than 0 (not drop ship), 1 (drop ship request not accepted in Purchasing) or 7 (cancel drop ships).
- Any order lines have been pick-released to Warehouse BOSS or WMS-4000.

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

View order header and line information

Field descriptions - ORD700DA-01

Fields	Description
Order:	Infor LX displays the order, quote or return material authorization number that you selected on the initial screen. The field name changes according to the mode you selected on the initial screen.
Customer:	Infor LX displays the number of the sold-to customer for whom this order is being maintained. If you are in Create mode, it displays the sold-to customer number you specified in the initial screen or in the Order Create window. This field is not enterable on this screen.
Ship-to:	Displays the number of the customer to which to ship this order.
Currency:	Displays the currency defined for this transaction.
Amount:	Infor LX displays the total monetary charge for all of the lines on this order. This total is rounded according to the rounding rules specified for the transaction currency. The total may also include some components, such as extended amounts for each line, special line amounts, calculated taxes, and discounts, which are assumed to be properly rounded by the rules that apply to them and therefore may not require separate rounding. This field may have a value of 0.00 until you validate the order or until it is priced.
Line Actions:	The following line actions are available: **4=Delete Line** Delete a line from the order. Considerations You cannot delete lines with promotions assigned. Any promotions applied to the order line must also be deleted at the same time. You cannot delete Free Goods lines directly. If you try to do so, the Order Line Promotions screen, ORD740D2-01) appears. To delete a free goods line, delete the line-level or total-order promotion that generated the free goods line. You cannot delete lines that have shop orders assigned to them. You cannot delete lines that have open drop shipment purchase orders after they have been accepted in Purchasing. Before you can delete these lines,

you must first delete the drop shipment purchase order or cancel the drop shipment request.

11=Reprice (for specific line number only)

Reprice the line. If you previously repriced the line manually, there may be a value stored in the Manual Price Override Reason Code field. Repricing with line action 11 clears that field.

13=Line Notes

Access the Note Mode Selection (SYS255D) screen to view or maintain line notes.

16=Allocations

Access the Customer Order Allocation Detail screen ORD725D-01 for the selected line. The action is available only in Order mode, and it is not available for the following situations:

Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

17=Special Charge Lookup

For item classes that are eligible for special charges, access the Item Class List (WINIICD) screen to select a charge code.

23=Item Lookup

Access Item Lookup, ORD744D-01, to select an item to add to the order on a blank line in Create mode, or, on an existing line, to replace the previous item. You cannot replace items that already have shipments or lines that have bracket promotions assigned to them.

This action is not valid for existing special lines.

You cannot use this action for existing FAS or kit component lines because these lines are treated as a set and you cannot affect them individually.

25=Line Quantity Detail

Access the Order Line Quantity Detail screen, ORD700D3-01. This action does not apply to quotes.

The Line Quantity Detail screen does not appear for special lines. If you request this action in a special line, the Special Line Detail screen, ORD700D3-02, appears.

27=Line Inventory Detail

Access the Order Line Inventory screen, ORD700D3-04.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

28=Line Pricing/Financial

Access the Line Financial Detail screen, ORD700D3-03.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

29=Line Dates

Access the Order Line Dates screen, ORD700D3-05.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

30=Line Shipping

Access the Order Line Shipping screen, ORD700D3-06.

This screen does not apply for special lines. If you use this action on a special line, the Special Line Detail screen, ORD700D3-02, appears instead.

41=UPC Lookup

If you know an item's UPC code but do not know the item number, specify 41=UPC Lookup in the Act field and specify the UPC code in the Item Number field. When you press Enter, the system displays a list of all the items with that UPC code.

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.

Line (4,0): This field displays the line number of each order line. New line numbers are generated sequentially by the program. You can add data in any blank line, but when you validate, Infor LX will move the data to the top blank line available and assign it the next line number in sequence.

Item Number (35,A): Specify the item to order. You can specify a valid Infor LX internal item number. If you specify a kit or FAS parent, or if free goods promotions apply, the system may automatically create additional lines. If the item is an assortment parent, the system displays the Assortments/Features/Options screen. After you select assortment components on that screen, the system replaces the original assortment parent item number with lines for the selected components.

Note: If you ship from a warehouse type 4 (Warehouse BOSS) or type 5 (WMS-4000), you cannot ship items of the following types:

- Type 0=Phantom
- Type 3=Assortment
- Type 4=Kit (prohibited for warehouse type 4 only)
- Type 5=Planning Bill
- Type 6=non-Balancing
- Container-Controlled Item

Or, you can enter the customer item number that you define in Customer X-Reference Item Maintenance, ORD150.

After validation, the user preference you set governs whether the system displays the customer item number or the internal item number.

For special lines, leave this field blank. After validation, Infor LX displays the value *SPECIAL.

If you change an existing item number here, the system deletes the original item and creates a new one with the value you specify unless the item is not available for deletion. An item is not available for deletion if any of the following conditions apply:

- Shipments have occurred
- Allocations exist for the line
- Item number is for kit or FAS components
- Item is a planning bill item
- Open drop-ship request exists
- Promotions have been applied to this line

Order Qty (Quantity) (11,3):

Specify the quantity of the item to order in the selling unit of measure. To change the order quantity, you can change the quantity in the line or change the unit of measure. This field value does not change as you make shipments and partial shipments against the line. The system tracks those changes in the Open Order Quantity and Shipped Quantity fields.

The following restrictions and conditions apply to this field:

A non-zero value is required. Orders cannot be accepted with line quantity of zero. For returns, RMAs, the ordered quantity must be negative.

In revise mode, you cannot reduce the ordered quantity to less than the shipped quantity.

You cannot update this field for kit component lines and FAS component lines.

If promotions exist, you cannot change the item, price, and quantity.

The system may automatically change the order quantity changed after validation if automatic or manual item substitution occurs.

You cannot reduce the ordered quantity to less than the allocated quantity.

If you activate Quantity Edits in User Preferences and a minimum quantity for an item exists in the Item Master or Item Cross-Reference files, the system validates the line quantity against that minimum. If the ordered quantity in the line does not meet the criteria that exists, use F6 to update the quantity.

If you use Warehouse BOSS (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

UM (Unit of Measure) (2,A):

This field applies to regular lines only. Specify the selling unit of measure for this item. If you leave this field blank, the system searches for the selling unit of measure based on the following hierarchy:

Unit of Measure Conversion file, UIM, for the item and sold-to customer

Unit of Measure Conversion file, UIM, for the item and ship-from warehouse

Item Master file, IIM

You can override this value with a different valid selling unit of measure.

You cannot change this field if one of the following conditions exists:

The system has processed shipments for the line.

The line is a Kit or FAS component.

Promotions exist for the line. -You must first delete the promotions. When promotions apply, you cannot change item, price, or quantity.

If you use Warehouse BOSS, (type 4) or WMS-4000 (type 5) warehouses, see the Considerations for Warehouse BOSS Users or Considerations for WMS-4000 users in the Order Entry Overview section of this document.

Net Price (14,4):

The system displays the net selling price in the selling unit of measure from the Item Master list price, special prices, promotions, other system prices, or the system copies the net selling price from the original invoice, order, quote, or RMA. You can override this field.

This field is not available if you select the Tax Only field for this order line or if you invoiced the line. The price cannot be changed if you have already invoiced the line.

If promotions apply to this line or the entire order, you must delete the promotions before you can change item, quantity or price.

Under some conditions, the system expects a net price of zero, for example in create mode if you select Batch Pricing, for free goods assigned through Promotions and Deals, or for kit components. If you want a zero price for a regular order line, you must first perform normal pricing routines to determine a valid list price and net price. You can then override the net price with zero.

For Dynamic Weights and Measures, DWM, items, the system displays the net price in the DWM pricing unit of measure.

Item Description (50,A): Infor LX displays the item's description.

Wh (Warehouse) (3,A): Specify the allocatable ship-from warehouse for this order line. If you are maintaining an order line, you cannot change the warehouse if the order line has been shipped, or if allocations exist for this line. The warehouse hierarchy includes:

Item Master, IIM, default ship-from warehouse

Item/Ship-to Customer/Ship-to number specific, EIX

Item/Ship-to customer specific, EIX

Order header warehouse

Note: If you are using a warehouse type 4 (Warehouse BOSS) or type 5 (WMS-4000), see the Considerations for your advanced warehouse.

Request (8,0): The system displays the request date you specified when you created the order, quote, or return material authorization.

In create mode, the system displays the current date. In copy mode, you specify this date on the Copy screen.

Changes to this field do not affect existing line request dates.

Schedule Date (8,0): Infor LX displays the scheduled date entered for the order. The program uses this date to retrieve list prices and special prices.

In Create mode, this field defaults to the current date.

Changes to this field do not affect existing line price book dates.

Drop (1,0): Specify Y if you want to delete (drop) this line after its first shipment. Otherwise, specify N. If you specify N=No, the line prints on all invoices and backorders. You can change this drop code entry at billing time. You cannot drop order lines from a managed warehouse.

In Create mode, the default is Y for post-ship orders, financial orders, non-inventory items, and special lines. The default is N for other lines.

The backorder code defined for this order overrides the drop code you specify for an order line. Drop codes are intended for use on special lines and orders with backorder code of 0=back-ordering allowed.

For regular lines, you can change this value from Y to N if the backorder code = 0, the order line is open, and it is not a post-ship or financial order. You can change this value N to Y if the backorder code = 0 and the order line is open.

For special lines, you can change this value from Y to N only if there is an open regular line elsewhere on the order. If the last regular line is deleted but a special line remains open, you must also delete the special line before the order can be stored.

You cannot change the drop flag individually for kit or FAS component lines. These are updated automatically with the same value as the Drop flag for their parent lines.

Charge (2,A):

Specify the charge code (item class) if this is a special line. The charge code associates the correct revenue account and/or tax code with the special line. This charge code must be a valid item class. You can maintain item class codes in Item Class Maintenance in the Inventory Management application.

In Revise mode, you cannot modify the special line if invoicing has occurred, or if a Billing work record exists for it.

This field does not apply to regular lines.

Tax Code (5,A):

Specify the item tax code to use to calculate the tax for this line . Infor LX uses this item tax code with the customer's default tax code to yield the tax rate for this line. Infor LX calculates taxes during Invoice Print in the Billing application. You can maintain tax codes in Tax Rate Code Maintenance, SYS140D1.

This value must be a valid tax code, and it must result in a valid tax rate combination when used with the header tax code to determine tax rates.

If you do not specify a tax code in Create mode, Infor LX retrieves this line's default tax code from the Item Master file for regular lines or the Item Class Tax Code for special lines.

Extended Amount (15,2)

Specify the extended amount for this line.

Regular lines: Infor LX calculates this field after you enter an item and quantity and press Enter to validate. Any manual entry you make in this field is ignored, and the correct calculated value appears.

The extended amount is calculated as follows:

Quantity in Selling U/M is multiplied by the Price in Selling U/M. Rounding follows the rounding rules for the transaction currency.

For DWM items, the extended amount is calculated differently, as follows:

Quantity in Selling U/M is converted to Quantity in Stocking U/M

Quantity in Stocking U/M is multiplied by the DWM dual measure unit from the Item Master record.

The total value expressed in the DWM dual measure unit is multiplied by the DWM unit price.

Special lines: You can specify a special line amount if you know it (you can also enter or modify it during the billing process).

In Revise mode, no change can be made to the special line if invoicing has occurred, or if a Billing work record exists for it.

Note that negative line amounts are only allowed for RMAs, post-ships, and financial orders, unless you activate Allow Negative Special Lines in Regular Orders in Order Entry System Parameters, ORD820D. This parameter gives you the ability to provide a one-time discount in a customer order.

Screen actions - ORD700DA-01

Commands	Description
F6=Accept	Accept (post) the order. If you did not validate, this function validates before it posts the order. You return to the Order Directory screen after posting.
F11=Fold	Display the folded screen.
F12=Cancel	Cancel maintenance of this order. Cancel is available only in Revise mode. You must then press Enter to complete the exit. If you use F12 again, you cancel the Cancel request. The program does not save changes you made to the order if you exit with F12 rather than F6=Accept. However, changes that you made through called programs, such as Configurator, Notes, and Line Notes, are not lost when you use F12.
F14=Pricing, Sales, Commissions	Access Pricing, Sales and Commissions, ORD700D9-03. to view, create, or maintain order pricing information.
F15=Billing and Financial	Access the Billing and Financial screen, ORD700D9-04 to view, create, or maintain billing and miscellaneous financial information.
F16=Shipping	Access the Shipping Information screen, ORD700D9-02, to view, create, or maintain order shipping information.

F17=Inventory	Access the Inventory Information screen, ORD700D9-05, to view, create, or maintain order inventory information.
F19=Tax, Currency, Payment	Access the Tax, Currency, Payment screen, ORD700D9-06, to view, create, or maintain order tax, currency, payment, and tax exemption declaration information. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card entry, ORD503D2

Use the Credit Card Entry program, ORD503D2, to provide credit card information that the system uses to validate the card. An exit point program, ORD650B, then calls a middleware payment application to request payment authorization for orders with credit card payment terms.

Access: Order Maintenance, ORD700D2-01 and Order Hold Manual Release, ORD580D2-01

Specify credit card details for an order

Use the Credit Card Entry screen, ORD503D2-01, to provide details from the credit card that the customer uses to pay this order. The system presents this screen after you use F6=Accept in Order Maintenance, ORD700D2-01, to process the order if the order has a credit card payment term. The system also presents this screen after you use action 19=Credit Card Detail in Order Hold Manual Release, ORD580D2-01, to release an order from credit card hold.

If you access the screen from the Order Hold Manual Release program, ORD580D, the order has been declined and must be released from credit card hold. If the order was authorized and declined due to a validation issue, releasing it from credit card hold will not call the exit program for re-authorization. If the order was not authorized initially, releasing it from credit card hold calls the exit program for authorization. You can make changes to the credit card information.

Note that credit card term orders continue to initiate a credit check from Order Entry, ORD700. If the credit check fails, the order is put on credit hold. The WINCRED screen appears for information purposes only. The credit check failure does not prevent the order from obtaining credit card authorization for the order amount. The order is not put on credit hold if the customer exceeds his credit limit but uses a credit card to pay for the order.

If the system accesses Credit Check, ORD503B, from a program other than Order Entry and the order has a credit card payment term, the system does not go through normal credit check processing.

Field descriptions - ORD503D2-01

Fields	Description
Credit Card Provider Code (2,A):	Specify the two-character code that identifies the credit card provider to Infor LX.
Name (30,A):	Infor LX displays the name of the credit card provider.
Credit Card Number (30,A):	Specify the full credit card number. Do not include spaces. You can correct credit card errors in this screen if the validation fails the first time you send the information out to the credit card manager. You can no longer change the credit card number after you accept the order and the credit card manager returns a unique ID, called a handle, to identify the transaction. If the customer later decides to use a different credit card number, you must delete the order and create a new order. If you process a return (RMA order) and the override credit card flag is turned on in system parameters, you can provide a different credit card number in this field than the one used for the original order. The program displays the Override Credit Card Number screen on which you specify the reason for a change in the card number to credit for the return. If the override credit card flag is turned off in the system parameters, you cannot change the credit card number.
Verification Value (4,A):	Specify the three- or four-digit verification code from the back of the credit card.
Expiration Month (2,A):	Specify the expiration month on the credit card.
Expiration Year (4,A):	Specify the expiration year on the credit card.
Decline Code (10,A):	This field does not appear in order Create mode. The field displays the decline code that the credit card provider sent back when it declined authorization.
Decline Code Description (30,A):	This field displays the description of the decline code the credit card provider sent, if you set up decline code reason text for this code in the Approval/Decline Code Master Maintenance screen, ORD131D2-01.
Cardholder Name (50,A):	Specify the name of the cardholder as it appears on the credit card.
Address Lines 1-6 (50,A):	These fields display the A/R Customer address information from the Customer Master file, RCM. The credit card provider can verify this information against the address information it has for this credit card holder.

City (50,A):	Specify a value in the City field if your middleware requires that a specific city value be passed to it. The City field value is not validated and it is not stored in the Customer Master file, RCM. It is stored in the Credit Card Header only for use with credit card processing.
State (3,A):	This field displays the A/R Customer state or province from the Customer Master file, RCM. The credit card provider can verify this information against the address information it has for this credit card holder.
Country (4,A):	This field displays the A/R Customer country code from the Customer Master file, RCM. The credit card provider can verify this information against the address information it has for this credit card holder.
Postal Code (9,A):	This field displays the A/R Customer postal code from the Customer Master file, RCM. The credit card provider can verify this information against the address information it has for this credit card holder.
Phone Number (25,A):	This fields display the A/R Customer phone number from the Customer Master file, RCM.
Email Address (80,A):	This field displays the A/R Customer email address from the Customer Master file, RCM.
Manual Authorization Code (50,A):	If you authorize a payment manually, for example, by telephone, enter the authorization code from the credit card provider.
Authorize Amount (15,2):	This field displays the transaction amount to authorize. The amount includes the order total plus packing material and the greater of the percentage of order allowance or amount allowance specified in Order Entry System Parameters, ORD820D-09. Note that the authorization amount is expressed in the transaction currency. The allowance amount from the system parameter is originally in global currency. Infor LX uses an exchange rate file to calculate the allowance amount in the transaction currency.
Currency Code (3,A):	This field displays the transaction currency of the amount to authorize.
Validate/Authorize (50,A):	The value in this field defaults from the system parameters, but you can override it here. Specify 1=Validate to validate the card only. Specify 2=Authorize to validate, then authorize the payment amount. Note that the only valid entry is 1=Validate if on-line authorization is prohibited.

Screen actions - ORD503D2-01

Commands	Description
F6=Accept	Save the information on the screen to the work file. Perform the validation or validation/authorization processing. This screen action calls the exit program, ORD650B, to invoke the credit card authorization from a middleware payment application.
F14=View History	This function is only available during Manual Credit Hold Release, ORD580D2. Access the Credit Card History screen, ORD503D3-01, to view details of activity with this credit card for the specified order.
F15=Remove from Hold	This function is only available during Manual Credit Hold Release, ORD580D. Access the Credit Card Entry screen, ORD503D2-01, to release the order from credit card hold. If the order is authorized, order header credit hold is removed. If the order is not authorized, the system calls the exit program, ORD650B, to obtain authorization from the middleware payment application. If the transaction does not receive authorization, the system creates another decline record and the order remains on hold.
F19=Accept on Hold	This function is only available when the credit card is declined. This allows the user to accept the order on credit card hold until further review.
F21=Delete	This function is only available during order entry. Physically delete the credit card order with no audit trail. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify the reason for a credit card change

If you process a return (RMA order), use the Override Credit Card screen, ORD503D2-02, to provide the reason a credit card number was changed from that of the original order .

Field descriptions - ORD503D2-02

Fields	Description
Override Credit Card Reason:	Provide the reason you changed the credit card number for the RMA.

Screen actions - ORD503D2-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card history, ORD503D3

Use the Credit Card History program, ORD503D3, to view credit card transaction history.

Access: Order Maintenance, ORD700D2-01

View credit card transaction history for an order

Infor LX displays the Credit Card History screen, ORD503D3-01, if you use screen action F14=View History from the Credit Card Information screen, ORD503D2-01. The screen displays details of transactions against the credit card used for a specific order. The display shows whether attempts to authorize transactions were authorized or declined. In each case, the display shows the amounts, dates, and other relevant information. The display also shows settled amounts and the dates on which they were paid.

Screen actions - ORD503D3-01

Commands	Description
F13=Sequence	Toggle the sorting sequence of the credit card transactions between ascending and descending order.

All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Credit card provider listing, WINRPCD

Use the Credit Card Provider List program, WINRPC, to select a value from a list of available credit card providers. The list displays the company, provider code, prefix, and name of the provider.

Access: Prompt in a credit card provider field.

Select a credit card provider

Use the Credit Card Provider Listing screen, WINRPCD, to select a credit card provider to return to the credit card provider field in the previous screen.

Screen actions - WINRPCD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Customer credit check, WINCRED

If you continue with Order Entry for a new or copied order, Infor LX displays the Order Maintenance screen, ORD700D2-01, unless the new order causes the A/R customer's receivable balance to exceed the credit limit or credit days. In that case, Infor LX calls the Customer Credit Check program, WINCRED, to allow you to view details of the customer's current credit status.

View customer credit details

The Customer Credit Check screen, WINCRED, displays the A/R Customer's credit position, which is evaluated twice during order entry/maintenance (when you start to create the order, and when you accept the order). The A/R customer comes from the Sold-To Customer Master record. You can override the A/R customer on the Billing and Financial screen, ORD700D9-04.

If Credit Limit field or Credit Days field in the Customer Master record for this customer contains a value, Infor LX performs an automatic credit check before you proceed to enter the order details. If the sum of outstanding account receivables, open drafts, and open orders exceeds the credit limit for this customer, and/or if the oldest invoice exceeds credit days, Infor LX displays this screen after you use F6 on the first screen.

This screen also appears after you enter or change order line data that causes the customer to exceed the credit limit. The screen appears if the total amount of the order plus the existing receivables amount exceeds this customer's credit limit.

If this customer is beyond his credit limit, you have two options:

Use F6 to place the order on credit hold. At a later time you can continue to process the order by overriding the credit hold for this order. You can also cancel out of this screen, then cancel out of the order from screen Order Maintenance, ORD700D2-01.

Field descriptions - WINCRED

Fields	Description
Order Number:	Infor LX displays the order number of the order on credit hold.
Customer Number/ Name:	Infor LX displays the number and name of the sold-to customer for this order.
A/R Customer Number/ Name:	Infor LX displays the accounts receivable customer number and name.
MTD Sales Amount:	Infor LX displays the month-to-date sales amount from the customer.
YTD Sales Amount:	Infor LX calculates and displays the sum of the year-to-date sales (month's sales amount plus previous month's year-to-date amount) for the A/R customer.
Last YTD Sales Amount:	Infor LX displays the year-to-date sales for the previous year for the A/R customer.
Open Drafts:	Infor LX displays the outstanding drafts for the A/R customer.
Open Order Amount:	Infor LX displays the open order amount for the A/R customer.
Average Invoice Size:	Infor LX displays the A/R customer's average invoice size.
Total A/R Due:	Infor LX displays the total currency amount of the outstanding drafts for the A/R customer.
Credit Limit:	Infor LX displays the credit limit currency amount for the customer. Zero (0) credit limit means there is an unlimited credit amount for this A/R customer.

Amount Over Limit: Infor LX displays the A/R customer's amount over the credit limit using the following calculation: [(Total Accounts Receivable Due + Open Order Amount + Open Draft Amount) - Credit Limit].

Total Outstanding: Infor LX displays the total currency amount outstanding for the A/R customer.

Oldest Unpaid Invoice: Infor LX displays the system date of the oldest open invoice for the A/R customer.

Last Transaction: Infor LX displays the system date of the last transaction for the A/R customer.

Average Payment Days: Infor LX displays the average number of days that pass before an A/R customer sends a payment.

Credit Limit in Days: Infor LX displays the maximum number of days of credit allowed to this A/R customer before a payment must be made.

Days Over Limit: Infor LX calculates and displays the number of days the A/R customer has exceeded the credit limit. Infor LX subtracts the number of days the oldest invoice has gone unpaid from the number of days of credit allowed for this customer. A negative result indicates days over the limit.

Credit Hold: Infor LX displays the credit hold status of this order and its description.

The values in this field represent the following:

00	Order not on credit hold
01	Order on credit hold
98	System released order from hold
99	Order manually released from hold

You cannot change credit hold codes on this screen.

Password (8,A): Enter your credit password to remove this order from credit hold. As a security feature, the password does not appear on your screen.

Note: This password field only appears if you turned on the Use Credit Hold Password flag in the Accounts Receivable Aging program in System Parameters Generation. If you turned this flag on, Infor LX will require you to enter the password you set up in that SYS program to remove a customer from credit hold for a particular order.

Screen actions - WINCRED

Commands	Description
F6=Accept	Accept the order and place it on a credit hold.
F14=Override	Override credit hold on the order. If you specified the correct password, Infor LX overrides the hold and accepts the order.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order line detail maintenance, ORD700D3

The Order Line Detail program, ORD700D3, provides access to screens in which you can update detail information for the individual lines on the order.

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry overview help text for for additional details on the handling of specific date fields.

Add, maintain, or view quantity detail for the line

Use the Order Line Quantity Detail screen, ORD700D3-01, to view or update quantity information for the line. This screen applies to regular items only. For special lines, the details appear on the Special Line Detail screen, ORD700D3-02.

Field descriptions - ORD700D3-01

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field always contains the internal item number after the system validates it. If you enter the customer item number and the system validates it, the system moves that customer item number to the Ref Item field and fills this field with the internal item number.
Item Description (50,A):	The system displays the item description from the Item Master file, IIM. If you change the item description here, the system does not change the default description you define for this item in IDF Enterprise Item in the Inventory Management application.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.
Cross-Reference Item Description (50,A):	This is the description associated with the customer item number in the Ref Item field.
Order Qty (Quantity) (11,3):	This value is the quantity of the item in your current order in the selling unit of measure. To change the order quantity, you can change the quantity in the line or change the unit of measure. This field value does not change as you make shipments and partial shipments against the line. The system tracks those changes in the Open Order Quantity and Shipped Quantity fields. The following restrictions and conditions apply to this field: The system does not accept orders with line quantity of zero. For returns, RMAs, the quantity ordered must be a negative number. In revise mode, you cannot reduce the quantity ordered below the quantity already shipped. The system automatically protects this field for kit component lines and FAS component lines. If promotions exist, you cannot change the item, price, and quantity.

The system may automatically change the order quantity upon validation if automatic or manual item substitution occurs.

You cannot reduce the quantity ordered to less than the allocated quantity.

Warehouse (3,A): Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.

Warehouse Description (30,A): Infor LX displays the description of the allocatable ship-from warehouse for this order line.

Request (8,0): Specify the request date for this order line. By default, the system uses the request date from the order header request date when you create new lines. A change in the header request date does not affect existing lines. This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after the system invoices an order line, the request date value is protected against modification after invoicing. For resupply orders, the request date and time cannot be later than the scheduled date and time.

Sell U/M (2,A): This is the selling unit of measure for this line item. If you do not specify a value, the system uses the default according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, the system prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A) This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

CPO Line Number (4,0): Specify the customer purchase order line number for this item.

To Warehouse (3,A): Infor LX displays the warehouse code of the resupply order To Warehouse. The corresponding description appears to the right of this. This field appears for resupply orders only.

To Warehouse Description (30,A): Infor LX displays the warehouse description of the resupply order To Warehouse. This field appears for resupply orders only.

Line Quantity in Stocking Unit of Measure (2,A): Infor LX displays the stocking unit of measure for this line item. In Create mode, this field is blank until you validate the screen.

Stocking Unit of Measure Description (30,A): Infor LX displays the description of the stocking unit of measure for this line item.

Ordered Quantity (11,3): Infor LX displays the ordered quantity for this line in stocking unit of measure. Note that the enterable Order Quantity field above is in selling unit of measure.

Allocated Quantity (11,3): Infor LX displays the allocated quantity for this line in stocking unit of measure.

This value may be negative for post-ship returns.

Picked (11,3): Infor LX displays the pick-released quantity for this order line in stocking unit of measure. The picked quantity can never be negative.

Shipped (11,3): Infor LX displays the shipped quantity for this order line in stocking unit of measure. This value can be negative for post-ship returns.

Invoiced (11,3): Infor LX displays the invoiced quantity for this order line in stocking unit of measure. This value can be negative for financial credits and post-ship returns.

Received (11,3): Infor LX displays the received quantity for this order line in stocking unit of measure.

Line QuantY in Selling Unit of Measure (2,A): Infor LX displays the selling unit of measure for this line item. In Create mode, this field is blank until you validate the screen.

Selling Unit of Measure Description (30,A): Infor LX displays the description of the selling unit of measure for this line item.

Ordered Quantity (11,3): Infor LX displays the ordered quantity for this line in selling unit of measure. Note that the enterable Order Quantity field above is also in selling unit of measure.

Picked (11,3): Infor LX displays the pick-released quantity for this order line in selling unit of measure. The picked quantity can never be negative.

Shipped (11,3): Infor LX displays the shipped quantity for this order line in selling unit of measure. This value can be negative for post-ship returns.

Invoiced (11,3): Infor LX displays the invoiced quantity for this order line in selling unit of measure. This value can be negative for financial credits and post-ship returns.

Received (11,3): Infor LX displays the received quantity for this order line in stocking unit of measure. All received quantities are in stocking unit of measure.

Screen actions - ORD700D3-01

Commands	Description
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.
F13=Lean Details	If the line item you selected is a Lean item, access the Lean Detail screen, ORD700D3-07, to display details for the selected line.
F14=Notes	Access the Note Text Maintenance (SYS555D-04) screen to view or maintain notes for the selected order, quote, or RMA line.
F15=Line Promotions	Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.
F16=Material Status Inquiry	Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.
F17=Allocations	Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen. Note that F17=Allocations is not available for these orders: ■ Orders with types that do not affect inventory ■ Orders for kit or Features and Options components ■ Quotes and RMAs ■ Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.
F19=Line Inventory	Access Order Line Inventory, ORD700D3-04, to view and update inventory information for this order line.
F20=Line Shipping	Access Order Line Shipping, ORD700D3-06, to view and update shipping information for this order line.

F21=Line Pricing	Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.
F22=Line Dates	Access Order Line Dates, ORD700D3-05, to view and update date and time information for this order line. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view details for a special line

The Special Line Detail screen, ORD700D3-02, appears for special lines only.

Field descriptions - ORD700D3-02

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Type (1,A):	Infor LX displays the user order type associated with this order.
Class:	Infor LX displays the user order class associated with this order.
Curr (3,A):	Infor LX displays the transaction currency.
Line Status (5,0):	Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that this line is ready to complete. A single order line may have several statuses associated with it at any point in time. Note: Only positions four and five apply to special lines. Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions that apply to special lines are as follows: Position 4 = Ready for Invoicing Position 5 = Ready for Purge

Item

Infor LX displays *SPECIAL to indicate that this is a special line. The string is system generated.

Note: This string must appear in this field for a special line, regardless of the national language in which Infor LX is run. The string must never be translated.

Description (50,A):

For special lines, enter any description or comment text in this field. Infor LX saves and prints all 50 characters.

Special Lines on Orders: The description of the special line has two meanings depending on the entries in the "Charge Code" and "Extended Amount" fields:

No amount entered = Use this field for extra text for the order; you must enter an item class/charge code.

Amount is entered = Use this field as a description of the amount charge. If you enter an amount, you must enter an item class/charge code.

CPO Line Number (4,0): Specify the customer purchase order line number for this item.

Charge (5,A): Specify the charge code if this is a special line. The charge code associates the correct revenue account or tax code with the special line. This charge code must be a valid item class. You maintain item class codes in Item Class Maintenance in the Inventory Management application.

Entry (6,0): Infor LX displays the date you entered this order line.

Warehouse (3,A): Specify the ship-from warehouse for this order line.

Warehouse Description (30,A): Infor LX displays the description of the warehouse for this order line.

Request (Request Date) (6,0):

Specify the request date for this order line. The request date for this line item defaults from the order header. For further information about the request date, see the field description in the order line entry screen.

For time zone conversion users, Request Date is generally entered and displayed in the time zone of the line warehouse. However, special lines have no request time associated with them. Since conversion requires that a date have a time associated with it, no conversion is performed for the special line. The program stores the date directly as input.

Schedule (Scheduled Date) (6,0):

Specify the date that this line of the order is scheduled to be available.

For resupply orders (Base Order Type 9) only, Infor LX displays the scheduled receipt date on this screen.

For time zone conversion users, Schedule Date is generally entered and displayed in the time zone of the ship-to number or ship-to customer. However, special lines have no schedule time associated with them. Since conversion requires that a date have a time associated with it, no conversion is performed for the special line. The program stores the date directly as input .

Inventory Reason Code (2,A): Specify the inventory reason code for this transaction. Infor LX defaults to the inventory reason code on the order header. You can override the default in this field.

Note: Infor LX validates your entry against inventory reason codes defined for the B transaction effect. You can define and maintain inventory reason codes in Reason Code Maintenance in the Inventory application.

You can prompt in this field to retrieve the Inventory Reason Code List for the B Transaction Effect if you are in Order or Quote mode, or for the RM transaction effect if you are in RMA mode.

User 1 Reason Code/ Customer Reason Code (2,A): Specify the first user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

User 2 Reason Code/ Disposition Reason Code (2,A): Specify the second user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

User 3 Reason Code/Q/ C Reason Code (2,A): Specify the third user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

Drop (1,0): Specify yes to delete this line after its first shipment. Specify no to print this line on all invoices and back orders. You can change this drop code entry at invoice time. You cannot drop order lines from a managed warehouse.

The backorder code you define for this order overrides the drop code you entered for an order line. Drop codes are intended for use on special lines and orders with backorder code of 0.

Reference Line Number (4,0): If the system generates the special line, this entry is display-only. When you create a special line manually, enter the line number that the special line is linked to. Enter 0 to link the special line to the order.

The entry that you make in this field must be a valid regular line. You cannot attach the special line to another special line, a deleted line, promotional free goods, a kit component, or an FAS component.

You cannot change the reference line number for an existing special line. You can delete the existing special line and create a new one with the desired data.

Note that it is possible to manually attach a special line to a drop shipment line. After the drop shipment is confirmed through Drop Ship Confirmation, BIL650, Infor LX picks this up as a charge. However, because drop shipments are not on loads, the system does not automatically generate a special line.

Special lines that you create through the traditional process by manually entering the charge code and amount on the Order Maintenance ORD700D2-01) screen represent traditional order-level special lines. The reference line number for these special lines is 0.

Charge/Allowance Code: Display only. In Create or Revise modes, it may be populated if a qualified charge or allowance results in generation of this special line. You maintain these charges in the Charge/Allowance Assignment program, PRO190.

In Copy mode, the value in this field comes from the original record. A change of customer, quantity, a reprice request, or other action is likely to result in modification or deletion of the special line.

Extended Amt (15,2): Infor LX displays the amount of the special line in transaction currency:

Tax Code (5,A): Specify the item tax code that is used to calculate the VAT and sales tax for this order. Infor LX uses this item tax code with the customer's default tax code to yield the tax rate for this line of the order. Infor LX calculates taxes during Invoice Print in the Billing application. Maintain tax codes in Tax Rate Code Maintenance in the System Parameters application.

If you do not specify a tax code, Infor LX retrieves this item's default tax code from the Item Master file.

You can prompt in this field to retrieve the Tax Rate Code List.

Salesperson (6,0): Specify the salesperson associated with this order line only if the system parameters specify to pay commissions at the line level.

Salesperson Name (30,A): Infor LX displays the name of the salesperson associated with the salesperson number.

Commission Code (2,A): Specify the salesperson commission code used to calculate commissions on this order only if the system parameters specify to pay commissions at the line level. Infor LX combines the commission with the item's default commission code from Item Master Maintenance in the Inventory Management application and the customer's default commission code from the Customer Master

Maintenance in the Accounts Receivable application to retrieve the correct commission rate.

Screen actions - ORD700D3-02

Commands	Description
F6=Accept	Accept the information on the screen. You return to the Order Maintenance screen, ORD700D2-01.
F13=Notes	Access the Note Text Maintenance (SYS555D-04) screen to view or maintain notes for the selected order, quote, or RMA line.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view pricing and financial information for the line

Use the Line Pricing and Financial Detail screen, ORD700D3-03, to view and maintain financial information for this order line. Line Financial - Additional Detail, ORD700D3-08, contains additional financial fields for the line. The screen displays for regular lines only. Special line details appear on the Special Line Detail screen, ORD700D3-02.

Field descriptions - ORD700D3-03

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field contains the line's internal item number after validation. The field accepts input of up to 35 alphanumerical characters to you to input the customer item number. If you input a customer item number, after validation, Infor LX moves that value to the Ref Item field and fills the Item Number field with the internal item number.

Item Description (50,A):	Regular lines: Infor LX displays the item description from the Item Master file, IIM. You can change the item description here, but Infor LX does not change the default description you defined for this item in IDF Enterprise Item. You can enter up to 50 characters in this field; however, Infor LX only saves the first 30 characters of your entry.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.
Order Quantity (11,3):	You can change the quantity of this order.
Cross-Reference Item Description (50,A):	This is the description associated with the customer item number in the Ref Item field.
Order Qty (Quantity) (11,3):	This value is the quantity of the item to order in the selling unit of measure. To change the order quantity, you can either change the quantity here or change the unit of measure. This field value does not change when you make shipments and partial shipments against the line: The system tracks those changes in the Open Order Quantity and Shipped Quantity fields. The following restrictions and conditions apply to this field: A non-zero value is required. Infor LX cannot accept orders with line quantity of zero. For returns, the quantity must be a negative number. In Revise mode, you cannot reduce the quantity ordered below the quantity already shipped. This field is automatically protected for kit component lines and FAS component lines. If promotions exist, the item, price, and quantity cannot be changed. The order quantity may be automatically changed when you validate if automatic or manual item substitution occurs. You cannot reduce the order quantity to less than the allocated quantity.
Warehouse (3,A):	Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.
Warehouse Description (30,A):	Infor LX displays the description of the allocatable ship-from warehouse for this order line.
CPO Line Number (4,0):	Infor LX displays the customer purchase order line number for this item.

Request (8,0):

Specify the request date for this order line. The value defaults from the order header request date when you create new lines. If you change the header request date, existing lines are not changed.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing.

Sell U/M (2.A):

This is the selling unit of measure for this line item. If you do not specify a value in this field, the value defaults in according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, file for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, Infor LX prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A)

This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

To Warehouse (3,A):

Infor LX displays the warehouse code of the resupply order To Warehouse. The corresponding description appears to the right of this. This field appears for resupply orders only.

To Warehouse Description (30,A):

Infor LX displays the warehouse description of the resupply order To Warehouse. This field appears for resupply orders only.

Price (15,5):

Infor LX displays the net price in selling unit of measure for the selected line when you first display this screen. Use F21 to display the price in the pricing unit of measure.

Infor LX determines the net selling price unless you override this value. This field is not available if you select the Tax Only field for this order line or if you have already invoiced the line.

Note: For DWM items, the net price is entered, calculated and displayed in the DWM Pricing Unit of Measure.

Pricing U/M (Unit of Measure):

Infor LX displays the customer order pricing unit of measure.

Extended Amt (15,2):

For regular lines, the system calculates this field as the net price of the line in selling unit of measure in transaction currency multiplied by the ordered quantity in selling unit of measure.

Infor LX calculates the extended amount follows:

Quantity in Selling U/M is multiplied by the price in selling U/M. Rounding proceeds following the rounding rules for the transaction currency.

For DWM items, the extended amount is calculated differently, as follows:

Quantity in selling U/M is converted to quantity in stocking U/M.

Quantity in stocking U/M is multiplied by the DWM dual measure unit from the Item Master record.

The total value expressed in the DWM dual measure unit is multiplied by the DWM unit price.

Line Status (5,0):

Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that this line is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Net Price Source (2,A):

Infor LX displays the system code that indicates the source of the net price for this order line.

The following are valid net price source codes:

00=No Pricing Performed

01=Failed Pricing

02=Special Price applied to List Price

03=Promotions and deals applied to list price

04=Special price applied to list, the promotions and deals applied to special price

05=List price (see list price source codes for specific list prices)

06=Manual price override

07=Copied from invoice price

08=Free goods line

09=Valid line not priced

13=Copied from invoice price, promotions attached

List Price Source (2,A): Infor LX displays the system code that indicates the source of the list price for this order line.

The following are valid list price source codes:

00=No Pricing Performed

01=Failed Pricing

02=Item Master list price

03=List Price Book (A) Item/Customer

04=List Price Book (B) Item/Region

05=List Price Book (C) Item/CDC

06=List Price Book (D) Item/Facility

07=Copied from invoice price

08=Free goods line

09=Valid line not priced

10=Cost-Plus List Price (9)

11=Multi-Currency List Price (0)

12=No List Price Found

13=Copied from invoice price-promotions attached

Margin Hold (2,A): Infor LX displays the system margin hold code. The following codes are valid:

00=Line not on Margin Hold

01=Line on Margin Hold

98=Release Line from Margin Hold

99=Line Manually Release from Margin Hold

Margin Percent (5,2):

Infor LX displays the calculated order line margin percent. Infor LX calculates the value as follows:

Determine the Cost per Unit

Infor LX retrieves the System Parameters record to determine which cost set to use for profit margin costing.

Infor LX retrieves the Cost Master record, CMF, to find the cost. Infor LX uses the System Parameters record cost set value for the specific line items on the order.

The margin calculation retrieves the Cost Master record for the item, facility, and the cost set based on the System Parameters record cost set for the margin calculation and the facility that is associated with the warehouse. Infor LX uses the record in which the Cost Bucket = 0 (blank. If there is no cost at the facility level in the Cost Master record, Infor LX uses the Cost Master record for the item in a blank facility. If no Cost Master record is found, the cost is zero.

Infor LX does not calculate the cost for free goods lines.

Calculate the Profit

Infor LX calculates the profit differently, depending on whether the price of the item does or does not includes tax.

Calculation if Price Includes Tax:

Infor LX accumulates the line extended amount for all regular lines. It uses the net price, transaction currency, and stocking UOM.

Line extended amount = Net selling price * Total line quantity

Infor LX calculates the transaction amount.

Transaction amount = Sum of the line extended amount - Sum of taxes - Discount billed in transaction currency

Profit = Transaction amount - Sum of costs

If the System Parameters record is set to include special lines in margin calculation, then Profit = Transaction amount + Special lines amount - Sum of costs

Infor LX does not include free goods lines in the total order margin calculations.

Note: This calculation only includes special lines where the record ID = CL or CS.

Calculation if Price does not Include Tax:

Infor LX accumulates the line extended amount for all regular lines. It uses the net price, transaction currency, and stocking UOM.

Line extended amount = (Net price in transaction currency for stocking unit of measure * Total line quantity)

Infor LX calculates the transaction amount

Transaction amount = Sum of the line extended amount -Total order discount - Order discount billed in transaction currency

Profit = Transaction amount - Sum of costs

If the System Parameters record is set to include special lines in margin calculation, then Profit = Transaction amount + Special lines amount - Sum of costs

Infor LX does not include free goods lines in the total order margin calculations.

Note: This calculation only includes special lines where the record ID = CL or CS.

Calculate the Margin

Margin = (Sum of Profit/Sum of line extended amount) * 100

If the option set includes special lines in the margin calculation, then Margin = (Sum of Profit/Sum of line extended amount + Special lines amount) * 100

Manual Price Override Reason Code (2,A):

If you overrode the system pricing for this line, the field displays the reason code you specificed in the Manual Price Override Reason Code screen, ORD751D-01. If the net price source code is set to 06 (manual override), you may be able to change this value. If the net price source code is not set to 06, the field does not apply.

Program ID (10,A):

Optional. This field appears only if the Trade Funds Management application, TFM, is installed.

Specify the Program ID to use to update a commitment with the amount of this order line, including tax. Order entry updates the accumulated amount of the commitment. The value must exist in the Commitments file, TMC.

Note: for quote lines, Infor LX does not update the commitment until the quote is converted to a customer order.

Spend Type (2,A):

Optional. This field appears only if the Trade Funds Management application, TFM, is installed.

Specify the Spend Type to use to update a commitment with the amount of this order line, including tax. Order entry updates the accumulated amount of the commitment. The value in this field must exist in the Commitments file, TMC.

Note: for quote lines, the commitment is not updated until the quote is converted to a customer order.

Discount Type (1,0):

Specify the Discount Type Code for this order line based on whether you want Infor LX to allow or to limit the application of promotions and allowances.

The following are valid discount type codes:

0	Allow promotions and allowances
1	Only promotions Allowed
2	Only allowances allowed
3	No promotions or allowances

Pricing Facility (3,A):

This field appears only if the Promotions Defined by Pricing Facility option in Promotions and Deals System Parameters, PRO820d, is set to Yes

In the create mode, this value defaults from the owning facility of the header warehouse.

In the copy mode, this value is copied from the original record.

In the revise mode, you cannot change the Pricing Facility if invoicing has already occurred on any line of the order.

If you change the pricing facility, you must use F9 to reprice the order, quote, or RMA, based on the new pricing facility.

Pricing facility does not apply to special lines.

Advanced List Price Qualifier (1,A):

Optional. You can enter any value. The value you enter is used to qualify or disqualify pricing structures during the list price search if the following conditions apply:

Advanced List Pricing is enabled in Promotions and Deals System Parameters, PRO820D.

Advanced List Pricing applies to this customer and order line, as set in **IDF Customer > Sales > Pricing Data** tab.

The Requirements Group Selectable Fields program, PRO171, is defined to use this field.

Advanced List Price Options (1,A): Optional. If this is used, you must specify a valid value that is defined in the Code Master table, PRCOPT.

Tax Code (5,A): Specify the item tax code to use to calculate the VAT and sales tax for this order. Infor LX uses this item tax code with the customer's default tax code to yield the tax rate for this order line. Infor LX calculates taxes during Invoice Print in the Billing application. Maintain tax codes in Tax Rate Code Maintenance in the System Parameters application.

Tax Only (1,0): Specify the tax only code. Specify 1 for a tax only line that is payable by the customer and produces an invoice. Specify 2 for a tax only line that is payable by the company and does not produce an invoice. The system bases the tax calculation on the normal selling price unless you override the Tax Basis field. The system does not display this field if you specify a net selling price for this order line.

Tax Basis Amount (15,5): Specify the amount on which to calculate the tax, if there is no charge for this line item. Use this field only if you select the Tax Only field. If you leave the Tax Only and Tax Basis fields blank, the system uses the normal selling price for tax processing. The system uses the Tax Only and Tax Basis fields during VAT-only invoice processing.

Salesperson (6,0): Specify the number of the salesperson associated with this order line only if commissions are paid at the line level in the System Parameters.

Salesperson Name (30,A): Infor LX displays the name of the salesperson associated with the salesperson number.

Commission Code (2,A): Specify the salesperson commission code to use to calculate commissions on this order if commissions are set to be paid at the line level in the System Parameters. Infor LX combines the commission with the item's default commission code from the Item Master file, IIM, and the customer's default commission code from the Customer Master file, RCM, to retrieve the correct commission rate.

If you do not specify a tax code, Infor LX retrieves this item's default tax code from the Item Master file.

Self Bill Ref Number (35,A): (Reference only) Infor LX displays the Self Billing Reference Number for this Customer and Order. Infor LX only displays this field if the customer is a Self Billing customer.

Reference: Display only. This is the name of an advanced list price record, maintained in the Advanced List Price program in the Promotions and Deals application.

	This field does not appear if the Order Entry System Parameter does not allow advanced list pricing.
Sequence:	Display only. Within a single advanced list price reference, you can have multiple sequence numbers. You maintain advanced list price records in the Advanced List Price program in the Promotions and Deals application. This field does not appear if the Order Entry System Parameter does not allow advanced list pricing.

Screen actions - ORD700D3-03

Commands	Description
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.
F9=Reprice	Reprice the line if you changed any data. Note that use of this field provides standard system pricing for the line. If you had a manual price override, the system overwrites your manually entered price and clears the reason code field if you use this function.
F10=Additional Detail	Access the Additional Detail screen, ORD700D3-08, to view additional financial details for this line.
F11=Bracket Price Markup	Access the Bracket Price Markup Calculation screen, PRO750, if brackets apply. You maintain them in the List Price Bracket program, PRO160.
F13=Lean Details	If the line item you selected is a Lean item, access the Lean Detail screen, ORD700D3-07, to display details for the selected line.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes for a selected order, quote, or RMA line.
F15=Line Promotions	Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.

F16=Material Status Inquiry Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.

F17=Allocations Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen.

Note that F17=Allocations is not available for these orders:

- Orders with types that do not affect inventory
- Orders for kit or Features and Options components
- Quotes and RMAs
- Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

F18=Line Quantity Access the Order Line Quantity Detail screen, ORD700D3-01.

F19=Line Inventory Access Order Line Inventory, ORD700D3-04, to view and update inventory information for this order line.

F20=Line Shipping Access Order Line Shipping, ORD700D3-06, to view and update shipping information for this order line.

F21=Line Pricing Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.

F21=Switch Toggle between showing the price in the pricing unit of measure or in the selling unit of measure.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view additional financial detail for the line

The Line Financial - Additional Detail screen, ORD700D3-08, lets you view and maintain additional financial information for the order line. This screen applies to regular lines only.

All the fields for this screen are documented under Line Financial Detail, ORD700D3-03

Screen actions - ORD700D3-08

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view inventory detail information for the line

Use the Order Line Inventory screen, ORD700D3-04, to view and maintain line inventory detail information. This screen applies to regular lines only. Special line details are displayed on the Special Line Detail screen, ORD700D3-02.

Field descriptions - ORD700D3-04

Fields	Description
Order (9,0):	Infor LX displays the order, quote or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field contains the line's internal item number after validation. The field accepts input of up to 35 alphanumerical characters to you to input the customer item number. If you input a customer item number, after validation, Infor LX moves that value to the Ref Item field and fills the Item Number field with the internal item number.
Item Description (50,A):	Regular lines: Infor LX displays the item description from the Item Master file, IIM. You can change the item description here, but Infor LX does not change the default description you defined for this item in IDF Enterprise Item. You can enter up to 50 characters in this field; however, Infor LX only saves the first 30 characters of your entry.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.

Cross-Reference Item Description (50,A): This is the description associated with the customer item number in the Ref Item field.

Order Qty (Quantity) (11,3): This value is the quantity of the item to order in the selling unit of measure. To change the order quantity, you can either change the quantity here or change the unit of measure. This field value does not change when you make shipments and partial shipments against the line: The system tracks those changes in the Open Order Quantity and Shipped Quantity fields.

The following restrictions and conditions apply to this field:

A non-zero value is required. Infor LX cannot accept orders with line quantity of zero. For returns, the quantity must be a negative number.

In Revise mode, you cannot reduce the quantity ordered below the quantity already shipped.

This field is automatically protected for kit component lines and FAS component lines.

If promotions exist, the item, price, and quantity cannot be changed.

The order quantity may be automatically changed when you validate if automatic or manual item substitution occurs.

You cannot reduce the order quantity to less than the allocated quantity.

Warehouse (3,A): Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.

Warehouse Description (30,A): Infor LX displays the description of the allocatable ship-from warehouse for this order line.

Request Date (8,0): Specify the request date for this order line. The value defaults from the order header request date when you create new lines. If you change the header request date, existing lines are not changed.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing.

Note: For resupply orders, the Request Date and Time cannot be later than the Schedule Date and Time.

CPO Line Number (4,0): Infor LX displays the customer purchase order line number for this item.

Sell U/M (2.A): This is the selling unit of measure for this line item. If you do not specify a value in this field, the value defaults in according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, file for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, Infor LX prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A) This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

To Warehouse (3,A): Infor LX displays the warehouse code of the resupply order To Warehouse. The corresponding description appears to the right of this. This field appears for resupply orders only.

To Warehouse Description] (30,A): Infor LX displays the warehouse description of the resupply order To Warehouse. This field appears for resupply orders only.

Drop (1,0): Specify yes to delete this line after its first shipment. Specify no to print this line on all invoices and back orders. You can change this drop code entry at invoice time. You cannot drop order lines from a managed warehouse.

The backorder code you define for this order overrides the drop code you enter for an order line. Drop codes are intended for use on special lines and orders with backorder code of 0.

Back Order Code (1,0): Infor LX displays the backorder code for this customer. As the default, Infor LX applies the backorder status of the order header to any order or line that can be backordered.

You can maintain backorder codes in Code Master Table Maintenance, SYS105D1, and override them on the order header when you maintain ship-to information. You cannot maintain backorder codes in line detail screens.

The backorder codes are described as follows:

0=Any order or line may be backordered.

Any order or order line can be backordered for this customer. You can pick by order or by line. Pick slips print for all items, even if the allocated quantity is zero.

1=No backordering allowed.

Back ordering is not allowed for this customer. All order lines must be allocatable. You can perform pick release by order or by line to allow partial picks to the staging location. You can only pick confirm by order. In Pick confirmation, all lines of the order must be selected and must be complete, that is, they must be fully allocated and fully confirmed. If any lines do not meet this criteria, Infor LX de-selects the order and performs no processing. Partially allocated quantities remain, and all lines of the order remain in their existing statuses. Allocations or inventory confirmation must be performed at the line level during Pick confirm.

2=Ship complete lines, backorder incomplete lines.

Ship any completely allocatable lines. Infor LX backorders only incomplete lines that you select for processing in Pick confirm. You can pick by order or by line. Incomplete lines that you process in Pick confirm are backordered. Full or partial allocations remain.

3=Ship complete lines, cancel incomplete lines.

Ship any complete lines, cancel incomplete order lines and consider the order complete. You can Pick release by order or by line in varying quantities for different lines. Infor LX cancels only incomplete lines that you select for processing in Pick confirm. You can Pick confirm by line or by order. If you Pick confirm by order, Infor LX cancels only the incomplete lines that are ready for Pick confirm.

4=Ship available inventory, cancel remainder of selected partial lines.

Ship available inventory, cancel the remainder of partial lines and consider the order line complete. You must pick by line. You can Pick confirm by order. Remaining selected partial lines are canceled during Pick confirm in this application.

Back Order Code Description (30,A): Infor LX displays the description of the backorder code displayed in the backorder code field.

Times Back Ordered (3,0): This field displays a count of back order attempts for this line. This field applies only to orders, not quotes or RMAs.

Inventory Reason Code (2,A): Specify the inventory reason code for this transaction. Infor LX defaults to the inventory reason code on the order header. You can override the default in this field.

You can define and maintain inventory reason codes in Reason Code Maintenance, INV140D1.

Use Lot Qualification (1,A): Specify Yes to use lot qualification data to determine what inventory you can allocate to this order line.

For a lot-controlled item that has the corresponding field set to 1=Yes in the Customer Master file, the default in this field is 1=Yes if there is an active record in the Customer/Group Item Requirements file, ECI, for this item and customer. If the item in this order line is not lot controlled, or if the Customer Master value for this field is 0, this field defaults to 0=No and cannot be changed.

For a lot-controlled item that has this field set to 1 in the Customer Master file, this field also defaults to 0 if there is no active ECI record for this customer and item combination. In that case, you can change the value here, since you can create the ECI record later.

User 1 Reason Code/ Customer Reason Code (2,A): Specify the first user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

User 2 Reason Code/ Disposition Reason Code (2,A): Specify the second user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

User 3 Reason Code/Q/C Reason Code (2,A): Specify the third user-defined reason code for this transaction. Infor LX validates the code using the B transaction effect in Order or Quote mode, or the RM transaction effect if you are in RMA mode.

Line Status (5,0): Infor LX displays the status for this order line. This value represents the next step(s) in the order processing cycle that this line is ready to complete. A single order line may have several statuses associated with it at any point in time.

Values of 0 (does not apply) or 1 (applies) display in each of the five positions of the status field. The meaning of the status positions is as follows:

Position 1 = Ready for Pick Release

Position 2 = Ready for Pick Confirm

Position 3 = Ready for Ship Confirm

Position 4 = Ready for Invoicing

Position 5 = Ready for Purge

Note: For order lines processed in Warehouse Management BOSS (warehouse type 4), you cannot perform any additional processing or make changes to the line after the status field shows a 1 in the second position, ready for pick confirm, because processing is now transferred to your advanced warehouse management system's application.

Weight (11,3):

Infor LX displays the calculated weight of the items on this order line. Weight equals quantity remaining multiplied by the weight per stocking unit of measure.

The calculation uses the ordered quantity and the weight per item that is defined in the Item Master or, for managed warehouses, in the Item/Warehouse Master.

Weight is expressed as an absolute value, so shipping weights for returns or RMAs also display positive values.

Volume (11,3):

Infor LX displays the calculated volume of the items on this order line. Volume equals quantity remaining multiplied by the volume per stocking unit of measure.

The calculation is based on ordered quantity and on the volume per item as defined in the Item Master or, for managed warehouses, in the Item/Warehouse Master.

Volume is expressed as an absolute value, so shipping volumes for returns or RMAs also display positive values.

Pallets (11,3):

Infor LX displays the calculated pallets for the items on this order line. Pallets equal quantity remaining divided by the stocking units of measure per pallet.

The calculation uses the ordered quantity and the number of items per pallet that is defined in the Item Master.

Pallets here are expressed as an absolute value, so shipping pallet values for returns or RMAs also display positive values.

These pallet calculations differ from the storage or movement pallets used in managed warehouses.

Nature of Transaction (2,0):

Specify the nature of transaction code to apply to this item. You can define nature of transaction codes in System Table Maintenance, SYS105D1. The default is 10=Default Sale if the line quantity is positive and 16=Default Credit the line quantity is negative.

Shipping Group Code (3,A):

Specify a group code for the line. For kit and FAS components, the shipping group code defaults to the value used for the corresponding parent item.

Do not enter group codes for drop ship lines.

Note: If the backorder code is set to 1, the Shipping Group Code must be the same for all lines in the order.

Allocation Required: Display only. This value indicates whether allocations are required for this order line, and whether fair share allocations apply. The following options are valid:

Valid choices

- **0**
  No
- **1**
  Yes
- **2**
  Fair Share

Screen actions - ORD700D3-04

Commands	Description
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.
F13=Lean Details	If the line item you selected is a Lean item, access the Lean Detail screen, ORD700D3-07, to display details for the selected line.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes for a selected order, quote, or RMA line.
F15=Line Promotions	Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.
F16=Material Status Inquiry	Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.

F17=Allocations

Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen.

Note that F17=Allocations is not available for these orders:

- Orders with types that do not affect inventory
- Orders for kit or Features and Options components
- Quotes and RMAs
- Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

F18=Line Quantity

Access the Order Line Quantity Detail screen, ORD700D3-01.

F20=Line Shipping

Access Order Line Shipping, ORD700D3-06, to view and update shipping information for this order line.

F21=Line Pricing

Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view date and time information for the line

Use the Line Dates screen, ORD700D3-05, to view and maintain line date information. This screen applies to regular lines only. Special line details are displayed on the Special Line Detail screen, ORD700D3-02.

Dates are stored in data base fields in 8 positions, including two for century, but on day, month and year are displayed on the screen.

Time fields are presented in 24 hour time format. The time fields are optional and default to "0".

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Field descriptions - ORD700D3-05

Fields	Description
Order (9,0):	Infor LX displays the order, quote, or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field contains the line's internal item number after validation. The field accepts input of up to 35 alphanumerical characters to you to input the customer item number. If you input a customer item number, after validation, Infor LX moves that value to the Ref Item field and fills the Item Number field with the internal item number.
Item Description (50,A):	Regular lines: Infor LX displays the item description from the Item Master file, IIM. You can change the item description here, but Infor LX does not change the default description you defined for this item in IDF Enterprise Item. You can enter up to 50 characters in this field; however, Infor LX only saves the first 30 characters of your entry.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.
Cross-Reference Item Description (50,A):	This is the description associated with the customer item number in the Ref Item field.
Order Qty (Quantity) (11,3):	This value is the quantity of the item to order in the selling unit of measure. To change the order quantity, you can either change the quantity here or change the unit of measure. This field value does not change when you make shipments and partial shipments against the line: The system tracks those changes in the Open Order Quantity and Shipped Quantity fields. The following restrictions and conditions apply to this field: A non-zero value is required. Infor LX cannot accept orders with line quantity of zero. For returns, the quantity must be a negative number.

In Revise mode, you cannot reduce the quantity ordered below the quantity already shipped.

This field is automatically protected for kit component lines and FAS component lines.

If promotions exist, the item, price, and quantity cannot be changed.

The order quantity may be automatically changed when you validate if automatic or manual item substitution occurs.

You cannot reduce the order quantity to less than the allocated quantity.

Warehouse (3,A): Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.

Warehouse Description (30,A): Infor LX displays the description of the allocatable ship-from warehouse for this order line.

Sell U/M (2.A): This is the selling unit of measure for this line item. If you do not specify a value in this field, the value defaults in according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, file for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, Infor LX prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A) This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

CPO Line Number (4,0): Infor LX displays the customer purchase order line number for this item.

To Warehouse (3,A): Infor LX displays the warehouse code of the resupply order To Warehouse. The corresponding description appears to the right of this. This field is displayed for resupply orders only.

To Warehouse Description (30,A): Infor LX displays the warehouse description of the resupply order To Warehouse. This field is displayed for resupply orders only.

Entry Date (6,0): Infor LX displays the date you entered the order, quote or return material authorization line.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Entry Time (6,0): Infor LX displays the time you entered the order, quote or return material authorization line.

Request (6,0): Specify the request date for this order line. The value defaults from the order header request date when you create new lines. If you change the header request date, existing lines are not changed.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing.

Note: For resupply orders, the Request Date and Time cannot be later than the Schedule Date and Time.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Request Time (6,0): Specify the time shipping of the order is requested. This time is critical in the system because order picking is based on this time. Material Requirements Planning also uses this field (as the Material Requirements Planning due time) for planning and projection purposes.

Note: For resupply orders, the Request Date and Time cannot be later than the Schedule Date and Time.

Schedule Date (6,0): Specify the date that this line of the order is scheduled to be available. This date is for reference only except when used for resupply orders. However, it can be used as a selection parameter in Pick Release, Pick Confirm, OLM and other areas.

NOTE: For resupply orders (Base Order Type 9) only, Infor LX displays the scheduled receipt date on this screen. If you change the schedule receipt date here, Infor LX will update the due date of the order line.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Schedule Time (6,0): Specify the time the order is scheduled to be available. This field is used for reference only.

Price Book Date (6,0): Specify the book date for this order line. The book date for this line defaults from the order header. Infor LX uses this date to determine list prices, special prices, and promotions.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

UDATE1xx (6,0): Specify a date for this user-defined reference field. This field has the name specified for it in Order Entry System Parameters. Example: You might want to define this field as the previous date this line item was ordered by this customer, or the date you first shipped it to this customer.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Time for User-defined Date 1 (6,0): Specify a time for this reference field.

UDATE2xx (6,0): Specify a date for this user-defined reference field. This field has the name specified for it in Order Entry System Parameters. Example: You might want to define this field as the previous date this line item was ordered by this customer, or the date you first shipped it to this customer.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Time for User-defined Date 2 (8,0): Specify a time for this reference field.

Receipt Date (6,0): This field appears only for resupply orders (base order type 9). Infor LX displays the scheduled receipt date for this order line. The default value comes from the Order Header work file in Line Create mode.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Receipt Time (6,0): This field appears only for resupply orders (base order type 9). Infor LX displays the scheduled receipt time for this order line.

Store Date (6,0): Infor LX displays the Store Date. If you do not use the Store Date as a pricing qualifier, this is for information only. If you change this date and the Store

Date is a pricing qualifier, Infor LX reprices the line. Promotions can be added or removed based on this field.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Warehouse Date (6,0):	Infor LX displays the Warehouse Date. If you do not use the Warehouse Date as a pricing qualifier, this is for information only. f you change this date and the Warehouse Date is a pricing qualifier, Infor LX re-prices the line. Promotions can be added or removed based on this field. If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.
Control Number (8,A):	Specify the control number. This field appears for items with a scheduling level of 1, 2, or 3 in the Facility Planning Data file.
BOM Method (2,A):	Specify the parent material method code. This field appears for items with a scheduling level of 2 or 3 in the Facility Planning Data file.
RTG Method (2,A):	Specify the parent routing method code. This field is displayed for items with a scheduling level of 2 or 3 in the Facility Planning Data file.

Screen actions - ORD700D3-05

Commands	Description
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.
F13=Lean Details	If the line item you selected is a Lean item, access the Lean Detail screen, ORD700D3-07, to display details for the selected line.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes for the selected order, quote, or RMA line.

F15=Line Promotions Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.

F16=Material Status Inquiry Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.

F17=Allocations Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen.

Note that F17=Allocations is not available for these orders:

- Orders with types that do not affect inventory
- Orders for kit or Features and Options components
- Quotes and RMAs
- Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

F18=Line Quantity Access the Order Line Quantity Detail screen, ORD700D3-01.

F19=Line Inventory Access Order Line Inventory, ORD700D3-04, to view and update inventory information for this order line.

F20=Line Shipping Access Order Line Shipping, ORD700D3-06, to view and update shipping information for this order line.

F21=Line Pricing Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view shipping information for the line

Use the Order Line Shipping screen, ORD700D3-06, to view and maintain line shipping detail information. This screen applies to regular lines only. Special line details are displayed on the Special Line Detail screen, ORD700D3-02. This screen is not available for RMAs.

Field descriptions - ORD700D3-06

Fields	Description
Order (9,0):	Infor LX displays the order, quote, or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field contains the line's internal item number after validation. The field accepts input of up to 35 alphanumerical characters to you to input the customer item number. If you input a customer item number, after validation, Infor LX moves that value to the Ref Item field and fills the Item Number field with the internal item number.
Item Description (50,A):	Regular lines: Infor LX displays the item description from the Item Master file, IIM. You can change the item description here, but Infor LX does not change the default description you defined for this item in IDF Enterprise Item. You can enter up to 50 characters in this field; however, Infor LX only saves the first 30 characters of your entry.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.
Cross-Reference Item Description (50,A):	This is the description associated with the customer item number in the Ref Item field.
Order Qty (Quantity) (11,3):	This value is the quantity of the item to order in the selling unit of measure. To change the order quantity, you can either change the quantity here or change the unit of measure. This field value does not change when you make shipments and partial shipments against the line: The system tracks those changes in the Open Order Quantity and Shipped Quantity fields. The following restrictions and conditions apply to this field: A non-zero value is required. Infor LX cannot accept orders with line quantity of zero. For returns, the quantity must be a negative number. In Revise mode, you cannot reduce the quantity ordered below the quantity already shipped.

This field is automatically protected for kit component lines and FAS component lines.

If promotions exist, the item, price, and quantity cannot be changed.

The order quantity may be automatically changed when you validate if automatic or manual item substitution occurs.

You cannot reduce the order quantity to less than the allocated quantity.

Warehouse (3,A): Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.

Warehouse Description (30,A): Infor LX displays the description of the allocatable ship-from warehouse for this order line.

Request (8,0): Specify the request date for this order line. The value defaults from the order header request date when you create new lines. If you change the header request date, existing lines are not changed.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing.

Note: For resupply orders, the Request Date and Time cannot be later than the Schedule Date and Time.

Sell U/M (2.A): This is the selling unit of measure for this line item. If you do not specify a value in this field, the value defaults in according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, file for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, Infor LX prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A) This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

CPO Line Number (4,0): Infor LX displays the customer purchase order line number for this item.

To Warehouse (3,A): Infor LX displays the warehouse code of the resupply order To Warehouse. The corresponding description appears to the right of this. This field is displayed for resupply orders only.

To Warehouse Description] (30,A): Infor LX displays the warehouse description of the resupply order To Warehouse. This field is displayed for resupply orders only.

Means (4,A): Specify the means of transportation for this line. The means defaults from the order header.

Note: The Outbound Logistics Management application uses the carrier, route, means, zone, and freight terms.

While this field is not meaningful for RMAs, if you make an entry in it, the value will be validated and stored.

Nature of Transaction (2,0): Specify the nature of transaction code to apply to this item. You can define nature of transaction codes in System Table Maintenance, SYS105D1. The default is 10=Default Sale if the line quantity is positive and 16=Default Credit the line quantity is negative.

If you are using Intrastat reporting, you must make an entry in this field.

Country of Destination (4,A): Specify the country of ultimate destination for this order line. If a single order line has several countries of ultimate destination and all require tracking, you must split the order line into multiple lines, one for each country.

Note: If you are creating an RMA by copying an invoice, this field is copied. However, the value is the Country of Origin for the return.

Inventory Reason Code (2,A): Specify the inventory reason code for this transaction. Infor LX defaults to the inventory reason code on the order header. You can override the default in this field.

You can define and maintain inventory reason codes in Reason Code Maintenance, INV140D1.

Kanban Required Flag (1,0): Specify 0=No if no Kanban card number is required for this item. Specify 1=Yes if a customer has a Kanban card number to associate with this item. A Kanban card is used to record the quantity of an item received at a particular work center and operation from some other work center and operation.

Receiving Dock (35,A): Specify a receiving dock for this order line. This field is not validated. The value in this fields defaults in from a hierarchy that begins with the Ship-To Customer. The first record found provides the default for the Receiving Dock field, even if the value in that record is blank.

Inbound Delivery Number (17,A):	Specify the inbound delivery number for this order. This value is not validated.
Contract (50,A):	Infor LX displays the contract number that applies to this line if one exists. This line contract number does not print on customer statements. The value is not validated.
Bid ID Contract Line Number (4,A):	Specify the bid contract ID line number for this order line. The value is not validated.
Shipping Group Code (3,A):	Specify a group code for the order line. For kit and FAS components, the shipping group code defaults to the same value as that of the corresponding parent item. Do not enter group codes for drop ship lines. This field does not apply to special lines. Note: If you set the backorder code to 1, the Shipping Group Code must be the same for all lines in the order.
Weight (11,3):	Infor LX displays the calculated weight of the line item in the ordered quantity.
Volume (11,3):	Infor LX displays the volume of the line item in the ordered quantity.
Pallets (11,3):	Infor LX displays the calculated total pallets for this line.
Containers (11,3):	Infor LX displays the calculated total containers for this order line.
Estimated Packaging Deposit (15,2):	Infor LX displays an estimate of the packaging deposit amount for this order line. Infor LX only displays this field if OLM is installed.

Screen actions - ORD700D3-06

Commands	**Description**
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.

F13=Lean Details	If the line item you selected is a Lean item, access the Lean Detail screen, ORD700D3-07, to display details for the selected line.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes for a selected order, quote, or RMA line.
F15=Line Promotions	Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.
F16=Material Status Inquiry	Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.
F17=Allocations	Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen. Note that F17=Allocations is not available for these orders: ■ Orders with types that do not affect inventory ■ Orders for kit or Features and Options components ■ Quotes and RMAs ■ Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.
F18=Line Quantity	Access the Order Line Quantity Detail screen, ORD700D3-01.
F19=Line Inventory	Access Order Line Inventory, ORD700D3-04, to view and update inventory information for this order line.
F21=Line Pricing	Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.
F22=Line Dates	Access Order Line Dates, ORD700D3-05, to view and update date and time information for this order line. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view lean detail for a lean line item

Use the Order Line Lean Detail screen, ORD700D3-07, to view and maintain line details that apply only to order lines for lean items.

Two different Order Line Lean Detail screen presentations are available. For lean manufactured items, the screen includes cell and shop order details. For lean non-manufactured items, the screen displays purchase order details. Various fields are maintainable, as described in the fields section.

Note: the item, request date, order quantity, selling unit of measure, warehouse and schedule date (if you are using Capable to Promise) are protected and cannot be changed if the linked shop order is ineligible for change. An item is a lean item if that flag is turned on in its Item Master record A shop order is ineligible for change if it has progressed beyond status 04, if it has a finished quantity, if it has any components issued, or if it is hard allocated.

Field descriptions - ORD700D3-07

Fields	Description
Order (9,0):	Infor LX displays the order, quote, or return material authorization number that you specified on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Line (4,0):	Infor LX displays the customer order line number.
Customer Number (8,0):	Infor LX displays the Sold-To Customer Number.
Customer Name (50,A):	Infor LX displays the Sold-To Customer Name.
Item Number (35,A)	This field contains the line's internal item number after validation. The field accepts input of up to 35 alphanumerical characters to you to input the customer item number. If you input a customer item number, after validation, Infor LX moves that value to the Ref Item field and fills the Item Number field with the internal item number.
Item Description (50,A):	Regular lines: Infor LX displays the item description from the Item Master file, IIM. You can change the item description here, but Infor LX does not change the default description you defined for this item in IDF Enterprise Item. You can enter up to 50 characters in this field; however, Infor LX only saves the first 30 characters of your entry.
Ref Item (35,A)	This is the customer item number. If you enter the customer item number in the Item field, when you validate, Infor LX moves it to this field and displays the internal item number in the Item field.
Cross-Reference Item Description (50,A):	This is the description associated with the customer item number in the Ref Item field.
Order Qty (Quantity) (11,3):	This value is the quantity of the item to order in the selling unit of measure. To change the order quantity, you can either change the quantity here or change the unit of measure. This field value does not change when you make

shipments and partial shipments against the line: The system tracks those changes in the Open Order Quantity and Shipped Quantity fields.

The following restrictions and conditions apply to this field:

A non-zero value is required. Infor LX cannot accept orders with line quantity of zero. For returns, the quantity must be a negative number.

In Revise mode, you cannot reduce the quantity ordered below the quantity already shipped.

This field is automatically protected for kit component lines and FAS component lines.

If promotions exist, the item, price, and quantity cannot be changed.

The order quantity may be automatically changed when you validate if automatic or manual item substitution occurs.

You cannot reduce the order quantity to less than the allocated quantity.

Warehouse (3,A): Specify the allocatable ship-from warehouse for this order line. You cannot change the warehouse if the order line has been shipped, or if allocations exist for this line.

Warehouse Description (30,A): Infor LX displays the description of the allocatable ship-from warehouse for this order line.

Request Date (6,0): Specify the request date for this order line. The value defaults from the order header request date when you create new lines. If you change the header request date, existing lines are not changed.

This value is one possible qualifier for promotions and special prices. Since repricing cannot occur after Infor LX invoices an order line, the request date value is protected against modification after invoicing.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Request Time (6,0): Specify the request time for the date in the preceding field for this order line.

Schedule Date (6,0): Infor LX displays the date on which the order line is scheduled to be shipped. This value defaults from the order header file if you maintain the order. If you create an order, it defaults to the current date.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Schedule Time (6,0): Infor LX displays the time on this date when the order line is scheduled to be shipped.

Sell U/M (2.A): This is the selling unit of measure for this line item. If you do not specify a value in this field, the value defaults in according to the following hierarchy:

1. Unit of Measure Conversion file, UIM, file for the item and sold-to customer
2. Unit of Measure Conversion file, UIM, for the item and ship-from warehouse
3. Item Master file, IIM

You can override this value with a valid selling-to-stocking unit of measure, however, Infor LX prints the selling U/M on the order acknowledgment and the invoice. All transactions that affect inventory, such as a customer order, are in stocking unit of measure.

Unit of Measure Description (30,A): This is the description associated with the selling unit of measure that you specified in the Sell U/M field.

CPO Line Number (4,0): Infor LX displays the customer purchase order line number for this item.

Default Cell (8,0): Manufactured item only. Infor LX displays the default cell in which this lean item is manufactured.

Default Cell Description (30,A): Infor LX displays the description of the default cell.

Customer Requested Dock Date (6,0): Reference only. This is the date on which the customer wants the order to arrive at its receiving location.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Customer Requested Dock Date Time (4,0): Reference only. This is the time on the specified date at which the customer wants the order to arrive at its receiving location.

Customer Requested Ship Date (6,0): Reference only. Specify the date the customer requested you to ship this order. The value in this field updates the Customer Order Header files.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Customer Requested Ship Time (4,0): If you pressed F10 to activate this field, you can maintain the Customer Requested Ship Date and Time fields for this line. Specify the time at which the customer wants you to ship this order. This field updates the Customer Order Header files.

Original Customer Requested Ship Date (6,0): Display only. This field displays the Customer Requested Ship Date value that you entered when you first created the order.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Original Customer Requested Ship Time (4,0): Display only. This field displays the Customer Requested Ship Time on the date displayed in the preceding field that you entered when you first created the order.

CTP Date Used

Display only. The CTP Date Used flag indicates whether cell capacity was used to calculate CTP dates and whether the Lean capable-to-promise date was used to replace the order line request and schedule dates and times.

The following values are valid:

0	Never
1	Always
2	Only if after Request Date

A value of 0 means that the system did not override the request and schedule dates and times with CTP dates and it did no capacity checking to calculate CTP dates. However, variables still used in the Lean date calculations are shipping lead-time, dispatch time, and possibly OLM dock scheduling dates.

A value of 1 means that the system overrode request and schedule dates with CTP dates and considered cell capacity to calculate CTP dates. The shipping lead-time, dispatch time, and possibly the OLM dock scheduling dates are also considered.

A value of 2 means that the system may have overridden request and schedule dates with CTP dates, but only if the CTP dates were later than the original request and schedule dates. The system did check capacity and also considered shipping lead-time, dispatch time, and possibly OLM dock scheduling in the calculations.

Caution: An order that is created through a batch process such as RMS or DRP is created using the Lean parameters for CTP Date Used and OLM Dock Scheduling from the facility or contract, and it assumes that the CTP Usage Mode is 1 (always call Lean scheduler date calculations). An order you enter or maintain in Order Entry, ORD700, is governed instead by the User Preferences settings for CTP Usage Mode and CTP Date Used flag, and it uses the OLM Dock Scheduling flag from the facility. The CTP Usage Mode could be set differently in the User Preferences and not call CTP calculations at all.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Dock Scheduling Date Used

Display only. The Dock Scheduling Date Used value indicates whether the dates entered in Dock Scheduling Maintenance, OLM150, were used in CTP ship date calculations.

Value are 0=No or 1=Yes.

If the value is 0, the system did not consider the dates from Dock Scheduling Maintenance in Lean calculations.

If the value is 1, the system used the dates entered in Dock Scheduling Maintenance as dock scheduling dates in Lean calculations.

Example:

A customer-requested ship date falls on a Thursday, but our Dock Scheduling dates specify that we only ship on Mondays. The Lean scheduler considers that we have to ship on the Monday prior to the customer's requested ship date to complete the delivery on time. Similarly, after Lean capacity calculations determine the CTP shipping date, the scheduler looks for the next OLM Dock Scheduling date as the next possible shipment date.

See the help text for the CTP Date Used field for a caution note about RMS and batch orders.

CTP Dock Date (6,0):

Display only. This field displays the date calculated for when the order line is expected to arrive at the customers site. The program determines this by forward scheduling the Address Master's shipping lead time days and hours from the CTP ship date.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

CTP Dock Time (4,0):

Display only. This field displays the latest Capable to Promise Dock the time in 24 hour clock format, calculated on the CTP dock date for when the order line is expected to arrive at the customers site.

CTP Ship Date (6,0):

Display only. Infor LX displays the date scheduled for shipment of the order line by the capable to promise calculation. For a manufactured item, this calculation looks at available cell capacity to determine when the order line can be manufactured. Infor LX offsets this date from the manufacturing (shop order) completion date by the dispatch lead time and adjusts the result to the next ship date and time on the OLM dock scheduling file, if this is used.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

CTP Ship Time (4,0): Display only. Infor LX displays the calculated time of day in 24 hour clock format on the CTP ship date, when the order line is scheduled to be shipped.

Purchase Order or Shop Order (9,0): For non-manufactured items, Infor LX displays the PO number for this order line. For manufactured items, Infor LX displays the SO number.

Vendor or Cell (8,0): For non-manufactured items, Infor LX displays the vendor from the PO for this line. For manufactured items, Infor LX displays the manufacturing cell number for the shop order which applies to this order line.

Quantity Ordered/ Quantity Required: For non-manufactured items, Infor LX displays the quantity ordered in stocking unit of measure on the PO for this order line. For manufactured items, Infor LX displays the quantity required in stocking unit of measure on the displayed shop order.

Quantity Received/ Quantity Finished: For non-manufactured items, Infor LX displays the quantity in stocking unit of measure received against the PO for this order line. For manufactured items, Infor LX displays the quantity finished in stocking unit of measure on the displayed shop order.

Due Date (6,0): For non-manufactured items, Infor LX displays the Purchase Order Due Date for the displayed PO line. For manufactured items, Infor LX displays the Shop Order Due Date for the displayed shop order.

If you use time zone conversion, see the section Note to Time Zone Conversion Users in the Order Entry Overview help text for additional details on the handling of specific date fields.

Status of PO/SO: For non-manufactured items, Infor LX displays the text that corresponds to the PO line status in the Purchase Order Line file, HPO. Example: Printed. For manufactured items, Infor LX displays the text that corresponds to the applicable shop order status in the Shop Order Header file. Examples: Released, Scheduled, Completed.

Screen actions - ORD700D3-07

Commands	Description
Enter	Validate the screen and display any error messages. Enter does not perform screen navigation here.
F2=Navigation	Access the Line Navigation screen, ORD700D3-09, to quickly access any other order line detail screen. This function key first validates and then posts the order on the current screen.
F6=Accept	Accept changes to the screen. Accept validates any changes to the screen, updates the Customer Order Line Item work file ECLW file with the screen values, and returns to the Line Entry screen, ORD700D2-01.
F9=CTP	Perform CTP calculations.
F10=Enter Cust Ship Dat	Input-enable the Customer Requested Ship Date and Time fields.
F13=Cell Workbench	Manufactured item only. If the item you selected is a Lean manufactured item, access the Cell Workbench screen, LMP500D, to display manufacturing details for the selected line item.
F14=Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes for a selected order, quote, or RMA line.
F15=Line Promotions	Access Line Promotions, ORD740D2-01, for the selected order or quote line. This function first processes an Enter validation request and an F6=Accept post of the current screen.
F16=Material Status Inquiry	Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.
F17=Allocations	Access Customer Order Allocation Detail, ORD725D-01, for this order line. This function first processes an Enter validation request and F6=Accept post of the current screen. Note that F17=Allocations is not available for these orders: ■ Orders with types that do not affect inventory ■ Orders for kit or Features and Options components ■ Quotes and RMAs ■ Rush orders (base order class 1) if you process the order from a Type 5, Infor WM-controlled warehouse, and if the Allow Allocation of Rush Orders flag is set to No in System Integration Parameters, SYS830D.

F18=Line Quantity	Access the Order Line Quantity Detail screen, ORD700D3-01.
F19=Line Inventory	Access Order Line Inventory, ORD700D3-04, to view and update inventory information for this order line.
F20=Line Shipping	Access Order Line Shipping, ORD700D3-06, to view and update shipping information for this order line.
F21=Line Pricing	Access Line Financial Detail, ORD700D3-03, to view and update pricing information for this order line.
F22=Line Dates	Access Order Line Dates, ORD700D3-05, to view and update date and time information for this order line. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Navigation to order line detail screens

Use the Line Navigation screen, ORD700D3-09, to quickly select the line detail screen you would like to review or update. Access the navigation screen from any line detail screen, or with Action 17=Line Navigation from the main line entry screen, ORD700D2-01.

Field descriptions - ORD700D3-09

Fields	Description
Select (1,0):	Type 1=Select in the field before the line detail screen you want to access and press Enter. Infor LX displays the requested screen. You cannot select more than one screen for sequential display, but you can return to this screen from any line detail screen with F2=Navigation to make another selection. Selection gives the following results:

Selection	Screen
Quantity	Line Quantity Detail
Pricing & Financial	Line Pricing and Financial Detail
Inventory	Line Inventory Detail
Dates	Line Dates screen

Shipping	Line Shipping Detail
Notes	Note Mode Selection
Allocations	Allocations
Line Promotions	Line Promotions
Status	Order Status
Intercompany Automation Detail	Order Line Intercompany Automation Detail

Screen actions - ORD700D3-09

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Return freight details, ORD700D5

The Return Freight Details program, ORD700D5, provides a means for you to provide information that Infor LX uses to generate a PO for return freight charges.

The Return Freight Panel only displays on an RMA or post ship order copied from an RMA. An original customer order can not access this screen.

Date/Time Conversion

Time zone conversion functionality allows you to view dates correctly for a region, regardless of the time zone in which you operate. Supply chain programs convert regional dates that display or are entered on the screen for a specific region, such the region of the order line warehouse, the ship-to address, the ship-to customer, and so on, to the corresponding dates and times for the region that is your system date and time. To display these dates in inquiries and reports, the programs convert the dates back to values appropriate to the region of the warehouse before it displays these dates on the screen or prints them in reports.

See the section Note to Time Zone Conversion Users in the Order Entry overview help text for for additional details on the handling of specific date fields.

Specify details for a purchase order for return freight charges

Infor LX displays the Return Freight Details screen, ORD700D5-01, when you press F9 from the Order Header Shipping screen, ORD700D9-02.

Specify the Vendor Number, Commodity Code, and Freight Amount that Infor LX uses to generate a purchase order for return freight charges.

Field descriptions - ORD700D5-01

Fields	Description
RMA Number/Order Number (9,0):	(Reference only) Infor LX displays the return material authorization number or post-ship order number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Vendor Number (8,0):	Specify the vendor number to use to create a purchase order for return freight.
Vendor Name (50,A):	Infor LX displays the vendor name associated with the vendor number you specify.
Commodity Code (35,A):	Specify the commodity code to use to create a purchase order line for return freight. The commodity code must already exist in the Commodity & Special Charge Code file, HPC.
Commodity Description (50,A):	Infor LX displays the description associated with the commodity code you specify.
Freight Amount (15,2):	Specify the amount of the return freight charge.

Screen actions - ORD700D5-01

Commands	Description
F6=Accept	Use F6 to accept your changes and return to the Order Header Shipping screen, ORD700D9-02.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order line purchase order reference, ORD700D7

The Order Line Purchase Order Reference program, ORD700D7, allows you to link packaging return lines to the purchase order under which you received them.

Link packaging return lines to the original receiving purchase order

Access the Order Line Purchase Order Reference screen, ORD700D7-01, with line action 38 on the ORD700D2-01 screen.

Use F6 to validate the PO number and update the Customer Order Line Items Work file, ECLW.

Field descriptions - ORD700D7-01

Fields	Description
Order Number:	Infor LX displays the order, quote, or return material authorization number that you selected on the initial screen. The field name changes according to the filters you used when you made your selection on the initial screen.
Order Line:	Infor LX displays the order line number.
Customer Number:	Infor LX displays the Sold-To Customer Number.
Customer Name:	Infor LX displays the Sold-To Customer Name.
Item Number:	Infor LX displays the packaging item for this order.
Item Description:	Infor LX displays the description of the packaging item.
Purchase Order Number (9,0):	This field references the purchase order under which the packaging item was originally received. If packaging items were accumulated before the return, this field references one of the purchase orders. The PO number referenced in this field must exist on the system, and the packaging item must exist on the PO.

Screen actions - ORD700D7-01

Commands	Description
F14=Purchasing Inquiry	Access the Purchasing Inquiry program, PUR300.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Manual price override reason code, ORD751D

Use the Manual Price Override Reason Code program, ORD751D, to provide a reason code when you override system pricing in Order Entry or Billing.

Access: Order Maintenance, ORD700D2, Order Line Detail, ORD700D3, or Invoice Line Detail, BIL501D3

Specify a reason code for a manual price override

Use the Manual Price Override Reason Code screen, ORD751D-01, to specify a reason code for the order or invoice line for which you manually overrode the price. This screen appears if you manually specify a price and either the Promotions and Deals System parameter or a flag in the Customer Master for the sold-to customer indicates that a reason code is required for price overrides.

Field descriptions - ORD571D-01

Fields	Description
Order (9,0):	This field displays the order number from which the screen was called.
Line (4,0):	This field displays the number of the order line you priced manually.
Item Number (35,A):	This field displays the item number on the order line.
Order Quantity (11,3):	This field displays the quantity on the order line in selling unit of measure.
Selling U/M (2,A):	This field displays the selling unit of measure of the item.
Original Net Price (15,5):	This field displays the original net price for the line in the Order Entry screen before the override.
Currency (3,A):	This field displays the currency in which the net price is expressed.

Override Net Price (15,5):	This field displays the manually entered net price for the line from the Order Entry screen.
Reason Code (2,A):	Specify the code for the reason that you overrode the system price of the line with a manually entered price. If a default reason code was provided in the Customer Master for this customer, that value appears here as the default. If you leave this field blank and do not use the F9=Reprice function, the line is created but placed on reason code hold.
Description of the Reason Code:	This field displays the description defined for the price override reason code that defaulted from the Customer Master or that you specified in this screen.

Screen actions - ORD571D-01

Commands	Description
F6=Accept	Accept the reason code and the price override. If you are in order entry mode and did not specify a valid reason code, F6 places the line on pricing hold. Pricing hold is not available in Billing.
F9=Reprice	Restore system pricing to the line, reversing the price override. No reason code is required if you reprice the line. Repricing is not available if you accessed this screen from Invoice Line Detail, BIL501D3.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Customer order allocation detail, ORD725D

Allocations tell the picking department which locations, and/or lots or QMS sequence number inventory, and/or pallets, and/or containers of a given product to pull for a specific shop order. The Customer Order Allocation Detail program, ORD725D, allows you to allocate inventory to lines of a customer order and to maintain existing allocations.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Allocate specific inventory to individual order lines

Use the Customer Order Allocation Detail screen, ORD725D-01, to allocate specific inventory to lines in the order.

Any of the following conditions causes Infor LX to display this screen:

- On request with line action 16 from the Line Entry screen
- On request with F17 from an Order Line Detail screen
- Automatically for post-ship orders
- Automatically, as Inventory Confirmation, for post-ship orders for items that do not require allocations
- Automatically if you reduce the ordered quantity to a quantity less than the currently allocated quantity

Allocations do not apply, and the screen is not valid, under the following conditions:

- Financial orders for order types which do not affect inventory
- Non-inventory items (item type 6)
- Quotes
- RMAs
- Drop Shipment lines
- Kit components
- FAS components
- Assortment parents
- Special lines

Note that non-planning-bill type phantoms can be allocated. Planning bill phantoms cannot be allocated because they may only exist on an order as a component of a FAS parent.

Infor LX displays either the Allocations or the Inventory Confirmation mode of the screen according to the criteria in the table below.

Table headings are abbreviated as follows:

Pick Conf?=Pick Confirmed?

Alloc Req?=Allocations Required?

Alloc Qty=a Quantity is Allocated

Pick Conf?	Alloc Req?	Alloc Qty	Mode
N	Y	Y	Allocations*
N	Y	N	Allocations*
N	N	N	Confirmation*
N	N	Y	Allocations*
Y	Y	Y	Allocations
Y	Y	N	Allocations
Y	N	N	Allocations
Y	N	Y	Allocations

*Screen opens automatically

The headings in the preceding table mean the following:

Pick Confirmation Event: The confirmation event is determined by the order class. When there is no pick confirmation step, you must either allocate or confirm the line before the order can be accepted. If you try to validate the record line before it is allocated or confirmed, Infor LX opens the appropriate window automatically.

Allocation Required: Required line allocations are determined by the allocation required flag for that line.

Allocated Quantity: The allocated quantity is the hard-allocated line quantity.

Field descriptions - ORD725D-01

Fields	Description
Item:	Infor LX displays the item number you selected for allocations.
Item Description:	Infor LX displays the description of the item you selected.
Item Class:	Infor LX displays the item class of the item you selected for allocations.
Warehouse:	Infor LX displays the ship-from warehouse you selected for allocations.

Cust (Customer): Infor LX displays the customer name.

Order/Line: Infor LX displays the order number and the line number on the order that you selected for allocation.

Qty Ordered (Stocking): Infor LX displays the quantity for the line you selected for allocation in stocking unit of measure.

Stocking U/M: Infor LX displays the stocking unit of measure for the line you selected for allocation.

Qty Ordered (Selling): Infor LX displays the quantity for the line you selected for allocation in selling unit of measure.

Selling U/M: Infor LX displays the selling unit of measure for the line you selected for allocation.

Remaining Qty: Infor LX calculates the ordered quantity that is not yet allocated.

Alloc Qty: Infor LX calculates the allocated quantity of the item as you process allocations.

Alloc U/M: Infor LX displays the item allocation unit of measure for the line you selected. This value is the same as the stocking unit of measure.

Req Date (Requested Date): Infor LX displays the request date you specified when you created the order.

Line Actions:

The following line actions are available:

4=Delete

Delete a previously entered allocation.

11=Allocate

Create a new allocation on the top blank line, or create or revise allocated quantities on the existing lines.

17=Lot Notes

Call Lot Notes Maintenance to create or update notes for the line item's lot. This action key is only available for lot-controlled items.

22=Serial Numbers

If STTi is installed, access the Sales/Resupply Order Allocate screen, INV599D-01, to maintain the serial numbers assigned to the order.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Sts (Status) (2,A): Infor LX displays the lot status for each record. The allocation determination is based upon the Lot Inventory Status field on the Location Inventory record, ILI, which may be different if you use QMS. Allocations may or may not be allowed based upon settings for any given lot status. These settings are maintained in the Lot Status Code Maintenance program, API150D. You can see a list of currently defined reserved and user-defined statuses in that program.

Lot/QMS Sequence (25,A): Infor LX displays the lot number for lot-controlled items or the QMS sequence number for non-lot-controlled QMS items for which QMS processing is not complete.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment.

For lots, if you do not specify lot potency at the time you that you create the lot, the potency defaults to the same value as the item potency. If you re-allocate an active ingredient to a lot that has a different potency from the potency of the lot originally allocated, Infor LX does not automatically recalculate the compensating ingredient quantities. Potency does not apply to non-lot-controlled items.

Location (10,A): Infor LX displays the existing inventory location. If you create an allocation, you must specify an allocatable location value in this field. This field will not appear in the blank top line if the item is container controlled. For container-controlled items, the location the field displays for existing allocations is the location of goods in the container.

Note: If you receive an error message that the Warehouse/Lot/Location combination does not exist, you can override this with the F14 key. If you do this, Infor LX creates a record of the combination you use in the Location Inventory file, ILI. But you can only create a complete, usable record if the warehouse for the line is not a managed warehouse.

Pallet (8,0): Infor LX displays the pallet number associated with this order line. This field only appears if the warehouse for the order line is a managed warehouse.

Container (10,A): Infor LX displays the user-defined container ID. This field is only valid for container-controlled items. For regular warehouses, the name reflects the name you defined in Advanced Process Industries Parameters in the System Parameters application.

Qty to Alloc (11,3)/ <Wght> to Alloc (11,4): Specify the quantity of the item to allocate. This field is generally used for forced allocations during post-ship orders or to enter negative-quantity allocations to process returns.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters) and this is a DWM item, this is the equivalent DWM unit of measure value <Wght>.

Alloc Qty/Alloc <Wght>: Infor LX displays the quantity of the item that is allocated in each lot or QMS sequence number and location.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters) and this is a DWM item, Infor LX also displays the equivalent DWM unit of measure value <Wght>. The weight (or other dual unit of measure value, depending on what is assigned in your environment) allocated is the Average Actual <Wght> from the Item Master record until you confirm the actual value that you ship during the pick confirm process.

On Hand Quantity/On Hand <Wght>: Infor LX displays the on hand quantity of the item in this warehouse location and container.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters) and this is a DWM item, Infor LX also displays the equivalent DWM unit of measure value <Wght>. The weight (or other dual unit of measure value, depending on what is assigned in your environment) allocated is the Average Actual <Wght> from the Item Master record until you confirm the actual value that you ship during the pick confirm process.

Available Quantity/ Available <Wght>: Infor LX displays the quantity of the item that is available in each lot or QMS sequence number and location.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters) and this is a DWM item, Infor LX also displays the equivalent DWM unit of measure value <Wght>. The weight (or other dual unit of measure value, depending on what is assigned in your environment) allocated is the Average Actual <Wght> from the Item Master record until you confirm the actual value that you ship during the pick confirm process.

Lot Potency: Infor LX displays the potency code for this item in this lot and location. This field appears only for lot-controlled items.

Lot Reference:	Infor LX displays the reference number for this lot.
Lot QA Date:	Infor LX displays the quality assurance date of the lot-controlled item in each lot and location.
Lot Expiration Date:	Infor LX displays the expiration date of the item in each lot and location. This field appears only for lot-controlled items.

Screen actions - ORD725D-01

Commands	Description
F6=Accept	Validate the order line. Accept the allocations, or accept the fact that there are no allocations, and exit the screen.
F9=Auto Allocate	Instruct Infor LX to search the lot/location inventory and automatically perform the allocation. Auto Allocate is not available for managed warehouses or for order lines that do not require allocations.
F10=Lock/Unlock	If allocations for the order line are unlocked, use F10=Lock to prevent changes to allocations for the line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 1=Yes. If allocations for the order line are locked, use F10=Unlock to allow changes to allocations for the line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 0=No.
F15=PreAsn Lot	Pre-assign specific lots to allocate for this order. The Pre-Assigned Lots Allocation screen, SFC720D5-01, in the Shop Floor Control application appears. This function operates only for lot-controlled items.
F16=Material Status Inquiry	Access the Warehouse Availability Inquiry screen, WINIWM1D, to view inventory detail for this item. The listing also includes warehouses other than the order line warehouse, but these are not meaningful to order entry. Only inventory physically located in the order line warehouse can be allocated or shipped.
F21=Delete Allocations	Delete a particular allocation. Infor LX recalculates the allocated quantity and the remaining quantity.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Weight entry/maintenance by lot, ORD727D

The Weight Entry/Maintenance by Lot program, ORD727D, allows manual entry of Scanned Shipment records into the Scanned Shipments File, ISS. The ISS file facilitates scanning DWM item inventory when you load it into trucks. Often, DWM customers do not allocate stock because they take product directly off the production line and load it into a truck for shipping. They tell the system what they picked, rather than picking what the system tells them.

If you perform allocation during the pick release process, the system assumes that allocated weights for DWM items are the average weights from the Item Master until you determine the real picked weight from the Scanned Shipment records in the ISS file.

The Order Line Allocations file, ELA, and the Scanned Shipment file, ISS, must match one another to ensure that the real actual weight that was scanned or entered into the ISS file is the same as the allocated weight for inventory reduction. If all other data except the weight matches in the two files, the weight from the ISS file overrides the ELA weight to relieve inventory. If these two files do not match, error messages appear during pick confirm.

Access: ORD menu or Action 19 from Pick Confirm

Specify an order and line to create a scanned shipment record for a DWM item

Use the Dynamic Weights and Measures Maintenance screen, ORD727D-01, to specify an order and line number for DWM maintenance.

Field descriptions - ORD727D-01

Fields	Description
Order (9,0):	Specify the order number for which to create a Scanned Shipment record in the ISS file.
Line (4,0):	Specify the line in the order for which to create the Scanned Shipment record in the ISS file.

Screen actions - ORD727D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify material allocation information to create a scanned shipment record

Use the Dynamic Weights and Measures Maintenance - ELA screen, ORD727D-02, to send material allocation information to a Scanned Shipment file, ISS, record.

If material allocations (ELA records) exist for the item, but no ISS Scanned Shipment records exist, the material allocations from ELA appear. Use F6=Accept to copy the material allocation details into the scanned shipment file. If no material allocations exist, you will see a blank DWM-ELA screen. Specify material allocation details to copy into the ISS file when you use F6=Accept.

You can add or change details on this screen to copy into the DWM Scanned Shipment file when you use F6=Accept, but this does not change the ELA allocations records. To access the material allocations, use action 12=Allocate on the pick confirm screen.

The header of this screen displays Order Number, Line Number, Item Number, and Description, and Stocking Unit of Measure for the item. The screen contains multiple lines, sequenced to allow you to record all location/lot/container combinations from which you took inventory to fill the order line.

Field descriptions - ORD727D-02

Fields	Description
Line:	This field functions as a sequence number when you split the inventory you pick for the line among two or more location/lot/container combinations.
Whse (3,A):	Infor LX displays the Warehouse from the customer order.
Loc (10,A):	Specify the Location from which you picked the inventory for this line.
Lot (25,A):	Specify the Lot from which you picked the inventory for this line.
Container (10,A):	Specify the Container from which you picked the inventory for this line.
Pallet (9,0):	This field only appears if Warehouse Management is installed and the warehouse on the customer order is a managed warehouse. Specify the Pallet from which you picked the inventory for this line.

Quantity/Alloc (13,3):	Specify the quantity that you picked from this location/lot/container combination.
<Weight> (11,4):	Specify the actual DWM dual unit of measure value that corresponds to the quantity you picked from this location/lot/container combination.

Screen actions - ORD727D-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Specify material allocation information to update a scanned shipment record

When you enter an order and line number on the Dynamic Weights and Measures Maintenance screen, ORD727D-01, to update an existing record, Infor LX displays a message that the record exists. Press Enter again to continue. Infor LX displays the Dynamic Weights and Measures - ISS screen, ORD727D-03. The screen displays data you entered the last time you updated this record. Use this screen to modify the pick data you entered previously. The header of this screen displays Order Number, Line Number, Item Number and Description, and Stocking Unit of Measure for the item. You can initiate update of an ISS record from the ORD menu or with an action code during the Pick Confirm process.

Field descriptions - ORD727D-03

Fields	Description
Action Codes	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Act (Action)	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.
Line:	This field functions as a sequence number when you split the inventory you pick for the line among two or more location/lot/container combinations.
Whse (3,A):	Infor LX displays the Warehouse from the customer order.
Loc (10,A):	Infor LX displays the Location from which you picked the inventory for this line. You can change this value.

Lot (25,A):	Infor LX displays the Lot from which you picked the inventory for this line. You can change this value. This field only appears for lot-controlled items.
Container (10,A):	Infor LX displays the Container from which you picked the inventory for this line. This field only appears for container-controlled items. You can change this value.
Pallet (9,0):	This field only appears if Warehouse Management is installed and the warehouse on the customer order is a managed warehouse. Infor LX displays the Pallet from which you picked the inventory for this line. You can change this value.
Quantity/Alloc (13,3):	Infor LX displays the quantity you picked from this location/lot/container combination. You can change this value. If you do change it, you must also update the <Weight> value.
<Weight> (11,4):	Infor LX displays the DWM dual unit of measure actual value corresponding to the quantity picked from this location/lot/container combination. You can change this value. If you do change it, you must also update the Quantity/Alloc value as appropriate.

Screen actions - ORD727D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order total promotions, ORD740D1

The Order Total Promotions program, ORD740D1, allows you to assign eligible promotions to the order.

View or assign promotions to a total order

Use the Order Total Promotions screen, ORD740D1-01, to enter or view the total order promotion assignments for this order. The order number defaults to the number of the order from which you accessed this screen. If you press F11 to fold the screen, Infor LX displays additional display fields. You can find descriptions of these fields under the help text for the F11=Fold screen action key.

You cannot delete total order promotion tracking records if you invoiced any line of the order. Use Promotion Tracking, PRO130, in the Promotions and Deals application to close out a promotion.

Promotion Capping Considerations

If you use promotion capping, you may receive a warning message in this screen if an assigned promotion exceeds the maximum amount you defined as the promotion cap amount. This can occur following repricing if the system reassigns a promotion and it now exceeds the promotion maximum amount. The warning may also appear if you manually assign a promotion and the amount exceeds the maximum amount. You can remove the promotion or you can override the warning message with F14 and assign the promotion.

If a promotion offers free goods tied to quantity ordered, the free goods display shows the number of free items for which the order qualifies. If you use promotion capping and set a maximum number of free goods for a promotion, the free goods field displays a number up to that maximum only, regardless of how many qualifying items the customer orders.

Field descriptions - ORD740D1-01

Fields	Description
Order:	Infor LX displays the number of the order from which you called the promotions screen.
Order Total Incentive:	Infor LX displays the sum of the Off Invoice Amount and Bill Back Amount options that are available for the selected record when you select and assign promotions.
Off Invoice Amount:	Infor LX displays the sum of the Total Order Off Invoice promotions you selected or accepted for this order. Click the Refresh button to refresh this option.
Bill Back Amount:	Infor LX displays the cumulative bill-back amount assigned to the order line number when you select or assign promotions.
Line Actions:	The following line actions are available: **11=Assign Standard** Assign the standard portion of the split promotion rather than the combination of off-invoice and bill-back portions of the promotion. **12=Assign Split** Assign the combination of off-invoice and bill-back portions, rather than the standard portion, of the split promotions. **15=Detail** Display order line promotions from the Promotion Master, PRO110D2-01.

16=Contract Flag Lookup

Display a list of valid contract flags with the description of each.

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

Promotion (Number): Infor LX displays all promotions for which this order qualifies.

Promotion Line: Infor LX displays all promotion lines for which this order qualifies.

Term: Infor LX displays one of the following Promotion Terms Codes for this promotion. In the table, (Off) = (Off Invoice), (BB) = (Bill Back):

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)
6	Split at Total Order Level (Off)
7	Split at Line Item Level (BB)
8	Split at Total Order Level (BB)

CF (Contract Flag): Infor LX displays the contract flag for this promotion line. You set this flag in the Promotion Master, PRO110. The promotion assignment hierarchy is described in the following section:

1=Exclusive promotions first.

Only a single record applies, using 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 search ends.

2=Semi-exclusive.

Only a single record applies, using 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), this ends the search for other promotions with contract flags of Best Discount, Lowest Discount, Always Assigned, or Regular.

4=Best Discount.

Only a single record applies, although all qualified best discount promotions are analyzed. The program assigns the single promotion that results in the largest discount amount offered. You can manually remove this promotion, but cannot assign any others while any promotion with Contract Flag=Best Discount is assigned. If a Best Discount promotion qualifies, no other promotions with contract flags of Lowest Discount, Always Assigned, or Regular are searched for. This does not apply to bracket promotions.

5=Lowest Discount.

Only a single record applies, although all qualified Lowest Discount promotions are analyzed. The program assigns the single promotion that results in the smallest discount amount offered. Note that surcharge- or penalty-type promotions result in a negative discount amount offered, and in such cases, the largest penalty type promotion is assigned. If a Least Discount promotion qualifies, this ends the search for other promotions with contract flags of Always Assigned or Regular. This does not apply to bracket promotions.

3=Always Assigned.

Multiple records of this type can qualify and be assigned. You cannot manually remove an Always-Assigned promotion. You can think of Always Assigned as the same as Regular, except that Always Assigned has a forced auto assignment characteristic.

0=Regular.

If no Exclusive, Semi-Exclusive, Best-Discount, or Lowest-Discount promotions exist, one or more Regular promotions can qualify and be assigned. You can combine them with Always-Assigned promotions. The program does not require a search for records with Contract Flag=Best Discount or Lowest Discount if you have not activated the system parameter to use these contract flags.

Discount:

Infor LX displays the discount amount to use with the Method.

For amount-type total order discounts, this field shows the Discount Amount that you defined in the Promotion Master. If you view promotion details for a return or RMA, the actual discount amount to credit for a partial return or partial RMA can be a calculated portion of the full discount amount that you defined for the promotion.

Method (7,A): Infor LX displays the word that describes the discount method for this promotion line. The methods are described in the following.

Amount

The amount displayed in the Discount field is the discount amount off the total order amount. For example, if the total order amount is 100, and the promotion calls for 10 off, the total order Discount option shows "10.00".

Percent

The amount displayed in the Discount field is a percentage of the total order amount. For example, if the total order amount is 100, and the promotion is set up for a 10% discount (net = 90), the total order Discount option shows "10.00" (amount equivalent of a 10% discount off the entire order amount).

Cash (Value)

The discount method applies a cash value discount for the promotion offered at the order level.

Free (Good)

The discount is the value of free goods for the promotion offered.

Total Discount: Infor LX displays the total discount amount for this promotion.

Taken: Infor LX displays Y (Yes) if this promotion is already selected or automatically assigned to the order. This field is blank if the promotion is not selected or someone has deleted the promotion tracking record.

Assignment Sequence (3,0): Reference Only. If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Assignment Sequence.

Application Point (3,0): Reference Only. If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Assignment Sequence.

Full Pallet Flag (1,0): Infor LX displays the Full Pallet Flag. This flag indicates whether promotions are applied only to amounts of the order that constitute full pallets.

Screen actions - ORD740D1-01

Commands	Description
F11=Fold	Fold the screen to display the following additional fields:

Ext Amt (Extended Amount):

This calculated field displays the results when you apply this and all other line-level promotions to the line.

Split (Off Invoice, Bill Back)

This field displays the results when you apply available split promotions, whether you took the promotions or not.

FG or CV Item:

This field displays the Free Goods or Cash Value item number if those types of promotions exist.

Assignment Sequence:

The system assigns promotions with product sequence=0 according to the traditional promotion assignment hierarchy of price, amount, percentage, free goods, and cash value.

You can specify other levels to supersede the traditional assignment sequence.

If you use a promotion sequence, this also supersedes the traditional method of calculating promotion price basis. The Application Point field contains a value to indicate at what level the system should assign a given promotion.

Enter these values in the Promotion Master program, PRO110.

This field is only available if the Allow User-Defined Promotion Assignment Sequence flag is set to Yes in the Promotions and Deals System Parameters program, PR0820D.

Application Point:

If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Application Point.

This field indicates at what level a given promotion is assigned.

The default is 0, and it signifies the calculated original basis, which is usually based on list price. Multiples of 10 are expected.

This field works in conjunction with the Assignment Sequence field. You can enter the values in the Promotion Master program, PRO110.

Full Pallet Flag:

Infor LX displays the Full Pallet Flag. This flag indicates whether bracket promotions are applied only to amounts of the order that constitute full pallets. 1=Yes.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order line promotions, ORD740D2

The Order Line Promotions program, ORD740D2, allows you to assign available order line promotions to the selected line.

View or assign promotions to a line

Use the Order Line Promotions screen, ORD740D2-01, to enter or display order line promotions that are available for the selected line. If you press F11 to fold the screen, Infor LX displays additional display fields. You can find descriptions of these fields under the help text for the F11=Fold screen action key.

Promotion Capping Considerations

If you use promotion capping, you may receive a warning message in this screen if an assigned promotion exceeds the maximum amount you defined as the promotion cap amount. This can occur following repricing if the system reassigns a promotion and it now exceeds the promotion maximum amount. The warning may also appear if you manually assign a promotion and the amount exceeds the maximum amount. You can remove the promotion or you can override the warning message with F14 and assign the promotion.

If a promotion offers free goods tied to quantity, the free goods display shows the number of free items for which the order line qualifies. If you use promotion capping and have set a maximum number of free goods, the free goods field will display a number up to that maximum only, regardless of how many qualifying items the customer orders.

Field descriptions - ORD740D2-01

Fields	Description
Order/Line:	Infor LX displays the order number and order lines you selected.
Item:	Infor LX displays the number of the ordered item.
Description:	Infor LX displays the description of the ordered item.
Promotion Price Basis:	Infor LX displays the value the program uses to calculate the discount amount for the next promotion you choose to assign.

Net Price:

Infor LX displays the prorated line price (per pricing unit of measure) for the item when you select or assign promotions in transaction currency.

Note: When you return to the line entry screen or any line detail screen, Infor LX display prices after it converts them to the line's selling unit of measure. Quantities on these screens may be displayed in stocking or selling unit of measure.

Qty Ordered (Quantity Ordered):

Infor LX displays the quantity of the ordered item on the line in stocking unit of measure.

Bill Back Amount:

Infor LX calculates and displays the cumulative bill-back discounts offered for this order line number when you select or assign promotions. This amount does not include the effect of bracket promotions. Those promotions appear in the Bracket Promotions screen, ORD740D3-01.

Total Extended Amount:

Infor LX displays the extended amount for the order line when you select or assign promotions in transaction currency for the pricing unit of measure.

Line actions:

The following line actions are available:

11=Assign Standard

Assign the standard portion of the split promotion rather than the combination of off-invoice and bill-back portions of the promotion.

12=Assign Split

Assign the combination of off-invoice and bill-back portions, rather than the standard portion, of the split promotions.

15=Detail

Display order line promotions from the Promotion Master, PRO110D2-01.

16=Contract Flag Lookup

Display a list of valid contract flags with the description of each.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Promotion (Number):

Infor LX displays all promotions for which this order line qualifies.

(Promotion) Line: Infor LX displays all promotion lines for which this order line qualifies.

Term: Infor LX displays one of the following Promotion Terms Codes for this promotion. In the table, (Off) = (Off Invoice), (BB) = (Bill Back):

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)
6	Split at Total Order Level (Off)
7	Split at Line Item Level (BB)
8	Split at Total Order Level (BB)

CF (Contract Flag): Infor LX displays the contract flag for this promotion line. You set this flag in the Promotion Master, PRO110. The promotion assignment hierarchy is described in the following section:

Valid choices

- **0=Regular.**

  If no Exclusive, Semi-Exclusive, Best-Discount, or Lowest-Discount promotions exist, one or more Regular promotions can qualify and be assigned. You can combine them with Always-Assigned promotions. The program does not require a search for records with Contract Flag=Best Discount or Lowest Discount if you have not activated the system parameter to use these contract flags.
- **1=Exclusive promotions first.**

  Only a single record applies, using 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 search ends.
- **2=Semi-exclusive.**

  Only a single record applies, using 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), this ends the search for other promotions with contract flags of Best Discount, Lowest Discount, Always Assigned, or Regular.

- **3=Always Assigned.**

  Multiple records of this type can qualify and be assigned. You cannot manually remove an Always-Assigned promotion. You can think of Always Assigned as the same as Regular, except that Always Assigned has a forced auto assignment characteristic.

- **4=Best Discount.**

  Only a single record applies, although all qualified best discount promotions are analyzed. The program assigns the single promotion that results in the largest discount amount offered. You can manually remove this promotion, but cannot assign any others while any promotion with Contract Flag=Best Discount is assigned. If a Best Discount promotion qualifies, no other promotions with contract flags of Lowest Discount, Always Assigned, or Regular are searched for. This does not apply to bracket promotions.

- **5=Lowest Discount.**

  Only a single record applies, although all qualified Lowest Discount promotions are analyzed. The program assigns the single promotion that results in the smallest discount amount offered. Note that surcharge- or penalty-type promotions result in a negative discount amount offered, and in such cases, the largest penalty type promotion is assigned. If a Least Discount promotion qualifies, this ends the search for other promotions with contract flags of Always Assigned or Regular. This does not apply to bracket promotions.

Discount per Item

Infor LX displays the prorated line amount that is associated with the promotion.

Method (7,A):

Infor LX displays the word that describes the discount method for this promotion line. The methods are described in the following.

Price

This method indicates that a promotion price is set for an item to override any other price.

Amount:

The amount displayed in the Discount field is the discount amount off the promotion price basis value. For example, if the promotion price basis value is 100, and the promotion calls for 10 off, the line-level Discount option shows "10.00".

Percent:

The amount displayed in the Discount field is a percentage of the promotion price basis value. For example, if the promotion price basis value is 100, and the promotion is set up for a 10% discount (net = 90), the total order Discount option shows "10.00" (amount equivalent of a 10% discount off the entire order amount).

Cash (Value)

The discount method applies a cash value discount for the promotion offered.

Free (Good)

The discount is the value of free goods for the promotion offered.

Total Discount: Infor LX displays the discount amount used with the Method option.

Net Price: Infor LX displays the prorated line price (per pricing unit of measure) for the item when you select or assign promotions in transaction currency.

Note: When you return to the line entry screen or any line detail screen, Infor LX display prices after it converts them to the line's selling unit of measure. Quantities on these screens may be displayed in stocking or selling unit of measure.

Taken: Infor LX displays Yes (Y) if this promotion is already selected or automatically assigned to the order. This field is blank if the promotion is not selected or someone has deleted the promotion tracking record.

Assignment Sequence (3,0): Reference Only. If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Assignment Sequence.

Application Point (3,0): Reference Only. If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Application Point field.

Full Pallet Flag (1,0): Infor LX displays the Full Pallet Flag. This flag indicates whether promotions are applied only to amounts of the order that constitute full pallets.

Screen actions - ORD740D2-01

Commands	Description
F6=Accept	Accept changes made on this screen and return to the Line Entry screen, ORD700D2-01.
F11=Fold	Fold the screen to display the following additional fields: Ext Amt (Extended Amount): This calculated field displays the results when you apply this and all other line-level promotions to the line. Split (Off Invoice, Bill Back) This field displays the results when you apply available split promotions, whether you took the promotions or not. FG or CV Item: This field displays the Free Goods or Cash Value item number if those types of promotions exist. Assignment Sequence: The system assigns promotions with product sequence=0 according to the traditional promotion assignment hierarchy of price, amount, percentage, free goods, and cash value. You can specify other levels to supersede the traditional assignment sequence. If you use a promotion sequence, this also supersedes the traditional method of calculating promotion price basis. The Application Point field contains a value to indicate at what level the system should assign a given promotion. Enter these values in the Promotion Master program, PRO110. This field is only available if the Allow User-Defined Promotion Assignment Sequence flag is set to Yes in the Promotions and Deals System Parameters program, PR0820D. Application Point: If you activated Allow User-Defined Promotion Assignment Sequence in the Promotions and Deals System Parameters, PRO820D-01, Infor LX displays the Application Point. This field indicates at what level a given promotion is assigned. The default is 0, and it signifies the calculated original basis, which is usually based on list price. Multiples of 10 are expected.

This field works in conjunction with the Assignment Sequence field. You can enter the values in the Promotion Master program, PRO110.

Full Pallet Flag:

Infor LX displays the Full Pallet Flag. This flag indicates whether bracket promotions are applied only to amounts of the order that constitute full pallets. 1=Yes.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Bracket promotions, ORD740D3

The Bracket Promotions program, ORD740D3, allows you to assign available bracket promotions to an order or quote.

View or assign bracket promotions to an order or quote

Use the Bracket Promotions screen, ORD740D3-01, to assign the bracket promotions that are available for the order or quote you selected on the initial screen. If you press F11 to fold the screen, Infor LX displays additional display fields. You can find descriptions of these fields under the help text for the F11=Fold screen action key.

Promotion Capping Considerations

If you use promotion capping, you may receive a warning message in this screen if an assigned promotion exceeds the maximum amount you defined as the promotion cap amount. This can occur following repricing if the system reassigns a promotion and it now exceeds the promotion maximum amount. The warning may also appear if you manually assign a promotion and the amount exceeds the maximum amount. You can remove the promotion or you can override the warning message with F14 and assign the promotion.

If a promotion offers free goods tied to quantity, the free goods display shows the number of free items for which the order qualifies. If you use promotion capping and have set a maximum number of free goods, the free goods field displays a number up to that maximum only, regardless of how many qualifying items the customer orders.

Field descriptions - ORD740D3-01

Fields	Description
Order:	Infor LX displays the customer order or quote you selected.
Region:	Infor LX displays the promotion region code, if one exists, for the selected record. Promotion regions are user defined in System Table Maintenance, SYS105D1. They are assigned to customers in IDF Customer. You can also assign region codes to customer ship-to records in Address Master Maintenance, ORD100D in this application.
Discount Code:	Infor LX displays the customer discount code, if one exists for this customer.
Promotion Customer Number:	Infor LX displays the promotion customer number for the selected record. You cannot change the promotion customer number after you have priced an order line.
Promotion Customer Name:	Infor LX displays the name associated with the promotion customer number.
Customer Type:	Infor LX displays the customer type for the promotion customer.
Ship-to Customer Number:	Infor LX displays the ship-to customer number for the selected record.
Ship-to Customer Name:	Infor LX displays the name associated with the ship-to customer number.
Ship To Number:	Infor LX displays the ship-to number that you specified on the Shipping Information screen, ORD700D9-02. If you did not specify a ship-to number, this field is blank.
Line actions:	The following line actions are available: **11=Assign Standard** Assign the standard portion of the split promotion rather than the combination of off-invoice and bill-back portions of the promotion. **15=Detail** Display additional information for the selected promotion from the Promotion Master, PRO110D.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Promotion (Number): Infor LX displays all bracket promotions for which this order or quote qualifies.

Promotion Line: Infor LX displays all bracket promotion lines for which this order or quote qualifies.

Order/Quote Line: Infor LX displays all order or quote lines which qualify for a bracket promotion.

Term: Infor LX displays one of the following Promotion Terms Codes for this promotion. In the table, (Off) = (Off Invoice), (BB) = (Bill Back):

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)
6	Split at Total Order Level (Off)
7	Split at Line Item Level (BB)
8	Split at Total Order Level (BB)

Method (7,A): Infor LX displays the word that describes the discount method for this promotion line. The methods are described in the following.

Amount

The amount displayed in the Discount field is the discount amount off the total order amount. For example, if the total order amount is 100, and the promotion calls for 10 off, the total order Discount option shows "10.00".

Percent

The amount displayed in the Discount field is a percentage of the total order amount. For example, if the total order amount is 100, and the promotion is set up for a 10% discount (net = 90), the total order Discount option shows "10.00" (amount equivalent of a 10% discount off the entire order amount).

Cash (Value)

The discount method applies a cash value discount for the promotion offered at the order level.

Free (Good)

The discount is the value of free goods for the promotion offered.

Price promotions are not performed at this level.

Discount: The bracket summary line shows the total amount of the bracket discount available with this promotion. The bracket detail lines show the portion of the bracket amount assigned to each of the qualifying order lines.

Net Price: This field applies to bracket detail lines only. Infor LX displays the net price in transaction currency for pricing unit of measure minus the discount for each line of the bracket promotion.

Taken: This field applies to bracket summary lines only. Infor LX displays Yes (Y) if this promotion is selected or automatically assigned to the order or No (N) if the promotion is not assigned or if the Promotion Tracking record has been deleted.

Screen actions - ORD740D3-01

Commands	Description
F11=Fold	Fold the screen to display the following additional fields: Extended Amount: This field appears for bracket detail lines only. Infor LX displays the calculated extended amount for the order line or quote line after it figures in the results if you apply the bracket promotion. The basis for the bracket promotion is always the original extended amount of each line. It is not a rolling basis that depends on previously assigned bracket promotions. Quantity: For bracket detail lines, Infor LX displays the order quantity for the corresponding order line in stocking unit of measure. For bracket summary lines, Infor

LX displays the sum of the quantity for the qualifying order lines. Because the summary line consists of quantities from different order lines for items which may have different stocking units of measure, this value may not be meaningful.

Volume:

For bracket detail lines, Infor LX displays the bracket discount volume of the order line for the bracket promotion. For bracket summary lines, it displays the sum of the bracket discount volume of all qualifying order lines.

Weight:

For bracket detail lines, Infor LX displays the bracket discount weight of the order line for the bracket promotion. For bracket summary lines, it displays the sum of the bracket discount weight of all qualifying order lines.

Amount:

This field does not apply to bracket detail lines. For bracket summary lines, Infor LX displays the calculated extended amount for all qualifying order lines.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Special price inquiry, ORD741D

The Special Price Inquiry program, ORD741D, allows you to view special price records that are used to price order lines.

Access: Line action 10 from Order Maintenance, ORD700D2-01

View special price information for an order line

Use Special Price Inquiry, ORD741D-01, to view the special price record for the order line. The screen does not appear if no special price applies to the line. For more information about special pricing, see the Special Price Maintenance information run documentation for the Promotions and Deals application.

Field descriptions - ORD741D-01

Fields	Description
Pricing Method:	Infor LX displays the pricing method you selected or entered on the Special Pricing Maintenance List screen in the PRO application.
Pricing Method Description:	Infor LX displays the description associated with the pricing method.
Company (Number):	Infor LX displays the number of the company for this customer defined within the pricing method in the pricing method field.
Company (Name):	Infor LX displays the name of the company for this customer that is defined within the pricing method in the pricing method field.
Currency:	Infor LX displays the currency defined for the company in the currency field.
Currency Description:	Infor LX displays the description of the currency.
Item Number:	Infor LX displays the item number for the line you selected on the previous screen.
Item Description:	Infor LX displays the description of the item.
Start Date:	Infor LX displays the start date of the effective period for this special price. Note that the list price effective periods of one company/currency code combination may overlap. In other words, the date range for one special price may fall within another date range or it may extend only partly into the range of another special price for the same company and currency. In this case, Infor LX uses the list price with the most recent start date.
End Date:	Infor LX displays the end date of the effective period for this special price.
Contract:	Infor LX displays the contract number to which this special price applies, if one exists. This line contract number does not appear on customer statements.
Notes:	Infor LX displays any notes that apply to this special price.
Price Type:	Infor LX displays the price type to apply to this special price. The values are described in the following table.

1	Percent Discount Based on Amount
2	Percent Discount Based on Quantity

3	Discount Price Based on Amount
4	Discount Price Based on Quantity

Price Type Description: Infor LX displays the description associated with the price type that applies to this special price.

Commission Code: Infor LX displays the user-defined two-character identifier for a customer, item, or salesperson commission code.

List Price: Infor LX displays the list price for the item to order.

Pricing U/M ((Pricing Unit of Measure): Infor LX displays the pricing unit of measure for the item to order.

Note that the price displayed on Order Maintenance, ORD700D2-01, may differ because it is converted there to the line selling unit of measure.

Quantity or Amount: Infor LX displays the quantity or price break at which each corresponding discount factor or price applies. When 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 LX applies the corresponding price or percentage factor.

Factor (Price or Percent): Infor LX displays the percentage factor or monetary amount to use with the quantity or monetary amount break point of the item in the Quantity/Price column.

The following conditions apply:

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: For price-type special prices, Infor LX calculates and displays the actual price for this item at each quantity or amount break, as defined in Special Price Maintenance, PRO140D. For percent-type special prices, this price is calculated as the list price multiplied by the Factor value for each line.

Screen actions - ORD741D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Sales history, ORD742D

The Sales History program, ORD742D, allows you to view the sales history for a customer.

Access: Line action 20 from Order Maintenance, ORD700D2-01

View sales history of the customer in your order

Use the Sales History screen, ORD742D-01, to view the sales history for the customer from within the order. The screen displays each item that has been invoiced. Infor LX creates a single record for each unique item number. The record includes combined numbers from all salespeople. You can also use this screen to select an item and specify a quantity for it to transfer back to a new line in the Order Maintenance screen, ORD700D2-01.

Field descriptions - ORD742D1-01

Fields	Description
Order/Quote/RMA:	Infor LX displays the number of the order, quote or RMA from which you called this screen.
Customer (8,0):	Infor LX displays the number of the sales history customer you designated in the order. In the Sales History screen, you can also specify a different customer number and view its sales history.
Customer Name:	Infor LX displays the description associated with the sales history customer.
Transaction Currency:	Infor LX displays the transaction currency code for the company associated with this order. This field only appears if the Multiple Currencies application is installed. Note: Although Sales History data is stored in global currency, it is converted to the transaction currency of the order from which you called this screen before it is displayed here.

Transaction Currency Description: Infor LX displays the description associated with the transaction currency code. This field only appears if the Multiple Currencies application is installed.

Line actions

The following line actions are available:

9=Select

Select the item you want to transfer back to the Order Maintenance screen, ORD700D2-01. You must specify a quantity in the Order Quantity field.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Item Number:

Infor LX displays the numbers of the items ordered and invoiced for the sales customer you are viewing.

The item records displayed here include regular items and FAS and kit parent items only. There is no separate sales history for FAS or kit component items.

Order Qty:

This field defaults to blank. To use line action 9=Select, specify a quantity for the item to transfer it back to the Order Maintenance screen as a new order line. The quantity on the Sales History screen is in stocking unit of measure, but when you transfer it back to the order as a new order line, the value appears in the equivalent selling unit of measure.

You can enter a negative order quantity here. If it is not allowed, Infor LX displays an error message after the information is returned to the Order Maintenance screen as a new order line.

UM (Unit of Measure): This value represents the stocking unit of measure in which quantity values appear on this screen. The description appears when the screen is folded.

YTD Quantity: Infor LX displays the quantity of the item on this line that has been sold to the displayed customer for the year to date. This quantity is stated in stocking unit of measure. This quantity can be negative if the quantity of the year-to-date returns exceeds that of the shipments.

YTD Amount: Infor LX displays the amount in transaction currency of the item on this line that has been sold to the displayed customer for the year to date. This amount can be negative if the value of the year-to-date returns exceeds that of the shipments.

Screen actions - ORD742D-01

Commands	Description
F6=Accept	Validate any changes, accept and post selections from this screen, and return to the Order Maintenance screen, ORD700D2-01.
F11=Fold	Fold the screen to display the YTD amount and descriptions of the item and the unit of measure.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Notes maintenance, ORD743D

The Notes Maintenance program, ORD743D, allows you to create or maintain notes for the order or order line.

Add, maintain, or view order or line notes

Use the Order/Line Notes Maintenance screen, ORD743D-01, to create or maintain notes for the order as a whole or for an order line, and to specify the documents on which to print the notes. The notes appear on documents in the order of the sequence numbers in the leftmost column.

The screen title is Order Notes Maintenance if you access the screen with a screen action. These notes apply to the order as a whole and appear on all lines of the order. If you access the screen with a line action code on a specific order line, or with a screen action from a Lines maintenance screen, the screen title is Line Notes Maintenance and the notes apply only to that specific order line.

Field descriptions - ORD743D-01

Fields	Description
Order/Quote/RMA:	Infor LX displays the order, quote, or RMA number for which to maintain notes.
Order Line Number (4,0):	For line notes, Infor LX displays the order line number to which the notes apply.
Sequence Number:	The sequence number determines the order in which the notes are printed on the paperwork for this order or order line. When you delete a note, Infor

	LX moves the remaining notes up in the sequence to eliminate empty sequence lines.
Note Text (50,A):	Specify the text of the notes to print on the paperwork for the order or order line.
Ackn (Print On Acknowledgment) (1,A):	Specify Y (Yes) in the document field to print the notes on the acknowledgement, otherwise, specify N (No). This field is available for all note types.
Pickr (Print On Pick Slip) (1,A):	Specify Y (Yes) in the document field to print the notes on the pick slip, otherwise, specify N (No). This field is available for order notes and order line notes, but not for quotes or RMAs.
Inv (Print On Invoice) (1,A):	Specify Y (Yes) in the document field to print the notes on the invoice, otherwise, specify N (No). This field is available for order notes and order line notes, but not for quotes or RMAs. The flag defaults to Y.
Print On Statement (1,A):	Specify Y (Yes) in the document field to print the notes on the statement, otherwise, specify N (No). This field is available for order notes, but not for quotes or RMAs.

Screen actions - ORD743D-01

Commands	Description
F6=Accept	Accept the changes on the screen and return to the screen from which you called the Notes program.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Item lookup, ORD744D

The Item Lookup program, ORD744D, allows you to search for and select items to add to your order.

Access: Line action 23 on an order line

Search for items by item number or description

Use the Item Lookup screen, ORD744D-01, to search for items by number, description, or extra description. You can select an item on this screen to return to your order, either to replace an existing line item, or to create a new order line for the item.

Field descriptions - ORD744D-01

Fields	Description
Line actions:	The following line actions are available: **8=Position to** Redisplay the list of items and position the selected record in the second line. You can type the first few letters of the item in the Item Number field and press Enter to find the closest match. Note that this works only in the Item Number field. Use the Search action to find an item by the description. **9=Select** Select the item you want to transfer back to your order. If you called the Item Lookup screen from a blank order line, the item creates a new order line. If you called the screen with a line action in an existing order line, the item you select replaces that original item in that order line in Order Maintenance, ORD700D2-01. You must specify a quantity in the Order Quantity field. **10= Search Item or Description** Search for an item if you only know part of the item number or description. Note that searches for character strings in the Description column are case sensitive. **11=Search Extra Description** Search for an item if you only know part of the extra description of the item. Note that searches for character strings in the Extra Description column are case sensitive. All other line actions on this screen perform standard Infor LX functions. See the overview information in this document. **12=Search UPC** Search for an item if you know the UPC code. Enter the UPC code in the Description field.

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

Customer:

Changed: *MR80328 Modified the help text for the Customer field of the ORD744D form*

This field indicates whether all items are listed or only the items this customer is allowed to order.

- The value All means that all items in the system are displayed unless the item's Product Lifecycle Code (PLC Code) does not allow the item on this transaction.
- The value Allowed means the screen displays only those items that the customer is allowed to order, as set up in the cross-reference flag setting in the Customer Master and the include/exclude settings in Item Cross Reference. Use F13 to toggle between the two views.

An item is not displayed if the item's Product Lifecycle Code (PLC Code) does not allow the item on this transaction.

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.

Item Number: Infor LX displays a list of all the item numbers or the allowed item numbers for the customer.

Description: Infor LX displays the descriptions of all listed item numbers.

Class: Infor LX displays the item class for each item from the Item Master file, IIM.

Screen actions - ORD744D-01

Commands	Description
F11=Fold	Fold the screen to display an additional item description.
F13=Customers All/Allowed	Switch between displaying all items and only the items this customer is allowed to order. Either included or excluded items are stored for this customer in the item cross-reference file. Whether that file contains allowed or disallowed items depends on the cross-reference flag setting in the Customer Master and the include/exclude settings in Item Cross-Reference.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Assortments, features and options, ORD745D

If you use line action 21=Features and Options in the Act field of a line on the Order Maintenance screen, Infor LX calls the Assortments, Features, and Options program, ORD745D. This program allows you to make changes to the suggested composition and quantity of items in an assortment.

Change the composition and quantity of items in an assortment

Use the Assortments, Features and Options screen, ORD745D-01, to make changes in an assortment.

Some regular line items appear on planning bills of materials. This screen displays all first-level components of the Features and Options or Assortment item. You can select the components to be include in the order. Infor LX controls component selection by component type:

For each component listed, you can enter or change the quantity to order and the tax option. The quantity to order for standard items defaults to the component's required quantity. The tax option defaults from the parent tax option.

If you have multiple levels in your planning bill of materials, this screen displays multiple times. After you complete your initial selections, each selected component that has planning bill components appears. This process continues for all levels in the planning bill of materials.

The following type codes are valid:

Type	Meaning
S	Required item
O	Optional item
B	Feature group: Select only one item.

After you make selections on the initial level, the program takes each selected component in sequence and displays its components in the planning bill of materials. This process continues for all levels in the planning bill of materials. When the specification is complete, the program returns to the next line item for entry.

All items are displayed in the planning bill of materials if their parents are selected. This includes phantoms.

Processing is the same for Kits (item type 4) and Assortments (item type 3). For standard items, (S), you can only change the quantity.

Posting

Customer Order Entry posts selected Features and Options to the Open Order file as lines on the customer order. This means that the lines on the order are re-numbered. The program also posts the information to an Unreleased Final Assembly Order file that is used by Final Assembly Release. You cannot maintain or ship Features and Options component lines. When you release a final assembly order, those component lines are automatically tagged as shipped, and the program creates manufacturing allocations for them. Until that time, all features and options lines appear as open. They appear as customer demand on order inquiries and in Master Production Scheduling and Material Requirements Planning.

Kit Pricing

A kit is a group of components that you sell together. The items in the kit are fixed. You cannot make substitutions. Infor LX performs all pricing at the parent level. It ignores pricing at the component level. Special pricing and PRO discounts also apply only at the parent level. Infor LX also calculates tax only at the parent level.

Assortment Pricing

An assortment is a group of components that you sell together. The items in the assortment are not fixed. You can substitute one item for another. Infor LX does not performs any pricing at the parent level. It performs all pricing at the component level. If the Invoice flag at the component level requires pricing, Infor LX shows the list price of the component on all appropriate documents. Special pricing and PRO discounts also apply only at the component level. Infor LX also calculates tax only at the component level.

Features and Options Pricing

A Features and Options item is a group of components that you sell together, but the buyer makes a selection from available options. Infor LX performs Features and Options pricing at the parent level. If the Invoice flag at the component level requires pricing, Infor LX rolls up the list price of the component to the parent level. The pricing calculations apply any special pricing and promotions that are set up at the parent level. The calculations ignore special pricing and promotions that are set up at the component level.

Printing

After you exit this program, Infor LX produces order acknowledgments if your order class is set to print. Order acknowledgments show line item quantities of the ordered items in the selling unit of measure.

Infor LX does not release order lines that include planning bill items, or picking slips that are printed by the Order Picking Release program in this application. You must release these orders through the Final Assembly Shop Order Release program. See the Material Requirements Planning run instructions for more information.

Field descriptions - ORD745D-01

Fields	Description
Parent Item:	Infor LX displays the parent item number you specified on the previous screen. A parent item is manufactured from components. This item is an Assortment parent (item type 3), a Features and Options parent (item type 5), or a Phantom

parent (item type 0), if the phantom appears as a lower-level component of a properly defined FAS planning bill.

Note that Assortment parents are not returned to the Order Maintenance screen, ORD700D2-01, as order lines. Instead, the components of that Assortment parent, in the quantities you specify, become new order lines.

Item Description: Infor LX displays the description of the item you specified on the Order Maintenance screen, ORD700D2-01.

Quantity Required (11,3): Infor LX displays the recommended quantity in stocking unit of measure for the parent. Selling and stocking units of measure should be the same for planning bill items. Display only.

Extended Amt: This calculated field displays the extended amount for the parent item. It is calculated as follows: quantity ordered in stocking unit of measure multiplied by net price for the stocking unit of measure in transaction currency. Infor LX calculates this field for FAS parent items only. The field is zero for Assortment parents, since there is no assortment parent item on the order.

Tax Only (1,0): Infor LX displays the tax only status for this parent item. 1=Yes. The tax is based on the normal selling price unless you override the value in the tax basis field.

Level: Infor LX displays the bubble number that you defined in Planning Bill Maintenance, BOM600, for this component.

Component: Infor LX displays the item number of the child component for this parent item.

Note: If the selected component is also a parent item, after successful validation, Infor LX present the Assortments, Features and Options screen, ORD745D-01 for that parent so you can select additional components.

Type: Infor LX displays the type code for this component. Reserved types are:

S = You must select this item.

O = This item is optional

All other values constitute feature groups from which you must select one but no more than one item.

Qty Required: Infor LX displays the quantity recommended for the parent order line component, or the quantity suggested for an optional component, in stocking unit of measure.

Qty Ordered:	Specify the quantity you want to order in stocking unit of measure. If you specify a quantity other than zero, the program selects the component for processing and creates an order line for it.
Tax (1,0):	This is the tax-only flag for this component. The value defaults from the parent item, but you can override it here. 0 indicates that the item is not tax only: the customer owes tax on the price of the item and it appears on the invoice. 1 indicates tax only. The customer owes the tax, which is calculated on the defined tax basis value for the item. 2 indicates tax only. The company owes the tax, which is calculated on the defined tax basis value of the item.
Extended Amt:	Infor LX displays the monetary total for the quantity ordered.

Screen actions - ORD745D-01

Commands	**Description**
F11=Fold	Fold the screen to display the following additional fields: Desc.: Infor LX displays the description of the component item. Eff Date: Infor LX displays the date on which this component becomes effective. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Cancellation reason code, ORD747D

The Cancellation Reason Code program, ORD747D, allows you to specify or display order cancellation details. If you chose in IDF Customer to track cancellations for a customer and you delete an order or order line, Infor LX calls this program.

Specify a cancellation reason code for a cancelled order or line

Use the Cancellation Reason Code screen, ORD747D-01, to specify a code that explains why you cancelled the order or line. The screen also displays the user who cancelled the order, and the date and time of the cancellation.

Field descriptions - ORD747D-01

Fields	Description
Order:	Infor LX displays the customer order number.
Line:	If you delete a line, Infor LX displays the line number. This field does not appear if you delete an entire order.
Cancellation Reason Code (2,A):	Specify the reason code to associate with the deletion of the order or line. The code must exist in the Code Master table.
Description:	Infor LX displays the description of the Cancellation Reason Code you specified.
User:	This field defaults to the current user ID if you are in Order Entry. If you are in Order Inquiry, Infor LX displays the User ID of the person who cancelled the order or order line.
Date:	This field defaults to the current date if you are in Order Entry. If you are in Order Inquiry, Infor LX displays the date on which the order or order line was cancelled.
Time:	This field defaults to the current time if you are in Order Entry. If you are in Order Inquiry, Infor LX displays the time at which the order or order line was cancelled.

Screen actions - ORD747D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

On-line allocation, ORD720D1

The On-line Allocation program, ORD720D1, allows you to allocate inventory to lines of a customer order and to maintain existing allocations.

Allocations tell the picking department which locations/lots/containers and quantities of a given product to pull for specific customer orders.

During allocation processing, Infor LX calls the Cross-Contamination Check algorithm to determine whether cross-contamination conditions exist. If they do, the system issues a warning message that you can override for a specific area, zone, location, or pallet.

Allocations print on pick slips during Pick Release, ORD550, in the Order Management application.

Note that this program does not process drop ship lines. It bypasses them.

You cannot directly make changes to allocations for order lines to ship from a Warehouse Management BOSS warehouse (Type 4) if the order line status shows a 1 in the second status field (ready for Pick Confirm). This status indicates that your advanced warehouse management system's application now controls the order process.

Note to Time Zone Conversion Users

If you use time zone conversion, see the topic Time Zone Conversion in the overview information in this document for information on how time zone conversion operates in the Order Management application.

Access: ORD menu

Select an order or order line for inventory allocation

Use the Customer Order Allocation Prompt screen, ORD720D1-01, to select an order or line to allocate stock to. The screen displays all open order lines that are available for allocation.

This screen includes kit parent lines and features and options parent lines. It also displays non-inventory items for reference only. You cannot allocate non-inventory items.

Field descriptions - ORD720D1-01

Fields	Description
Item Number (35,A):	Infor LX displays the item numbers in order lines that are eligible for allocation.
Order Number (9,0):	Infor LX displays the customer order number that is eligible for allocation.
Line/Seq Number:	Infor LX displays the customer order line/sequence number that is eligible for allocation.
Allocation Required:	A value of 1 in this field means that the order line requires allocations.
Allocation Lock:	A value of 1 in this field means that the order line is locked to further batch allocations. This value does not affect manual on-line allocations.
Act (Action) (2,0):	The following line actions are available:

11=Allocate

Access the Customer Order Allocation Detail screen, ORD720D2-01, to continue with allocation for the selected line.

15=Lock Allocation

Prevent changes to the allocation for the order line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 1=Yes.

16=Unlock Allocation

Allow changes to the allocation for the order line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 0=No.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Screen actions - ORD720D1-01

Commands	Description
F13=Filters	Access a filter screen to restrict order lines or re-sequence the display.
F16=Material Status Inquiry	Access Material Status Inquiry, INV300D, to view inventory information for an item you specify.
F17=Allocate by Lot	Access Customer Order Allocation - Inventory Detail, ORD720D3-01, to view allocations for a specific item/warehouse by lot.
F18=Allocations by Order	Access the Allocations by Order screen, ORD720D4-01, to view allocations for a specific item/warehouse by order number.
F19=Order Inquiry	Access t Order Inquiry, ORD300D1-01, to view open orders that are not yet allocated. See the Order Inquiry information in this document for additional information. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view inventory allocations for a line

Use the Customer Order Allocation Detail screen, ORD720D2-01 to create and maintain lot or QMS sequence number/location allocations, one order and one line item at a time. The screen displays all existing lot or QMS sequence number/location allocations for the selected line.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment and this is an item under QMS processing.

Features and Options Considerations

After you bill features and options orders, they automatically create and post a shop order receipts transaction to the final assembly order that is attached to the customer line item. In this case, the net effect on inventory is zero, because the billing process posts both the receipts transaction and the shipment (issue) transaction.

You must always enter lots and locations for features and options lines because no inventory exists. For features and options lines, Infor LX allows you to create new lots and lot/location combinations. Infor LX posts the lot/location data that you enter to the history files. This is important for uses such as serial number tracking.

Note that features and options component lines already show as shipped due to the release of the final assembly order.

Field descriptions - ORD720D2-01

Fields	Description
Line actions:	The following line actions are available: **17=Lot Notes** Access the Lot Master Maintenance notes screen, INV130D3-01, to add, maintain, or view the lot notes associated with the lot for this line item. This action only appears for lot-controlled items. **20=Pack Details** Access the Load Line Carton Selection screen, OLM522D3, to select the loads, order lines, and cartons for to view pack details. **22=Serial Numbers** If STTi is installed, access the Sales/Resupply Order Allocate screen, INV599D-01, to maintain the serial numbers assigned to the order.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Item Number: Infor LX displays the item number and description that you selected on the previous screen.

Item Class: Infor LX displays the item class for the selected item from the Item Master file, IIM.

Warehouse: Infor LX displays the ship-from warehouse code that is associated with the selected item in the Customer Order Line Items file, ECL.

Customer: Infor LX displays the customer name that is associated with the selected order.

Order Number: Infor LX displays the customer order number you selected on the previous screen.

Line: Infor LX displays the customer order line number you selected on the previous screen.

Qty Ordered(Stocking): Infor LX displays the ordered quantity for the line you select for allocation in stocking unit of measure.

Stocking U/M: Infor LX displays the stocking unit of measure for the line you select for allocation.

Qty Ordered(Selling): Infor LX displays the order quantity for the line you select for allocation in selling unit of measure.

Selling U/M: Infor LX displays the selling unit of measure for the line you select for allocation.

Remaining Issue Quantity: Infor LX calculates the remaining quantity of the item as you process allocations.

Allocated Quantity: Infor LX calculates the allocated quantity of the item while you process allocations.

Allocated U/M: Infor LX displays the item allocation unit of measure for the line you select. This value is the same as the stocking unit of measure.

Request Date: Infor LX displays the request date for this allocation.

Seq (3,0): Infor LX displays the sequence number of each item on the selected order. Infor LX automatically assigns the next available sequence number during allocations.

Lot/QMS Sequence (25,A): Infor LX displays the lot number for each lot-controlled line item or the QMS sequence number for non-lot-controlled QMS items for which QMS processing is not yet complete. If you create an allocation, refer to the following information for lot or QMS sequence number status availability.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment and this is a non-lot-controlled item under QMS processing.

Lot or QMS Sequence Number Status:

A=Active

Allocations are allowed.

C=Conditional Pass, H=On Hold, Q=Quality Hold. or R=Rejected

Allocations are allowed with an override.

E=Expired, T=Return to Vendor, V=Archived, or Z=Deleted

Allocations are not allowed.

The codes listed are the reserved status codes. You can set up user-defined codes in Lot Status Code Maintenance, API150D2-01, and specify allocation allowances for them.

Loc (10,A): Infor LX displays the location code for each line item. For container-controlled items, this is the location of goods in the container. To create an allocation, specify the location from which you want to allocate inventory.

Pallet (9,0): Specify the pallet number for each line item if the item is palletized. For managed warehouses, if the location is type A (reject), 0 (main storage), 5 (inspection), or 7 (receiving), you must specify a pallet number unless you allocate a containerized item. For these items, Infor LX uses the pallet number from the container.

If you specify a pallet number for a return to a palletized location or a location that can be palletized, the pallet must be pre-assigned in the warehouse.

Container (10,A): Specify the container number for each container-controlled line item. Because your business may use its own terminology for containers, you can specify a different field name for this field in Advanced Process Industries Parameters, API820D-03. For regular warehouses, Infor LX uses the term you specify.

Qty to Alloc (11,3) / <Wgt> (11,4):	Specify the positive quantity of the line iYtem to allocate to the customer order. If you have Dynamic Weights and Measures functionality activated in your Infor LX environment and this is a DWM item, Infor LX also displays the equivalent DWM unit of measure value <Wght>. The weight (or other dual unit of measure value, depending on what is assigned in your environment) allocated is the Average Actual <Wght> from the Item Master until you confirm the actual value that you ship during the pick confirm process.
Alloc Qty (11,3) / <Wgt> (11,4):	Infor LX displays the quantity that is allocated to the order line. If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters) and this is a DWM item, Infor LX also displays the equivalent DWM unit of measure value <Wght>. The weight (or other dual unit of measure value, depending on what is assigned in your environment) allocated is the Average Actual <Wght> from the Item Master until you confirm the actual value you ship during the pick confirm process.
Potency:	Infor LX displays the lot potency of existing allocations for lot-controlled items.
QA Date:	Infor LX displays the quality assurance approval date for existing allocations of lot-controlled items.
Lot Expiration Date:	Infor LX displays the lot expiration date for existing allocations of lot-controlled items.

Screen actions - ORD720D2-01

Commands	**Description**
F6=Accept	Validate the order line and accept the allocations you made in the screen.
F9=Auto Allocate	Perform allocations and create Allocation to Orders records, ELA, for all lines that require allocations. This function does not apply to managed warehouses. Note: To enter an allocation for post-shipment billing, do not use this function. Since the quantity is already been shipped, if you use this function you will allocate or reserve a duplicate quantity in this lot/location. Instead, use the Accept function to accept the post-shipment billing quantity.
F10=Lock/Unlock	If allocations for the order line are unlocked, use F10=Lock to prevent changes to allocations for the line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 1=Yes. If allocations for the order line are locked, use

	F10=Unlock to allow changes to allocations for the line. This action sets the Batch Allocation Lock flag (ECL.CLBALK) to 0=No.
F15=PreAsn Lot	Access Shop Order Allocations by Order, SFC720D5-01, to pre-assign a lot for a lot-controlled item.
F16=Material Status Inquiry	Access the Warehouse Availability Inquiry screen, WINIWM1D, to view inventory detail for this item. The listing also includes warehouses other than the order line warehouse, but these are not meaningful to order entry. Only inventory physically located in the order line warehouse can be allocated or shipped.
F17=Allocate by Lot	Access Customer Order Allocation - Inventory Detail, ORD720D3-01, to view allocations for a specific item/warehouse by lot.
F18=Allocations by Order	Access the Allocations by Order screen, ORD720D4-01, to view allocations for a specific item/warehouse by order number.
F20=Cust Ord by Item	Access the Customers Orders by Item screen, WINECL1D, to view orders that include the selected item.
F21=Delete Allocations	Delete all allocations.
F22=Kit Component Allocations	Display the Kit Allocation Maintenance screen, ORD728D-01, to maintain kit component allocation details. This function key is available if the item is a kit parent, Item Type=4.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Select inventory for allocation by lot/QMS sequence, location, container

The Customer Order Allocation - Inventory Detail screen, ORD720D3-01, displays all active Lot/Location Inventory information for the requested item and lot or QMS sequence number. Both non-lot and lot-controlled items appear. Use the screen to select lots, QMS sequence numbers, locations, and containers for allocation.

To display information for other items or warehouses, specify another item number and/or warehouse number and press Enter.

Field descriptions - ORD720D3-01

Fields	Description
Line actions	The following line actions are available: **11=Select** Select a record for allocation processing. **17=Lot Notes** Display the lot notes associated with the lot for this line item. This action only appears for lot-controlled items. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.
Item (35,A):	Infor LX displays the item number you selected on the previous screen. You can specify a different item number to view other allocations, however you can only create and maintain allocations for the item number you originally selected.
Ship-from Whse (3,A):	Infor LX displays the warehouse you selected on the previous screen. You can specify a different warehouse to view other allocations, however you can only create and maintain allocations for the warehouse you originally selected.
Lot/QMS Sequence (25,A):	Infor LX displays the lot numbers for lot-controlled item or the QMS sequence number for non-lot-controlled QMS items for which QMS processing is in progress. If the item is container controlled, this value represents the lot or QMS sequence number of the goods in the container. To create an allocation, specify the lot number or the QMS sequence number.
Status:	Infor LX displays the lot status for each record.
Warehouse:	Infor LX displays the warehouse for each record.
Loc (10,A):	Infor LX displays the location code of each line item. For container-controlled items, this is the location of goods in the container. To create an allocation, specify the location from which you want to allocate inventory.
Pallet (9,0):	Specify the pallet number for each line item.

Container (10,A):	Specify the container number for each container-controlled line item.
Allocated Quantity (11,3):	Infor LX displays the quantity of the selected item that is already allocated. To create an allocation, specify a positive quantity of the line-item that you want to allocate to the customer order or a negative quantity that you want to return.
Available:	Infor LX displays the quantity of the selected item that is available to allocate. Infor LX uses the following formula to calculate this value: Available quantity = On hand - Issues + Receipts + Adjustments - Allocations
Lot Expiration Date:	Infor LX displays the lot expiration date for existing allocations of lot-controlled items.
On Hand Quantity:	Infor LX displays the on hand quantity for each lot. Infor LX uses the following formula to calculate this value: On hand = Opening Balance - Issues + Receipts + Adjustments
Lot Reference:	Infor LX displays the reference code from the Lot Master file for each lot.
Potency:	Infor LX displays the lot potency of existing allocations for lot-controlled items.
QA Date:	Infor LX displays the quality assurance approval date for existing allocations of lot-controlled items.

Screen actions - ORD720D3-01

Commands	Description
F6=Accept	Accept the allocations you made in the screen.
F15=PreAsn Lot	Access Shop Order Allocations by Order, SFC720D5-01, to pre-assign a lot for a lot-controlled item.
F16=Material Status Inquiry	Access the Warehouse Availability Inquiry screen, WINIWM1D, to view inventory detail for this item. The listing also includes warehouses other than the order line warehouse, but these are not meaningful to order entry. Only inventory physically located in the order line warehouse can be allocated or shipped.

F18=Allocations by Order	Access the Allocations by Order screen, ORD720D4-01, to view allocations for a specific item/warehouse by order number.
F20=Cust Ord by Item	Access the Customers Orders by Item screen, WINECL1D, to view orders that include the selected item. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

View existing customer and shop order allocations for the item/warehouse

The Allocations by Order screen, ORD720D4-01, displays all existing customer order and shop order allocations for the selected item and warehouse. It includes both non-lot-controlled items and lot-controlled items.

Field descriptions - ORD720D4-01

Fields	Description
Item (35,A):	Infor LX displays the item number you selected on the previous screen. You can specify a different item number to view other allocations, however you can only create and maintain allocations for the item number you originally selected.
Ship-from Whse (3,A):	Infor LX displays the warehouse you selected on the previous screen. You can specify a different warehouse to view other allocations, however you can only create and maintain allocations for the warehouse you originally selected.
Type:	Infor LX displays the order type for each record: Cust=Customer Order, Resup=Resupply Order.
Order:	Infor LX displays a list of existing customer order or shop order allocations.
Line:	Infor LX displays the order line for the item in each order allocation.
Warehouse:	Infor LX displays the warehouse for each order allocation.
Location:	Infor LX displays the location number for each order allocation.
Lot:	Infor LX displays the lot number, if any, for each order allocation.
Container:	Infor LX displays the container number, if any, for each order allocation.

Pallet	For managed warehouses, Infor LX displays the pallet number, if any, for each order allocation.
Quantity:	Infor LX displays the allocated quantity for each order allocation.
Exp Date:	Infor LX displays the lot expiration date, if any, for each order allocation.

Screen actions - ORD720D4-01

Commands	**Description**
Enter	View allocations for the new combination after you specify a different item and/or warehouse code.
F10=Material Status	Access Material Status Inquiry, INV300D-02, to view inventory information for an item you specify.
F13=Filters	Access a filter screen to restrict the display to customer orders, shop orders, or all orders.
F15=PreAsn Lot	Access Shop Order Allocations by Order, SFC720D5-01, to pre-assign a lot for a lot-controlled item.
F16=Warehouse Availability Inquiry	Access the Warehouse Availability Inquiry screen, WINIWM1D, to view inventory detail for this item. The listing also includes warehouses other than the order line warehouse, but these are not meaningful to order entry. Only inventory physically located in the order line warehouse can be allocated or shipped.
F20=Customer Orders	Access the Customer Order List, WINECHD, to view existing customer orders.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Kit allocation maintenance, ORD728D-01

The Kit Allocation Maintenance program, ORD728D-01, allows you to maintain kit component allocation details. This program provides the following functionality for kit component allocations:

- Ensures the proportional relationship between kit parent quantity and kit component quantities
- Allows substitution of different lots than the lots allocated by the system
- Allows specification of lots, if the system did not specify lots

The system uses the same rules as in ORD720D2 to validate the kit component allocations. If an allocation is not valid, the system issues an error message.

The system uses the ELAW file as a work file for Kit Component Allocation creation and maintenance.

Access: ORD720D2-01, F22=Kit Component Allocations

Maintain kit component allocations

Use the Kit Allocation Maintenance screen, ORD728D-01, to maintain kit component allocation details.

Use this screen to maintain individual kit allocations if you can complete the allocation with a single record for each component at the location, lot, container level. Use ORD728D-02 if the component allocation requires more than one location, lot, or container.

Field descriptions - ORD728D-01

Fields	Description
Kit Quantity to be Allocated (8,0)	You can reduce the quantity to auto-allocate less than the required quantity or to validate the quantity of kit components for a partial kit allocation. The system calculates this value. You can specify a smaller quantity to auto-allocate less than the required quantity or to validate component quantities against a partial kit allocation. If you change this quantity, press Enter or use F10=Validate to automatically update the required number of kit components.
Line actions:	Use one of these line actions: **11=Allocate** Display the Kit Component Allocation Maintenance screen, ORD728D-02, to maintain kit component allocations for one or more lots, locations, or containers. **12=Allocate by Lot** Display the Customer Order Allocation - Inventory Detail screen, ORD720D3-01. Select an item, location, lot, container, and quantity for the kit component. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Act (2,0):	Use one of these line actions:

11=Allocate

Display the Kit Component Allocation Maintenance screen, ORD728D-02, to maintain kit component allocations for one or more lots, locations, or containers.

12=Allocate by Lot

Display the Customer Order Allocation - Inventory Detail screen, ORD720D3-01. Select an item, location, lot, container, and quantity for the kit component.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.

Line (4,0):	Specify the customer order line that is eligible for allocation.
Quantity Required (11,3):	The system calculates this field from the quantity ordered minus the quantity shipped. You can reduce this quantity if additional kits are already allocated or to reduce the total number of kits to allocate.

Screen actions - ORD728D-01

Commands	Description
F6=Accept	Validate the allocation and post the allocation to the ELA file.
F9=Auto Allocate	Auto allocate the kit components.
F10=Validate	Validate the kit component allocation. Validation applies to the location, lot, lot suitability, and container, if applicable. Lot suitability includes availability date, expiration date, lot status, and customer lot qualifiers.
F21=Delete Allocations	Delete all allocations that you or the system performed for the kit parent or any kit component.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Add, maintain, or view kit component allocations

The Kit Component Allocation Maintenance screen, ORD728D-02, displays the existing records in the ELA file for the kit component line, including location, lot, container, and quantity. Use this screen to specify multiple lot, location, and container quantities for individual kit component lines.

Field descriptions - ORD728D-02

Fields	Description
Line actions:	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. On this screen you can revise an allocation quantity without using the line action.
Seq (3,0):	Specify an allocation sequence number to reposition the list. Infor LX displays the sequence number of each item on the selected order. Infor LX automatically assigns the next available sequence number during allocations.
Location (10,A):	Infor LX displays the location code for each line item. To create or revise an allocation, specify the location from which you want to allocate inventory. You cannot maintain this field if the item is container-controlled.
Lot/Serial (25,A):	Specify a valid lot for a lot-controlled item. The screen displays this field if the kit component item is lot-controlled. You cannot maintain this field if the item is container-controlled.
Container (10,A):	Specify the container number for each container-controlled line item. Because your business may use its own terminology for containers, you can specify a different field name for this field in Advanced Process Industries Parameters, API820D-03. For regular warehouses, Infor LX uses the term that you specify. The screen displays this field if the kit component item is container-controlled.
Qty Alloc (11,3):	Specify the positive quantity of the line item to allocate to the customer order. If you enter a non-zero number and press Enter, the system revises the allocation. If you enter zero and press Enter, the system deletes the allocation from the ELAW file. You can revise and delete the allocation quantity without using the action codes.

Screen actions - ORD728D-02

Commands	Description
F6=Accept	Validate the allocation and post the allocation to the ELA file.
F9=Auto Allocate	Perform allocations and create Allocation to Orders records, ELA, for all lines that require allocations.

F10=Validate	Validate the kit component allocation. Validation applies to the location, lot, lot suitability, and container, if applicable. Lot suitability includes availability date, expiration date, lot status, and customer lot qualifiers.
F17=Allocate by Lot	Access Customer Order Allocation - Inventory Detail, ORD720D3-01, to view allocations for a specific item/warehouse by lot.
F21=Delete Allocations	Delete all allocations that you or the system performed for the kit parent or any kit component. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Warehouse inventory lookup, ORD746D

The Warehouse Inventory Lookup program, ORD746D, allows you view warehouses that contain inventory for the selected line item and select a warehouse to return to your order line.

Select a warehouse that has inventory for an order line

Use line action 18 on a regular order line in the Order Maintenance screen, ORD700D2-01, to access the Warehouse Selection screen, ORD746D-01. The screen displays warehouses that contain inventory for this line item. The screen displays on-hand quantity, allocated quantity, and available inventory of this item in each warehouse. Use this information to select a warehouse that has the available inventory and that meets your current requirements.

Field descriptions - ORD746D

Fields	Description
Line actions:	The following line actions are available: **1=Select** Select a warehouse with appropriate inventory for the order line.

	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.
Warehouse (3,A):	Infor LX displays a list of warehouses that contain inventory for this line item. You can select a warehouse from the list. The warehouse you select replaces the existing value in the selected order line.
On Hand (13,3):	Infor LX displays the on-hand quantity of the inventory of this item in the warehouse in stocking unit of measure.
Allocated Quantity (11,3):	Infor LX displays the quantity of the item in the warehouse that is already allocated to customer orders in stocking unit of measure. This value can be negative due to post-ship returns.
Available Quantity (13,3):	Infor LX displays the quantity of the item in the warehouse that is available for allocation in stocking unit of measure.

Screen actions - ORD746D

Commands	**Description**
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order Line Intercompany Automation Detail, ORD748D

Intercompany automation is a special customer order process where the shipping warehouse company differs from the order transaction company. The accounting entries are automatically generated to first sell the stock from the shipping warehouse's company to the ordering company before recognizing revenue from the customer. Use the Intercompany Automation Maintenance program, ORD748D, to view details of the intercompany automation record associated with the order line.

Access: Line action 42 from Order Maintenance, ORD700D2-01; Intercompany Automation Detail option from Order Line Navigation window

View order line intercompany automation detail

Use the Intercompany Automation Maintenance Selection screen, ORD748D-01, to view details of transactions related to an intercompany automation order line.

Screen actions - ORD748D-01

Commands	Description
F22=Toggle Language	Use F16=Toggle Language to switch between the customer name and address in the master file (base) language and in your language, assuming the customer information was translated into your language.
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Dynamic weights and measures entry, ORD750D

The Dynamic Weights and Measures Entry program, ORD750D, allows you to perform price adjustments on DWM items. The system calls the program automatically if the order is a financial order (base order class 008) and the item on the order line is a dynamic DWM item.

View and adjust the price of a dynamic DWM item in a financial order

Use the Dynamic Weights and Measures Entry screen, ORD750D-01, to view information from the order line and adjust the quantity, the DWM dual measure equivalent to the quantity, and the unit price. The screen also displays the calculated extended amount of the order line. Since a DWM item's price is in the DWM pricing unit of measure and the program uses its dual unit of measure value to calculate the extended amounts, this screen allows you to adjust prices based on either the dual unit of measure value or the unit price in DWM pricing unit of measure. Infor LX also performs dual unit of measure tolerance checking on this screen.

Field descriptions - ORD750D-01

Fields	Description
Order (9,0):	Infor LX displays the number of the order to adjust.
Line (4,0):	Infor LX displays the line number in the order to adjust.

Item (35,A): Infor LX displays the item number on the line.

Description (50,A): Infor LX displays the description of the item.

Quantity (11,3): If you specify a quantity in the order line in Order Maintenance, ORD700D2-01), that value appears here. In conjunction with the Unit of Measure field, you can change the quantity into either stocking or selling unit of measure.

Unit of Measure (stocking): Infor LX displays the unit of measure from the order line. You can change the UOM to stocking or selling unit of measure to match the quantity you enter. DWM items cannot use additional alternate selling units of measure: they can only use stocking and selling units of measure from the Item Master record.

<Weight> (11,4) If you specified a value in the quantity field of the order line in Order Maintenance, ORD700D2-01, Infor LX displays the DWM dual unit of measure equivalent here. It uses the value for the DWM pricing unit of measure from the Item Master record. You can adjust this value here.

Infor LX performs a tolerance check. If you violate the tolerances from the Item Master record, you receive an error message. Use F14 to override the message and continue, or adjust the value.

Unit of Measure (DWM pricing) Infor LX displays the DWM pricing unit of measure for this item from the Item Master record.

Unit Price (15,5): Infor LX displays the unit price for the DWM pricing unit of measure for this item.

The Extended Amount field displays the calculated total. It is calculated from the this value and the quantity and the equivalent dual measure value you enter here. You can change the unit price here for this order line. Be aware that if you change it, Infor LX does not apply promotions or special pricing that might otherwise apply.

Ext Amt: Infor LX updates the extended amount for this order line, based on values you specify in the Quantity, DWM dual measure, and unit price fields in this screen.

Screen actions - ORD750D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Supplemental orders selection, ORD760D

Use the Supplemental Orders Selection program, ORD760D, to select items from supplemental orders to return to your customer order.

Infor LX presents this screen automatically in Create mode after you initiate a new order with a customer number in the Order Directory screen, ORD700D1-01, and press Enter.

The program checks system parameters to see which supplemental orders the environment supports. Next, it checks the customer to determine which supplemental order types the customer uses, and it selects the supplemental orders to display on that basis. The selection shows the individual item lines of all selected supplemental orders. The list starts with a standing order if the program finds one. Next, it lists items in a shopping list order, if it finds one. Finally, the list displays the items in the global order if the program finds one and if this customer does not require the use of customer cross-reference item numbers.

You can only view and select items from a template order, supplemental order type 4, from the Order Maintenance screen, ORD700D2-01. Specify the ID of the template order you want to use and press Enter. The Supplemental Order Selection screen presents the lines in the template order for selection.

Supplemental orders require a default value for the order header warehouse. The order header warehouse defaults from the Ship To Customer, if available. If there is no default ship-to customer, then the order header warehouse defaults from the Sold To Customer. Warehouse is an optional field in IDF Customer and, if Warehouse is not defined, certain supplemental order capabilities may not be available to customers.

Access: Automatic in Create mode from the Order Directory screen.

Select supplemental order lines to add to a customer order

Use the Supplemental Order Directory screen, ORD760D-01, to select items to return to your customer order. You can add quantities to order lines or retain existing quantities. Selected lines must have a quantity greater than zero. You can later change quantities that you specify here in the Order Maintenance screen, ORD700D2-01.

Field descriptions - ORD760D-01

Fields	Description
Standing Order Date (8,0):	Specify the date for which you want to view standing order details for this customer. The date defaults to the order entry date, which is the current date, but you can change it here.
Line actions:	The following line actions are available: **11=Select** Select one or more supplemental order lines to copy to your customer order. You cannot use the Select action on the Position to line. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.
Supp Order Type (1,0):	Specify the type of supplemental order to which to position the list . One or more of the following types are available in this screen, depending on your system parameter settings:

Type	Description
1	Standing Order
2	Shopping List
3	Global Order

Item Number (35,A)	Specify the number of the item to which to position the list.
Order Qty (11,3):	Specify the quantity of the item that you want to copy to your customer order. It must be a positive number. You can accept the existing quantity unless it is zero and later change the quantity to order in the Order Maintenance screen, ORD700D2-01.

Screen actions - ORD760D-01

Commands	Description
F6=Accept	Validate selected lines and copy them to the customer order.
F11-Fold	Fold the screen to display additional line details.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order/quote/RMA/invoice language override, ORD765D

Use this program to enter the translations for customer ship-to names and addresses as they appear on customer orders, quotes, and RMAs. The screen lists existing records in the Customer Order MLS Address file, ECN.

Infor LX adds the ship-to record to the ECN file when you create an order.

When you change the ship-to number or the ship-to customer on an order, quote, or RMA, Infor LX deletes the old ECN record and creates a new record with the new Ship To Customer / Number.

If you access this program from within ORD700, the customer order that you were maintaining in ORD700 is the only order that is available for translation. You must access this program from a menu to maintain all the orders that require translation.

If you access this program from BIL501D2-04, the heading appears as Invoice Release Language Override, and the filter defaults to 3=Invoice Release.

Access:

- Menu ORD
- F10=Language Override from the address maintenance screens in ORD700 or from BIL501D2-01.

Add or select a customer order/quote/RMA/invoice

Use the Customer Order Language Override screen, ORD765D-01, to add or select a customer order, quote, RMA, or invoice to translate and the language for translation.

Field descriptions - ORD765D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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. All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document.
Order/Quote/RMA (9,0):	Specify the number of the order to translate.
Language (3,A):	Specify the language to use in the translation.

Screen actions - ORD765D-01

Commands	Description
F13 = Filters	F13=Filters is not available if you access ORD765D through ORD700. Use the Filter Options screen to change the order type and to select from the following sequences: 1=Order/Language - Active 2=Order/Language - All 3=Only Review Required Records All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Filter options

Use the Filter Options screen to change the order type and to limit the list of customer orders, quotes, RMAs, or invoices.

Field descriptions - Filter

Fields	Description
Order, Quote, RMA, Invoice Release selection (1,0):	Specify one of the following options: 0=Customer Orders 1=Customer Quotes 2=Customer RMAs 3=Invoice Release
Record Selection (1,0):	Specify one of the following options to limit the list of records: 1=Order/Language - Active 2=Order/Language - All 3=Only Review Required Records
Filter (3,A):	Specify a language to display only records for that language.

Screen actions - Filter

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Enter translated order information

Use the Ship To Information - Language Maintenance screen, ORD765D-03, to enter the translated name and address for the order that you selected on the previous screen.

The screen displays the name and address in the master file (base) language. Enter the translated information in the fields at the bottom of the screen. When you press Enter, the system updates the Customer Order MLS Address file, ECN.

Field descriptions - ORD765D-03

Fields	Description
Order Number (9,0):	If you are in Create or Copy mode, specify the number of the customer order record to create or copy.
Language Code (3,A):	If you are in Create or Copy mode, specify a language to use for translation.
Ship To Name (50,A):	Specify the ship-to name in the selected language.
Attention Of (30,A):	Specify the name of the contact in the selected language.
Ship To Address (50,A):	Specify the ship-to address for this order in the selected language.

Screen actions - ORD765D-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Enter translated customer po number

Use the Ship To Information - Language Maintenance screen, ORD765D-04, to enter the customer purchase order number for the order that you selected on the previous screen.

The screen displays the name and address in the master file (base) language. Enter the translated information in the fields at the bottom of the screen. When you press Enter, the system updates the Customer Order MLS Address file, ECN.

Field descriptions - ORD765D-04

Fields	Description
Customer PO (23,0):	If you are in Create or Copy mode, specify the number of the customer po record to create or copy.
Review:(1,0)	The Review field shows a value of 1 if the field needs to be reviewed for possible translation.

Screen actions - ORD765D-04

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Document regeneration, ORD798D1

The Document Regeneration program, ORD798D1, allows you to regenerate selected order processing documents. To regenerate the documents, Infor LX makes a copy of the inactive print record, reactivates it, and calls the appropriate print program. The print file stores the regenerated record with the new user, date and time.

Note that the regenerated document may not be an exact copy of the original document. Infor LX only stores key information for regeneration purposes, and a user can modify or delete the underlying detail during any number of order processing functions. A regeneration request always includes the current order details as they exist in the Infor LX files at the time that you request regeneration.

Note that Bills of Lading and Packing Lists are the only shipping documents that you can regenerate with this program if you do not have the Outbound Logistics Management (OLM) application installed.

Access: ORD menu

Regenerate order processing documents

Use the Document Regeneration Select screen, ORD798D1-01, to view the document IDs that exist in the Document Type Master file, LDC, and to select the type of document to regenerate.

Field descriptions - ORD798D1-01

Fields	Description
Document ID:	Infor LX displays a list and description of the active document types in the Document Type Master file. Use 9=Select in the Act field in front of the docu-

ment type you want and press Enter to view documents that are available to regenerate.

Screen actions - ORD798D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Regenerate an order processing document to save or print

The Document Regeneration List screen displays all documents for the requested document ID that are available to regenerate.

Field descriptions - ORD798D2-01

Fields	Description
Line actions:	The following actions are available: **11=Regenerate** Use the selected print options to print a hard copy of the regenerated document. **12=Create Save** Copy the existing Print Detail work file, ZPD, save record. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* in the overview information in this document. **13=Regenerate and Override Language** Access the Language Override Selection screen, SYS531D-01, to select a language for the selected document.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 25)* 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.

Document ID: Infor LX displays the document ID and description you selected on the previous screen.

Key Fields: Infor LX displays the key fields for each existing document. Some fields may be blank or contain zeros. For more information about keys for reserved Infor LX document ID's, refer to the following list of Document IDs topic.

Document IDs

The following section lists the keys to the more common Infor LX reserved Document IDs.

Each document ID is followed by its definition, then the key fields.

LX ACK

Acknowledgment Document (customer order, quote, or RMA)

Order Number

Format = 0 (customer order)

Format = 1 (quote)

Format = 2 (RMA)

LX BOL

Bill of Lading Document

Load Number

Shipment Number

Intermodal Number

Order Number

LX INVOICE

Invoice Document

Prefix

Document Number

Document Year

Company

Document Type

LX MANIFEST

Manifest Document

Load Number

Shipment Number

Intermodal Number

LX PACK LIST

Packing List Document

Warehouse (required), and you must also input at least one of the following fields:

Load Number

Shipment Number

Intermodal Number

LX PALLET LBL

WHM Pallet Labels Document

Warehouse

Picker Number

Pick Suffix

LX PALLET LST

WHM Pallet List Document

Warehouse

Picker Number

Pick Suffix

LX PICK LIST

WHM Pick List Document

Warehouse

Picker Number

Pick Suffix

LX PICK SLIP

Pick Slip Document

Warehouse

Picker Number

LX PROFORMA-A

Proforma (pre-shipment) Document

Proforma Number

Order Number

LX PROFORMA-B

Proforma (post-ship) Document

Proforma Number

Order Number

LX PROFORMA-C

Proforma (invoicing) Document

Prefix

Document Number

Document Year

Company

Document Type

Order: Infor LX displays the order number.

Format: Infor LX displays the print format for each existing document.

Values are defined in the following table:

Value	Definition
1	Hard copy print
2	Save records
3	Hard copy print and save

If users created earlier regeneration requests, the list shows multiple copies of the same record, each with a different user IDs and/or date and time.

Create Date: Infor LX displays the original creation date for the print record or regeneration request.

Create Time:	Infor LX displays the original creation time for the print record or regeneration request.
Create User:	Infor LX displays the original user identification for the print record or regeneration request.

Screen actions - ORD798D2-01

Commands	Description
F13 = Filter	Specify whether to sequence documents by order number or first key field.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order close/purge, ORD900D

The Order Close/Purge program, ORD900D, allows you to close entire orders that meet the criteria established in the system parameters. All order lines must be eligible to close. To close individual order lines, use the Order Entry program, ORD700.

Certain additional restrictions apply. You cannot close order lines that have hard allocations, open shop orders, open purchase orders, or a status of Shipped but not Invoiced.

The purge process physically deletes all records from the files and places them in archive files. After the data is in the archive files, you can save the archives to storage media and delete them from your system. This program purges the following files:

- Order Header (ECH)
- Order Lines (ECL)
- Order Special Lines (ECS)
- Drop Shipment Requests (EDS)
- Pick List file (Picking work file, IPP)
- Final Assembly (KAO)
- Promotions Assigned (PDA)
- Free Good Promotions (PDF)
- Bracket Promotions (PDB)

Note that other files are also purged if records exist, for example: Customer Standard Notes (ESN), Billing Release Header (BBH) and Billing Release Line Items (BBL), though these should have been purged directly by Billing, Print Detail Workfile (ZPD) and other work files, CO Line Number Cross Reference (ELX), and ION Shipment Cross Reference (EXS).

Note also that the following order-related files are not purged with this program: Invoice Header (SIH), Invoice Line (SIL), Promotion Tracking (PDT), and Invoiced Lot (EIL).

Infor recommends that you run the Cleanup ECL and ECS Files program, ORD990, to remove header records that have no lines and line records that have no headers before you run this Order Close/Purge program.

Access: ORD menu

Close and purge orders

Use the Order Purge screen, ORD900D, to close and/or purge orders. The fields that display on the screen depend on the order close/purge settings in Order Entry System Parameters, ORD820D-03.

Field descriptions - ORD900D-01

Fields	Description
Orders will be closed based on the criteria:	Infor LX displays the rules for closing and purging orders that are set in the Order Entry System Parameters, ORD820D-03.
Run Option (1,0):	This option appears if the system parameters support order close. Specify the processes to run: 1 Close Only 2 Purge Only 3 Close and Purge
Run Mode (1,0):	Specify 0=Edit to print an audit report that lists the orders that are eligible to close and purge. Specify 1=Update to close and/or purge orders. The Update choice also prints a report that lists the closed and purged orders.
Archive (1,0):	Specify Yes to write deleted records to archive files. The program writes purged records to the following files: Customer Order Header Purge, EHH (copy of Customer Order Header), Customer Order Line Purge, EHL (copy of Customer Order Lines), Customer Order Special Lines Purge, EHS (copy of Customer Order Special Lines), and Customer Standard Notes, EHN (Order Notes and Order Line Notes). Specify No if you do not want to save records to archives.

Screen actions - ORD900D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Clear quotes, ORD930D

The Clear Quotes program, ORD930D, allows you to delete obsolete customer quotes, that is, quotes that you will not convert to actual orders, from the system. You can delete them by quote date range, customer number range, and quote order number range, or a combination of the three.

You can run this program regularly if your quotes are effective for a limited period. For example, if your quotes are valid for 30 days, you can run this program with a To Quote Date 30 days in the past to delete quotes that are older than 30 days.

Infor LX automatically produces an audit trail to list the deleted quotes.

Access: ORD menu

Delete obsolete customer quotes from the system

Use the Delete Quotes screen, ORD930D-01, to set criteria for quotes to include in the deletion.

The default values in the screen include all customer quotes in the deletion, so check your selection criteria carefully before you press Enter to run the program.

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 - ORD930D-01

Fields	Description
From Quote Date (8,0):	Specify a range of values to limit the dates of quotes to include in the deletion.
To Quote Date (8,0):	Specify a range of values to limit the dates of quotes to include in the deletion.
From Customer Number (8,0):	Specify a range of values to limit the customer numbers of quotes to include in the deletion.

To Customer Number (8,0):	Specify a range of values to limit the customer numbers of quotes to include in the deletion.
From Quote Number (9,0):	Specify a range of values to limit the quote numbers to include in the deletion.
Expired Quotes Only (1,0):	**Added:** *MR 66738 Added new field to implement cancel date for quotes and RMAs* Specify Yes to delete only expired quotes in the selected range.
To Quote Number (9,0):	Specify a range of values to limit the quote numbers to include in the deletion.

Screen actions - ORD930D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Delete RMAs, ORD935D

The Delete RMAs program, ORD935D, allows you to delete and physically remove closed RMAs from the RMA file. After you use an RMA through post-ship billing and subsequently close it, the records remain on the system unless you use this menu option to physically remove them. Infor LX prints a report that lists the RMAs you delete.

Access: ORD02 menu

Delete obsolete RMAs from the system

Use the Delete RMAs screen, ORD935D-01, to set criteria for closed RMAs to include in the deletion.

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 - ORD935D-01

Fields	Description
From/To RMA Date (8,0):	Specify a range of values to limit the header entry dates of RMAs to include in the deletion.
From/To Customer Number (8,0):	Specify a range of values to limit the customer numbers of RMAs to include in the deletion.
From/To RMA Number (9,0):	Specify a range of values to limit the RMA numbers of RMAs to include in the deletion.
Expired RMAs Only (1,0):	**Added:** *MR 66738 Added new field to implement cancel date for quotes and RMAs* Specify Yes to delete only expired RMAs in the selected range.

Screen actions - ORD935D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Clear batch allocation lock flag, ORD940D

If you use the Clear Batch Allocation Lock Flag program, ORD940D, to clear the lock flags on order lines, you do not have to maintain each order line through Pick Confirm, ORD570, or Pick Release, ORD550, or manually allocate stock to each order line. After you clear the locks, Infor LX allocates inventory to these order lines based on the normal parameters of warehouse, allocation priority, and request date the next time you run Batch Order Allocations, ORD400D.

Infor LX produces an audit trail report that lists the order lines for which you clear the batch allocation lock field.

Access: ORD menu

Clear batch allocation locks from orders

Use the Clear Batch Allocation Lock Prompt screen, ORD940D-01, to select the orders for which you want to clear the allocation lock.

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 - ORD940D-01

Fields	Description
From/To Warehouse (3,A):	Specify a range of values to limit the warehouses of order lines to include in the selection.
From/To Item Number (35,A):	Specify a range of values to limit the item numbers of order lines to include in the selection.
From/To Request Date (8,0):	Specify a range of values to limit the request dates of order lines to include in the selection. Selection is based on the date in the line warehouse.

Screen actions - ORD940D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Order/line in use maintenance, ORD950D

The Order/Line In Use Maintenance program, ORD950D, allows you to clear the In Use status from orders, quotes, and RMAs.

Use this program with caution. If your selection includes a user/program that is legitimately in use to access an order, quote, or RMA, you can cause unpredictable consequences if you run the program.

Access: ORD menu

Remove in-use status from an order, quote, or RMA

Use the Order/Line In Use Maintenance screen, ORD950D-01, to select an order, quote, or RMAs to remove its In Use status.

This program should be used with caution. If any user/program is legitimately accessing the order or a program is in progress, unpredictable results can occur if you run this program.

Field descriptions - ORD950D-01

Fields	Description
Enter Order Number to Remove In Use Fields (9,0):	Specify the number of the order to release from In Use status so you can process it.
Enter Quote Number to Remove In Use Fields (9,0):	Specify the number of the quote to release from In Use status so you can process it.
Enter RMA Number to Remove In Use Fields (9,0):	Specify the number of the RMA to release from In Use status so you can process it.

Screen actions - ORD950D-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Zero work field in IWI, ORD970D

This program resets file information. Consult the project manager or the appropriate department supervisor before you run this program. Never run this program if any uncompleted transactions exist online.

For example, do not run this program if you have done shop order release but have not done shop order printing

This program resets the order work field , WOWRK, to 0 in the Warehouse Inventory File, IWM.

Access: Menu SYS01

Zero the allocation work field in the IWM file

Press Enter on the File Reset & Clean Up screen to run the program.

Screen actions - ORD970-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* in the overview information in this document.

Cleanup ECL and ECS files, ORD990D

The Cleanup ECL and ECS Files program, ORD990D, allows you to purge obsolete information from customer order files.

WARNING: This program purges file information. The MIS department must consult the project manager or the appropriate department supervisor before it presses Enter to run this program.

This program purges the following files:

ECL - customer order line items that do not have a header

ECS - customer order special line items that do not have a header

ECH - customer order header files that do NOT have a regular line and do NOT have a special line.

After you run this program, run Reset On Order and Allocated Amounts, INV971D.

Access: SYS01 menu

Confirm and run the reset and cleanup program

Use the File Reset and Clean Up screen, ORD990D-01, to confirm that you want to run the cleanup process to purge obsolete information from the ECL, ECS, and ECH files.

Screen actions - ORD990D-01

Commands	Description
Enter	Purge the files. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 26)* 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 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 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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