Purchasing 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

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Chapter 2
Purchasing Overview

2

General instructions

This document is divided into the following sections:

- Application overview: This section provides a general description of the functions and highlights of the application.
- Application flow: This section describes prerequisites to operate the application, the sequence in which to run the programs, and the functions of this application.
- How-to index: This section is an alphabetical list of application functions. Next to each function is the number of the program to use.
- Infor LX Purchasing security: This section explains how users can process purchase orders based on the security established for each user ID in the Infor LX System Security file.
- Multiple currency considerations: This section describes the parameters to use multiple currencies.

Application overview

The Purchasing application (PUR) enables you to perform day-to-day purchasing functions such as maintenance and tracking of requisitions and purchase orders. You can use numerous reports to evaluate vendor performance, purchase order pricing, expense projections, and open orders.

Highlights

- Multiple purchase order releases
- Optional three-way match of purchase order, inventory receipt, and invoice in Accounts Payable
- Automatic conversion of purchasing-to-stocking unit of measure upon receipt
- Ship-to location maintenance for drop shipments or multiple plants
- Integration with accounts payable
- Outside operation purchase orders

- Inspection information (inspection time support and dispatch list) for dock-to-stock tracking
- Automatic tie to MRP for vendor negotiation and scheduling
- Vendor contract and quotes
- Accept and process customer orders for inventory items shipped directly from a vendor to the customer

Drop Shipment

Infor LX provides a tightly integrated drop shipment processing capability. Infor LX supports the creation, tracking, and management of customer drop shipment orders through enhancements to the Order Processing, Purchasing, and Billing applications.

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

If a buyer creates a purchase order to respond to a drop ship request, 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 billing to initiate the invoice process. Infor LX supports the constant communication between the order professional, the buyer, and the billing professional throughout the order cycle.

Contract Processing

Infor LX provides a tightly integrated contract processing capability. Infor LX supports the creation, tracking, and management of scheduled purchase orders through enhancements to the Purchasing application.

You can use Purchasing to enter and track outgoing orders to suppliers from the initial requisition and purchase order through the receipt of the goods and the corresponding supplier's invoice.

A purchase order is made out to a single vendor for goods to send to one address. A purchase order can have multiple purchase lines that each specify a different item and include information about the quantity ordered, scheduled receipt date, and warehouse.

You can use Purchasing to enter scheduled purchase orders and track outgoing orders to suppliers. Purchasing tracks orders from contract maintenance through the receipt of the goods and the corresponding supplier's invoice.

A scheduled purchase order, which is tied to a contract, is made out to a single vendor for goods to send to one address. A scheduled purchase order can have multiple detail lines that each specify an item with the quantity ordered, scheduled receipt date, warehouse, and facility. You can monitor maximum quantity and monetary value restrictions at both the contract header level and the contract detail level. The system takes into account any changes in the quantity ordered or received and purchase order monetary values.

Use PUR 640 to complete purchase order receipts posting.

Rounding

Infor LX supports three system-wide rounding methods:

- Truncate
- Increment
- Half-adjust

Infor LX also supports three round-to positions:

- 0
- 10
- 100

This rounding fulfills legal and fiscal requirements in several European countries.

You specify the rounding method and round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies, MLT.

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

Application flow

A purchase order is the formal authorization to purchase material from a vendor or supplier. A purchase order is made out to a single vendor for the shipment of goods to one ship-to address. A purchase order can have multiple detail lines that each specify an item, the quantity ordered, the scheduled receipt date, and the warehouse.

The Purchasing application enables you to perform day-to-day purchasing functions such as maintenance and tracking of requisitions, contracts, and purchase orders. You can track outgoing purchase orders to suppliers from the time you enter the purchase orders into the system until the receipt of the goods and the corresponding supplier's invoice.

You can also use Purchasing to enter scheduled purchase orders. Scheduled purchase orders, which are tied to a contract, are made out to a single vendor for the shipment of goods to one ship-to address. Scheduled purchase orders can have multiple detail lines that each specify an item, the quantity ordered, the scheduled receipt date, the warehouse, and the facility. You can monitor maximum quantity and monetary value restrictions at the contract header and the contract detail levels. The system takes into account any changes in quantity ordered or received and purchase order monetary values.

You can maintain the names and numbers of regular suppliers in the Vendor Master file. A vendor alpha lookup inquiry searches on the vendor name to easily locate vendor numbers. You can specify one-time vendors that remain on file only through the life of the purchase order.

The Ship-to file contains your own delivery or street address. You can specify a ship-to number on a purchase order to request to send the invoice to your office and the goods to the warehouse. You can also specify a one-time delivery address.

The Inventory Item Master file contains information about the inventory items ordered. See the Inventory document for details. Infor LX supports a purchasing unit of measure and a stocking unit of measure. The system automatically converts the purchase units into stocking units for inventory reporting and inquiry purposes. You can enter amounts on the purchase order receipt in the purchase unit of measure and Infor LX automatically converts the amounts to stocking units so that inventory updates correctly.

After Infor LX accepts an open purchase order, the open purchase order immediately appears on inquiries and reports such as the Material Status Inquiry in the Inventory application. Additional reports include open purchase order, expected purchase cost, and vendor delivery performance reports. The inventory on-order balance shows the effect of a new order.

After the goods arrive, you must complete specific inventory transactions to receive the goods into stock. You must have a stock receipt to update inventory balances. Because the invoice usually arrives at a later time, you must also have a cost update transaction. A purchase order remains open until the system both receives and costs the purchase order. You can generate a report of all purchase orders that are received but not invoiced.

Note: Your system may handle stock receipts with costs, that is, the arrival of the invoice with the goods. In this case, you need only one inventory transaction that prompts for cost as well as quantity. This transaction is similar to type P. If you do not want to enter costs through the system, the type P transaction is sufficient. Other combinations and effects are possible because Inventory transactions are user-defined. See the following section on Inventory Transactions for Purchase Order Receipts and Costing and the Inventory document.

Use Purchase Receipts, PUR550D, to complete purchase order receipts posting.

A purchase order is complete after you receive all line items on a purchase order into stock. You can use the month-end purge, PUR900, to delete completed purchase orders. If you do not handle costs through Infor LX, you can purge uncosted lines. However, do not purge uncosted lines if you expect to enter vendor invoices. See the following section on Inventory Transactions for Purchase Order Receipts and Costing for more detailed information.

Receipt tolerances and over-receipt options

Infor LX allows you to define over/under receipt quantity tolerance percentages at the item/vendor/facility/manufacturer, commodity, warehouse, or system parameter levels. The system applies the tolerance percentages to the purchase order line quantity to determine whether the receipt quantity constitutes full delivery.

Example:

Receipt Qty Tolerance % (+)=10%

Receipt Qty Tolerance % (-)=5%

If the purchase order line quantity is 100, then:

Over Receipt Qty=100 + (100 * 0.10)=110

Under Receipt Qty=100 - (100 * 0.05)=95

A purchase order line is considered fully received if the receipt quantity is between 95 and 110. To automatically close the PO line if the receipt quantity is within tolerance, enable auto close at the item/vendor, commodity, warehouse, or system parameter level.

Infor LX also allows you to over-receive purchase order lines. An over-receipt is a receipt quantity that is greater than the PO line quantity with the over-tolerance receipt quantity added to it. The system displays a warning message to notify you that the quantity received is more than the remaining purchase order line quantity.

Example:

Receipt Qty Tolerance (+)=10%

Quantity Ordered=100

Quantity Received=20

Remaining Quantity=Quantity Ordered - Quantity Received=80

Upper Receipt Qty Limit=Remaining Qty + (Qty Ordered * Tolerance %)=90

The system displays an over-receipt warning message if the receipt quantity is greater than 90.

You can prevent or allow over receipt at the item/vendor level or at the system parameter level.

If Infor LX is set up to prevent over-receipts, you cannot post a receipt quantity that is more than the remaining PO line quantity with the over tolerance % added to it. As an alternative, you can:

Receive the maximum, remaining line quantity plus over-tolerance percentage quantity, and reject the balance to quarantine

or

Receive the full quantity into quarantine.

Note: Over-receipt checking applies only to receipts to stock.

Purchasing application integration

You can integrate Purchasing with other applications within Infor LX, including Inventory (INV), Configurable Ledger (CLD), and Accounts Payable (ACP).

Purchasing requires the integration of Inventory (INV), which records the issue of purchase orders and the subsequent receipt of goods and the vendor's invoice.

You can install Accounts Payable (ACP) with Purchasing. Accounts Payable checks invoices against purchase orders and uses the same Vendor Master file, AVM.

If you install both Accounts Payable and the Configurable Ledger (CLD), you can use an optional facility to update costs in inventory and the general ledger directly from vendor invoices.

The general sequence of implementation for these products is outlined below.

General Ledger

The Configurable Ledger (CLD) and Accounts Payable (ACP) interface with the Purchasing application to perform a three-way match. The installation of this application is optional.

Accounts Payable

Optionally, you can integrate Accounts Payable (ACP) with Purchasing. ACP requires more detailed information in the Vendor file than Purchasing requires.

Accounts Payable automatically checks for a valid purchase order when you match invoices to POs and receipts. Enter any outstanding active purchase orders through PO Release, PUR500, before you can match invoices in Accounts Payable.

Accounts Payable can also update the Actual Cost fields in the Inventory Master file directly from vendor invoices. You must provide the following information in order for Accounts Payable to complete this update:

- Define a type C inventory transaction. For more information, see the section on Transaction Effect maintenance.
- Enter a valid purchase order on the Invoice Entry header screen, ACP500D2-01, or in the Next Purchase Order field on the Invoice Entry: PO Costing screen, ACP500D3-01.
- Enter the information for the actual cost transaction on the appropriate lines.

Infor LX uses this information to search for the specific purchase order in the Purchase Order file to set inventory details, for example, the warehouse. The system generates a type C inventory transaction, posts the transaction to the Inventory files, and updates costs.

Note: The system updates Quantity fields in the Inventory Master file based on how you set up the C transaction. You can set up the C transaction to update inventory as well as cost.

The purchase order line updates with the cost value.

Inventory

You must integrate all of the inventory files with the Purchasing application. In addition, you must define the following fields on the Item Master file (IIM) before you can use Purchasing:

Stocking U/M

The item is stored, sold, or used in this unit.

Purchasing U/M

The item is purchased in this unit.

Conversion Factor

The number used to convert purchasing units into stock units.

Vendors

Two vendor numbers can be associated with an item. The system uses the primary vendor as the default vendor during purchase order entry.

Standard Cost

If Costing is not installed and there is no relevant Vendor/Price record, Infor LX uses this field to calculate the expected cost of a purchase.

Example:

Product	Purchasing U/M	Conversion Factor	Stocking U/M
xxx	yd (yards)	3.0000	ft (feet)

With the conversion factor of 3.0, Infor LX converts five yards of purchased product xxx to 15 feet at the time of receipt. The system then uses this information for inventory tracking and management purposes.

Purchasing

To use the Purchasing application, set up Vendor Master and Vendor Ship-to files. Enter all active purchase orders that are outstanding when you implement Purchasing.

Inventory transactions for purchase order receipts and costing

The inventory transactions for purchase order receipts and costing include the definition of both inventory and purchase order transactions for the system, the completion of daily running tasks, and the procedures for month end.

Inventory Transactions

The Purchasing application requires that you define the receipt of goods into stock, with an update of quantity-on-hand by warehouse and location, and the cost update upon receipt of the vendor's invoice. You can define this information in several ways:

- Enter two separate inventory transactions.
- Enter one combined inventory transaction.
- Enter the receipt with an inventory transaction and specify that Accounts Payable does the cost update.
- Ignore costs altogether so that the system updates only the receipt.

Define inventory transactions through Transaction Effect Maintenance, INV150. The Inventory document provides complete instructions and examples.

Define purchase order transactions in Purchase Order Receipts, PUR550D. The following examples illustrate transactions that you can use if you implement Purchasing:

- Type P -- Uncosted receipt into stock for the arrival of goods.
- Type G -- Cost-update. Use this type if the invoice and goods arrive separately. If Accounts Payable is installed, a cost update is unnecessary.
- Type Q -- Costed version of Type P. Use this type if invoices arrive with the goods. This is a single transaction that performs both receipt and cost updates.

■   Type C --Reserved transaction type used by Accounts Payable. You set up this transaction type with only a description because Accounts Payable completes the cost update.

These definitions are only examples. Your system may define these transactions differently. If you are uncertain about your system setup, enter purchases of dummy items, then complete the inventory transactions to receive them. Use the inquiry programs to check the results. Check the quantity and cost fields in both Purchasing (Purchase Orders) and Inventory (Item and Warehouse quantity on hand, actual costs).

Do not change transaction effects without a thorough understanding of their functions.

Costing

Each line item can have an expected as well as a standard cost. Infor LX calculates the expected cost on the basis of the Vendor Price quote information, if a quote exists for the item; or it calculates the cost from the item standard cost held on the Cost Master File, CMF, in cost set number two.

If you use facility-specific costing, Infor LX searches for the facility-specific information in CMF and then searches for the global information. The system automatically retrieves the standard cost and posts the actual cost to either the facility-specific file or the global cost file in CMF by a purchase order cost transaction, that is posting the invoice from the vendor.

You can calculate actual purchase costs when you update inventory based on a system parameter: You can use either a weighted average actual cost or the last cost for actual costing of purchased items in inventory.

If Accounts Payable and Configurable Ledger are installed, you can automatically create the cost update transactions when you enter vendor invoices into Accounts Payable. You must enter stock receipts in Purchase Order Receipts, PUR550, but the system updates costs from the vendor invoice you enter in Accounts Payable. Accounts Payable Invoice Entry, ACP500, displays the Inventory Costing screen, that displays uncosted purchase order lines and allows you to enter costs. The program then updates the inventory and purchase order costing with the inventory C transaction. See the Accounts Payable document for details.

The purchase price variance report displays actual cost, standard cost, and expected cost.

Daily Running

The Purchasing application requires the completion of several daily running tasks outlined below.

1) Use Requisition Entry, PUR600, to enter new requisitions to use to create purchase orders. Requisition creation is optional. You can enter a purchase order without a requisition. You can use either PO Consolidation/Release, PUR640, or Requisition Release, PUR650, to create a purchase order from a requisition. The system then marks the requisition complete. When you use Month End Close, PUR900, the system purges completed requisitions.

You can also create purchase orders without requisitions in PO Release/Maintenance, PUR500. Purchase orders that you create in PUR500 are not associated with requisitions and do not update the requisition file.

Use Requisition Print, PUR620, to print all open requisitions (those that have not been changed to purchase orders).

Automatic Release, PUR651D, and PO Consolidation/Release, PUR640, allow the automatic release of MRP requirements to purchase order lines.

2) Use Purchase Order Release/Maintenance, PUR500, to enter new purchase orders and to make changes to existing purchase orders. Infor LX automatically changes the Print Flag field to 1 (printed) each time you print a purchase order line, but you can reset the Print Flag field to 0 to reprint a line.

3) Purchase Order Print, PUR520, enables you to print all purchase order lines entered since the last printout. However, you do not have to print the purchase orders.

4) Use Stock Receipts Entry, Inventory Transactions, INV500, Purchase Receipts, PUR550D, to enter stock as you receive the stock and to enter costs as you receive invoices.

5) Use Reports and Inquiries, PUR2XX, PUR3XX, INV300, to generate reports as needed.

Month End

If every line of a purchase order is completed or closed, you can purge the purchase order at month end. If you use the costing applications, then you can restrict the purge to only those purchase orders with all lines closed and costed. For scheduled purchase orders, you can purge all received and costed detail lines at month end.

Use Schedule History Purge, PUR955, to selectively purge history details for the schedule.

Non-inventory items

You can use Purchasing for non-inventory items such as MROs, maintenance repair and operating supplies. Follow the directions below.

1. Define a new item type for non-inventory items in Item Type Master Maintenance, INV171, and set the Manufactured Flag to N. For the item type description, specify non-inventory or MRO, or your own description for non-inventory items.

2. Define a new item class for non-inventory items in Item Class Maintenance, INV160.

3. For each major category of non-inventory items that you want to track, set up a new item number in IDF Enterprise Item. This item number can be as simple as MRO, or FURNITURE, or SUPPLIES. Most Infor LX users only have a few new items like this. For each of these items, assign the item type and class for non-inventory items.

4. Define a new inventory transaction effect type for the receipt of non-inventory items in Transaction Effect Maintenance, INV150. Use a transaction description such as non-inventory receipts. Specify Yes in the Aff PO Quantity field. Specify values in the other description fields but leave all other fields blank so that inventory is not affected by this non-inventory transaction effect type. All non-inventory purchase order receipts then use this transaction effect type in Inventory Transactions, INV500, or Purchase Receipts, PUR550D.

5. When you enter the purchase order, use the regular program, Purchase Order Release/Maintenance, PUR500, or the requisition system, PUR600, PUR620, and Purchase Order Consolidation/Release, PUR640. Specify the item number for the non-inventory item and complete the entry screen as appropriate. Your outstanding commitments are now available through the purchasing inquiries and purchasing reports.

6. Process receipts with the new non-inventory purchase item receipt transactions effect code through Inventory Transactions, INV500, or Purchase Receipts, PUR550D. Apply vendor invoices as usual through Invoice Entry, ACP500, to get the three-way match. You can find information such as purchase price variances and vendor history and performance in the various purchasing reports.

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.

- Add line items to existing purchase orders - PUR500
- Alpha look-up, item - INV350
- Alpha look-up, vendor - PUR310
- Approve Procurements - PUR530
- Authorization file maintenance - PUR170
- Authorization listing - PUR175
- Authorize procurements - PUR530
- Automatic release of purchase orders - PUR651
- Change purchase order information - PUR500
- Close purchase orders - PUR500
- Close purchasing month-end - PUR900
- Close purchasing year-end - PUR910
- Commodity code listing - PUR185
- Commodity code maintenance - PUR180
- Consolidate purchase order requisitions - PUR640
- Create drop ship purchase order - PUR660
- Delete purchase order line items - PUR500
- Delete requisitions - PUR600
- Delete vendor contract/quote - PUR150
- Display open purchase orders by item - INV300
- Display POs by PO, vendor, item, customer order - PUR300
- Display requisitions by PO, vendor, item, customer order - PUR300
- Expense projections report - PUR230
- Inquiry, item or vendor history - PUR300
- Inquiry, material status - INV300
- Inquiry, purchasing - PUR300
- Inquiry, quotations by item or vendor - PUR300
- Inquiry, warehouse - INV330
- Inspection dispatch report - PUR270
- Inventory transactions - INV500
- Item alpha lookup - INV350

- Item/vendor history report - PUR258
- Maintain clause codes by contract - PUR159
- Maintain contract header details - PUR151
- Maintain contract detail lines - PUR152
- Maintain purchase order notes - ORD140
- Maintain purchase orders - PUR500
- Maintain requisitions - PUR600
- Maintain schedule prices - PUR154
- Maintain ship-to numbers - PUR130
- Maintain shipping pattern codes - PUR161
- Maintain time periods - PUR165
- IDF Vendor
- Maintain vendor notes - ORD140
- Maintain vendor quotes - PUR150
- Maintain vendor split rules - PUR157
- Maintain week/dates cross reference file - PUR155
- Material status inquiry - INV300
- Month-end purchasing close - PUR900
- Notes maintenance for purchase order - ORD140
- Notes maintenance for purchase order line - ORD140
- Notes maintenance for vendor - ORD140
- Open purchase orders by buyer/item report - PUR204
- Open POs by commodity code/due date report - PUR205
- Open POs by expected delivery date report - PUR260
- Open purchase orders by item class/item report - PUR203
- Open purchase orders by item/due date report - PUR202
- Open POs by purchase order number report - PUR200
- Open purchase orders by vendor report - PUR201
- Outside operation purchase orders - INV500
- Post purchase order costs/invoices - PUR550D
- Post purchase order receipts - PUR550D
- Print consumable schedule print - PUR542
- Print contract details - PUR153
- Print contract exception report - PUR288
- Print expense projection report - PUR230
- Print inspection dispatch report - PUR270
- Print item/vendor history report - PUR258
- Print open purchase orders by buyer/item - PUR204
- Print open POs by commodity code/due date - PUR205
- Print open POs by expected delivery date - PUR260
- Print open purchase orders by item class/item - PUR203

- Print open purchase orders by item/due date - PUR202
- Print open POs by purchase order number - PUR200
- Print open purchase orders by vendor - PUR201
- Print outstanding requisitions report - PUR254
- Print production schedule print - PUR540
- Print purchase orders - PUR520
- Print purchase order line - PUR500
- Print purchase planning report - PUR284
- Print purchase planning exception report - PUR286
- Print purchase price variance report - PUR220
- Print received but uncosted PO report - PUR210
- Print receiving report - PUR250
- Print reject report - PUR250
- Print requisitions - PUR620
- Print requisitions by buyer/item - PUR255
- Print requisitions by requisition/item - PUR254
- Print scheduled PO document - PUR524
- Print schedule summary report - PUR290
- Print ship-tos - PUR140
- Print vendor negotiation report - PUR275
- Print vendor performance/detail report - PUR240
- Print vendor performance/summary report - PUR262
- Print vendor quotes - PUR256
- Print vendor schedule report - PUR280
- Print vendor split rules - PUR158
- Print vendors - PUR110
- Procurement authorization maintenance - PUR530
- Purchase order audit report - PUR500
- Purchase order authorization maintenance - PUR170
- Purchase order notes - ORD140
- Purchase order receipts - PUR550D
- Purchase order release - PUR500
- Purchase price variance report - PUR220
- Purchasing system parameters - SYS800
- Purge costed or closed purchase orders - PUR900
- Purge schedule history details - PUR955
- Quote maintenance - PUR150
- Quotations by item or vendor inquiry - PUR300
- Receipts, purchase order - PUR550D
- Received but uncosted purchase orders report - PUR210
- Receiving report - PUR250
- Release purchase order requisitions - PUR640

- Release purchase orders - PUR500
- Requisition consolidation and release - PUR640
- Requisition print - PUR620
- Requisition selection - PUR650
- Requisitions by buyer/item report - PUR255
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- Revise drop ship purchase order - PUR660
- Select PO clause codes - PUR163
- Ship-to listing - PUR140
- Ship-to maintenance - PUR130
- Special charges listing - PUR186
- Special charges maintenance - PUR181
- Vendor alpha lookup - PUR310
- Vendor history - PUR258
- Vendor inquiry - PUR300
- Vendor master listing - PUR110
- IDF Vendor
- Vendor negotiation report - PUR275
- Vendor notes - ORD140
- Vendor performance/detail report - PUR240
- Vendor performance/summary report - PUR262
- Vendor quotes maintenance - PUR150
- Vendor quotes report - PUR256
- Vendor schedule report - PUR280
- Warehouse inquiry - INV330
- Year-end purchasing close - PUR910

Infor LX purchasing security

The ZSC file contains Infor LX Security. This file has one record per profile. Each record controls the authorization for each Infor LX product. Within each application, you can grant authorization for programs, warehouses, and transaction effect codes. Infor LX security allows multiple security officers. Infor LX security performs all security checks at the menu level. In addition to security checks for the Infor LX system, Infor LX security allows for user-defined products. See the "Security master maintenance section" in the System Parameters document.

Multiple currency considerations

The Multiple Currencies application allows you to perform Purchasing, Accounts Payable, Accounts Receivable, Order Entry, and Billing transactions in multiple currencies. Use this application to enter

subsystem transactions in any system-defined currency and to account for unrealized gains and losses that result from fluctuating exchange rates. The following sections provide information to use Multiple Currency Purchasing:

- Multiple currency processing authorization
- Purchase order currency codes
- Conversion rate retrieval

You can find detailed information on Multiple Currencies System Parameters in the help text for the Multiple Currency application.

Multiple currency processing authorization

To use Multiple Currency Purchasing, you must have these system parameters set up: MLT installed in System Parameters, SYS800D-01, Accounts Payable and/or Purchasing set to Yes on the Multi-Currency System Parameters screen, MLT800D-01, and Multi-Currency set to Yes on the Company Maintenance screen, ACR120D2-02.

Purchase order currency codes

To process purchasing transactions in multiple currencies, you must define currency codes in Currency Code Maintenance. You can find this program in Configurable Ledger, CLD.

You must also define the global, base, and transaction currencies:

- Global currency is a product-wide currency that is used for all inventory activity. The system converts all foreign currency transactions to the global currency to consolidate sales and inventory reporting. You define the global currency on the Multi-Currency System Parameters screen, MLT800-01.
- You establish base currency in the vendor's company master record, ACR120.
- The system uses the vendor's currency as the transaction currency. However, you can override the transaction currency during purchase order entry. The purchase order currency, recognition rate, invoice exchange rate, and global exchange rate must be the same for a purchase order header and its associated lines.

In addition, these currency definitions are important to costing purchasing transactions. Standard cost is expressed in global currency. Expected cost is expressed in the transaction currency used in the purchase order or purchase order line. Base expected cost and base standard cost are always expressed in base currency.

Conversion rate retrieval

Infor LX captures currency exchange rates when it processes purchase orders. You define the exchange rates in Configurable Ledger Exchange Rate Maintenance. The system uses the exchange rates to convert from one currency to another.

During processing, Infor LX searches for a conversion or spot rate that uses the same From currency and To currency as the transaction. Infor LX also searches for the spot rate type defined in the company master record and the spot rate date equal to the transaction date. If no spot rate date equal to the transaction date exists, Infor LX searches for the most recent spot rate date.

Example

Infor LX selects the conversion factor marked with (*). to use for a purchase order transaction dated 12/18/96 with USD currency. The company base currency is STR and the rate type is spot rate:

From Currency	To Currency	Rate Type	Effective Date
CAN	STR	SPOT	12/01/96
STR	USD	SPOT	12/27/96
USD	STR	MAVE	12/28/96
USD	STR	SPOT	11/30/96
USD	STR	SPOT	12/01/96 (*)
USD	STR	SPOT	12/29/96

Chapter 3
Programs

3

Item/vendor quality maintenance, PUR120D

Use Item/Vendor Quality Maintenance, PUR120D, to control and track vendor quality. You can use this program, in conjunction with parameters set in Purchasing Parameters, PUR820D, to enforce validation of PO lines against active and valid/approved item/vendor and commodity/vendor relationships before POs are created or receipts are processed. A relationship created with this program is considered valid and approved during the period from the effective date to the discontinue date set in this record. You can use vendor, item or commodity, facility (optional), manufacturer (optional), and effective and discontinue dates to create distinct records for this program.

You can maintain user-defined quality data outside of the Quality Management application (QMS) for both items and commodities. Also, you can set receipt quantity tolerances at the item/vendor level. Depending on whether you have QMS activated and how you set a parameter in Purchasing Parameters, you can use the information you specify here to assign default lot statuses individually by item/vendor when you receive PO lines.

Access: PUR02

Add, maintain, or view item/vendor quality information

Use the Item/Vendor Quality Maintenance selection screen to add a new item/vendor relationship or to select an item/vendor relationship to maintain or view.

Field descriptions - PUR120D1-01

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.

14=Inspection Results

Access the Item/Vendor Quality History Maintenance screen, PUR560D2-01, which displays the history of previous control checks. You can create a new record to update test dates and other test results. You must be authorized to this action.

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. 21)* in the overview information in this document.

Item/Commodity (1,0): Specify 0 to work with an item; specify 1 to work with a commodity.

Item/Commodity (35,A): Specify the item number or commodity code to work with.

Vendor (8,0): Specify the vendor number to maintain in association with the item or commodity selected for this quality relationship.

Facility (3,A): Specify a valid facility to make this relationship facility specific.

Manufacturer (8,A): Specify a valid manufacturer to associate with this item/vendor relationship.

Effective Date (8,0): Specify the date upon which this item/commodity relationship becomes active.

To maintain this date in Create and Copy modes, create a new record with a new set of dates. Dates for the same item/vendor/facility/manufacturer cannot overlap those of any other active record for that item/vendor/facility/manufacturer.

You can specify 999999 as a placeholder date to create a relationship before the relationship is approved. You can maintain the record until you replace the 999999 value with valid dates. A record is only valid and approved within the effective and discontinue dates specified for that record.

Discontinue Date (8,0): Specify the date upon which this item/commodity record will no longer be active.

To maintain this date in Create and Copy modes, create a new record with a new set of dates. Dates for the same item/vendor/facility/manufacturer cannot overlap those of any other active record for that item/vendor/facility/manufacturer.

You can specify 999999 as a placeholder date to create a relationship before the relationship is approved. You can maintain the record until you replace the 999999 value with valid dates. A record is only valid and approved within the effective and discontinue dates specified for that record.

Status (1,0):   This field indicates whether the relationship is active in the Item/Vendor Master, HAV.

Screen actions - PUR120D1-01

Commands	Description
F13=Filters	Access the Filter Options screen.
	Specify how to display the information:
	1=All records by Item /Commodity, Vendor, Facility
	2=Active records by Item/Commodity, Vendor, Facility
	3=Active records by Vendor, Item/Commodity, Facility
	4=Active records by Facility, Item/Commodity
	5=Active records by Item/Commodity, Facility
	The default value is 1.
F14=Item Alpha Lookup	Access the Item Alpha Lookup screen, INV350D-01.
F15=Vendor Alpha Lookup	Access the Vendor Alpha Lookup screen, PUR310D-01.
F16=Purchasing Inquiry	Access the Purchasing Inquiry selection screen, PUR300D1-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Copy an item/vendor relationship to add a new relationship

Infor LX displays the Item/Vendor Quality Maintenance - Copy screen if you specify the Copy line action. This screen displays the values you copy as From fields. Specify the values to change in the To fields. Press Enter to access the Item/Vendor Quality Maintenance detail screen, PUR120D2-01.

Field descriptions - PUR120D1-02

Fields	Description
Item/Commodity (from and to) (1,0) (35,A):	Infor LX displays the item or commodity type and number for the relationship you select to copy. Specify the item or commodity number to use in the new relationship in the To Item/Commodity field. Note: Type must match. You can only copy an item to an item and a commodity to a commodity.
Vendor Number (from and to) (8,0):	Infor LX displays the vendor number for the relationship you select to copy. Specify the vendor number to use in the new relationship in the To Vendor Number field.
Facility (from and to) (3,A):	Infor LX displays the facility for the relationship you select to copy. Specify the facility to use in the To Facility field.
Manufacturer (8,A):	Infor LX displays the manufacturer for the relationship you select to copy. Specify the manufacturer to use in the To Manufacturer field.
Effective Date (from and to) (8,0):	Infor LX displays the effective date for the relationship you select to copy. Specify the date to use in the new relationship in the To Effective Date field. This date cannot be later than the discontinue date. Note: The new effective and discontinue dates cannot overlap those of other relationships.
Discontinue Date (from and to) (8,0):	Infor LX displays the discontinue date for the relationship you select to copy. Specify the date to use in the new relationship in the To Discontinue Date field. This date cannot be earlier than the effective date. Note: The new effective and discontinue dates cannot overlap those of other relationships.
Copy Pass Criteria Notes (1,A):	Specify Yes to copy the Pass Criteria Notes for the relationship you select to copy to the new relationship. Otherwise specify No. Note: The system copies the notes to an existing Item/Facility/Vendor relationship only after you use F13 to override a warning message.
Copy Sample/Test Notes (1,A):	Specify Yes to copy the Sample/Test Notes of the relationship you select to copy to the new relationship. Otherwise specify No. Note: The system copies the notes from an existing Item/Facility/Vendor relationship only after you use F13 to override a warning message.

Screen actions - PUR120D1-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See the overview information in this document.

Add, maintain, or view item/vendor quality details

Use the Item/Vendor Quality Maintenance detail screen to specify vendor quality, inspection, and receipt tolerance information and to set up default lot status for the selected item/vendor relationship.

Access: Enter from the Item/Vendor Quality Maintenance selection screen

Field descriptions - PUR120D2-01

Fields	Description
Item/Commodity (1,0):	Infor LX displays the value that indicates an item or a commodity. The value is 0 for an item or 1 for a commodity.
Item/Commodity (35,A):	Infor LX displays the item number or commodity code you selected on the previous screen.
Item/Commodity Description (50,A):	Infor LX displays the description of the item or commodity you selected on the previous screen.
Vendor (8,0):	Infor LX displays the vendor number associated with the item or commodity in the selected quality relationship.
Vendor Description (50,A):	Infor LX displays a description of the vendor you selected on the previous screen.
Facility (3,A):	Infor LX displays the facility associated with the selected quality relationship if the relationship is facility-specific.
Item Class (5,A):	Infor LX displays the item class of the selected item. This field does not apply if you update a commodity/vendor relationship.
Stocking Unit of Measure (2,A):	Infor LX displays the stocking unit of measure for an item or the commodity unit of measure for a commodity.
Purchasing Unit of Measure (2,A):	Infor LX displays the purchasing unit of measure for the item or the commodity unit of measure for the commodity.

Manufacturer (8,A)/ (40,A): Infor LX displays the manufacturer/manufacturer description if a manufacturer is associated with the item/vendor relationship selected on the previous screen.

Effective Date (8,0): Infor LX displays the date upon which this item/commodity relationship becomes active.

Discontinue Date (8,0): Infor LX displays the date upon which this item/commodity relationship will no longer be active.

Revision Level (35,A): Infor LX displays the item's revision level as noted in the Item Master file at the time this relationship was created. The revision level is a user-defined field maintained in the Item Master. You can indicate a revision level if you update an item for which you do not want to create a new item number. The system uses revision levels in the Item Master to manually track changes to the item.

Vendor Item Number (35,A): Infor LX displays the code or number used by the supplying vendor for this item. The system retrieves the value from the Customer/Item Cross-Reference file, EIX.

Vendor Item Number Description (35,A): Infor LX displays the description of the vendor item. The system retrieves the value from the Customer/Item Cross-Reference file, EIX.

Buyer (3,A): Infor LX displays the buyer code associated with this item/vendor quality relationship.

Note: Commodities do not have buyers. This field applies only to items.

Vendor Quality Rating (3,A): This is an optional, user-defined field. Specify a rating code from A to Z to identify how the current item/commodity has performed as supplied by this vendor.

Next Inspection Date (8,0): This is an optional, user-defined field. Specify the date on which you want the next quality inspection to take place.

Next Cumulative Quantity (11,3): This is an optional, user-defined field. Specify the number of items to receive before the next inspection takes place.

Next Inspection Interval (3,0): This is an optional, user-defined field. Specify the number of days before the next quality inspection takes place, irrespective of the number of items received.

Quantity Cumulative Interval (11,3): This is an optional, user-defined field. Specify the recommended quantity of items to process before a quality inspection is necessary.

Allow Over Receipt (1,0): Specify Yes to allow over receipts for this item/vendor or commodity/vendor combination. Otherwise specify No.

Tolerance Auto Close (1,0):   Specify Yes to automatically close the PO lines for this item/vendor or commodity/vendor relationship if the receipt quantity is within tolerance. Otherwise, specify No.

Receipt Quantity Tolerance Percent (+) :   Specify the tolerance percentage for an over-receipt quantity.

Receipt Quantity Tolerance Percent (-) :   Specify the tolerance percentage for an under-receipt quantity.

Default Lot Receipt Status (2,A):   Specify a default lot status for a lot-controlled item only. If you specify a default lot status here, and the Purchasing parameter flag is set to Yes for Default lot status, and QMS is turned off, then the default lot status specified here overrides the default lot status set in system parameters. The value you specify must be an active record in the Inventory Lot Status file, IST.

You can create a lot status tailored to your business needs in Lot Status Code Maintenance, API150D.

The following reserved lot status options are available:

- A
- Active (ACTIVE)
- C
- Conditional Pass (CONDPS)
- E
- Expired (EXPIRD)
- H
- Hold (HOLD)
- Q
- Quality Hold (QHOLD)
- R
- Rejected (REJECT)
- V
- Archived (ARCH)
- Z
- Deleted (DELETD)

Current Cumulative Quantity (11,3):   This field displays the current cumulative quantity of this item for this item/vendor quality relationship. This value is important if you schedule inspection based on next cumulative quantity.

Days in Quarantine (3,0):   This field is reserved for future use.

Days in Inspection (3,0):   This field is reserved for future use.

Screen actions - PUR120D2-01

Commands	Description
F14=Inspection Results	Access the Item/Vendor Quality History Maintenance screen, PUR560D2-01, which reflects the history of previous control checks, and where you can update current test results.
F15=Item Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain item notes.
F16=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.
F17=Pass Criteria Notes	Access the PUR Quality Notes screen, PUR145D-0, for note type Pass/Criteria Notes to create or update PUR quality notes.
F18=Sample/Test Notes	Access the PUR Quality Notes screen, PUR145D-0, for note type Sample/ Test Notes to create or update PUR quality notes.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Item/vendor quality listing, PUR125D

Use Item/Vendor Quality Listing, PUR125D, to list any item/vendor and commodity/vendor relationships, all relationships, or valid/approved relationships only based on the value in the Effective Record Date field. This program generates two reports. One report lists each item/vendor or commodity/vendor relationship that falls within the filters on the screen along with its associated quality information. The other report lists only relationships that contain lot-controlled items. This report prints the default lot receipt status tied to each item/vendor relationship for the range of relationships that you select.

Access: PUR02

Print an item/vendor quality report

Use the Item/Vendor Quality List screen to specify the information to print on the Item/Vendor Quality List 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. These range fields use extreme values by default.

Field descriptions - PUR125D-01

Fields	Description
From/To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
From/To Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From/To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From/To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
From/To Manufacturer (8,A):	Specify a range of values to limit the manufacturer codes to include in the report.
From/To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From/To Item Class (5,A):	Specify a range of values to limit the item class codes to include in the report.
Effective Record Date (8,0):	Specify the effective record date to filter relationships included in the Item/Vendor Quality List. Leave this field blank to include all relationships, or enter a date to limit the report to only valid/approved relationships that include this date in their effective range.
Default Lot Receipt Status (2,A):	This field applies to lot controlled-item/vendor relationships only. Specify a default lot status to which to limit the Item/Vendor Quality Code List Report, PUR125O2.
	The following reserved status options are valid:
	A=Active
	C=Conditional Pass
	E=Expired
	H=Hold
	Q=Quality Hold
	R=Rejected
	V=Archived
	Z=Deleted

Other status lot receipt status values may also be available. You can create lot receipt statuses tailored to your business needs in Lot Status Code Maintenance, API150D.

Print Notes (1,A):

Indicate whether to print quality notes for the selected relationships. Specify one of the following values:

Valid choices

- **0**

  No, do not print notes.

- **1**

  Yes, print only Pass Criteria notes.

- **2**

  Yes, print only Sample/Test notes.

- **3**

  Yes, print both Pass Criteria and Sample/Test notes.

Report Sequence (1,A):

Specify how to sort the information in the report. Specify one of the following values:

1=Item/Facility/Vendor/Manufacturer

2=Facility/Item/Vendor/Manufacturer

3=Vendor/Item/Facility/Manufacturer

4=Buyer/Vendor/Item/Facility/Manufacturer

If you choose option 1, the system sorts the information first by item, then by facility, then by vendor, then by manufacturer, option 2 sorts first by facility, and so on.

Note: In the options listed above, item represents commodity for commodity records.

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 - PUR125D-01

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Address master maintenance, PUR130D1

Use Address Master Maintenance, PUR130D1, to maintain ship-to numbers. Ship-to numbers represent delivery addresses when you enter data in Requisition Maintenance, PUR600, and Purchase Order Release/Maintenance, PUR500. Therefore, a ship-to number can represent one of your office locations, receiving docks, warehouses, plants, or stores.

The Ship-to Master file, EST, stores ship-to numbers.

Access: Menu PUR02

Add or select a ship-to address

Use the Ship To Master Selection screen, PUR130D1-01, to add a new ship-to number or select a ship-to number to maintain, print, or view.

Field descriptions - PUR130D1-01

Fields	Description
Line actions	The action codes described in the following section are available:
	14=Language Override
	Display the Ship To Master Language Override screen, PUR131D-01. The list is positioned at the address that you selected on PUR130D1-01. Select this address, or another address, 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. 21)* in the overview information in this document.
Ship To Number (4,0):	Specify the number of the ship-to location to maintain. These numbers are user-defined; you do not have assign these numbers in order.

Screen actions - PUR130D1-01

Commands	Description
F13 = Filter	Access a filter screen and specify whether to view all records or only active records by ship-to number or name.
F14=Language Over-rides	Display the Ship To Master Language Override screen, PUR131D-01. Select a ship to name and address and the language for translation.
F15=Toggle Language	Use F15=Toggle Language to switch between the ship-to name and address in the master file (base) language and in your language, assuming the ship-to 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. 22)* in the overview information in this document.

Add, maintain, or view ship-to address details

After you select the ship-to number to maintain on the Ship To Master Selection screen, PUR130D1-01, Infor LX displays the Ship To Master Maintenance detail screen, PUR130D2-01.

Field descriptions - PUR130D2-01

Fields	Description
Ship-To Number (4,0):	Infor LX displays the ship-to number to maintain.
Ship To Name (50,A):	Specify the name of the ship-to location.
Attention to (30,A):	Specify the name of the contact person at the ship-to location.
Address Line-1 (50,A):	Specify the address details for this ship-to location.
Address Line-2 (50,A):	Specify the address details for this ship-to location.
Address Line-3 (50,A):	Specify the address details for this ship-to location.
Address Line-4 (50,A):	Specify the address details for this ship-to location.
Address Line-5 (50,A):	Specify the address details for this ship-to location.
Address Line-6 (50,A):	Specify the address details for this ship-to location.

State (3,A):   Specify the state abbreviation for this ship-to location.

Postal Code (9,A):   Specify the postal code for this ship-to location.

Country Code (4,A):   Specify the country code for this ship-to location.

Phone Number (25,A):   Specify the phone number for this ship-to location.

Region Code (10,A):   Specify the region code for this ship-to location. The region code determines the region-specific attributes such as time zone and date and decimal formats for this ship-to location.

Fax Number (25,A):   Specify the fax number associated with this address.

E-Mail Number (80,A):   Specify the e-mail address for this vendor.

Primary Language (3,A):   Specify the foreign language code for this ship-to location.

Store Number (5,0):   Specify the store number associated with this ship-to location, if one exists.

Comment (30,A):   Specify any additional information for this ship-to location such as hours of operation to accept deliveries, access directions, and so on.

Country Code (2,A):   Specify the member or non-member country code for this ship-to location. This code and the registration number form the EC VAT number.

Registration No (15,A): Specify the registration number for this ship-to location.

Screen actions - PUR130D2-01

Commands	Description
F21=Language Override	Display the Ship To Master Language Override screen, PUR131D-01. Select a ship to name and address and the language for translation.
F22=Toggle Language	Use F22=Toggle Language to switch between the ship-to name and address in the master file (base) language and in your language, assuming the ship-to 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. 22)* in the overview information in this document.

Ship to master language override, PUR131D

Use this program to enter the translations for ship to names and addresses. The screen lists existing records in the 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 vendors on the PUR131D-01 screen includes changes made in Ship To Master Maintenance, PUR130D1. 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 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 004 and Language Code ***. PUR130D2 automatically creates and maintains this record. The blank Language record is not listed on PUR131D-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 PUR02
- Action 14=Language Override from the Ship To Master Selection screen, PUR130D1-01
- F14=Language Overrides from the Ship To Master Selection screen, PUR130D1-01
- F21=Language Override from the Ship To Master Maintenance screen, PUR130D2-01

Add or select a ship to address record

Use the Ship To Master Language Override screen, PUR131D-01, to add or select a ship to address record to translate.

Field descriptions - PUR131D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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. 21)* in the overview information in this document.

Ship To (4,0):   Specify the number of the ship to record to create or copy.

Language (3,A):   Specify the language to use in the translation.

Screen actions - PUR131D-01

Commands	Description
F13 = Filters	Access the Filter Options screen to select from the following sequences:
	1=Ship To/Language - Active
	2=Ship To/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. 22)* in the overview information in this document.

Filter options

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

Field descriptions - Filter

Fields	Description
Filter Options (1,0):	Specify one of the following options to limit the list of records.
	1=Ship To/Language - Active
	2=Ship To/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. 22)* in the overview information in this document.

Enter translated ship to information

Use the Ship To Information - Language Maintenance screen, PUR131D-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 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.

Field descriptions - PUR131D-03

Fields	Description
Ship To Number (4,0):	If you are in Create or Copy mode, specify the number of the ship-to 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 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 ship-to record in the selected language.

Screen actions - PUR131D-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. 22)* in the overview information in this document.

Address master listing, PUR140D

Use Address Master Listing, PUR140D, to print a list of the Ship-To Master file in numeric order by ship-to number. You set up ship-to numbers in Ship-to Master Maintenance, PUR130.

Access: Menu PUR02

Print a ship-to address report

Use the Ship To Listing screen, PUR140D-01, to print an Address Master Listing report.

Field descriptions - PUR140D-01

Fields	Description
Override Print Option (1,0):	Use this field to specify the language or languages for the ship-to 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 Ship To Language

Print the names and addresses in the language assigned to the ship-to in Address Master Maintenance, PUR130D2.

3=Print Language Overrides in Specified Language

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 ship-to names and addresses from all the language (ESX) records.

(Language) (3,0):   Specifiy the language to use on the report.

Screen actions - PUR140D-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. 22)* in the overview information in this document.

Purchasing quality notes, PUR145D2

Use Purchasing Quality Notes, PUR145D2, to create item/vendor quality notes to associate with item/vendor or commodity/vendor relationships. This program has no selection screen because only users authorized to the Item/Vendor Quality Maintenance screen, PUR120D2-01, and screen actions F17 and F18 can access these notes.

You can create two quality note types:

If you use F17 to access the program, the system displays Pass Criteria Notes as the note type. These user-defined notes describe the specification of the product (pass rate qualification) against samples and tests.

If you use F18 to access the program, the system displays Sample/Test Notes as the note type. These user-defined notes describe the current samples to take and the tests to run.

With either note type, the screen displays detail from the item or commodity/vendor relationship from which it was called. The fields displayed are Item/Commodity and description, Vendor, Facility, Manufacturer and description, and Effective and Discontinue dates for that relationship.

You can specify note text and also indicate whether to print the note lines on the receiver ticket when you run Purchase Receipts, PUR550D. You cannot print this note if you use Inventory Transactions, INV500, or Goods Receiving, WHM510, to receive a line.

If you create a note for an item or commodity/vendor relationship that does not specify a facility, this note prints globally on all matching item or commodity/vendor relationships, whether the relationships have a specific facility or not. The receiver ticket first shows the global notes, then any notes created for the specific item/vendor/facility relationship.

Access: F17 or F18 from the Item/Vendor Quality Maintenance detail screen, PUR120D2-01.

Add note text

Use the PUR Quality Notes screen, PUR145D-0, to enter note text for an item/vendor or commodity vendor relationship.

Field descriptions - PUR145D2-01

Fields	Description
Note Text (50,A):	Specify the text of the note. Specify 1 in the Rec field to print the note on the receiver ticket generated if you receive with Purchase Receipts, PUR550. If your note spans more than one line, specify 1 for each line.
Rec (Receiver Ticket) (1,0):	Specify 1 for each line your note spans to print the note on the receiver ticket generated if you receive a line with Purchase Receipts, PUR550. Otherwise, specify 0.
	You cannot print this note if you use Inventory Transactions, INV500, or Goods Receiving, WHM510, to receive a line.

Screen actions - PUR145D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor quote maintenance, PUR150D1

Use Vendor Quote Maintenance to establish a master file with standardized vendor quote information. Infor LX uses vendor quotes to automatically calculate the expected cost for a purchase order, based on the quantity ordered and the price breaks established in the quote. See the quantity price break example below.

Each vendor quote is uniquely identified by a vendor number, item number, quote effective date, quote discontinue date, currency, if Multiple Currencies is installed, and country of origin, if the processing is enabled in Purchasing System Parameters.

This method allows for flexibility because you can define and maintain more than one quote for any one item and vendor combination. If you use vendor quotes for outside operations then you can enter quote details for specific operations and routing methods.

The system stores vendor quotes in the Vendor Quote Master file, HQT, and the quote operation detail records in the Vendor Quote Master Extension file, HQE.

Quantity/Price Break Example:

Specify at least one quote to avoid an error message if you use Purchase Order Consolidation/Release, PUR640.

Suppose you use a specialized widget, Widget47Z, in your manufacturing process. This widget is only available from a few widget vendors. On your request, the widget vendor, vendor number 55555, supplies a quote for Widget47Z. The quote contains various prices, depending on the quantity of widgets you order. Assume that all prices are stated in monetary amount per purchasing unit. You specify the following quantity/price break data in the vendor quote file for vendor 55555 and Widget47Z:

- Quantity Level: 1. 10 Price Level: 1. 1.000
- Quantity Level: 2. 100 Price Level: 2. 0.950
- Quantity Level: 3. 1000 Price Level: 3. 0.915
- Quantity Level: 4. 2000 Price Level: 4. 0.800
- Quantity Level: 5. 5000 Price Level: 5. 0.700
- Quantity Level: 6. 10000 Price Level: 6. 0.650
- Quantity Level: 7. Price Level: 7.
- Quantity Level: 8. Price Level: 8.

Therefore, the system costs an order quantity of 5000 widgets at $.700 per purchasing unit for a total order of $3500.00. The system costs another order quantity of 4999 at $.800 per purchasing unit.

If you create a purchase order for Widget47Z, Infor LX uses the quantity entered in PO Consolidation/Release, PUR640,or PO Release/ Maintenance, PUR500. Infor LX then accesses the Vendor Quote Master file to determine the applicable price per purchasing unit for each item.

If vendor 55555 issues an occasional discount for Widget47Z to adjust inventory, you can create a vendor quote with the appropriate effective period. During that period, Infor LX includes the discount quote data in the search for the least expensive price for the quantity of goods ordered.

Access: Menu PUR

Add or select a vendor quote

Use the Vendor Quote Maintenance selection screen to add a new vendor quote or select a vendor quote to maintain, view, or print.

Field descriptions - PUR150D1-01

Fields	Description
Line actions	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=Operation Detail Lines
	Access the Vendor Quote Operation Detail Maintenance screen, PUR150D3-01, to create or maintain the detail on the quote for an outside operation.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Vendor Number (8,0):	Specify the vendor number for which to maintain this quote.
Item/Commodity (1,0) (35,A):	In the first field, specify the item/commodity indicator. Specify 0, the default value, for an item. Specify 1 for a commodity.
	In the second field, specify the item number or commodity code for which to maintain this quote. The quote only applies to this item or commodity if the item or commodity is associated with the vendor number specified on this screen. The quote only applies to this item or commodity if the purchase order entry date is within the effective date range specified in the following two fields.
Facility (3,A):	Specify the facility to which this quote applies. If you leave this field blank, the quote applies to all facilities.
Quote Effective Date (8,0):	Specify the date this vendor quote becomes effective, that is, the first effective day for this quote.
	If you have more than one quote for the same vendor and item, the effective periods must be unique. They can, however, overlap. If two or more valid effective quotes exist, the system always uses the quote with the latest effective date.
Quote Discontinue Date (8,0):	Specify the date this vendor quote will be discontinued (no longer effective). This is the first day that this quote is not effective.
	This date must occur after the quote effective date.

Contract Number (10,A): The contract number that you specify must exist in the Contract Header file. The effective and discontinue dates for the quote must be within the range on the Contract Header file.

Currency (3,A): Specify the code of the currency in which to maintain this quote. This quote only applies for the vendor, item, effective date range, and currency you specify here. If you specify a currency different from the vendor's currency set up in Vendor Master Maintenance, Infor LX prompts you to override the currency code with F17.

The system displays this field only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.

Screen actions - PUR150D1-01

Commands	Description
F13=Filters	Display the filter functions available.
	Select how to display the information:
	1=All Records by Item Number
	2=Active Rcds by Item Number
	3=Active Recs by Vendor/Contract/Item
	4=Active Recs by Vendor/Item/Contract
F14=Item Alpha Lookup	Access Item Alpha Lookup, INV350, where you can search for and select an item number to transfer back to this screen.
F15=Vendor Alpha Lookup	Access Vendor Alpha Lookup, PUR310, where you can search for and select a vendor number to transfer back to this screen. For further instructions to select a vendor number, refer to the section on PUR310 in this document.
F16=Purchasing Inquiry	Access Purchasing Inquiry, PUR300, to review purchase order information. You cannot transfer information from Purchasing Inquiry back to this screen. The inquiry is for review only. For further instructions on the inquiry, refer to the section on PUR300 in this document.
F18=Item/Vendor Quality	Access the Item/Vendor Quality Maintenance Selection screen, PUR120D1-01. You must have group authority to use this screen action.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view vendor quote details

After you complete the Vendor Quote Maintenance selection screen, PUR150D1-01, Infor LX displays the Vendor Quote Maintenance detail screen, PUR150D2-01.

Field descriptions - PUR150D2-01

Fields	Description
Vendor Number (8,0)/ Name (50,A):	The system displays the vendor number and vendor name specified on the selection screen.
	Use Notes Maintenance, ORD140, to assign user-defined notes to a vendor number or purchase order line number. You can designate these notes to print on purchase orders for this vendor.
Currency (3,A):	The system displays the currency code for this contract or quote specified on the selection screen.
Item/Commodity (1,0) (35,A):	The system displays the item number or commodity code specified on the selection screen. The item/commodity indicator is 0 for an item or 1 for a commodity. The description of the item or commodity follows.
Item Class (5,A):	The system displays the item class for this item.
Facility (3,A):	Infor LX displays the facility to which this quote applies.
Facility (3,A):	Infor LX displays the description of the facility to which this quote applies.
Manufacturer (8,A):	Specify the manufacturer to assign to this vendor quote.
	If you prompt on this field and QMS is installed, the system lists valid manufacturer/item combinations from Manufacturer/Item Maintenance, QMS105D1. If you do not have QMS installed, the system lists valid manufacturers from Manufacturer Master Maintenance, QMS100D.
Quote Effective Date (8,0):	If a contract number exists, the quote effective date must be within the range listed on the contract header file.

Purchase U/M (2,A):   Infor LX displays the purchasing unit of measure from the Item Master file, IIM, for inventory items or from the Commodity Master file, HPC, for commodity non-inventory items.

Stock U/M (2,A):   For inventory items, Infor LX displays the stocking unit of measure from the Item Master file, IIM. The system does not display this field for commodity non-inventory items.

Discontinue Date (8,0):   If you specify a date and a contract number exists, the discontinue date must be later than the effective date on the quote but earlier than the discontinue date on the Contract Header file.

Last Cost (15,5):   The system displays the cost of the most recent item or commodity purchased under this quote or contract.

Vendor Item Number (35,A):   Specify the code or number used by the supplying vendor for this item. Infor LX retrieves this number to use on the purchase order.

    The system writes the value specified here to the Vendor History file, HVH.

Box Size (11,3):   Specify the quantity of the item to define as a standard box. The system uses the value from the Item Facility Planning (CIC) record as the default value. If no CIC record exists, the system uses the value from the Item Master.

Standard Cost (15,5):   The system displays the standard cost for this item or commodity.

Vendor Lead Time (3,0):   You can specify additional lead time for this item/commodity and vendor. This field is reference only and has no effect on due dates. You can revise this date based on your agreement with the vendor for this quote.

Last Quote Date (8,0):   In Update mode, this field displays the date that this quote information was last updated. The date indicates how current the quote data is. In Add mode, this field displays the current date. You can change the date.

Contract Number (10,A):   Specify a code up to distinguish this contract or quote from other quotes for the same vendor and item. If you specify a contract number, the system updates the Contract to Date Quantity fields.

    If you access vendor contract/quote maintenance from the contract header maintenance program, the system uses the vendor number and the contract number from the contract header and you cannot maintain the numbers.

    Caution: If you use contract processing and you leave the contract number blank, the system does not update the contract header and detail files.

Contract Quantity (11,3):   Specify the vendor's total contract quantity commitment for this item or commodity.

Inventory Commodity (35,A): Infor LX displays the commodity code for this inventory item. The system displays this field only for inventory items.

Country of Origin (4,A): Specify the country of origin to assign to this vendor quote. The system assigns this country of origin to any purchase order or requisition lines priced with this quote. You must specify a valid value in the Country Master file, LCN.

Preliminary PO Price (15,5): Specify the price to use for preliminary POs if the ordered quantity does not equal or exceed the normal quote break levels. If this value is 0, the system uses the standard cost.

The system displays this field only if the system parameter and vendor master settings allow preliminary purchase orders.

Declaration Date (8,0): This field is reference only. Specify the date on which you assigned the country of origin to this quote.

Pur to Stock Conversion (11,5): Infor LX displays the purchasing unit of measure to stocking unit of measure conversion factor for this item. The system displays this field only for inventory items.

Quantity Level 1, 2, 3, 4, 5, 6, 7, 8 (11,3): The system uses these eight fields with the corresponding Price at Level fields on the right to establish quantity/price breaks. These quantity/price breaks are offered by this vendor as a volume discount.

Specify up to eight quantity levels for this quote. These quantities must be in the item's purchasing unit of measure. Each quantity level you specify requires a corresponding price at level amount. You must specify these quantity level amounts in ascending (increasing) order (25, 50, 100, 200, and so on). Do not specify zero as the beginning quantity. Infor LX retrieves the corresponding price to cost purchase orders.

Note: The values in the quantity fields represent the minimum quantity necessary to receive the price at that level. For example, if Qty Level 1 is 25 and Qty Level 2 is 50, you receive the price at level 1 pricing for any quantity between 25 and 50.

Price at Level 1, 2, 3, 4, 5, 6, 7, 8 (15,5): These eight fields represent the price per purchasing unit for the quantities specified in the corresponding Qty Level fields to the left. Leave the fields blank if the Quantity Level fields immediately to the left are also blank.

Specify up to eight price at level prices to correspond to the quantity levels to the left. You must specify these purchasing unit prices in descending (decreasing) order($5.00, $4.75, $4.25, $3.95). Infor LX checks the quantity level, retrieves the correct price, and then performs the purchase order costing. See the example at the end of this section.

You must specify prices in the currency used to negotiate the quote.

You must specify at least one quantity/price combination for Infor LX to update the Vendor Quote Master file; otherwise, use F17 to override.

After the system retrieves a price, the Expected Cost field of the Purchase Order Master file displays the price.

Ordered (11,3):   The system displays the quantity ordered to date under this contract, based on purchase order line quantities from Purchase Order Release/Maintenance, PUR500, Requisition Release, PUR650, and Purchase Order Consolidation/Release, PUR640. The system updates this field only if you specify a value in the Contract Number field.

Received (11,3):   The system displays the quantity received to date under this contract, based on purchase order line receipts from Purchase Receipts, PUR550D, Inventory Transactions, INV500, and Invoice Entry, ACP500. The system updates this field only if you specify a value in the Contract Number field.

Costed: (11,3):   The system displays the quantity costed to date under this contract, based on cost transactions from Purchase Receipts, PUR550D, Inventory Transactions, INV500, and Invoice Entry, ACP500. The system updates this field only if you specify a value in the Contract Number field.

Last Order Date (8,0):   The system displays the most recent purchase order line entered against this contract from Purchase Order Release/Maintenance, PUR500, Purchase Order Consolidation/Release, PUR640, or Requisition Release, PUR650. The system updates this field only if you specify a value in the Contract Number field.

Last Rcpt Date (8,0):   The system displays the transaction date for the most recent purchase order line receipt under this contract from Purchase Receipts, PUR550D, Inventory Transactions, INV500, or Invoice Entry, ACP500. The system updates this field only if you specify a value in the Contract Number field.

Comments (120,A):   Specify any comments to accompany this vendor quote. You can use four separate fields of 30-character alphanumeric length. These comments print on the Vendor Quotations report, PUR256.

Screen actions - PUR150D2-01

Commands	Description
F18=Item/Vendor Quality	Access the Item/Vendor Quality Maintenance Selection screen, PUR120D1-0. You must have group authority to use this screen action.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view operation details

Use this screen to maintain the quote detail for an outside operation. The screen lists all the quotes available for this item, vendor, currency, facility, and contract. You can add quotes for the outside operation and maintain the details for existing quotes.

Field descriptions - PUR150D3-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Effective (8,0)	The starting effectivity date for the quote detail record is displayed. You can change this date.
Discontinue (8,0)	Specify the ending date for the quote detail record.
Contract (10,0)	Specify the contract number assigned to this quote.
Operation (3,0)	Specify the operation on the routing for the outside operation. The vendor's quote is for this outside operation.
Method (2,A)	Specify the routing method code for the item on the outside operation.

Screen actions - PUR150D3-01

Commands	Description
F13=Filters	Use Filters to display only active records or all records.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Specify quote details for an outside operation

Specify the details for the quote; include at least one quantity level and the price for that level.

Field descriptions - PUR150D4-01

Fields	Description
Manufacturer (8,A)	Specify the manufacturer to assign to this vendor quote for the outside operation.
Discontinue (8,0)	You can change the discontinued date that you entered on the previous screen.
Vendor Item (35,A)	The screen shows the vendor's number for this item from the base quote. You can change the item number. Infor LX retrieves this number to use on the purchase order.
Box Size (11,3)	Specify the quantity of the item to define as a standard box. The system uses the value from the Item Facility Planning (CIC) record as the default value. If no CIC record exists, the system uses the value from the Item Master.
Vendor Lead Time (3,0)	Specify additional lead time for this item, operation, and vendor. This field is for reference only and has no effect on due dates. You can revise this date based on your agreement with the vendor for this quote.
Last Quote Date (6,0)	The screen shows the last date that the quote was updated. You can change the date.
Contract Quantity (11,3)	Specify the vendor's total contract quantity commitment for this item and operation.
Preliminary PO Price (15,5)	Specify the price to use for preliminary POs if the ordered quantity does not equal or exceed the normal quote break levels. If this value is 0, the system uses the standard cost. To use preliminary prices, specify 1=Yes for the system parameter Allow use of Preliminary Purchase Orders in Purchasing System Parameters, PUR820D-03.

Qty Level (11,3)   Use the quantity level fields with the corresponding Price at Level fields to establish quantity/price breaks that are offered by this vendor as a volume discount.

Specify up to eight quantity levels in the item's purchasing unit of measure. Each quantity level that you enter requires a corresponding price at level amount. Specify these quantity level amounts in ascending (increasing) order for example, 25, 50, 100, 200. Do not enter 0 as the beginning quantity. LX retrieves the corresponding price when purchase orders are costed.

Note: These numbers represent the minimum quantity necessary to receive the price at that level. For example, if Qty Level 1 is 25 and Qty Level 2 is 50, you receive Price at Level 1 pricing for any quantity between 25 and 50.

Price (15,5)   Use these fields to specify the price per purchasing unit for the quantities entered in the corresponding Qty Level fields. Leave the fields blank if the Quantity Level fields immediately to the left are blank.

Specify up to eight prices to correspond to the quantity levels to the left. Specify these purchasing unit prices in descending (decreasing) order for example, $5.00, $4.75, $4.25, $3.95. LX retrieves the price for the corresponding quantity level and then costs the purchase order.

Declaration Date (8,0)   This field is reference only. Specify the date on which you assigned the country of origin to this quote.

Comments (60,A)   Describe any comments to accompany this vendor quote. These comments appear on the PUR150O4 report.

Screen actions - PUR150D4-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Contract header maintenance, PUR151D

Contract processing is a method to record an agreement between you and your vendor. Use the contract to monitor quantities ordered and received and their monetary values against the contract.

The contract consists of header and item details for one or many items, if the items are specific to the same vendor. You can have one item per contract or multiple contracts for the same vendor.

The system assigns purchase order numbers for each item on a contract; items can have the same or different purchase order numbers.

Each contract header can have up to three restrictions applied:

- Effectivity Date
- Maximum Quantity
- Maximum Value

Note: With these restrictions a buyer/planner cannot convert MRP planned orders into purchase order lines. A contract exception report is available to show contracts due to expire within x days, within x% of completion, and so on.

For example, you can create a contract for vendor number 1000 that includes 10 different items. At the header level you can stipulate that the contract is effective from January 1, 2005 to October 10, 2005, or that a maximum quantity of 50,000 units are purchased, or that a maximum monetary value of 100,000 is not exceeded. The same restrictions are available at the item detail level.

Infor LX calculates and displays the monetary values in the contract header in Base currency.

Access: Menu PUR03

Add or select a contract

Use the Contract Maintenance selection screen, PUR151D-01, to add a new contract, or to maintain or view an existing contract.

Field descriptions - PUR151D-01

Fields	Description
Line action:	The following line actions are available:
	11=Maintain Lines
	Maintain the contract detail information.
	12=Maintain Quotes
	Display the Vendor Quote Maintenance selection screen.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

11=Maintain Lines

Maintain the contract detail information.

12=Maintain Quotes

Display the Vendor Quote Maintenance selection screen.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Contract Number (10,A):

Specify a code to distinguish this contract from others for the same vendor. You manually assign contract numbers; you can use contract numbers that incorporate the vendor's name. For example, you can use ABCSUPPL01 to represent the ABC Supply Company.

Screen actions - PUR151D-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. 22)* in the overview information in this document.

Add maintain, or view contract header information

If you specify line actions 1 to create, 2 to revise, 3 to copy, or 5 to display from the Contract Maintenance selection screen, PUR151D-01, Infor LX displays the Contract Maintenance header information screen, PUR151D-02.

Field descriptions - PUR151D-02

Fields	Description
Contract Number (10,A):	Infor LX displays the contract number from the selection screen. You manually assign contract numbers and you can change the numbers in Create or Copy mode. You can use contract numbers that incorporate the vendor's name. For example, you can use ABCSUPPL01 to represent the ABC Supply Company.
Vendor Number (8,0):	Specify the mandatory vendor number associated with this contract.
Facility (3,A):	Specify the facility code associated with the contract. If you specify a facility, the contract details relate only to that facility. Leave this field blank to associate the contract with all facilities.
Type (1,A):	Specify the contract type code. Specify 0 for non-scheduled or 1 for scheduled.
Contract Start Date (8,0):	Specify a date on which the contract becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.
(Contract) End Date (8,0):	Specify a date after which the contract is no longer effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract. You must specify an end date to proceed to the next screen.
Contract Text 1 (40,A):	Specify free-form text or comments.
Contract Text 2 (40,A):	Specify free-form text or comments.
Contract Text 3 (40,A):	Specify free-form text or comments.
Contract Maximum Value (17,4):	Specify a maximum monetary value for this contract. The system assumes the value to be in the Infor LX base currency. If the maximum value is exceeded, Infor LX does not release planned orders from MRP to become purchase order lines. If a maximum value is defined on the contract header, the sum total of all item maximum values on the contract item details cannot exceed that defined at the header level. You can define maximum values at either the header or detail level or both. A value of 9999999999999.9999 indicates no limit.
Contract Ordered Value (17,4):	The system updates this field whenever you change the value of purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered value in calculations

within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Value (17,4):

The system updates this field whenever you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received value in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Maximum Quantity (13,3):

Specify a maximum quantity for this contract. The system assumes the quantity to be in the purchasing unit of measure defined for the item. Infor LX does not release planned orders from MRP to become purchase order lines if the maximum quantity is exceeded. If a maximum quantity is defined on the contract header, the sum total of all item maximum quantities on the contract cannot exceed the maximum quantity. You can define maximum quantities at either the header, detail level, or both. A value of 99999999999.99 indicates no limit.

Contract Ordered Quantity (13,3):

The system updates this field whenever you change the quantity on purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Quantity (13,3):

The system updates this field whenever you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Screen actions - PUR151D-02

Commands	Description
F20=User Details	Specify user details. Infor LX displays the Contract Maintenance user-defined information screen, PUR151D-03.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add user-defined text

Use F20, User Details, on the Contract Maintenance header information screen, PUR151D-02, to access the Contract Maintenance user-defined information screen, PUR151D-03, which allows you to enter user-defined details.

Field descriptions - PUR151D-03

Fields	Description
User-Defined Text 1 (30,A):	Specify free-form text or comments.
User-Defined Text 2 (30,A):	Specify free-form text or comments.
User-Defined Text 3 (30,A):	Specify free-form text or comments.
User-Defined Quantity 1 (17,4):	Specify a free-form value.
User-Defined Quantity 2 (17,4):	Specify a free-form value.
User-Defined Quantity 3 (17,4):	Specify a free-form value.

Screen actions - PUR151D-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. 22)* in the overview information in this document.

Contract detail maintenance, PUR152D

After the contract header information exists, you can create contract detail lines for one or more items. You cannot purchase items through a contract without valid contract detail information.

Contract details contain information about each item you intend to purchase on a contract. As with the header information, you can optionally define restrictions such as date effectivity, maximum quantity, or maximum value.

Note: A purchasing system parameter enables you to prohibit acceptance of an item or commodity in a purchase order line if a valid/approved Item or Commodity/Vendor record does not exist in the Item/Vendor Master file, HAV. If purchase order lines are revised, they are subject to revalidation to ensure that the associated item/vendor record is still valid (that the effective/discontinue date range set up for the contract falls within the effective and discontinue dates of the matched item/vendor record).

The sum total of all quantity or value restrictions defined at an item level on a contract cannot exceed the restrictions defined on the header.

Infor LX calculates and displays the monetary values in the contract detail panel in base currency.

You can define purchase order numbers manually or automatically for each item detail record. You can have more than one item on a contract with the same order number. Each time you release requirements from MRP, the system adds the requirements as additional lines to the purchase order number recorded on the contract detail record.

In a multi-facility environment, you can specify a facility or you can leave the facility code blank to define one record for each item. For example, if item ABC123 is purchased on behalf of three facilities, you can have one value for item ABC123 and a blank facility code or three separate values, one for each facility. Alternatively, you can have separate contracts, headers and detail, for each facility.

When you create a contract, the system creates purchase order header information. When you use the online release programs, batch release program, or PO Release/Maintenance, PUR500, the system adds the lines to this purchase order.

You must choose one of two schedule types.

Production schedules generate releases with requirements time-phased across user-defined time buckets. This type is most often used for normal inventory items. The system always prints open requirements within a user-defined schedule horizon. To reprint requirements, specify Amend to reset the PO print setting to 0.

Consumable schedules are used for inventory or non- inventory consumable items. Requirements are immediate, not time-phased, and print only once. To reprint requirements, specify Amend to reset the PO print setting to 0.

Access: Menu PUR03

Add or select contract detail information

Use the Contract Detail Maintenance selection screen, PUR152D-01, to add new contract detail lines for an existing contract or to select a detail line to maintain or view.

Field descriptions - PUR152D-01

Fields	Description
Line Actions	The action codes described in the following section are available:
	13=Operation Detail Lines
	Display the Contract Operation Detail Maintenance screen, PUR152D3-01, to create or maintain the contract details for an outside operation.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
	13=Operation Detail Lines
	Display the Contract Operation Detail Maintenance screen, PUR152D3-01, to create or maintain the contract details for an outside operation.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Item Number (35,A):	Specify the item number associated with this contract line. The item number must exist in the Item Master file.
	Note: If you receive into a warehouse type 4, an Infor Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:
	■ Item Type 0, Phantom ■ Item Type 3, Assortment ■ Item Type 4, Kit

- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Facility (3,A):   Specify the facility code associated with the contract detail line. If specified, the contract details relate only to the specified facility. Leave this field blank to associate the contract detail line with all facilities.

Warehouse (3,A):   Specify the warehouse code associated with the contract detail line. If specified, the contract details relate only to the specified warehouse. Leave this field blank to associate the contract detail line with all warehouses within any specified facility.

To consolidate lines of a scheduled contract with Purchase Order Consolidation/Release, PUR641, you must specify a warehouse in this field.

Note: If you receive into a warehouse type 4, an Infor Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Purchase Order Number (9,0):   Specify a purchase order number associated with this contract detail line. If you leave this field blank, the system automatically assigns an order number from the system parameters. If you manually assign a purchase order number, you cannot use a previously existing number unless the number is for the same vendor and contract associated with the contract detail line. Note that a contract with fifty different items can have from one to fifty purchase order numbers.

The purchasing system parameters allow you to assign different PO number ranges for production and consumable type items.

Contract (10,A):   Specify the contract number for the item to maintain.

Vendor Number (8,0):   Specify the vendor number for the contract to maintain.

Effective From Date (8,0):   Specify a date on which the contract detail line becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Planner code (3,A):   Specify the planner responsible for a particular contract line. If you specify a facility, the system uses the planner code defined in the Item Facility file, if a

value exists. Otherwise, the system uses the planner code in the Item Master file.

Buyer code (3,A): Specify the buyer responsible for a particular contract line. If you specify a facility, the system uses the buyer code defined in the Item Facility file if a value exists. Otherwise, the system uses the buyer code in the Item Master file.

Screen actions - PUR152D-01

Commands	Description
F13=Filters	Specify whether to view all records or only active records and specify the sort sequence.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view contract information

If you access Contract Detail Maintenance from Contract Header Maintenance, Infor LX displays the Contract Detail Maintenance screen, PUR152D-02. Use this screen to add, revise, delete, or view contract detail information.

Field descriptions - PUR152D-02

Fields	Description
Line Actions	The action codes described in the following section are available:
	13=Operation Detail Lines
	Display the Contract Operation Detail Maintenance screen, PUR152D3-01, to create or maintain the contract details for an outside operation.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

13=Operation Detail Lines

Display the Contract Operation Detail Maintenance screen, PUR152D3-01, to create or maintain the contract details for an outside operation.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Item Number (35,A):

Specify the item number associated with this contract line. The item number must exist in the Item Master file.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Facility (3,A):

Specify the facility code associated with the contract detail line. If specified, the contract details relate only to the specified facility. Leave this field blank to associate the contract detail line with all facilities.

Warehouse (3,A):

Specify the warehouse code associated with the contract detail line. If specified, the contract details relate only to the specified warehouse. Leave this field blank to associate the contract detail line with all warehouses within any specified facility.

Note: If you receive into a warehouse type 4, a Warehouse BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Purchase Order Number (9,0):

Specify a purchase order number associated with this contract detail line. If you leave this field blank, the system automatically assigns an order number from the system parameters. If you manually assign a purchase order number, you cannot use a previously existing number unless the number is for the same vendor and contract associated with the contract detail line. Note that

a contract with fifty different items can have from one to fifty purchase order numbers.

Effective From Date (8,0): Specify a date on which the contract detail line becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Screen actions - PUR152D-02

Commands	Description
F13=Filters	Specify whether to view all records or only active records.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view contract detail line information

If you specify line actions 1 to create, 2 to revise, 3 to copy, or 5 to display from the Contract Detail Maintenance selection screen, PUR152D-01, Infor LX displays the Contract Detail Maintenance detail screen, PUR152D-03. Use this screen to add, maintain, or view information for contract detail lines.

Field descriptions - PUR152D-03

Fields	Description
Contract Number (10,A):	Infor LX displays the contract number specified on the selection screen.
Vendor Number (8,0):	Infor LX displays the vendor number specified on the selection screen.
P O Number (9,0):	Infor LX displays the purchase order number specified on the selection screen.
	The purchasing system parameters allow you to assign different PO number ranges for production and consumable type items.
Item Number (35,A):	Infor LX displays the item number specified on the selection screen. The item must exist in the Item Master file.
Ship to Type (1,0):	Specify the code for the ship-to record.
	■ 0, use Ship-to number from the Ship-to Master file

- 1, use the Customer number from the Customer Master file
- 2, use the Vendor number from the Vendor Master file
- 3, use the Warehouse from the Warehouse Master file
- 4, use manually entered ship-to information
- 5, use the address information from the related customer order when creating the new PO line. (valid for purchased kanban items flagged as lean only).

Ship To (4,0): Specify the ship-to number for each contract detail line. This code defines where to deliver the goods ordered. The ship-to number is based on the ship-to type. Valid choices are:

- 0=Specify a (4,0) ship to number corresponding to a ship-to master (EST) record.
- 1=Specify a (6,0) customer number corresponding to a customer master (RCM) record.
- 2=Specify a (5,0) vendor number corresponding to a vendor master (AVM) record.
- 3=Specify a (2,A) warehouse code corresponding to a warehouse master (IWM) record.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

Item Type 0, Phantom

Item Type 3, Assortment

Item Type 4, Kit

Item Type 5, Planning Bill

Item Type 6, non-Balancing

Container-Controlled Item

Facility (3,A): Infor LX displays the facility code specified on the selection screen. If specified, the contract details relate only to the specified facility. Leave this field blank to associate the contract detail line with all facilities.

Warehouse (3,A): Infor LX displays the warehouse code specified on the selection screen. If specified, the contract details relate only to the specified warehouse. Leave this field blank to associate the contract detail line with all warehouses within the specified facility.

Note: If you create a purchase order from a contract detail that has a blank warehouse, the system validates the user's user authority against the stocking warehouse for the item/facility assigned to the contract.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Planner code (3,A): Infor LX displays the planner code specified on the selection screen. The planner code specified is responsible for this contract detail line. If you specify a facility, the system uses the planner code defined in the Item Facility file if a value exists. Otherwise, the system uses the planner code in the Item Master file.

Buyer code (3,A): Infor LX displays the buyer code specified on the selection screen. The buyer code specified is responsible for this contract detail line. If you specify a facility, the system uses the buyer code defined in the Item Facility file if a value exists. Otherwise, the system uses the buyer code in the Item Master file.

Append to Schedule (1,A): Specify the required value. Specify Yes to append. Otherwise, specify No.

Note: If you specify No, the system does not append requirements to this schedule. If the contract is about to expire, you may not want to append additional requirements to this contract. The default value is Yes.

Schedule Type (1,A): Specify the schedule type to define the type of printed document output for this item/order at schedule print time. You can choose one of these two schedule types:

Production schedules generate releases with requirements time-phased across user-defined time buckets. This type is most often used for normal inventory items. The system always prints open requirements within a user-defined schedule horizon. To reprint requirements, specify Amend to reset the PO print setting to 0.

Consumable schedules are used for inventory or non- inventory consumable items. Requirements are immediate, not time-phased, and print only once. To reprint requirements, specify Amend to reset the PO print setting to 0.

1=Schedule is for production type items or raw materials

2=Schedule is for consumable type items

PO Print Flag (1,A):   This field indicates whether the purchase order has printed. Specify one of the following values:

0=No

1=Yes

2=Amend

Amend resets all purchase order line print flags to 0, and allows you to reprint.

Outside Operation PO (1,0):   Specify 1 to make the contract available for outside operation PO pricing. Otherwise, specify 0.

Outside Work Center (6,0):   Specify the outside work center to limit the contract to shop order outside operations that are for the same work center as the contract. If you leave this field blank, the contract is valid for all work centers.

Vendor Item (35,A):   In Revise Mode, specify the code or number used by the supplying vendor for this item. Infor LX retrieves this number to use on the purchase order.

In Create mode, if a valid quotation exists that contains a vendor item number, the system populates this field after you press Enter.

Contract Start Date (8,0):   Specify a date on which the contract detail line becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Contract End Date (8,0): Specify a date after which the contract detail lines are no longer effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Contract Maximum Value (17,4):   Specify a maximum monetary value for this contract detail line. The system assumes the value to be in the Infor LX base currency. Infor LX does not release planned orders from MRP to become purchase order lines if the maximum value is exceeded. If a maximum value is defined on the contract header, the sum total of all item maximum values on the contract item details cannot exceed that defined at the header level. You can define maximum values at either the header or detail level or both. A value of 9999999999999.9999 indicates no limit.

Contract Maximum Quantity (13,3):   Specify a maximum quantity for this contract detail line. The system assumes the quantity to be in the purchasing unit of measure defined for the item. Infor LX does not release planned orders from MRP to become purchase order lines if the maximum quantity is exceeded. If a maximum quantity is defined

on the contract header, the sum total of all item maximum quantities on the contract cannot exceed the maximum quantity. You can define maximum quantities at either the header, detail level, or both. A value of 99999999999.99 indicates no limit.

Contract Ordered Value (17,4):   The system updates this field if you change the value of purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered value in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Ordered Quantity (13,3):   The system updates this field automatically if you change the quantity on purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Value (17,4):   The system updates this field if you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received value in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Quantity (13,3):   The system updates this field if you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Comment (10,A):   Specify a ten-character comment in this field. This field is for reference only.

Box Size (11,3): Specify the quantity of the item to define as a standard box. The system uses the value from the Item Facility Planning record, CIC. If no CIC record exists, the system uses the value from the Item Master.

Last Release Date (8,0): The system updates this field whenever you convert MRP requirements into purchase order lines.

Last Release Number (8,0): This system increases this number sequentially if you print a schedule. You can reset this number manually.

Shipping Pattern (10,A): The system uses the value from the Vendor Master record, but you can override the value here. Specify the shipping pattern code that holds the dates on which you accept shipments from your vendor. You can use this code to adjust the vendor due date from converted MRP requirements on the purchase order line so that the shipment falls on a shipping date for the specified shipping pattern. Leave the code blank if all working days are acceptable for the shipment.

The code you enter must exist in the Shipping Patterns file.

If you create a shipping pattern for a contract that extends more than one year, create a shipping pattern code record for each included year, but give each record the same shipping pattern code name.

For example, for a contract that begins in 2005 and ends some time in 2006 in which you want to receive a shipment every Wednesday , you can call the pattern Wednesdays. Define a Wednesdays shipping pattern for year 2005 and a Wednesdays shipping pattern for year 2006. Specify an every-Wednesday shipment in each pattern. When you assign the shipping pattern to your contract, Infor LX finds the pattern correctly under code Wednesdays, regardless of the year.

Warning: If you assign a shipping pattern code that is defined for a shorter term than the term of the contract, the system calculates an incorrect vendor delivery date for PO lines released after the term of the shipping pattern code. Infor LX assigns the last valid shipping pattern date to these lines. In the example above, if you use a shipping pattern code defined only for Wednesdays in 2005, PO lines for a Wednesday in the year 2006 will receive the date of the last Wednesday in 2005. However, the system sets the requirement date correctly as the PO line due date.

Print Frequency Code (1,A): This is a user defined field used in conjunction with the schedule print programs. You can optionally define as many as five print frequency codes to use for the selection of the item ranges when you print schedules.

Release Method (1,0): Specify the code to denote how to convey a schedule for an item/vendor combination to the supplier. Specify one of the following values:

Valid choices

- **0**

  None
- **1**

  Print only
- **2**

  Print and EDI
- **3**

  EDI only
- **4**

  Print and Supplier Exchange
- **5**

  Supplier Exchange only

Self Bill Method (1,A): Use this field to indicate whether the self bill method is applicable for this contract detail and how to process self-billing. The system displays this field only if you specify Yes in the Self Billing Allowed field in the Vendor Master. You can change the contract detail after creation, but after a PO line is received, you cannot change the value. This system uses 0 as the default value.

Specify one of the following values:

Because the vendor is not known when you create a contract detail manually, the system always displays this field in Create mode. If the Self Billing Allowed field specifies No for the vendor, the system does not display the Self Bill Method field in Revise mode and you receive an error if you specify a value in the Self Bill Method field. You will also receive an error if you specify a type 3 warehouse. Valid choices are:

- 0=Not used. Do not use self bill for this contract detail.
- 1=Bill at Receipt. Process an invoice after you receive inventory.
- 2=Bill at Consumption. Process an invoice after a shop order consumes inventory.

Screen actions - PUR152D-03

Commands	Description
F18=Item/Vendor Quality	Access the Item/Vendor Quality Maintenance Selection screen, PUR120D1-01. You must have user authority to use this screen action. F3 from Item/Vendor Quality Maintenance screens returns you to this screen.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add or select contract operation detail information

Use the Contract Detail Operation Maintenance selection screen, PUR152D3-01, to add or maintain detail lines for a contract for an outside operation.

Field descriptions - PUR152D3-01

Fields	Description
Line Actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Act (2,0):	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
P. Ord (9,0):	Specify a purchase order number associated with this contract detail line. If you leave this field blank, the system automatically assigns an order number from the system parameters. If you manually assign a purchase order number, you cannot use a previously existing number unless the number is for the same vendor and contract associated with the contract detail line. Note that a contract with fifty different items can have from one to fifty purchase order numbers.
Contract (10,A):	Specify the contract number for the outside operation.
Operation (3,0):	Specify the operation on the routing for the outside operation. The contract is for this outside operation.
Method (2,A):	Specify the routing method code for the item on the outside operation.

Effective From Date (8,0): Specify a date on which the contract detail line becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Planner (3,A): Specify the planner responsible for a particular contract line. If you specify a facility, the system uses the planner code defined in the Item Facility file, if a value exists. Otherwise, the system uses the planner code in the Item Master file.

Buyer (3,A): Specify the buyer responsible for a particular contract line. If you specify a facility, the system uses the buyer code defined in the Item Facility file if a value exists. Otherwise, the system uses the buyer code in the Item Master file.

Screen actions - PUR152D3-01

Commands	Description
F13=Filters	Specify whether to view all records or only active records and specify the sort sequence.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view contract detail line information

If you specify line actions 1 to create, 2 to revise, 3 to copy, or 5 to display from the Contract Detail Maintenance selection screen, PUR152D3-01, Infor LX displays the Contract Detail Operation Maintenance detail screen, PUR152D3-02. Use this screen to add, maintain, or view information for contract detail lines for an outside operation.

Field descriptions - PUR152D3-02

Fields	Description
Contract Number (10,A):	Infor LX displays the contract number specified on the selection screen.
Vendor Number (8,0):	Infor LX displays the vendor number specified on the selection screen.
P O Number (9,0):	Infor LX displays the purchase order number specified on the selection screen.

The purchasing system parameters allow you to assign different PO number ranges for production and consumable type items.

Item Number (35,A):   Infor LX displays the item number specified on the selection screen. The item must exist in the Item Master file.

Ship to Type (1,0):   Specify the code for the ship-to record.

- 0, use Ship-to number from the Ship-to Master file
- 1, use the Customer number from the Customer Master file
- 2, use the Vendor number from the Vendor Master file
- 3, use the Warehouse from the Warehouse Master file
- 4, use manually entered ship-to information
- 5, use the address information from the related customer order when creating the new PO line. (valid for purchased kanban items flagged as lean only).

Ship To (4,0):   Specify the ship-to number for each contract detail line. This code defines where to deliver the goods ordered. The ship-to number is based on the ship-to type. Valid choices are:

- 0=Specify a (4,0) ship to number corresponding to a ship-to master (EST) record.
- 1=Specify a (6,0) customer number corresponding to a customer master (RCM) record.
- 2=Specify a (5,0) vendor number corresponding to a vendor master (AVM) record.
- 3=Specify a (2,A) warehouse code corresponding to a warehouse master (IWM) record.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

Item Type 0, Phantom

Item Type 3, Assortment

Item Type 4, Kit

Item Type 5, Planning Bill

Item Type 6, non-Balancing

Container-Controlled Item

Facility (3,A): Infor LX displays the facility code specified on the selection screen. If specified, the contract details relate only to the specified facility. Leave this field blank to associate the contract detail line with all facilities.

Warehouse (3,A): Infor LX displays the warehouse code specified on the selection screen. If specified, the contract details relate only to the specified warehouse. Leave this field blank to associate the contract detail line with all warehouses within the specified facility.

Note: If you create a purchase order from a contract detail that has a blank warehouse, the system validates the user's user authority against the stocking warehouse for the item/facility assigned to the contract.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Planner code (3,A): Infor LX displays the planner code specified on the selection screen. The planner code specified is responsible for this contract detail line. If you specify a facility, the system uses the planner code defined in the Item Facility file if a value exists. Otherwise, the system uses the planner code in the Item Master file.

Buyer code (3,A): Infor LX displays the buyer code specified on the selection screen. The buyer code specified is responsible for this contract detail line. If you specify a facility, the system uses the buyer code defined in the Item Facility file if a value exists. Otherwise, the system uses the buyer code in the Item Master file.

Append to Schedule (1,A): Specify the required value. Specify Yes to append. Otherwise, specify No.

Note: If you specify No, the system does not append requirements to this schedule. If the contract is about to expire, you may not want to append additional requirements to this contract. The default value is Yes.

Schedule Type (1,A): Specify the schedule type to define the type of printed document output for this item/order at schedule print time. You can choose one of these two schedule types:

Production schedules generate releases with requirements time-phased across user-defined time buckets. This type is most often used for normal in-

ventory items. The system always prints open requirements within a user-defined schedule horizon. To reprint requirements, specify Amend to reset the PO print setting to 0.

Consumable schedules are used for inventory or non- inventory consumable items. Requirements are immediate, not time-phased, and print only once. To reprint requirements, specify Amend to reset the PO print setting to 0.

1=Schedule is for production type items or raw materials

2=Schedule is for consumable type items

PO Print Flag (1,A):   This field indicates whether the purchase order has printed. Specify one of the following values:

0=No

1=Yes

2=Amend

Amend resets all purchase order line print flags to 0, and allows you to reprint.

Operation (3,0):   Specify the operation on the routing for the outside operation. The contract is for this outside operation.

Method (2,A):   Specify the routing method code for the item on the outside operation.

Outside Operation PO (1,0):   Specify 1 to make the contract available for outside operation PO pricing. Otherwise, specify 0.

Outside Work Center (6,0):   Specify the outside work center to limit the contract to shop order outside operations that are for the same work center as the contract. If you leave this field blank, the contract is valid for all work centers.

Vendor Item (35,A):   In Revise Mode, specify the code or number used by the supplying vendor for this item. Infor LX retrieves this number to use on the purchase order.

In Create mode, if a valid quotation exists that contains a vendor item number, the system populates this field after you press Enter.

Contract Start Date (8,0):   Specify a date on which the contract detail line becomes effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Contract End Date (8,0):   Specify a date after which the contract detail lines are no longer effective. If you specify contract effectivity dates in the contract header information, the system uses these dates for any new items added to the contract.

Contract Maximum Value (17,4): Specify a maximum monetary value for this contract detail line. The system assumes the value to be in the Infor LX base currency. Infor LX does not release planned orders from MRP to become purchase order lines if the maximum value is exceeded. If a maximum value is defined on the contract header, the sum total of all item maximum values on the contract item details cannot exceed that defined at the header level. You can define maximum values at either the header or detail level or both. A value of 9999999999999.9999 indicates no limit.

Contract Maximum Quantity (13,3): Specify a maximum quantity for this contract detail line. The system assumes the quantity to be in the purchasing unit of measure defined for the item. Infor LX does not release planned orders from MRP to become purchase order lines if the maximum quantity is exceeded. If a maximum quantity is defined on the contract header, the sum total of all item maximum quantities on the contract cannot exceed the maximum quantity. You can define maximum quantities at either the header, detail level, or both. A value of 99999999999.99 indicates no limit.

Contract Ordered Value (17,4): The system updates this field if you change the value of purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered value in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Ordered Quantity (13,3): The system updates this field automatically if you change the quantity on purchase order lines linked to this contract. However, you can maintain or override this field manually. The system uses the contract ordered quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Value (17,4): The system updates this field if you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received value in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Contract Received Quantity (13,3): The system updates this field if you receive a quantity. However, you can maintain or override this field manually. The system uses the contract received quantity in calculations within the contract exception report to determine the completion percentage against a contract.

Note: The system does not include values and quantities for packaging items associated with contract items in the contract ordered and received quantities and values.

Comment (10,A): Specify a ten-character comment in this field. This field is for reference only.

Box Size (11,3): Specify the quantity of the item to define as a standard box. The system uses the value from the Item Facility Planning record, CIC. If no CIC record exists, the system uses the value from the Item Master.

Last Release Date (8,0): The system updates this field whenever you convert MRP requirements into purchase order lines.

Last Release Number (8,0): This system increases this number sequentially if you print a schedule. You can reset this number manually.

Shipping Pattern (10,A): The system uses the value from the Vendor Master record, but you can override the value here. Specify the shipping pattern code that holds the dates on which you accept shipments from your vendor. You can use this code to adjust the vendor due date from converted MRP requirements on the purchase order line so that the shipment falls on a shipping date for the specified shipping pattern. Leave the code blank if all working days are acceptable for the shipment.

The code you enter must exist in the Shipping Patterns file.

If you create a shipping pattern for a contract that extends more than one year, create a shipping pattern code record for each included year, but give each record the same shipping pattern code name.

For example, for a contract that begins in 2005 and ends some time in 2006 in which you want to receive a shipment every Wednesday , you can call the pattern Wednesdays. Define a Wednesdays shipping pattern for year 2005 and a Wednesdays shipping pattern for year 2006. Specify an every-Wednesday shipment in each pattern. When you assign the shipping pattern to your contract, Infor LX finds the pattern correctly under code Wednesdays, regardless of the year.

Warning: If you assign a shipping pattern code that is defined for a shorter term than the term of the contract, the system calculates an incorrect vendor delivery date for PO lines released after the term of the shipping pattern code. Infor LX assigns the last valid shipping pattern date to these lines. In the example above, if you use a shipping pattern code defined only for Wednesdays

in 2005, PO lines for a Wednesday in the year 2006 will receive the date of the last Wednesday in 2005. However, the system sets the requirement date correctly as the PO line due date.

Print Frequency Code (1,A): This is a user defined field used in conjunction with the schedule print programs. You can optionally define as many as five print frequency codes to use for the selection of the item ranges when you print schedules.

Release Method (1,0): Specify the code to denote how to convey a schedule for an item/vendor combination to the supplier. Specify one of the following values:

Valid choices

- **0**
  None
- **1**
  Print only
- **2**
  Print and EDI
- **3**
  EDI only

Self Bill Method (1,A): Use this field to indicate whether the self bill method is applicable for this contract detail and how to process self-billing. The system displays this field only if you specify Yes in the Self Billing Allowed field in the Vendor Master. You can change the contract detail after creation, but after a PO line is received, you cannot change the value. This system uses 0 as the default value.

Specify one of the following values:

Because the vendor is not known when you create a contract detail manually, the system always displays this field in Create mode. If the Self Billing Allowed field specifies No for the vendor, the system does not display the Self Bill Method field in Revise mode and you receive an error if you specify a value in the Self Bill Method field. You will also receive an error if you specify a type 3 warehouse. Valid choices are:

- 0=Not used. Do not use self bill for this contract detail.
- 1=Bill at Receipt. Process an invoice after you receive inventory.
- 2=Bill at Consumption. Process an invoice after a shop order consumes inventory.

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Contract listing, PUR153D

Contract Listing, PUR153D, provides a report that shows contract details. You can restrict the report to show only contract header details, contract item details, or both. You can also restrict the report to a range of contract numbers or vendor numbers or both.

Access: Menu PUR02

Print a contract report

Use the Contract Report screen, PUR153D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR153D-01

Fields	Description
From Contract Number (10,A):	Specify a range of values to limit the contract number codes to include in the report.
To Contract Number (10,A):	Specify a range of values to limit the contract number codes to include in the report.
From Vendor Number (8,0):	Specify a range of values to limit the vendor number codes to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor number codes to include in the report.
Report Type (1,0):	Define the type of contract details to print on the report. Specify one of the following values:

1

Prints contract header details only

2

Prints contract item details only

3

Prints both contract header and item details. This is the default value.

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 - PUR153D-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. 22)* in the overview information in this document.

Schedule price maintenance, PUR154D

Use Schedule Price Maintenance, PUR154D, to update the purchase order price for outstanding purchase order lines if you revise a quotation. If you create purchase order lines from a contract, the system uses the price from the Quotation file and uses the price break and price effectivity information to arrive at an expected price for each order line. The system generates some of these lines for requirements due in the future. If the supplier updates prices between the time when the lines are created and the goods are received, you can also update the Quotation file to reflect this change. The system does not automatically update prices on the existing order lines unless you run this program. Note that the system updates only purchase order lines with no receipts.

Access: Menu PUR03

Select a price to schedule

Use the Schedule Price Maintenance selection screen to select the price to schedule.

Field descriptions - PUR154D-01

Fields	Description
Action (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.
	11=Select
	Select the required schedule price by vendor
	13=Operation Detail
	Access the Vendor Schedule Price Operation Detail screen, PUR154D1-01, to select and update the purchase order price for an outstanding purchase order line for an outside operation.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
	11=Select
	Select the required schedule price by vendor
	13=Operation Detail
	Access the Vendor Schedule Price Operation Detail screen, PUR154D1-01, to select and update the purchase order price for an outstanding purchase order line for an outside operation.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Item Number (35,A):	Specify the item number associated with this schedule price. The item number must exist in the Item Master file.
Vendor (8,0):	Specify the vendor number associated with this schedule price.
Quote Effective Date (8,0):	Specify the date this vendor quote becomes effective, that is, the first effective day for this quote.
	If you have more than one quote for the same vendor and item, the effective periods must be unique. The periods can, however, overlap. If the system

must choose between two or more valid effective quotes, it always uses the lowest priced quote.

Quote Discontinue Date (8,0):

Specify the date to discontinue this vendor quote. This is the first day that this quote is not effective.

This date must occur after the quote effective date.

Currency (3,A):

Specify the currency in which the price is quoted.

Contract

Specify the contract for which to update the price.

Fac (3,A):

Specify the facility to which this quote applies. The program only updates lines that have a facility that matches the facility specified for this quote.

Caution: Do not leave this field blank if you created facility-specific quotes. If this field is blank, when you press Enter on the maintenance panel, the system reprices contract detail/purchase order lines and does not consider any existing facility-specific quotes.

Screen actions - PUR154D-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. 22)* in the overview information in this document.

Apply the new price

Use the Schedule Price Maintenance screen to apply the new price changes from the Quotation file to existing purchase order lines. Infor LX displays the field values entered or selected on the selection panel for item, vendor, effective and discontinue dates, currency, and facility. This screen also displays the quantity and price levels of the quote.

Caution: If you created facility-specific quotes, ensure that the Facility field displays a value. If this field is blank, when you press Enter, the system reprices contract detail/purchase order lines and does not consider any existing facility-specific quotes. You can cancel this screen before you update any lines and specify the facility number on the selection screen.

Use this screen to apply the new price changes from the Quotation file to existing purchase order lines. You cannot maintain the fields.

Screen actions - PUR154D-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. 22)* in the overview information in this document.

Specify the purchase order price for an outside operation

Use the Vendor Schedule Price Operation Detail screen to update the purchase order price for outstanding purchase order lines. Update the purchase order price after you update the quote for an outside operation.

After you select the outside operation and press Enter, the PUR154D1-02 screen is displayed. Review the information that is displayed and press Enter to update the outstanding purchase order lines with the information in the quote.

Field descriptions - PUR154D1-01

Fields	Description
Action (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. **11=Select** Select the record for the outside operation.
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. **11=Select** Select the record for the outside operation.
Operation (3,0):	Specify the operation that is associated with this schedule price.
Method (2,A):	Specify the routing method code for the item on the outside operation.
Effective (8,0)	Specify the starting effectivity date for the quote detail record.
Discontinue (8,0)	Specify the ending date for the quote detail record.
Contract (10,0)	Specify the contract number assigned to this item and operation.

Screen actions - PUR154D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Week numbers/date X-ref maintenance, PUR155D1

Use Week Numbers/Date Cross Reference Maintenance, PUR155D1, to maintain a cross reference between week numbers and calendar dates.

After you specify the year number, number of weeks in the year, and start date of the year, the system automatically sets up the cross reference.

You can later amend the number of weeks in the year, and year and week start dates. You can delete entire cross references. If you create weeks with other than seven days, you cannot use the shipping pattern maintenance auto-create function.

Access: Menu PUR02

Specify the year for the cross reference

Use the Week Numbers/Dates Cross Reference year specification screen, PUR155D1-01, to specify the year for the cross reference.

Field descriptions - PUR155D1-01

Fields	Description
Year number (4,0):	Specify a numerical designation for the year calendar to create or retrieve. You can use any unique numerical string, but Infor recommends that you consistently use a meaningful two-character or four-character string that identifies the year for which you create the calendar, such as 98 or 1998 for the real year 1998. You can create a year called 98 and a differently defined year called 1998 to create two separate calendars. None of the calendars

that you create can have week starting dates that match those in any other calendar.

Screen actions - PUR155D1-01

Commands	Description
F15=Auto Create	Automatically create a new year.
F21=Delete Year	Delete a previously defined year.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Specify additional cross reference information

If you use F15, Auto Create, or if you specify a year for which no cross reference record exists, on the Week Numbers/Dates Cross Reference year specification screen, PUR155D1-01, Infor LX displays the Week Numbers/Dates Cross Reference selection screen, PUR155D1-02. Use this screen to specify the number of weeks and the first date for the cross reference year.

Field descriptions - PUR155D1-02

Fields	Description
Year number (4,0):	Infor LX displays the year number specified on the previous screen. You can amend the year number.
Number of Weeks in year (2,0):	Specify the number of weeks in the year.
First Date in Year (8,0):	Specify the start date of the first week of the year.

Screen actions - PUR155D1-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Week numbers/dates X-ref details, PUR155D2

Use the Week Numbers/Dates Cross Reference detail maintenance program, PUR155D2, to add and maintain cross reference records.

Add or maintain a cross reference

If you press Enter from the Week Numbers/Dates Cross Reference year specification screen, PUR155D1-01, or the Week Numbers/Dates Cross Reference details screen, PUR155D1-02, Infor LX displays the Week Numbers/Dates Cross Reference detail maintenance screen, PUR155D2-01. Use this screen to add or maintain a cross reference record.

The following fields display header information:

- Year number
- Number of weeks in year
- Start date of year
- End date of year

You cannot maintain the week numbers.

Field descriptions - PUR155D2-01

Fields	Description
Starts (8,0):	Infor LX displays a table that shows week numbers and corresponding start dates. To amend the start date of a week specify the new start date in the appropriate field.

Screen actions - PUR155D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Family group explode contract, PUR156D

Use Family Group Explode Contract, PUR156D, to generate contract details for all items with the same family group code in the IIM file. You maintain the family group code in IDF Enterprise Item.

Create contract details by family group code

Use the Explode Contract By Family Group Code selection screen, PUR156D-01, to specify the contract number for which to create contract details. You can explode only scheduled contracts.

Specify a contract number and press Enter to run the program.

Field descriptions - PUR156D01

Fields	Description
Contract Number (10,A):	Specify the contract number to explode. You can explode only scheduled contracts.

Screen actions - PUR156D01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Contract description list, WINHCHD

You can access this program when you prompt on the Contract Number field in the Explode Contract By Family Group Code selection screen.

Select a contract

Use the Contract Description List screen to select a contract to explode. The information on this screen comes from the Contract Header file, HCH, which you maintain in Contract Header Maintenance, PUR151.

Field descriptions - Contract description list

Fields	Description
Action (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Contract (10,A):	The system displays the contract number to select for explosion.

Vendor (8,0):	The system displays the vendor associated with the contract.
Contract Description (40,A):	The system displays the contract description.

Screen actions - Contract description list

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor split rule maintenance, PUR157D1

Use Vendor Split Rule Maintenance, PUR157D1, to create, maintain, and view the rules for the allocation of one item's MRP generated requirements to a number of vendors. Only Batch Release and Production Schedule Print use the rules defined here.

The items used must be defined as appendable within the Contract Detail file. The rules give various methods to divide the required quantity; you can use the rules in combination if they are valid but not mutually exclusive. The system applies the rules in the sequence in which the vendors are defined. The last vendor in sequence must not have any maximum or minimum restrictions as that vendor receives whatever quantities are left.

You do not need multiple vendors to use the round-to multiple feature. If an item has only a single vendor but must be ordered in a multiple, then you can set up a single rule for the item and specify only the round-to multiple. The warnings below about the round-to multiple still apply.

Effectivity dates control all rules. The rules can be facility-specific or global. The following rules are available to define vendor purchasing allocations:

- Percentage Split - The system splits the MRP suggestions for the selected day according to the appropriate percentage per vendor. The total percentage for all appendable vendors must be 100%.
- Maximum Quantity - The system allocates each MRP suggestion up to but not exceeding the maximum quantity specified for the vendor.
- Maximum Quantity Within n Days - The system allocates MRP suggestions up to a maximum quantity for each vendor, and takes into account purchase orders raised over the last n days where n is a number definable for each vendor. The days are calendar days and include non-working days.
- Minimum Quantity to Apply - If the MRP suggestion is equal to or exceeds the minimum quantity, the system applies the suggested quantity to that vendor. If the suggested quantity

is less than the minimum, the system ignores that vendor and checks the next vendor in sequence.

- Round to Minimum Quantity - If the MRP suggestion is equal to or exceeds the minimum quantity, the system applies the suggested quantity to that vendor. If the suggested quantity is less than the minimum, the system rounds the suggested quantity up to the minimum and applies the quantity to that vendor. If this quantity exceeds the remaining requirement quantity, the system ignores that vendor and processes the next rule in the sequence.
- Round Up to Multiple - After you calculate a requirement quantity with percentage split, maximums, minimums, and so on, you can round the requirement quantity up to a multiple. For example, you can purchase an item in boxes. If you enter ten as a multiple and the schedule calculates the requirement quantity as 702, the system actually creates a quantity of 710.

Note: If the minimum or maximum falls below or above the percentage defined for the vendor, the system uses the minimum or maximum value. For example, if the minimum is 400, the percentage is 30%, and the requirement is 1000, the system creates a purchase order line for 400.

For example:

Sequence	Vendor	Percentage	Min	Round to Multiple?
10	A	50	100	Yes
20	B	30	10	
30	C	20	15	

If the MRP suggestion for a day is 160, it is processed as follows.

Each percent represents 160/100=1.6 units.

Sequence 10 for vendor A has a minimum. The minimum takes priority over the percentage. The percentage calculation, 50% of 160, is 80, which is below the minimum. Therefore 100 is allotted to vendor A. This is converted to purchase units of measure and created as a purchase order line for vendor A.

This leaves 60 units, which represents 50% (30+20) of the required split, although more than 50% of the units have been used. For further calculation, each percentage point now represents:

The balance in units/balance in percent which gives 60/50=1.2 units

Because there is a balance outstanding, 60, the next vendor in sequence is processed, sequence 20 and vendor B. This just has a percentage so multiply the percentage by the units per percentage point giving 30 x 1.2=36. No minimum or maximum need to be taken into account, but because there is a multiple of ten, the quantity of 36 is rounded up to 40 and a PO line is created. The outstanding balance is now 20 (160-100-40).

Because there is a balance outstanding, the next vendor in sequence, C, is processed. This vendor is the last one defined and so it does not have any maximum or minimum stipulations. The remaining

quantity of 20 is allocated to vendor C. However, there is also a multiple stipulation of 15. Therefore the quantity of 20 is rounded up to 30 and a PO line created.

Note that in the above example the planned order quantity of 160 is less than the released quantity (100+40+30) of 170.

Access: Menu PUR03

Select an item for which to add, maintain, or view vendor split rules

Use the Vendor Split Rules Maintenance selection screen, PUR157D1-01, to select an item for which you want to add, maintain, or view vendor split rules.

Field descriptions - PUR157D1-01

Fields	Description
Action (2,0):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value. All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Item Number (35,A):	Specify the item number associated with this vendor split rule. The item number must exist in the Item Master file.
Fac (3,A):	Specify the facility associated with this vendor split rule.
Effective (From Date) (8,0)	Infor LX displays the date on or after which the vendor split rules become effective.

Screen actions - PUR157D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor split rules detail maintenance, PUR157D2

Use Vendor Split Rules Detail Maintenance, PUR157D2, to add, maintain, or view vendor split rules.

Add, maintain or view a vendor split rule

After you specify a line action and press Enter on the Vendor Split Rules Maintenance selection screen, PUR157D1-01, the system displays the Vendor Split Rules Maintenance detail screen, PUR157D2-01. Use this screen to add, maintain, or view vendor split rules.

Field descriptions - PUR157D2-01

Fields	Description
Item Number (35,A):	Infor LX displays the item number specified on the selection screen. You can maintain the item in Create and Copy modes.
Effective From Date (8,0):	Specify the date on or after which the vendor split rules become effective. You can maintain the effective from date in Create and Copy modes.
Effective To Date (8,0):	Specify the date after which the vendor split rules are no longer effective. You can maintain the effective to date in Create and Copy modes.
Facility (3,A):	Infor LX displays the facility code only if the System Parameter to allow splitting rules by facility is set to Yes.
Select (2,0):	Specify 4 against a line to delete the rules for a vendor.
Sequence (3,0):	Specify the sequence number of each vendor splitting rule. The MRP automatic release program applies the splitting rules in strict sequence as defined by this field.
Vendor Number (8,0):	Specify the vendor number for each line. The system displays the vendor name below the vendor number. You must already have a valid contract detail

record defined for this item and vendor with the Append to Schedule field set to Yes in Contract Detail Maintenance, PUR152.

Percent (5,2): Specify the percentage of MRP requirements each vendor is expected to receive. The total for each item must equal 100%.

Maximum Quantity (13,2): Specify the maximum quantity for the vendor to receive from each MRP requirement. Do not enter a maximum quantity for the last vendor in the sequence. You can use this field independently of the Max Qty Days field.

Max Qty Days (3,0): Specify the number of calendar days for which the maximum quantity is applicable. You do not have to specify a value in this field even if you have defined a maximum quantity, but you must have defined a maximum quantity figure to use this field. Some vendors may have fixed capacity constraints. For example, a vendor can produce 2000 units of a particular item only every five days. If this is the case, specify 2000 in the maximum quantity field and five in this Max Qty Days field. The MRP automatic release program does not load this vendor with more than 2000 units in any five day period and it does not include any existing purchase order lines in that calculation.

Minimum Quantity (13,2): Specify the minimum quantity for the vendor to receive from each MRP requirement. Do not specify a minimum quantity for the last vendor in sequence. If the vendor's share of the MRP requirement does not at least equal this quantity, and the Round to minimum field is set to 0, the vendor does not receive any of the requirement. If the vendor's minimum is less than the remaining MRP requirement and the Round to minimum field is set to 1, the vendor receives a quantity at least equal to the minimum.

Round to minimum (1,A): Specify 1 to indicate that this vendor always receives a quantity at least equal to the minimum, unless this is greater than the remaining MRP requirement, in which case Automatic Release, PUR651, moves to the next vendor in sequence. For example, if the minimum is 200 and round to is 1, but the MRP requirement is only 100, this vendor receives nothing and the program seeks to allocate the quantity of 100 to one of the other vendors in sequence. If you specify 1, you must have first specified a minimum quantity.

Specify 0 to not round to minimum.

Round up to Multiple (7,2): After you calculate a requirement quantity with percentage split, maximums, minimums and so on, you can round the requirement quantity up to a multiple. For example, you can purchase an item in boxes of 10. If you specify 10 as a multiple and the calculated requirement quantity is 702, the system calculates a quantity of 710. Use this feature with extreme caution; you can create purchase order quantities that exceed the original planned order quantity in MRP.

Screen actions - PUR157D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor split rules listing, PUR158D

This report lists out the rules defined to split the requirements of items across multiple vendors. For each item selected the report lists all of the fields defined in Vendor Split Rule Maintenance.

Access: Menu PUR02

Print a vendor split rule report

Use the Vendor Split Rules Report screen, PUR158D-01, to specify the selection criteria for the report.

Field descriptions - PUR158D-01

Fields	Description
From Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report. This field uses extreme values by default. For information on range fields, see the *Ranges* topic in the overview section of this document.
To Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report. This field uses extreme values by default. For information on range fields, see the *Ranges* topic in the overview section of this document.
Run Time Parameter (0 or 1):	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 - PUR158D-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. 22)* in the overview information in this document.

Clause code by contract maintenance, PUR159D

Use Clause Code by Contract Maintenance, PUR159D, to add or delete clause codes to a contract. For example, contract ABCSUPPL01 has 10 items and each item has a separate purchase order number. You want to attach clause code DEL to all 10 purchase orders. Rather than assign clause DEL to each order individually, you can specify the contract number and the clause code DEL to add the clause to all orders associated with the contract. You can also delete a clause code from all orders on a contract if a clause code is assigned to some but not all orders on the contract.

Access: Menu PUR03

Add or delete clauses by contract

Use the Maintain Clauses by Contract screen, PUR159D-01, to specify the contract number and clause code and whether to add or delete the clauses. After you specify a valid contract number and clause code and then press Enter, the system displays the following message: Purchase orders updated for contract xxxxxxxxxx, clause xxx.

Field descriptions - PUR159D-01

Fields	Description
Contract Number (10,A):	Specify the mandatory contract number. The system adds or deletes clause codes from all purchase orders associated with this contract number.
Clause Code (3,A):	Specify the clause code to add or delete.
Add or Delete (1 or 4):	Specify 1 to add a clause to all purchase orders associated with a contract or 4 to delete a clause from all purchase orders associated with a contract.

Screen actions - PUR159D-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. 22)* in the overview information in this document.

Shipment patterns header maintenance, PUR161D1

You can create tables of vendor delivery dates. Each table is identified by a unique shipping pattern code, which is identified by name and date.

You can optionally assign a shipping pattern code for each contract detail line; the system uses the code from the Vendor Master file but you can change the code.

If you specify a shipping pattern code on a contract detail line, the system adjusts the vendor due date on purchase order lines related to that contract with reference to the delivery dates defined for that shipping pattern code.

If you create a shipping pattern for a contract that extends more than one year, create a shipping pattern code record for each included year, but give each record the same shipping pattern code name.

For example, for a contract that begins in 2005 and ends in 2006, in which you want to receive a shipment every Wednesday, name the pattern Wednesdays. Define a Wednesdays shipping pattern for year 2005 and a Wednesdays shipping pattern for year 2006; specify an every-Wednesday shipment in each year. After you assign the shipping pattern to your contract, Infor LX finds the pattern correctly under code Wednesdays, regardless of the year.

Warning: If you assign a shipping pattern code that is defined for a shorter term than the term of the contract, you receive an incorrect vendor delivery date for PO lines released after the term of the shipping pattern code. Infor LX assigns these lines the last valid shipping pattern date. For the contract in the example above, if you use a shipping pattern code defined only for Wednesdays in 2005, PO lines for Wednesday in the year 2006 receive the date of the last Wednesday in 2005. However, the requirement date is set correctly as the PO line due date.

Access: Menu PUR02

Add or select a shipping pattern

Use the Shipping Patterns Header Maintenance selection screen, PUR161D1-01, to add a shipping pattern code or select a code to maintain.

Field descriptions - PUR161D1--01

Fields	Description
Action (2,A):	Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.
	11=Detail
	Maintain shipping pattern details.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Code (10,A):	Specify the code given to the shipping pattern.
Year (4,0):	Specify the year in CCYY format, for example, 1998.
Text (30,A):	Specify the description for the shipping pattern. The system displays this text on the shipping pattern lookup.

Screen actions - PUR161D1-01

Commands	Description
F13=Filters	Access the Filter Options screen to specify whether to include all codes or only active codes.
F15=Weeks/Dates Maintenance	Access Week Numbers/Date Cross Reference Maintenance, PUR155D1.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Copy a shipping pattern code to add a new code

If you specify line action 3, Copy, on the Shipping Patterns Header Maintenance selection screen, PUR161D1-01, Infor LX displays the Copy Options screen, PUR161D1-04. Use this screen to modify the information for the new code.

Field descriptions - PUR161D1-04

Fields	Description
To Year (4,0):	Specify the year in CCYY format, for example, 1998, for the copy to shipping pattern.
To Code (10,A):	Specify the code given to the copy to shipping pattern. The code must not exist for the copy to year.
Text (30,A):	Specify the description for the shipping pattern. The system displays this text on the shipping pattern lookup.

Screen actions - PUR161D1-04

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Maintain text for the shipping pattern code

If you specify line action 2, Revise, on the Shipping Patterns Header Maintenance selection screen, PUR161D1-01, Infor LX displays the Revise Text screen, PUR161D1-05.

Field descriptions - PUR161D1-05

Fields	Description
Text (30,A):	Specify the description for the shipping pattern. The system displays this text on the shipping pattern lookup.

Screen actions - PUR161D1-05

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Shipment patterns detail maintenance, PUR161D2

Use Shipment Patterns Detail Maintenance to add or maintain details for a shipping pattern code.

Add or select a ship date for the shipping pattern

If you specify line action 11, Detail, on the Shipping Patterns Header Maintenance selection screen, PUR161D1-01, Infor LX displays the Shipping Patterns Detail Maintenance selection screen, PUR161D2-02. Use this screen to add or maintain dates and comments for a shipping pattern code.

Field descriptions - PUR161D2-02

Fields	Description
Action (2,A):	Specify the number for the line action to perform. 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. 21)* in the overview information in this document.
Ship Date (8,0):	Specify the date a shipment can arrive at your site. The date becomes the purchase order vendor due date and the system notes the date on the schedule. The date must exist in the year as defined in the Week/Dates Cross Reference file.

Comment (30,A): Specify descriptive text for the shipping date.

Manually Entered (1,0): If you use the Create line action to specify a date, the system sets the manually entered value to 1. The system sets dates created by the weekly entry facility as 0. If you regenerate the weekly dates, you can choose to retain manual entries.

Screen actions - PUR161D2-02

Commands	Description
F14=Enter Weekly	Access the Shipping Patterns Detail Maintenance screen, PUR161D2-03 to automatically create the shipping dates on a weekly basis, for example every Tuesday and Friday. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Set up repetitive shipping dates

If you use F14, Enter Weekly, on the Shipping Patterns Header Maintenance selection screen, PUR161D1-01, Infor LX displays the Shipping Patterns Detail Maintenance screen, PUR161D2-03.

Use this option to set up repetitive shipping date patterns.

For example, a shipping pattern allows shipments every Monday and Thursday. Set the ship field for these days to 1. The system generates ship dates for each time that these days fall within the year as defined in the Week/Dates Cross Reference file.

You can apply these repetitive patterns separately to even-and odd-numbered weeks as well as to all weeks. The dates in these patterns can replace or add to existing dates as required.

Field descriptions - PUR161D2-03

Fields	Description
Ship (1,0):	Specify 1 to generate ship dates for every occurrence of this day in the requested year. Otherwise, specify 0.
Comment (30,A):	Specify descriptive text for the shipping pattern. The system repeats the text on all dates generated automatically and displays the text on the shipping pattern lookup.

Apply to weeks (1,0):   Specify one of the following codes to apply a different pattern for odd- and even-numbered weeks:

0=All weeks

1=Odd-numbered weeks

2=Even-numbered weeks

To determine which weeks are odd and even, the program looks at the Week/ Dates Cross Reference file for the requested year. The system deems the first week in the file as odd.

The system clears existing automatically created dates in the weeks that are processed and replaces the dates with the new selection. For example, you can set up odd-numbered weeks and retain the values for even-numbered weeks.

Delete Manual Entries (1,0):   Specify 0 to retain manual entries or 1 to delete manual entries from the file for weeks that are processed.

You can retain dates created manually when you apply or remove a new weekly pattern.

Screen actions - PUR161D2-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Copy a comment to a new shipping date

If you specify line action 3, Copy, on the Shipping Patterns Detail Maintenance screen, PUR161D2-02, Infor LX displays the Copy Options screen, PUR161D2-06. Use this screen to copy dates or comments to a new shipping pattern.

Field descriptions - PUR161D2-06

Fields	Description
To Date (8,0):	Specify the date for the copy to shipping date.
Comment (30,A):	Specify descriptive text for the shipping pattern. The system displays this text on the shipping pattern lookup.

Screen actions - PUR161D2-06

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add or revise a comment

If you specify Line action 2, Revise, on the Shipping Patterns Detail Maintenance screen, PUR161D2-02, Infor LX displays the Revise Comment screen, PUR161D2-07. Use this screen to revise a comment.

Field descriptions - PUR161D2-07

Fields	Description
Comment (30,A):	Specify descriptive text for the shipping pattern. The system displays this text on the shipping pattern look up.

Screen actions - PUR161D2-07

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

PO clause code selection, PUR163D

Use PO Clause Code Selection to add or remove clause codes to or from a contract purchase order. The system prints any clause codes associated with a purchase order on the purchase order document along with any vendor and item notes.

Access: Menu PUR03

Add or select a clause code/PO relationship

The PO Clause Code Selection screen, PUR163D-01, displays existing clauses assigned to POs in the file.

Field descriptions - PUR163D-01

Fields	Description
Action (2,0):	Specify the number for the line action to perform. To use the first line, specify the line actions 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. 21)* in the overview information in this document.
PO Number (9,0):	Specify the purchase order number for which to add or delete clauses.

Sequence No (3,0): If you add a clause code to a purchase order, leave this field blank; the system uses the next available sequence number for the order.

Clause Code (3,A): Specify the clause code for each clause.

Screen actions - PUR163D-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. 22)* in the overview information in this document.

Add or view clause text for a PO

If you specify line action 1, Create, or 5, Display, the system displays the PO Clause Code Selection detail screen, PUR163D-02. All fields are display only. Press Enter to add the clause text to the specified purchase order.

Field descriptions - PUR163D-02

Fields	Description
Purchase Order Number:	Infor LX displays the purchase order number for which to add or display clauses. This order number must have been previously defined in Contract Item Details Maintenance.
Clause Sequence:	Infor LX displays the clause sequence number assigned to this clause code.
Clause Code:	Infor LX displays the clause code to add to the specified purchase order.

Screen actions - PUR163D-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. 22)* in the overview information in this document.

Time period maintenance, PUR165D1

You can create time periods to subdivide your planning horizon into distinct periods. The system uses these periods for the Production Schedule Print report.

Access: Menu PUR02

Add or select a time period

Use the Schedule Time Period Maintenance selection screen, PUR165D-01, to add a time period or to select a time period to maintain or view.

Field descriptions - PUR165D-01

Fields	Description
Action (2,A):	Specify the number for the line action to perform. 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. 21)* in the overview information in this document.
Schedule Time Period Code (10,A):	Specify the code given to the time period.

Screen actions - PUR165D-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. 22)* in the overview information in this document.

Time period maintenance detail, PUR165D2

Use Time Period Maintenance Detail to specify the detail time periods

Add, maintain, or view time period details

If you specify line actions 1, Create, 2, Revise, 3, Copy, or 5, Display, from the Schedule Time Period Maintenance selection screen, PUR165D-01, Infor LX displays the Schedule Time Period Maintenance screen, PUR165D2-01.

Field descriptions - PUR165D2-01

Fields	Description
Time Period (10,A):	Specify the code given to the time period. The code links a time period to a vendor.
Description (30,A):	Specify descriptive text for the time period. The system displays this text on the time period lookup.
Days (3,0):	Specify the number of days for the period, from 1 to 999. The first entry of 0 is a catch-all bucket for any later requirements or purchase orders. You cannot specify a non-zero value after a zero value.
Time Period (10,A):	Specify the code given to the time period. The code links a time period to a vendor.
Description (30,A):	Specify descriptive text for the time period. The system displays this text on the time period lookup.
Days (3,0):	Specify the number of days for the period, from 1 to 999. The first entry of 0 is a catch-all bucket for any later requirements or purchase orders. You cannot specify a non-zero value after a zero value.

Screen actions - PUR165D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Authorization maintenance, PUR170

Companies set authorization levels to control moneys spent on outside procurements. Companies typically limit authorizations based on the type of goods requested (inventory or non-inventory), the amount of the procurement, and the person who requests the procurement.

Use Authorization Maintenance to restrict purchasing authorization for specified purchasing clerks, buyers, and supervisors. You can define the authorized users, their authorization limits, and next level approvals. Users can print purchase orders only in amounts up to their authorization limits.

You can specify whether authorization limits apply to inventory items, non-inventory items, or both in the Requisition and Purchase Order Approval Required field on the Purchasing System Parameters screen, PUR820D-01. If the value is 0 in System Parameters, the authorization limits set in Authorization Maintenance, PUR170, have no effect.

Access: Menu PUR02

Add or select a user authorization record

Use the Authorization User Selection screen, PUR170-01, to add a user authorization or to select an authorization to maintain or view. This screen displays the record status and the user name associated with the record.

Field descriptions - PUR170-01

Fields	Description
Action Code (2,0):	Specify the number for the line action to perform. 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. 21)* in the overview information in this document.

Company (3,0):   Specify the company number for this user and authorization level. You can authorize a user to more than one company.

User (10,A):   Specify the user ID to define with an authorization level. The user ID must already be defined as an authorized Infor LX user. Users not defined in this program have no authorization limits and can place orders for any amount of money.

Screen actions - PUR170-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter user authorization information

If you use F13, Filters, Infor LX displays the Authorization Filter screen, PUR170-03. You can specify the sort criteria for the user authorizations on the Authorization User Selection screen, PUR170-01.

Field descriptions - PUR170-03

Fields	Description
Selection (1,0):	**Changed:** *MR81215 Altered the List Item mentioned incorrectly for the selection*

Specify one of the following sort methods:

- 1=All records by company and user
- 2=Active records by company and user (default)
- 3=Active records by user name

To resequence the records on the Authorization User Selection screen, PUR170-01, select sequence method 1, 2, or 3 and press Enter.

Screen actions - PUR170-03

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view a user authorization record

If you specify line action 1, Create, 2, Revise, 3, Copy, 4, Delete, or 5, Display on the Authorization User Selection screen, PUR170-01, Infor LX displays screen PUR170-02.

This screen displays the following information:

- Company
- User
- Currency

You can change the company and user in Copy mode.

Field descriptions - PUR170-02

Fields	Description
User Name (30,A):	Specify the full name of the user. Because you can filter the active information to display alphabetically by user name, Infor suggests that you specify the last name first.
Amount Limit (15,2):	Specify the authorization amount limit for this company and user. Infor LX displays a message if the creation of or change to a purchase order or requisition exceeds the assigned amount limit for this user.
	The user specified in the Next User for Approval field must authorize requisitions or purchase orders for amounts over this limit.
Next User for Approval (10,A):	Specify the user ID for the next higher approval level. If purchase orders or requisitions exceed the amount limit specified for this user, the system places these orders on hold. The next approver can approve the POs and requisitions in Procurement Authorization, PUR530.

Screen actions - PUR170-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Authorization listing, PUR175

Authorization Listing prints a list of the authorization users, their authorization limits, and their next approval users.

Access: Menu PUR02

Print an authorization report

Use the Authorized User List screen, PUR175-01, to specify the selection criteria for the authorization 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 - PUR175-01

Fields	Description
Company (3,0):	Specify a range of values to limit the company numbers to include in the report.
User (10,A):	Specify a range of values to limit the users 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 - PUR175-01

Commands	Description
Standard Screen Actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Comm code/special chrg maintenance, PUR180/181B

Use Commodity Code Maintenance, PUR180, and Special Charge Maintenance, PUR181B, to create and maintain commodity and special charge codes and descriptions. You can also assign general ledger profit centers and tolerances to the commodity.

You can use commodity codes in place of the item number to designate the type of non-inventory item purchased.

Purchasing uses the commodity code to create and maintain the requisition and purchase order lines for non-inventory items and to aggregate inventory purchases.

Purchasing also uses the commodity code during purchase order consolidation to consolidate requests for similar items, such as service supplies, into one purchase order. Non-inventory items require the commodity code to support vendor contracts, profit centers, and procurement history.

Use the Purchasing application to enter commodity codes for purchased items.

Access: Menu PUR02

Add or select a commodity code or special charge code

Use the Commodity Code Selection screen, PUR180-01, or the Special Charge Selection screen, PUR181-01, to add a new code or to select a code to maintain, view, or print.

Field descriptions - PUR180-01 and PUR181-01

Fields	Description
Act (2,0):	Specify the number for the line action to perform. To use the first line, specify the line action and at least one key field value.
	12=Translate
	Access the Language Master Selection screen, QMS174D1-01, to translate the field names.

14=Language Override

Display the Item/Commodity Language Override screen, INV118D-01. The list is positioned at the commodity code or special charge code that you selected on PUR180-01. Select this commodity code or special charge code, or another code, 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. 21)* in the overview information in this document.

If you specify line action 2, Revise, for an inactive commodity or special charge code, the system reactivates that commodity or special charge code.

You cannot delete a commodity or special charge code if outstanding purchase orders exist for items that use the commodity or special charge code.

Commodity Code/Special Charge (35,A): Specify the commodity or special charge code. If you specify line action 1, Create, do not give a commodity code the same name as an existing item. In fields that require input of an item number or commodity code, Infor LX cannot distinguish the commodity from an inventory item of the same name.

Description (30,A): Specify the commodity or special charge code description.

Record Status (80): Infor LX displays the record status for the commodity or special charge code. You can specify line action 4 to delete active commodity or special charge codes.

Screen actions - PUR180-01 and PUR181-01

Commands	Description
F13=Filters	Access the Commodity Code Filter or Special Charge Filter screen to select how to display the information.
F15=Toggle Language	Use F15=Toggle Language to switch between the commodity or special charge code 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. 22)* in the overview information in this document.

Filter commodity code or special charge information

If you use F13, Filters, Infor LX displays the Commodity Codes Filter screen, or the Special Charge Codes Filter screen. Use this screen to select how to display the information on the Commodity Code Selection screen, PUR180-01, or the Special Charge Selection screen, PUR181-01.

Field descriptions - PUR180-03 and PUR181-03

Fields	Description
Selection (1,0):	Specify one of the following record selection methods:
	1=All records, sorted by commodity code (default)
	2=Active records only, sorted by commodity code
	3=Active records only, sorted by commodity code description

Screen actions - PUR180-03 and PUR181-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view commodity code details

If you continue with Commodity Code Maintenance, Infor LX displays the Commodity Code Maintenance detail screen, PUR180-02. For a complete list of commodity codes, refer to Commodity Code Listing, PUR185.

Field descriptions - PUR180-02

Fields	Description
Commodity Code (35,A):	Infor LX displays the commodity code specified on the selection screen. You can change the value in Copy mode.
Description (50,A):	Infor LX displays the description for this commodity.
Description (50,A):	Infor LX displays the description for this commodity.

Commodity Type (1,0): Specify the commodity type code. If you leave this field blank, Infor LX uses 0 as the default value. You can specify a commodity type for Maintenance Repair Order (MRO) parts and services. Infor LX processes the MRO parts and services commodity types in the same manner that it processes the Type 0 material commodity. Type 2 and Type 3 require a purchase order receipt. Type 1, service commodity, does not require a purchase order receipt; service commodities are received automatically when you enter them on the purchase order or requisition.

Specify one of the following values:

0

Material commodity.

1

Service commodity.

2

MRO Part

3

MRO Service Receipt

Tax Code (5,A): If you specify a value, Infor LX validates the tax code against the tax rate table, ZRTL03.

Profit Center (10,A): Infor LX does not use this field. You can enter a comment or other text in this field.

Commodity Unit of Measure (2,A): If you are using the system parameter, an error message is presented if a user changes the purchasing unit of measure for material commodity transactions.

If you revise a service commodity, you must use EA as the commodity unit of measure.

Delivery Days Tolerance Plus (3,0): Specify the number of days before (plus) the delivery due date for goods of this commodity code to be considered on time.

Delivery Days Tolerance Minus (3,0): Specify the number of days after (minus) the delivery due date for goods of this commodity code to be considered on time.

Quantity Received Percent Tolerance Plus (3,1): Specify the percent tolerance over (plus) the requested delivery amount to be considered full delivery. 0.0% is considered full delivery. Specify plus tolerances as percentages greater than 0.0. Specify the percent over or under

the value that you will accept but not the total percent. For example, enter +5% or -5% but not 95% or 105%.

Quantity Received Percent Tolerance Minus (3,1):
Specify the percent tolerance under (minus) the requested delivery amount to be considered full delivery. 0.0% is considered full delivery. Specify the percent over or under the value that you will accept but not the total percent. For example, enter +5% or -5% but not 95% or 105%.

Automatic Tolerance Close (1,0):
Specify Yes to automatically close purchase orders for commodities if quantity received is within the minus tolerance entered above. Otherwise, specify No. If you leave this field blank, Infor LX uses No as the default value.

If you do not want a purchase order to automatically close if the quantity received is within the minus tolerance, specify No in the Automatic Close field in the purchasing system parameters.

You can then set up the automatic close and the tolerance receipt quantity percent at each individual warehouse in Warehouse Master Maintenance, INV110D2.

Note: The system does not check tolerances or display a warning message if the PO Receipt is under/over PO tolerance percentage. You can set up tolerance percentage in Parameters Generation, SYS800.

Infor LX prints an audit trail report that shows the detail for any commodity codes added, revised, or deleted.

Screen actions - PUR180-02

Commands	Description
F21=Language Override	Display the Item/Commodity Language Override screen, INV118D-01. The list is positioned at the commodity code that you selected on PUR180-01. Select this commodity code, or another code, and the language for translation.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view additional commodity code details

If you continue with Commodity Code Maintenance, Infor LX displays the next Commodity Code Maintenance detail screen, PUR180-05.

Field descriptions - PUR180-05

Fields	Description
Commodity Code (35,A):	Infor LX displays the commodity code specified on the selection screen. You can change the value in Copy mode.
Description (50,A):	The system displays the description of this commodity code.
Container (10,A):	Specify the type of container for this commodity.
Country of Origin 1 (4,A):	Specify the country from which the commodity originated.
Country of Origin 2 (4,A):	Specify the second country involved in the origination of the shipment
Preference (6,A):	Specify the preference for this commodity.
Procedure 1 (5,A):	Specify the code for procedure 1.
Procedure 2 (5,A):	Specify the code for procedure 2.
Quota (6,A):	Specify the quota for this commodity.
Summary Declaration (30,A):	Specify the summary declaration for this commodity.
Supplementary UOM (2,A):	Specify the supplementary unit of measure for this commodity.
VM Code (1,A):	Specify the VM code for this commodity.
A1 Code (2,A):	Specify the A1 code for this commodity.
Adjustment (9,A):	Specify the adjustment for this commodity.
EC Commodity Code (8,A):	Specify the EC commodity code for this commodity.

Screen actions - PUR180-05

Commands	Description
F21=Language Override	Display the Item/Commodity Language Override screen, INV118D-01. The list is positioned at the commodity code that you selected on PUR180-01. Select this commodity code, or another code, and the language for translation.
F22=Toggle Language	Use F22=Toggle Language to switch between the commodity code 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. 22)* in the overview information in this document.

Add, maintain, or view special charge code details

If you continue with Special Charge Maintenance, Infor LX displays the Special Charges Maintenance detail screen, PUR181-02. For a complete listing of special charge codes, refer to Special Charge Code Listing, PUR186.

Access: Menu PUR02

Field descriptions - PUR181-02

Fields	Description
Special Charge (35,A):	Infor LX displays the special charge code specified on the selection screen. You can change the value in Copy mode.
Description (30,A):	Infor LX displays the special charge description specified on the selection screen. You can change the description.
Tax Code (5,A):	Specify a tax rate code for this special charge. If specified, Infor LX validates this code against the tax rate table, ZRTL03. You define tax codes in Tax Rate Code Maintenance, SYS140.
Fixed Charge (1,0):	Specify 0, the default value, if this is a special charge per purchasing unit of measure. The system multiplies the special charge extended amount by the number of units entered on the purchase order line or requisition line.
	Specify 1 if this is a fixed special charge. The system creates the purchase order line or requisition line with a quantity of one.

Infor LX prints an audit trail report that shows the detail for any special charges added, revised, or deleted.

Screen actions - PUR181-02

Commands	Description
F21=Language Override	Display the Item/Commodity Language Override screen, INV118D-01. The list is positioned at the special charge code that you selected on PUR181-01. Select this special charge code, or another code, and the language for translation.
F22=Toggle Language	Use F22=Toggle Language to switch between the special charge code 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. 22)* in the overview information in this document.

Commodity code listing, PUR185D

Use Commodity Code Listing, PUR185, to print a list of selected commodity codes.

Access: Menu PUR02

Print a commodity code report

Use the Commodity Code Listing screen, PUR185-01, to specify the selection criteria for the commodity code report.

Field descriptions - PUR185-01

Fields	Description
(From/To) Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.
Commodity Type (1,0):	Specify the commodity type codes to include on this report. Valid choices:

0=Material

1=Service

2=MRO Part

3=MRO Service Receipt

4=All

Override Print Option (1,0):

Specify the language in which to print the commodity code descriptions. 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 Information. Print the commodity code descriptions in the master file (base) language.

1=Print User Language Override for MLS records. Print the commodity code description in the language of the user who submits the job.

3=Print Language Overrides in Specified Language. Print the commodity code descriptions in the language that you select, assuming that the data is translated into that language. Specify a valid language code in the field to the left of the option.

4=Print All Available Languages. Print the commodity code descriptions from all the language (ZLI) records.

(Language) (3,0):

Specifiy the language to use on 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 - PUR185-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Special charge listing, PUR186D

Use Special Charge Listing, PUR186, to print a list of selected special charge codes.

Access: Menu PUR01

Print a special charge report

Use the Special Charge Listing screen, PUR186-01, to specify the criteria for the special charge report.

Field descriptions - PUR186-01

Fields	Description
(From/To) Special Charge (35,A):	Specify a range of values to limit the special charge codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.
Override Print Option (1,0):	Specify the language in which to print the special charge code descriptions. 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 Information. Print the special charge code descriptions in the master file (base) language.
	1=Print User Language Override for MLS records. Print the special charge code description in the language of the user who submits the job.
	3=Print Language Overrides in Specified Language. Print the special charge code descriptions in the language that you select, assuming that the data is

translated into that language. Specify a valid language code in the field to the left of the option.

4=Print All Available Languages. Print the special charge code descriptions from all the language (ZLI) records.

(Language) (3,0):	Specifiy the language to use on 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 - PUR186-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Commodity code or special charge code list, WINHPC

The Commodity Code List and Special Charge Code List programs display a list of all defined commodity codes or special charge codes.

Select a commodity code or special charge code

If you prompt on the Commodity Code field, Infor LX displays the Commodity Code List screen. If you prompt on the Special Charge Code field, Infor LX displays the Special Charge List screen.

Field descriptions - WINHPC

Fields	Description
Act (2,0):	Specify the number for the line action to perform. 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. 21)* in the overview information in this document.

Commodity/Special Charge Code (35,A): Infor LX displays the list of commodity codes or special charge codes.

Description (50,A): The system displays the description of the commodity code from Commodity Code Maintenance, PUR180, or the special charge code from Special Charge Code Maintenance, PUR181.

Screen actions - WINHPC

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor quote mass update, PUR485D

Use Vendor Quote Mass Update, PUR485D, to perform a mass update of vendor quotes that meet your specifications on the Vendor Quote Mass Update screen, PUR485D-01. You must perform a mass update operation one vendor at a time.

Access: PUR

Perform a mass update for a vendor

Field descriptions - PUR485D-01

Fields	Description
Vendor Number (8,0):	Specify the vendor for which you want to perform a mass update. The vendor must be a valid value in the Vendor Master file. This is a required field.
Facility (3,A):	Specify the facility to which you want to restrict the vendor quote update. The facility must exist in the Facility Master file. If you leave this field blank, the system processes quotes without regard to facility.

Currency (3,A):

Specify the currency to which you want to restrict the vendor quote update. The currency must exist in the Currency Master file. If you leave this field blank, the system processes quotes without regard to currency.

The system displays the Currency field only if Multiple Currencies is turned on.

Item Class (5,A):

Specify the item class to which you want to restrict the vendor quote update. The item class must exist in the Item Class Master file. If you leave this field blank, the system processes quotes without regard to item class.

Item/Commodity Type (1,0):

The item/commodity type field together with the item/commodity field allows you to filter the quotes by item or commodity. You must specify 0 for item or 1 for commodity.

Item/Commodity (35,A):

Specify the item or commodity to apply the vendor quote update to. If the type in the preceding field is 0 for item, the system validates this field against the Item Master file, IIM. If the type is 1 for commodity, the system validates this field against the Commodity and Special Charge Code file, HPC. If you specify an item/commodity code filter, Infor LX ignores the item class filter.

You can leave the item/commodity field blank to process vendor quotes regardless of the item/commodity.

New Effective Date (8,0):

The new effective date is a required field. You must specify a valid date. If the effective date is later than the discontinue date, the system displays an error message. The system uses the value in this field as the effective date for new quotes that you create in Vendor Quote Mass Update.

New Discontinue Date (8,0):

The new discontinue date is a required field. You must specify a valid date. If the discontinue date is earlier than the effective date, the system displays an error message. The system uses the value in this field as the discontinue date for new quotes that you create in Vendor Quote Mass Update.

Percentage Factor (6,2):

Specify the percentage factor to use as a multiplier applied to current quote prices.

Calculation example: If you specify 10.00%, the quote prices increase by 10%. Conversely, if you specify a percentage factor of 10.00-%, Infor LX decreases quote prices by 10%. You are limited to an extreme negative percentage factor of 99.99-% to avoid quote prices with a zero or a negative value.

Round to Position (1,0):

You can control the number of decimal positions for the new price after Infor LX applies the percentage factor. Specify a round-to position value of 0 through 5.

Aside from the round-to position, the system uses the rounding method defined in the Currency Code Master file, GCM, to arrive at the new price. The valid rounding methods are H=Half Adjust, I=Increment, and T=Truncate.

Example: Assume you have a quote in US dollars (USD) with a price of 1.65 that you want to increase by 12%. This gives a result of 1.84800 USD. However, if you only want to keep track of amounts to the nearest penny, a round-to position of 2 returns a result with two decimal places. The program checks the rounding method defined in the currency master file for USD and adjusts the price accordingly.

For a round-to method of Half Adjust, the system rounds the result to two decimal places. The result is 1.8500.

For a round-to method of Increment, the system increments the second decimal position if any digit after the second decimal position is greater than zero. The result is 1.8500.

For a round-to method of Truncate, the system drops all digits after the second decimal position. The result is 1.8400.

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 - PUR485D-01

Commands	Description
F6=Accept	Validate your entries and pass the parameters to Mass Update, PUR485B. You can run this program interactively or in batch.
F14=Item Alpha Lookup	Access the list of item numbers. If you make a selection, the system returns the value to the Vendor Quote Mass Update screen, PUR485D-01.
F15= Vendor Alpha Lookup	Access the list of vendor numbers. If you make a selection, the system returns the value to the Vendor Quote Mass Update screen, PUR485D-01.
F16=Purchasing Inquiry	Access Purchasing Inquiry, PUR300D1.
F17=Vendor Quotes	Access Vendor Quotes, PUR150D1. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Open purchase orders report by PO number, PUR200D

This program prints a list of unfilled (open) purchase orders. The report lists purchase orders numerically by purchase order number, with the following information:

- Item number
- Description
- Class
- Warehouse
- Unit of measure
- Quantity remaining
- Expected cost per unit
- Due date
- Vendor number
- Vendor item number
- Quantity in inspection
- Outside operation field value
- Outside operation
- Vendor delivery date
- Shop order number
- Currency
- Vendor name

Access: Menu PUR01

Print an open purchase order report by PO number

Use the Open POs by PO Number screen, PUR200D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR200D-01

Fields	Description
From PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.

From PO Warehouse (3,A):   Specify a range of values to limit the warehouse codes to include in the report.

To PO Warehouse (3,A):   Specify a range of values to limit the warehouse codes to include in the report.

Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.

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.

Override Date for Exchange Rate (8,0):   Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.

Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in Base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate; and the deutschmarks to US dollars exchange rate.

If you specify T for transaction currency in the Amount Type field, leave the override date blank. The report prints amounts in the transaction currencies.

Amount Type (1,A):   Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report the amounts in the company base (B) currency.

If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, you must specify a date in that field so that Infor LX can access the spot rate for that date.

Screen actions - PUR200D-01

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Open purchase orders by vendor report, PUR201D

Open Purchase Orders by Vendor, PUR201D, prints a list of unfilled (open) purchase orders. The report lists the purchase orders numerically by vendor number with the following information:

- Item number
- Description
- Class
- Warehouse
- Unit of measure
- Quantity remaining
- Expected cost per unit
- Due date
- Vendor item number
- Quantity in inspection
- Outside operation field value
- Outside operation
- Vendor delivery date
- Shop order number
- Currency
- Vendor number and name

Access: Menu PUR01

Print an open purchase orders report by vendor

Use the Received but Uncosted POs screen, PUR210D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR201D-01

Fields	Description
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
	Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.
	Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate; and the deutschmarks to US dollars exchange rate.
	If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the currencies in which the transactions take place.
Amount Type (1,A):	Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report the amounts in the company base (B) currency.
	If you specify T for transaction currencies, leave the Override Date field blank. If you select B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR201D-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. 22)* in the overview information in this document.

Open PO report by item/due date, PUR202D

This program prints a list of unfilled (open) purchase orders. The report lists the purchase order information alphanumeric order by item number. The report shows due date subtotals within each item number, with the oldest due date first. The report also includes the following information:

- Item description
- Class
- Warehouse
- Unit of measure
- Quantity remaining
- Expected cost per unit
- Due date
- Vendor number
- Vendor item number
- Quantity in inspection
- Vendor delivery date
- Shop order number
- Outside operation field value
- Outside operation
- Currency
- Vendor name

Access: Menu PUR01

Print an open purchase order report by item/due date

Use the Open Purchase Orders by Item/Due Date screen, PUR202D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR202D-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 PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report. Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109. Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate. If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the currencies in which the transactions take place.
Amount Type (1,A):	Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report the amounts in the company base (B) currency. If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR202D-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. 22)* in the overview information in this document.

Open PO report by item class/item, PUR203D

This program prints a list of unfilled (open) purchase orders. The report lists the purchase order information in alphanumeric order by item class and then item number with the following information:

- Item description
- Warehouse
- Unit of measure
- Quantity remaining
- Expected cost per unit
- Extended cost
- Due date
- Vendor number and name
- Vendor item number
- Vendor delivery date
- Shop order number
- Outside operation field value
- Outside operation
- Currency

Access: Menu PUR01

Print an open purchase order report by item class/item

Use the Open PO by Item Class selection screen, PUR203D-01, to specify the selection criteria for 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. These range fields use extreme values.

Field descriptions - PUR203D-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 PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
	Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.
	Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.
	If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the currencies in which the transactions take place.
Amount Type (1,A):	Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report them in the company base (B) currency.
	If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR203D-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. 22)* in the overview information in this document.

Open purchase orders report by buyer, PUR204D

This program prints a list of unfilled (open) purchase orders. The report lists the purchase order information in alphanumeric order by item number within buyer code and includes the following information:

- Item description
- Class
- Warehouse
- Unit of measure
- Quantity remaining
- Expected cost per unit
- Due date
- Vendor number and name
- Vendor item number
- Quantity in inspection
- Vendor delivery date
- Shop order number
- Outside operation field value
- Outside operation
- Currency

Access: Menu PUR01

Print an open purchase order report by buyer

Use the Open Purchase Orders by Buyer screen, PUR204D-01, to specify the selection criteria for 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. These range fields use extreme values.

Field descriptions - PUR204D-01

Fields	Description
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Item/Commodity (35,A):	Specify a range of values to limit the item numbers or commodity codes to include in the report.
To Item/Commodity (35,A):	Specify a range of values to limit the item numbers or commodity codes to include in the report.
	Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.
	Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.
	If you specify T for transaction currency in the Amount Type field, leave the override date blank. The report prints amounts in the currencies in which the transactions take place.
Amount Type (1,A):	Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report them in the company base (B) currency.
	If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR204D-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. 22)* in the overview information in this document.

Open PO report by commodity/due date, PUR205D

Open Purchase Orders Report by Commodity/Due Date, PUR205D, prints a list of unfilled (open) purchase orders. The report lists the purchase order information in alphanumeric order by commodity code and then by due date. The report includes the following fields from the purchase order header and purchase order lines:

- Commodity Code and Description
- Number and Line
- Warehouse
- (Purchasing) Unit of Measure
- Due Date
- Quantity remaining
- Expected Cost per Unit
- Extended Cost
- Vendor Number and Name
- Vendor's Item Number
- Requester's User I.D.
- Delivery Date
- Ship-To Number
- Currency Code

Infor LX prints a message if you do not confirm vendor acknowledgment of the purchase order by the acknowledgment date.

This report provides totals for commodity code and a grand total for all open purchase orders on the list.

If Multiple Currencies is installed, this report prints subtotals labeled as transaction, base, or global currency. The report prints the currency code next to the subtotals.

Access: Menu PUR01

Print an open purchase order report by commodity/due date

Use the Open Purchase Orders by Commodity/Due Date screen, PUR205D-01, to specify the selection criteria for 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. These range fields use extreme values.

Field descriptions - PUR205D-01

Fields	Description
From Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From PO Warehouse (3,A):	Specify a range of values to limit the commodity codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report. Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109. Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the

following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.

Amount Type (1,A):   Specify 0 or 1 to designate whether to report the amounts on this report in their transaction (0) currencies or convert and report them in the company base (1) currency.

If you specify 0 for transaction currencies, leave the Override Date field blank. If you specify 1 for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR205D-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. 22)* in the overview information in this document.

Received but uncosted PO report, PUR210D

This program prints a list of all purchase orders that do not have costs (voucher or invoice) posted to them. The report prints in item number sequence within item class and contains the following items for each purchase order:

- Type
- P O number
- Item number and description
- Item class
- Purchasing unit of measure
- Warehouse
- Quantities ordered/received/in inspection
- Costed quantity
- Uncosted quantity
- Standard cost per purchasing unit of measure
- Expected cost per purchasing unit of measure
- Extended expected cost
- Due date
- Vendor number and name
- Vendor item number

If Multiple Currencies is installed, this report prints subtotals labeled as transaction, base, or global currency. The report prints the currency code next to the subtotals.

Access: Menu PUR01

Print an uncosted open purchase orders report

Use the Received but Uncosted P.O.s screen, PUR210D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR210D-01

Fields	Description
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report. Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109. Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.

If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the transaction currencies.

Amount Type (1,A):   Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report them in the company base (B) currency.

If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR210D-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. 22)* in the overview information in this document.

GRN report, PUR212D

The Goods Receipt Note (GRN) report program generates several different reports depending on the selection criteria specified.

Access: PUR01

Print a GRN report

Use the GRN Print Selection screen, PUR212D-01, to specify the selection criteria for the report.

The selection screen allows you to specify the following ranges:

- Vendor
- Advice Note
- GRN Number
- Receipt Date

If you leave all the ranges blank the system selects all records so it is important to specify sensible report ranges. You can also specify user ID and workstation ID. You can specify whether to include new GRNs only, reprint old GRNs, or print both.

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 - PUR212D-01

Fields	Description
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From Vendor Advice Note (35,A):	Specify a range of values to limit the vendor advice note numbers to include in the report.
To Vendor Advice Note (35,A):	Specify a range of values to limit the vendor advice note numbers to include in the report.
From GRN Number (10,0):	Specify a range of values to limit the GRN numbers to include in the report.
To GRN Number (10,0):	Specify a range of values to limit the GRN numbers to include in the report.
From Receipt Date (8,0):	Specify a range of dates to limit the receipt dates to include in the report.
To Receipt Date (8,0):	Specify a range of dates to limit the receipt dates to include in the report.
User ID (10,A):	If you specify a user ID, the report includes only GRNS entered by the specified user.
Workstation ID (10,A):	If you specify a workstation ID, the report includes only GRNS entered at the specified workstation.
Currency Type (1,A):	Specify 0 to print the GRN value in transaction currency or 1 to print the GRN value in base currency.
Print Alternate Currency (1,A):	Specify Yes to print the GRN value in alternate currency as an additional detail line. Otherwise, specify No.

Regarding Print Alternate Currency:

If you specify 1, the system validates against the vendor company to ensure that the following conditions are true:

- The company has an alternate currency.
- The company has the Display/Print Flag field set to Yes.
- An exchange rate exists from the base to alternate currency.

If any validation checks fail, then the additional detail line does not print on that particular GRN print.

| **Print GRNs (1,A):** | Specify a value to determine which GRNs to include on the report as follows. |
| | |

Valid choices

- **0**

  Print only new GRNs that were not yet selected to print.

- **1**

  Print only old GRNs that were selected to print.

- **2**

  Print both old and new GRNs.

| **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 - PUR212D-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. 22)* in the overview information in this document.

Accrual report, PUR214D

Accrual Report, PUR214D, shows details of goods that have been received into the company, but have not yet been invoiced. There are two reports available: a summary report and a detail report.

Infor recommends that you run the Summary Report at month-end. The summary report shows uncosted purchase order lines followed by details of any unmatched GRNs that exist for that purchase order line. The system processes the report in vendor/item sequence and produces vendor cost totals in both expected and standard cost.

Infor recommends that you run the Detail Report at year-end or when it is necessary to provide receipt information to the auditors. The report shows details of all unmatched GRNs and is output in GRN number sequence so that it is easy to identify which was the last receipt made into the company.

The information included in the Accrual Report depends on the selection criteria that you specify.

Access: PUR01

Print an accrual report

Use the Accrual Report Selection screen, PUR214D-01, to specify the selection criteria for the report.

You can specify a range for purchase order warehouse. You must select a company number to restrict the report details.

Field descriptions - PUR214D-01

Fields	Description
Company Number (3,0):	Specify the company number to filter the details shown on the Accruals Report. This is a required field.
From PO Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.
Include Receipts To Date (8,0):	To ensure that the report includes all uncosted receipts, even those receipts that are received against a purchase order for which a GRN was not created, you cannot change this date. The system displays this date for informational purposes only.
Type of Currency (1,0):	Specify 0 to print the purchase order expected cost and GRN value in base currency, or 1 to print the purchase order expected cost and GRN value in alternate currency.
	If you print the reports in alternate currency, the system performs the following validation checks against the specified company number to ensure that the following conditions are true:
	■ The company has an alternate currency.
	■ The company has the Display/Print Flag field set to Yes.
	■ An exchange rate exists from the base to alternate currency.
Type of Report (1,0):	Specify 0 for a PO Accrual summary report or 1 for an Uncosted GRN detail 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 - PUR214D-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. 22)* in the overview information in this document.

Purchase orders by control number, PUR215D

Use Purchase Orders by Control Number, PUR215D, to print an open purchase order report by control number.

Print an open purchase orders report by control number

Use the Open Purchase Orders by Control Number screen, PUR215D-01, to specify the information to print on the Open Customer Orders report. The report prints the order lines in control number/order/line sequence for the control number range you specify.

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 - PUR215D-01

Fields	Description
Lower Control Number (10,A):	Specify a range of values to limit the control numbers to include in the report.
Upper Control Number (10,A):	Specify a range of values to limit the control numbers to include in the report.
Lower PO Warehouse (3,A):	Specify a range of values to limit the PO warehouses to include in the report.
Upper PO Warehouse (3,A):	Specify a range of values to limit the PO warehouses to include in the report.
Lower Currency (3,A):	Specify a range of values to limit the currency codes to include in the report.
Upper Currency (3,A):	Specify a range of values to limit the currency codes to include in the report.

Override Date for Ex-   Specify the associated override date for the exchange rate.
change Rate (8,A):

Amount Type (1,A):   Specify T for transaction currency. Specify B for base currency.

Run Time Parameter   Specify Interactive to process the data in real time or Batch to process the
(1,0):   data in the job queue. If you specify interactive processing, your session is
   unavailable for other tasks until the job finishes.

Screen actions - PUR215D-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. 22)* in the overview information in this document.

Purchase price variance report, PUR220D

Purchase Price Variance, PUR220D, prints a list of all costed purchase orders with variance analysis of expected cost, standard cost, and actual cost. The report computes the variance percentage for both standard costs to actual costs and expected costs to actual costs.

The report prints in purchase order number sequence and contains the following items for each purchase order:

- Item number and description
- Item class
- Purchasing unit of measure
- Warehouse
- Costed quantity
- Actual total cost
- Standard total cost
- Expected total cost
- Variance standard cost to actual cost
- Variance percentage of expected cost to actual cost
- Currency
- Rate

If Multiple Currencies is installed, this report prints subtotals labeled as transaction, base, or global currency. The currency code prints next to the subtotals.

In a multifacility environment, this report uses the facility-specific costs from the Item/Facility file, CIC.

Access: Menu PUR01

Print a purchase price variance report

Use the Purchase Price Variance screen, PUR220D-01, to specify the selection criteria for 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 - PUR220D-01

Fields	Description
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
	Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (8,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.
	Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.

If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the transaction currencies.

Amount Type (1,A): Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report the amounts in the company base (B) currency.

If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR220D-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. 22)* in the overview information in this document.

Expense projections report, PUR230D

Use Expense Projections Report, PUR230D, to print an expense projection report based on outstanding purchase orders as of a given due date. The report shows your expenses based on outstanding purchase orders. The report provides totals for each buyer code by date and by month and a grand total for all buyers.

You can specify a buyer range, due date range, a warehouse range, and if Multiple Currencies is installed, a currency code range to limit the open purchase orders to include on this report.

The report prints in buyer code order sequenced by due date. The report contains the following information for each buyer and due date:

- Due date
- Purchase order number
- Vendor delivery date
- Type and description of item/commodity
- Shop order and outside operations information, if outside operations flag set to Y
- Quantity Remaining (stock and purchase unit of measure)
- Quantity in inspection
- Expected cost
- Standard cost

- Currency
- Warehouse
- Vendor number
- Vendor name

Access: Menu PUR01

Print a purchase order expense projection report

Use the Purchase Order Expense Projection screen, PUR230D-01, to specify selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR230D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Due Date (8,0):	Specify a range of dates to limit the due dates to include in the report. The report includes only purchase orders with due dates on or between these two dates. You establish due dates for each purchase order when you create that purchase order in PO Release/Maintenance, PUR500. Specify the date in the format specified in System Parameters.
To Due Date (8,0):	Specify a range of dates to limit the due dates to include in the report. The report includes only purchase orders with due dates on or between these two dates. You establish due dates for each purchase order when you create that purchase order in PO Release/Maintenance, PUR500. Specify the date in the format specified in System Parameters.
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.

Note: The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.

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.

Override Date for Exchange Rate (8,0):   Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109.

Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate.

If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the transaction currencies.

Amount Type (1,A):   Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report the amounts in the company base (B) currency.

If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR230D-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. 22)* in the overview information in this document.

Vendor performance report, PUR240D

Vendor Performance Report, PUR240D, prints a list that contains purchased item delivery performance information about vendors. The report contains both the scheduled and actual delivery dates and the quantity ordered information for each transaction. The report displays the individual purchase order numbers with the ordered item number or commodity code and description.

This program accesses the Planned and Firm Planned Orders Transaction History files, ITH and KFP, and the Purchase Order Requisitions file, HPO, to retrieve the information. The system selects the transactions to include by the transaction's scheduled delivery date and by the purchase order's warehouse code.

This program computes the difference in days between the PO delivery date and the transaction date to determine if an individual line is early, on time, or late. The program does not use the days early or late system or warehouse parameters to determine if a receipt is early, on time, or late.

The report prints in vendor number order and contains the following information for each vendor:

- Vendor name
- Purchase order number
- Item number or commodity code and description
- Quantity ordered
- Item/commodity type code
- Stocking Quantity
- Stocking unit of measure
- Warehouse
- Scheduled delivery date
- Transaction date
- Days early (+) or late (-) on delivery

Access: Menu PUR01

Print a vendor performance report

Use the Vendor Performance Listing screen, PUR240D-01, to specify criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR240D-01

Fields	Description
From Scheduled Vendor Delivery Date (8,0):	Specify a range of dates to limit the purchase order receipt scheduled dates to include in the report. The report includes only purchase orders with scheduled delivery dates on or between these two dates.
	Specify the date in the time zone for the PO line warehouse.
To Scheduled Vendor Delivery Date (8,0):	Specify a range of dates to limit the purchase order receipt scheduled dates to include in the report. The report includes only purchase orders with scheduled delivery dates on or between these two dates.
	Specify the date in the time zone for the PO line warehouse.
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.

Screen actions - PUR240D-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. 22)* in the overview information in this document.

Receiving report, PUR250D

Receiving Report, PUR250D, prints a report of all received or rejected purchase orders. You must specify the desired transaction code for receipts or rejections. You set up transaction codes in Transaction Effects Maintenance, INV150. You can limit the received transactions to include in the report by warehouse code and by the receipt date. The receipt date for each purchase order is the transaction date that you specify for the PO. You can receive POs in Purchase Receipts, PUR550D, Inventory Transactions, INV500D1, or Invoice Entry, ACP500D1.

Receipts display on the report as positive quantities, and rejections display on the report as negative quantities.

The report prints in purchase order number sequence for each warehouse and contains the following information:

- Vendor number
- Vendor name
- Type and description of the item/commodity
- Quantity, ordered, received, and rejected
- Unit of measure
- Schedule date
- Transaction date

For purged purchase order records, the system uses Item Description not Found for the item description.

Access: Menu PUR01

Print a receiving report

Use the Receiving Report screen, PUR250D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR250D-01

Fields	Description
Transaction Cd/Receipt or Reject (2,A):	Specify the desired transaction code for either receipts or rejections. The report includes only transactions with this code.
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report. The report includes only receipts or rejections from these warehouses.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report. The report includes only receipts or rejections from these warehouses.
From Receiving Date (8,0):	Specify a range of dates to limit the receiving dates to include in the report. The report includes all purchase orders received either on or between these two dates. Specify the date in the format specified in System Parameters.
To Receiving Date (8,0):	Specify a range of dates to limit the receiving dates to include in the report. The report includes all purchase orders received either on or between these two dates. Specify the date in the format specified in System Parameters.

Screen actions - PUR250D-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. 22)* in the overview information in this document.

Requisition report by requisition number, PUR254D

Reqs by Requisition, PUR254D, prints a report of all open requisitions by requisition number.

Open requisitions are those that have not been released to create purchase orders. Completed requisitions have had purchase orders released. The system logically deletes completed requisitions. That is, the system flags the completed requisitions for physical deletion at the next purge.

The requisitions print in numeric order by requisition number. The report sequences requisitions with the same number by item number. The report contains the following data for each requisition number:

- Line number of the requisition
- Buyer
- Item number and description
- Order quantity

- Stocking and purchasing units of measure
- Purchasing U/M conversion
- Requisition entry date
- Last update date
- Ship-to location
- Due date
- MRP scheduled date
- Vendor delivery date
- Expected cost
- Standard cost
- Warehouse and description

Access: Menu PUR01

Print a requisition report by requisition number

Use the Requisitions By Requisition Number screen, PUR254D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR254D-01

Fields	Description
From Requisition (9,0):	Specify a range of values to limit the requisition numbers to include in the report.
To Requisition (9,0):	Specify a range of values to limit the requisition numbers to include in the report.

Screen actions - PUR254D-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. 22)* in the overview information in this document.

Requisitions report by buyer, PUR255D

Requisitions by Buyer, PUR255D, prints a report of all open requisitions by buyer code and item number. Like purchase orders, Infor LX stores requisitions until they are either consolidated into purchase orders or deleted.

The report sequences the requisitions by buyer code. You can limit this report to a selected range of buyer codes. The report sequences requisitions within the same buyer code by item number and then requisition number.

The report prints in requisition order number sequence and contains the following information:

- P/O ship via
- Buyer
- Type item/commodity description
- Order quantity
- Stock unit of measure
- Purchasing unit of measure
- Purchase U/M conversion factor
- Entry Date
- Last update
- Due date
- MRP scheduled date
- Vendor delivery date
- Expected cost
- Standard cost
- Ship to warehouse and description
- Outside operation field value, order, operation

Access: Menu PUR01

Print a requisition report by buyer number

Use the Requisitions By Buyer screen, PUR255D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR255D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
From Buyer Number (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer Number (3,A):	Specify a range of values to limit the buyer codes to include in the report.

Screen actions - PUR255D-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. 22)* in the overview information in this document.

Vendor contracts/quotes, PUR256D

Vendor Contracts/Quotes, PUR256D, prints a report of all vendor quotes in the Vendor Quote Master file, HQT. You enter vendor quotes in Vendor Quote Maintenance, PUR150. This report sequences quotes by vendor number; the report sequences quotes for the same vendor number by item number. The report contains the following data for each vendor:

- Vendor number
- Type item/Commodity Description
- Purchase U/M conversion factor
- Contract Number
- Effective from
- Effective to
- Currency
- Quantity ordered
- Quantity received
- Quantity costed

Use the range fields to limit the data on the report.

Access: Menu PUR01

Print a vendor quote report

Use the Vendor Contracts/Quotes screen, PUR256D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR256D-01

Fields	Description
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
Operation/To Operation (3,0):	Specify a range of values to limit the operations to include in the report.
Method/To Method (2,A):	Specify a range of values to limit the method codes 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.
From Contract Number (10,A):	Specify a range of values to limit the contract numbers to include in the report.
To Contract Number (10,A):	Specify a range of values to limit the contract numbers to include in the report.
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.

Screen actions - PUR256D-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. 22)* in the overview information in this document.

Vendor history report, PUR258D

Vendor History, PUR258D, prints a report of all vendor activity for items and commodities. You can run the report by items or commodities or both. You can limit the information by item, commodity, and vendor ranges. For any range in which you accept the default values, the program includes all available data in the report.

The report sorts the information by item/commodity type, then item/commodity number, and then by vendor number, and prints a total for each item.

The report contains the following data for each item or commodity/vendor combination:

- Vendor item or commodity number
- Vendor number and name
- Number of deliveries on-time, early, late, and total
- Quantity good/rejected
- Stocking and purchasing units of measure
- Latest cost transaction date
- Activity this month (quantity and amount)
- Activity this year (quantity and amount)
- Activity last year (quantity and amount)

Access: Menu PUR01

Print a vendor history report

Use the Vendor History by Item/Commodity screen, PUR258D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR258D-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 Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
Item/Commodity Type (1,0):	Specify one of the following codes to limit the information to include in the report:

Valid choices

- **0**

  Select inventory items only
- **1**

  Select commodities only
- **2**

  Select both items and commodities

From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.

Screen actions - PUR258D-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. 22)* in the overview information in this document.

Open PO report by expected delivery date, PUR260D

Open Purchase Orders By Expected Delivery Date, PUR260D, prints a list of open purchase orders. The report lists the purchase order information in order by expected delivery date with the oldest PO first. The report also includes the following information:

- Item description
- Warehouse
- Unit of measure
- Quantity ordered, received, and in inspection
- Due date
- Vendor number and name
- Vendor item number
- Shop order number
- Currency

If Multiple Currencies is installed, this report prints subtotals labeled as transaction, base, or global currency. The currency code also prints next to the subtotals.

Access: Menu PUR01

Print an open purchase order report by expected delivery date

Use the Open POs by Expected Del Date screen, PUR260D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR260D-01

Fields	Description
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To PO Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report. The system displays the following fields only if Multiple Currencies is installed on your system and the Accounts Payable and/or Purchasing field is set to Yes in Multi-Currency Parameters, MLT800.
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.
Override Date for Exchange Rate (6,0):	Specify the override date to use if you print this report in base currency. See the following field, Amount Type. This date determines the spot rate that the system uses to convert foreign currency-denominated amounts to base currency amounts. You set up spot rate types in Rate Type Maintenance, CLD185. You assign exchange rate values to spot rate types in Exchange Rate Maintenance, CLD109. Example: Assume the company's base currency is USD, US dollars. Assume that transactions take place in pounds sterling and deutschmarks. If you print the report in base currency (B), Infor LX uses this override date to find the following spot rates: the pounds sterling to US dollars exchange rate and the deutschmarks to US dollars exchange rate. If you specify T for transaction currency in the Amount Type field, then leave the override date blank. The report prints amounts in the transaction currencies.
Amount Type (1,A):	Specify T or B to designate whether to report the amounts on this report in their transaction (T) currencies or convert and report them in the company base (B) currency. If you specify T for transaction currencies, leave the Override Date field blank. If you specify B for base currency, specify a date in the Override Date field, so that Infor LX can access the spot rate for that date.

Screen actions - PUR260D-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. 22)* in the overview information in this document.

Vendor performance summary, PUR262D

Vendor Performance Summary, PUR262D, prints a summarized vendor performance report. Purchase Receipts, PUR550D, updates the counts of PO lines as either early, late, or on time. Infor LX factors the system or warehouse parameters for days late or days early into this calculation. A PO line received one day early with delivery tolerances set to zero days is counted as early.

The same PO line with a delivery days parameter of five days early is counted as on-time. The report contains the following data by vendor:

- Item number
- Amount this year (YTD)
- Amount last year (YTD)
- Quantity this year (YTD)
- Quantity last year (YTD)
- Purchasing unit of measure
- Deliveries early, on-time, late, and total
- Quantity good/rejected

Access: Menu PUR01

Print a vendor performance summary report

Use the Vendor Performance Summary screen, PUR262D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR262D-01

Fields	Description
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From Facility:	Specify a range of values to limit the facilities to include in the report.
To Facility:	Specify a range of values to limit the facilities to include in the report.

Screen actions - PUR262D-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. 22)* in the overview information in this document.

Inspection dispatch, PUR270D

Inspection Dispatch, PUR270D, prints a list of the purchase orders currently in inspection status. The report prints in due date sequence, then purchase order number sequence within each due date. The report contains the following information for each purchase order:

- Item number and description
- Vendor item number
- Purchase order quantity
- Received quantity
- Quantity in inspection
- Vendor delivery date
- Outside operation field value
- Shop order number
- Warehouse
- Due date
- Purchasing unit of measure

Access: Menu PUR01

Print an inspection dispatch report

Use the Inspection Dispatch screen, PUR270D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR270D-01

Fields	Description
From PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To PO Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.

Screen actions - PUR270D-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. 22)* in the overview information in this document.

Vendor negotiation report, PUR275D

Vendor Negotiation, PUR275D, prints a list of summary amounts. These amounts are the expected purchase amounts for each item reported through an upper release date. You choose the release date. The expected purchase amounts are a combination of the MRP planned order, purchase order, and contract amounts. The report sequence is by buyer, vendor, and then item number.

The report sequences the information by vendor number and then by contract number. The report contains the following information for each vendor contract:

- Quantity and price breaks
- Backlog status
- Purchasing unit of measure
- Item description
- Contract number
- Price
- Total vendor year to date amount
- Total vendor year to date quantity

- Effective from and to dates
- Last order date
- Contracted to date quantity received
- Contracted to date quantity ordered

You can run this report only if MRP or DRP is installed.

Access: Menu PUR01

Print a vendor negotiation report

Use the Vendor Negotiation Report screen, PUR275D-01, to specify the selection criteria for the report.

Field descriptions - PUR275D-01

Fields	Description
Upper Release Limit Date (8,0):	Specify the upper release date to use to select information for this report. The report prints only MRP planned orders scheduled for release before and including this date.
Facility to Print (3,A): (Optional)	Specify a facility to print planned orders for a particular facility.
Warehouse to Print (3,A): (Optional)	Specify a warehouse to print planned orders for a particular warehouse.
From Buyer Limit (3,A):	Specify a range of values to limit the buyer codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.
To Buyer Limit (3,A):	Specify a range of values to limit the buyer codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.
Print Vendor Pricing Information (1,0):	Specify 1 to include each vendor's pricing information. Otherwise, specify 0. The Vendor Quote file contains the price quotes received from vendors; you maintain this file in Vendor Quote Maintenance, PUR150.

Screen actions - PUR275D-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. 22)* in the overview information in this document.

Vendor schedule report, PUR280D

Vendor Schedule, PUR280D, prints a list of planned purchase orders. The report sequences the purchase orders by date and by item within vendor within buyer code. The report prints in buyer code order and contains the following information for each purchase order:

- Item number and description
- Alternate vendor number
- Purchase order quantity
- Past due quantity
- Number of weeks material commitment for this vendor as set in the Vendor Master file through IDF Vendor

Access: Menu PUR01

Print a vendor schedule report

Use the Vendor Schedule screen, PUR280D-01, to specify the selection criteria for the report.

Field descriptions - PUR280D-01

Fields	Description
Facility to Print (3,A):	Specify a facility code to process a single facility. Leave this field blank to process all facilities.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. This field uses extreme values by default.

Screen actions - PUR280D-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. 22)* in the overview information in this document.

Purchase planning report, PUR284D

Use Purchase Planning Report, PUR284D, to run the MRP Planning report, which calculates the variance between the schedules you sent to your vendors and the current material requirements calculated by MRP.

The report for single-sourced items shows general information such as item number, description, stock on hand, lot size, order policy, last receipt date, quantity, and advice note number for each item. The report show past due information, such as requirements due before the start of the first week.

The report includes the following information:

- MRP raw requirement
- Previous schedule quantity
- Net change (in units)
- Projected stock on hand
- Net change cost (in monetary units)

The report is sub-totaled by vendor and has a grand total at the end.

The calculations and/or data sources used for each of these lines is as follows.

MRP Raw Requirements are the actual quantities required of the item in each of the previously mentioned time frames. The raw requirements for an item are those that appear on the right hand side of the MRP Inquiry. They include requirements generated by customer orders, forecasts, shop order allocations, and planned requirements for higher level demand. The raw requirements do not include any MRP lot sizing or period days consolidation effects, for example, those shown on the left hand side of MRP300. MRP raw requirements are considered to be the absolute minimum quantity of an item required to meet all known demand.

Previous Schedule Quantity shows the quantity outstanding (or remaining) from the last time the schedule was printed. Each time the schedule is printed, the system stores requirements in the schedule history file. The value shown in the previous quantity row is therefore this last schedule quantity minus any receipts made during the period. For example, if the quantities required on the last schedule the vendor received were;-1000 for week 20, 1000 for week 21 and 1000 for week 22, but we received 1600 pieces between the date of printing the last schedule and the date of running the MRP Planning Report, the previous quantity figures would be zero for week 20, 400 (1000 - 600) for week 21 and 1000 for week 22.

Net Change in Units shows the minimum quantity required (in each time period) to add to the schedule to bring projected stock on hand back to zero if the projected stock on hand is negative. If projected stock on hand is greater than zero or minimum balance of one is defined, the net change quantity is shown as a negative. The net change figure should take into account previous net changes, because projected stock on hand is a cumulative figure, for example:

Projected OH	-100	-200	-200
Net Change	100	100	0

and if minimum balance quantity is 50, and projected on hand is greater than this:

Projected OH	100	200	200
Net Change	50	-150	-150

Projected Stock on Hand is a running calculation for each period. The exact calculation follows.

Stock on hand - MRP Raw requirements + Previous schedule quantity + any other purchase order line quantities (from other POs) in each time period.

Net Change Cost in Monetary Units is net change quantity multiplied by the item's standard cost. See Net Change in Units, above.

The program uses costs from the following files:

If the item is single sourced, the program uses the cost from the Item/Facility file. If no cost is found, the program uses the cost from the Item Master file.

If the item is multi-sourced, the program uses the cost from the Item Master file. If no cost is found, the program uses the first vendor in sequence to find the first appendable order for this item and vendor, retrieve the warehouse code, access the Warehouse Master file to determine the facility number, and return the cost for that item/facility combination.

You can restrict the report to any combination of facilities, warehouses, buyers, planners, vendors, commodity codes, purchase order numbers or items and you can request a separate report for multi-sourced items.

The separate report for multi-sourced items is similar in appearance, but, in addition to general item information, the report shows all vendor split rules for each item, and separate lines of the previous schedule quantities for each vendor. The report prints a total as in the single source report.

You can use the MRP planning report to estimate the additional value and quantities required in each time period to amend the schedules by, to satisfy the latest MRP requirements.

Note: If no requirements or outstanding quantities exist for an item, the system does not print the item on the report. The report starts a new page for each vendor and shows a final report total of net change costs.

Access: Menu PUR01

Print a purchase planning report

Use the Purchase Planning Report selection screen, PUR284D-01, to specify the criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR284D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
To Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.

To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
Multi Sourced Items (0 or 1):	Specify 0 to exclude multi-sourced items from printing or 1 to include multi-sourced items.
Run Time Parameter (0 or 1):	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 - PUR284D-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. 22)* in the overview information in this document.

Purchase planning exception report, PUR286D

The Purchase Planning Exception report, PUR286D, calculates the variance between the schedules you sent to your vendors and the current material requirements calculated by MRP. This report prints the details of only those items for which the variance between schedules and MRP exceeds the user-defined tolerance percentages.

The tolerance percentages relate to the net change quantity figure calculated for each item. If the net change quantity compared to previous quantity is outside of the tolerance percentages (defined separately as positive and negative) for a particular time bucket, the item prints on the report (subject to selection criteria)

For example, assume that you print schedules and transmit the schedules to vendors on a monthly basis, but you run MRP daily or weekly. Assume that you print new schedules today and show a quantity of 1000 per week required. Next week, you run an MRP generation that shows that you now need 1200 per week. The net change quantity is 200 per week (1200 - 1000) compared to the previous value of 1000, which gives a percentage change of +20%. If the tolerance percentages on the requesting screen are set at +20% or more, this item prints on the exception report. In summary, the report shows items for which the schedule quantities significantly increase or decrease. You may want to review these items before the next scheduled print run for the schedules.

The report produced for single sourced items shows general information such as item number, description, stock on hand, lot size, order policy and last receipt date, quantity, and advice note number for each item. This information follows five lines of information arranged in a spreadsheet type format with 11 columns across the page. The columns show past due, such as requirements due before the start of the first week on the report, eight separate columns for the next eight weeks, and two further columns each of four weeks duration.

The five lines of information include the following elements:

- MRP raw requirement
- Previous schedule quantity
- Net change in units
- Projected stock on hand
- Net change cost in monetary units

The report is sub-totaled by vendor and has a grand total at the end.

The calculations and/or data sources used for each of these lines is as follows.

- MRP Raw Requirements are the actual quantities required of the item in each of the previously mentioned time frames. The raw requirements for an item are those that appear on the right hand side of the MRP Inquiry. They include requirements generated by customer orders, forecasts, shop order allocations, and planned requirements for higher level demand. The raw requirements do not include any MRP lot sizing or period days consolidation effects, for example, those shown on the left hand side of MRP300. MRP raw requirements are considered to be the absolute minimum quantity of an item required to meet all known demand.

- Previous Schedule Quantity shows the quantity outstanding (or remaining) from the last time the schedule was printed. Each time the schedule is printed, the system stores requirements in the schedule history file. The value shown in the previous quantity row is therefore this last schedule quantity minus any receipts made during the period. For example, if the quantities required on the last schedule the vendor received were;-1000 for week 20, 1000 for week 21 and 1000 for week 22, but we received 1600 pieces between the date of printing the last schedule and the date of running the MRP Planning Report, the previous quantity figures are zero for week 20, 400 (1000 - 600) for week 21 and 1000 for week 22.

- Net Change in Units shows the minimum quantity required (in each time period) to add to the schedule to bring projected stock on hand back to zero if the projected stock on hand is negative. If projected stock on hand is greater than zero or minimum balance of one is defined, the net change quantity is shown as a negative. The net change figure should take into account previous net changes, because projected stock on hand is a cumulative figure, for example:

Projected OH	-100	-200	-200
Net Change	100	100	0

and if minimum balance quantity is 50, and projected on hand is greater than this:

Projected OH	100	200	200
Net Change	50	-150	-150

- ■   Projected Stock on Hand is a running calculation for each period. The exact calculation follows.

Stock on hand - MRP Raw requirements + Previous schedule quantity + any other purchase order line quantities (from other POs) in each time period.

Net Change Cost in Monetary Units is net change quantity multiplied by the item's standard cost. See Net Change in Units, above.

The program uses costs from the following files:

If the item is single sourced, the program uses the cost from the Item/Facility file; if no cost is found, the program uses the cost from the Item Master file.

If the item is multi-sourced, the program uses the cost in the Item Master file. If no cost is found, the program uses the first vendor in sequence to find the first appendable order for this item and vendor, retrieve the warehouse code, access the Warehouse Master file to determine the facility number, and return the cost for that item/facility combination.

You can restrict the report to any combination of facilities, warehouses, buyers, planners, vendors, commodity codes, purchase order numbers, or items and you can request a separate report for multi-sourced items.

The separate report for multi-sourced items is similar in appearance, but, in addition to general item information, the report shows all vendor split rules for each item, and separate lines of the previous schedule quantities for each vendor. The report prints a total as in the single source report.

You can use the MRP planning report to estimate the additional value and quantities required in each time period to amend the schedules by, to satisfy the latest MRP requirements.

Note:If no requirements or outstanding quantities exist for an item, the item does not print on the report. The report starts a new page for each vendor and shows a final report total of net change costs.

Access: Menu PUR01

Print an MRP exception report

Use the MRP Exception Report screen, PUR286D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR286D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
To Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
Multi Sourced Items (0 or 1):	Specify 1 to include multi sourced items in the report; otherwise specify 0.
Tolerances:	

Up to bucket (inclusive):	Specify the number for the first time bucket to use.
+% (5.2):	Specify the acceptable percentage tolerance.
-% (5.2):	Specify the acceptable percentage tolerance.
Up to bucket (inclusive):	Specify the number for the second time bucket to use.
+% (5.2):	Specify the acceptable percentage tolerance.
-% (5.2):	Specify the acceptable percentage tolerance.
+% (5.2):	Specify the acceptable percentage tolerance.
-% (5.2):	Specify the acceptable percentage tolerance.
Run Time Parameter (0 or 1):	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 - PUR286D-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. 22)* in the overview information in this document.

Contract exceptions report, PUR288D

Use the Contract Exceptions report program to list contracts that are due to expire within x days, are within x% of completion, or both. Percentage of completion is based on either value or quantity and measured against received or ordered to date values.

You can specify contract header or contract details, with the comparisons based on quantity or value.

If you specify contract header only, then the system bases the comparisons on the contract header details only. The report includes only exceptions for which the quantity or values of the contract detail lines exceed the contract header quantities or values.

If you specify contract details only, then the system bases the comparisons on only the contract detail lines. The report includes only exceptions for which the quantity or values of the contract detail lines exceed the contract detail line restrictions.

If you print both header and detail, the report lists the contract header details for any exceptions only once, followed by all the contract detail line exceptions for that contract.

Access: Menu PUR01

Print a contract exception report

Use the Contract Exception Report screen, PUR288D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR288D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
To Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.

From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
Selection based on header or detail? (0 or 1):	Specify 0 to report on exceptions based on contract header details or specify 1 to report on exceptions based on contract details. Exception detail comparisons are based on quantity or value.
	If you specify contract header only, then the system bases the comparisons on the contract header details only. The report includes only exceptions for which the quantity or values of the contract detail lines exceed the contract header quantities or values.
	If you specify contract details only, then the system bases the comparisons only on the contract detail lines. The report includes only exceptions for which the quantity or values of the contract detail lines exceed the contract detail line restrictions.
Contracts due to expire within no of days (3,0):	Specify a value between 1 and 999 to list those contracts due to expire within the stipulated number of calendar days.
Exceeding % Ordered (each 2,0):	Specify a percentage from 0 to 99 in % ordered or received fields, but not both, to identify whether the exception report compares contracts based on ordered-to-date or received-to-date quantities. A value of 0 in each field prints all contracts subject to the other restrictions entered.
Exceeding % received (each 2,0):	Specify a percentage from 0 to 99 in % ordered or received fields, but not both, to identify whether the exception report compares contracts based on ordered-to-date or received-to-date quantities. A value of 0 in each field prints all contracts subject to the other restrictions entered.
% Comparisons based on Quantity or Value:	Specify 0 to base percentage calculations on quantity; specify 1 to base percentage calculations on monetary value.

Print Header only, Detail only or both (0,1 or 2): Specify 0 to print contract header details only; specify 1 to print item details only or 2 to print header and item details.

Run Time Parameter (0 or 1): 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 - PUR288D-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. 22)* in the overview information in this document.

Vendor schedule summary report, PUR290D

Use Vendor Schedule Summary Report, PUR290D, to show schedule information that covers the last receipt information, the total quantity required on purchase order lines prior to the request date, and for the next six delivery dates, the quantities for requirements converted to become purchase order lines.

The report is in a spreadsheet layout and is sequenced by buyer, vendor and item with separate pages for each buyer and vendor.

Dates and quantities shown relate only to existing purchase order line requirements. This report does not show MRP requirements.

Access: Menu PUR01

Print a vendor schedule summary report

Use the Schedule Summary Report screen, PUR290D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR290D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
To Facility (3,A):	Specify a range of values to limit the facility codes to include in the report.
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order number codes to include in the report.
From Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
To Item Number (35,A):	Specify a range of values to limit the item number codes to include in the report.
Issue Date (8,0):	Specify the start date for the report. You cannot specify a date prior to the current date.
Run Time Parameter (0 or 1):	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 - PUR290D-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. 22)* in the overview information in this document.

Purchasing inquiry, PUR300D1

Use Purchasing Inquiry, PUR300D1, to inquire about purchasing activity (purchase orders, requisitions, vendor quotes) by purchase order number, vendor number, item number, or customer order number. You can limit your selections by currency and active or closed quote status. You must specify a value in one of the following fields:

- PO/Req Number
- Vendor Number
- Item/Commodity
- Customer Order

Depending on the criteria you select on the first screen, the remaining Purchasing Inquiry screens can vary slightly.

Access: Menu PUR02, or F14 from the following programs: Purchase Order Maintenance, PUR500; Procurement Authorization, PUR530; Requisition Maintenance, PUR600/PUR650; PO Consolidation/Release, PUR640; or Purchase Order Receipts, PUR550D

Select criteria to display purchasing information

Use the Purchasing Inquiry selection screen, PUR300D1-01, to specify the selection criteria to display purchasing information.

Field descriptions - PUR300D1-01

Fields	Description
PO/Req Number (9,0):	Specify the purchase order or requisition number to which to limit the inquiry.
Original Order Line Number (4,0):	Specify the number the line had originally in the purchase order.
Vendor Number (8,0):	Specify the vendor number to which to limit the inquiry.

Item/Commodity Flag and Name (1,0 and 35,A):	Specify the item or commodity code to which to limit the inquiry.
	To see purchase order information for a specific commodity or item, specify a value in the first Item/Commodity field. Specify 0 for item or 1 for commodity. This setting controls the prompt screen for the item/commodity name to display only items or only commodities. You must then specify the desired item or commodity. If you do not specify a specific item or commodity name, Infor LX displays all PO lines of all items and commodities for the specified vendor, regardless of whether the Item/Commodity field value is 0 or 1.
Customer Order (8,0):	Specify the number of the customer order to which to limit the inquiry.
Currency (3,A):	Specify the currency code used to limit purchase order information. The system uses this limit with the criterion you choose above. For example, if you choose to view purchase orders for Vendor 10, and you enter a currency code USD for US dollars, the system displays only purchase orders ordered in US dollars from Vendor 10.
	To view purchase orders for all currencies, leave this field blank.
Requisitions (1,A):	Specify 0 for purchase orders only. Specify 1 for requisitions only. The information on the screens that follow depends on the value in this field.
Active Quotes (1,A):	If you use this inquiry with screen action F17, Quotations by Item or Vendor, specify Yes here to view active quotes only. The system displays only quotes that are currently in their effective period. This field limits selections that access the Vendor Quote file, HQT.
	If you leave this field blank, the system displays all quotes, both effective and not effective.

Screen actions - PUR300D1-01

Commands	Description
F14=History	Access the Vendor History Inquiry for vendor screen, PUR300-08, or the History Inquiry for item or commodity screen, PUR300D7-01. You must specify a vendor number, item number, or commodity number. These screens list the purchasing activity by vendor or the purchased quantity and amount of a particular item or commodity for the month-to-date, year-to-date, and previous year for costed POs.
	You can specify only a vendor number or an item or commodity number but not both before you use F14. If you specify both, the item or commodity

number takes precedence and the system displays history by item or com-modity.

F16=Mat Sts Inq	Access the Material Status Inquiry - Summary screen, INV300D-02, to review the status of your inventory stock.
F17=Quotations	Access the Vendor Quotes Inquiry for vendor screen, PUR300D5-01, or the Item Quotes Inquiry for item or commodity screen, PUR300D6-01 after you specify a vendor or an item number. You establish quotes for vendor/item combinations in Vendor Quote Maintenance, PUR150.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View purchasing information for an item or commodity

If you specify an item number or commodity code on the Purchasing Inquiry selection screen, PUR300D1-01, and press Enter to view purchasing information, Infor LX displays the Purchasing Inquiry for item or commodity screen, PUR300D2-01. Use this screen to select an item or commodity for which to display details or ship-to information. This screen shows POs and vendors for the item or commodity you specified on the previous screen.

The header information for this screen displays month-to-date and year-to-date sales amounts for the item or commodity. The information also includes the quantity required by customers, including resupply warehouses, and the quantity on order. The on-order quantity includes purchase orders, shop orders, and resupply orders.

If you specify an item number or commodity on the initial selection screen, the system displays the following information on the Purchasing Inquiry for item or commodity screen, PUR300D2-01:

- Item number and description
- The buyer code associated with this item
- The stocking and purchasing units of measure for this item
- The vendors that supply this item (can be one or two)
- The amounts of this item on-hand, the amount required for customer orders (Cust. Required), the amount required for shop orders (Mfg. Required), and the amount on order
- Purchase orders where this item is found, the supplying warehouse and vendor, plus the amount ordered and received
- The purchase order due date (into stock)
- If you select a commodity in the selection window, Infor LX also displays the commodity type: 0=Material commodity, 1=Service commodity, 2=MRO part, 3=MRO service receipt.

The Due Date and Vendor Delivery Date fields display the date in the time zone for the line warehouse.

If you have Dynamic Weights and Measures functionality activated in Order Entry System Parameters, and this is a DWM item, you can view fields on this screen that express quantity values in the equivalent dual unit of measure values. When you access the screen, the system displays the field literals and values in quantity. For DWM Items, use F18, DWM Switch to toggle between quantity and dual measure values.

The system indicates preliminary purchase orders by an asterisk (*) before the order number.

The system indicates SMI (Supplier Managed Inventory) purchase orders by an ampersand (&) before the order number.

Field descriptions - PUR300D2-01

Fields	Description
Line actions:	The following line actions are available:
	14=Ship-To
	Access the Ship To Inquiry screen to view ship-to information.
	15=Detail
	Access the Purchase Order Line Detail screen, PUR302D-01.
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.

Screen actions - PUR300D2-01

Commands	Description
F11=Fold	Display additional fields. If you use F11 to fold the screen, Infor LX displays the following additional fields:
	Purchase order line number
	The vendor's number for this item
	The ordering currency
	The quantity in inspection
	Purchase order entry date
	Vendor delivery due date
	The quantity for which you have been invoiced (amount costed)

Outside operation PO flag

Delivery Number for all service purchase orders, as assigned to a purchase through Inbound Delivery Maintenance

Estimated Packaging Cost displays if packaging items are added to the purchase order for this item

Packaging Item Type if item is a packaging item

Price Option if item is a packaging item

F15=Vendor Qty Delivery   Access the Display Item Quantity Delivery Profile screen.

F16=Packaging Inquiry   Access Packaging Master Maintenance, OLM600, in inquiry mode.

F18=DWM Switch   Toggle between quantities and equivalent DWM dual measure values for DWM items. The system displays this screen action only if the item is a DWM item.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View purchasing information for a PO, vendor, or original purchase order line

If you specify a purchase order number or vendor number on the Purchasing Inquiry selection screen, PUR300D1-01 and press Enter to view purchasing information, Infor LX displays the Purchasing Inquiry for PO or vendor screen, PUR300D3-01, or, if you include an original line number for the purchase order, the Purchase Inquiry for original PO line screen, PUR300D3-02.

The Due Date and Vendor Deliver Date fields display the date in the time zone for the line warehouse.

Note: If Multiple Currencies is installed and turned on for Purchasing, you specified an alternate currency, and the Print/Display Flag value is 1 in the Vendor Master record for this purchase order's vendor, you can view monetary values in transaction, base, and alternate currencies. Use F13, Base Currency, to change currency views. If you did not define an alternate currency or the Print/Display Flag value is not 1, you can toggle between these values in transaction and base currencies.

If you specify line action 14, Ship-To, in the Act field, the system displays the Ship-To Inquiry screen with ship-to information for that PO line.

If you specify line action 15, Detail, in the Act field, the system displays the Purchase Order Line Detail screen, PUR302D-01, with detail for that purchase order line.

To distinguish service purchase orders from material purchase orders, this screen displays the delivery number for service purchase orders. An inbound delivery can have many purchase orders and lines

assigned to one delivery number. Infor LX assigns the delivery number only if you create service provider purchase orders in the Inbound Logistics Management application. Infor LX does not provide the delivery number for material purchase orders/lines because these lines can be associated with more than one inbound delivery.

If you specify a purchase order number or a vendor number on the initial selection screen and press Enter, Infor LX displays the information below.

If you include an original line number, Infor LX displays the Purchasing Inquiry for original PO line screen, PUR300D3-02, for PO original line numbers.

- Vendor number address to which purchase order is sent
- Ship-to number and address where items are delivered
- Purchase order cost. This is the ordered quantity multiplied by the expected cost.
- Purchase order number. Preliminary purchase orders are indicated by an asterisk (*).
- Original line number and current line number
- Item or commodity numbers and descriptions included on purchase order
- Warehouse
- Unit of measure
- The quantity of each item ordered and received

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment (Order Entry System Parameters), and this is a DWM item, you can view fields on this screen that express quantity values in the equivalent Dual Unit of Measure values. When you access the screen, the field literals and values are expressed in quantity. For DWM Items, use F18, DWM Switch, to toggle between quantity and dual measure values.

The system indicates SMI (Supplier Managed Inventory) purchase orders by an ampersand (&) before the order number.

Screen actions - PUR300D3-01/02

Commands	Description
F2=Vendor Address	Access the Purchasing Address screen and display address and contact detail for this vendor.
F9=Ship-to Address	Access the Warehouse Master Address screen and display address and contact detail for this ship-to. The system displays this screen action if you specified a purchase order.
F11=Fold	Display additional fields. If you use F11, Infor LX displays the following additional information:
	Purchase Order Line number
	Warehouse

Purchase Order due date

Purchase Order entry date

Purchasing unit of measure

Miscellaneous comments

The quantity for which you have been invoiced (quantity costed)

The quantity in inspection

Vendor's delivery due date

The expected cost and currency (order, base, or, where defined, alternate) in which this cost is expressed, switched by Processing Option F13

Outside PO flag (denotes whether this PO is for an outside operation)

The delivery number for all service purchase orders, as assigned to a purchase through Inbound Delivery Maintenance

Estimated Packaging Cost (displays when packaging items are added to the purchase order for this item)

Packaging Item Type (if item is a packaging item)

Receipt Price Option (if item is a packaging item)

F13=Base Currency Toggle between order (transaction) currency, base currency, and, where defined, alternate currency. The label of the screen action indicates which currency view the system displays the next time you use F13.

Note: If Multiple Currencies is installed and turned on for Purchasing, you specified an alternate currency, and the Print/Display Flag value is 1 in the Vendor Master record for this purchase order's vendor, you can view monetary values in transaction, base, and alternate currencies. Use F13 to change currency views. If you did not define an alternate currency or the Print/Display Flag value is not 1, you can toggle between these values in transaction and base currencies.

F14=PO Notes Access the Note Mode Selection (SYS255D) screen to view or maintain PO notes.

F15=Vendor Qty Delivery Access the Display Vendor Quantity Delivery Profile screen.

F16=Packaging Inquiry Access Packaging Master Maintenance, OLM600, in inquiry mode.

F18=DWM Switch	Toggle between display of quantities and display of equivalent DWM dual measure values for DWM items.
F22=P.O. Clauses	If your selection criterion is purchase order number, access the PO Clause Code Selection screen, PUR163D-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View purchasing information for a drop ship purchase order

If you specify a customer order number on the Purchasing Inquiry selection screen, PUR300D1-01, and press Enter, Infor LX displays the Purchasing Inquiry for customer order screen, PUR300D4-01.

This screen displays the following information:

- Customer number, name
- Order, request, and scheduled dates
- Order number
- Purchase order numbers that resulted from this order number, along with the supplying vendor number
- Item numbers or commodity codes on the purchase order along with the quantities ordered and received

If you have Dynamic Weights and Measures functionality activated in Order Entry System Parameters, and this is a DWM item, you can view fields on this screen that express quantity values in the equivalent dual unit of measure values. When you access the screen, the system displays the field literals and values in quantity. For DWM Items, use F18, DWM Switch, to toggle between quantity and dual measure values.

Field descriptions - PUR300D4-01

Fields	Description
Line action	The following line action is available:
	14=Ship-To
	Access the Ship To Inquiry screen to view ship-to information.
Act	Specify the number for the line action to perform and press Enter.

Screen actions - PUR300D4-01

Commands	Description
F11=Fold	Display additional fields. If you use F11 to fold the screen, Infor LX displays the following additional fields:
	Purchase order line number
	Vendor name
	The quantity in inspection
	Purchase order entry date
	Item description (inventory items) or commodity description (non-inventory items)
	The quantity for which you have been invoiced (quantity costed)
	Outside operation PO flag
	Vendor delivery due date
	Purchasing unit of measure
	The vendor's number for this item
F18=DWM Switch	Toggle between display of quantities and display of equivalent DWM dual measure values for DWM items.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View quotes for a vendor

If you specify a vendor number on the Purchasing Inquiry selection screen, PUR300D1-01, and use F17, Quotations, Infor LX displays the Quotes Inquiry for vendor screen, PUR300D5-01.

This screen displays the following information:

- Vendor number, name, and telephone number
- Item/commodity type, item number or commodity code, contract/quote number
- The first four quantity levels (displayed going down in a column) and their corresponding price levels (going down in a column), as set up in Vendor Quote Maintenance, PUR150
- The next four quantity levels (Quantity 5 - 8) and their corresponding price levels (going down in the next two columns), as set up in Vendor Quote Maintenance, PUR150
- Item or commodity description, load % amount, currency code, effective period start date and end date

- Purchasing unit of measure
- The facility to which the quote applies, and its description

Note: The system does not display a value in the Load % field; this field is reserved for future use.

You can select a quote and return to the calling program if you accessed this screen from Vendor Contract/Quote Maintenance, PUR150, PO Release/Maintenance, PUR500, Requisition Maintenance, PUR600, or Requisition Release, PUR650. To select a quote, specify X in the Select field, which the system displays in place of the Item/Commodity Type field.

Screen actions - PUR300D5-01

Commands	Description
F14=History	Access the Vendor History Inquiry for vendor screen, PUR300D8-01. F14 also switches between this vendor quotes screen and the vendor history screen.
F15=Open POs	Review all open purchase orders for this vendor on the Purchasing Inquiry for PO or vendor screen, PUR300D3-01. This is the same screen that the system displays if you specify a vendor number on the first screen and press Enter.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View quotes for an item

If you specify an item number on the Purchasing Inquiry selection screen, PUR300D1-01, and use F17, Quotations, Infor LX displays the Item/Quotes Inquiry for item or commodity screen, PUR300D6-01.

This screen displays the following information:

- Item number, item class, associated buyer code
- Item description, lead time, minimum balance amount, item order policy, purchasing unit of measure
- Month-to-date (MTD) and year-to-date (YTD) receipts, lot size, standard cost
- Quantity on-hand, quantity required to fill all open and backordered customer orders, quantity required to fill component requirements on released shop and production orders, and all expected due receipts of this item from open purchase orders, shop orders, production orders and resupply orders
- Vendor number and name
- Quantity of this item supplied MTD, YTD, and last year by the corresponding vendor on this line

- Vendor name, monetary amounts of this item purchased MTD, YTD, and last year from the corresponding vendor on this line
- Vendor number, contract/quote number
- The first four quantity levels (displayed going down in a column) and their corresponding price levels (going down in a column), as set up in Vendor Quote Maintenance, PUR150
- The next four quantity levels (Quantity 5 - 8) and their corresponding price levels (going down in the next two columns), as set up in Vendor Quote Maintenance, PUR150
- Vendor name, currency code, and effective period start and end dates
- The facility to which the quote applies, and its description

Screen actions - PUR300D6-01

Commands	Description
F14=Hist	Access the item History Inquiry for item or commodity screen, PUR300D7-01. F14 also toggles between this item quotes screen and the item history screen.
F15=Open POs	Access the Purchasing Inquiry for item or commodity screen, PUR300D2-01, to review all open purchase orders that contain this item.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View purchase order history by item or commodity

If you specify an item number and use F14, History, Infor LX displays the Item/Vendor History Inquiry for item or commodity screen, PUR300D7-01.

This screen displays the following information:

- Item number, item class, associated buyer code
- Item description, lead time, minimum balance amount, item order policy
- Month-to-date (MTD) and year-to-date (YTD) receipts, lot size, standard cost
- Quantity on-hand, quantity required to fill all open and backordered customer orders, quantity required to fill component requirements on released shop and production orders, and all expected due receipts of this item from open purchase orders, shop orders, production orders and resupply orders
- Vendor number, vendor item number
- Facility for this vendor and item combination
- Quantity of this item supplied MTD, YTD, and last year by the corresponding vendor on this line

- Vendor name, monetary amounts of this item purchased MTD, YTD, and last year from the corresponding vendor on this line

Screen actions - PUR300D7-01

Commands	Description
F14=Quotes	Access the Quotes Inquiry for item or commodity screen, PUR300D6-01, to review quotes received from this item. F14 also switches between this item history screen and the item quotes inquiry screen.
F15=Open POs	Review all open purchase orders that contain this item or commodity on the Purchasing Inquiry for item or commodity screen, PUR300D2-01.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View item or commodity history for a vendor

If you enter a vendor number on the Purchasing Inquiry selection screen, PUR300D1-01, and use F14, History, Infor LX displays the Item/Vendor History Inquiry for vendor screen, PUR300D8-01.

This screen displays the following information:

- Vendor number, name
- Vendor telephone number
- Item/commodity type, item number or commodity code and its associated vendor item number
- Facility for this vendor and item combination

- Quantities of the item or commodity ordered month-to-date (MTD), year-to-date (YTD) and last year by the displayed vendor
- Item or commodity description
- Monetary amounts of the item or commodity ordered MTD, YTD, last year by the displayed vendor

If you have Dynamic Weights and Measures functionality activated in Order Entry System Parameters, and this is a DWM item, you can view fields on this screen that display quantity values in the equivalent dual unit of measure values. When you access the screen, the system displays the field literals and values in quantity. For DWM items, use the DWM Switch, F18, to toggle between quantity and dual measure values.

Screen actions - PUR300D8-01

Commands	Description
F14=Quotes	Access the Quotes Inquiry for vendor screen, PUR300D5-01 to review quotes received from this vendor. F14 also switches between this vendor history screen and the vendor quotes inquiry screen.
F15=Open POs	Review all open purchase orders for this vendor on the Purchasing Inquiry for PO or vendor screen, PUR300D3-01.
F18=DWM Switch	Toggle between display of quantities and display of equivalent DWM dual measure values for DWM items.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor or item quantity delivery profile, PUR301D

Vendor or Item Quantity Delivery Profile provides a graphic representation of quantity delivery by vendor or by item number.

For purchasing inquiries by vendor number, the program displays the item number, purchase order number, a bar graph of order completeness, and the variance for each purchase order on the Display Vendor Quantity Delivery Profile screen. For purchasing inquiries by item number, the program displays the vendor number, purchase order number, a bar graph of order completeness, and the variance for each purchase order on the Display Item Quantity Delivery Profile screen.

Access: Use F15, Vendor Qty Delivery, on the Purchasing Inquiry for item or commodity screen, PUR300D2-01, or the Purchasing Inquiry for PO or vendor screen, PUR300D3-01

Display a vendor or item quantity delivery profile

The screen is sequenced by purchase order number. The graph of order completeness is a percentage (Quantity Received / Quantity Ordered). The variance is expressed in units (Quantity Received - Quantity Ordered).

Screen actions - PUR301-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

PO inquiry - line detail, PUR302D

Purchase Order Line Detail Inquiry displays the purchase order line details for the selected line on the Purchasing Inquiry for item or commodity screen, PUR300D2-01, or the Purchasing Inquiry for PO or vendor screen, PUR300D3-01.

Access: Line action 15, Detail, on the Purchasing Inquiry for item or commodity screen, PUR300D2-01, or the Purchasing Inquiry for PO or vendor screen, PUR300D3-01

View purchase order line details

The Purchase Order Line Detail screen, PUR302D-01, displays the following information for the selected purchase order line:

- Purchase Order Number. Preliminary POs are indicated by an asterisk (*).
- Line Number
- Status
- Orig Ln Number
- Orig Ord Qty
- Orig Due Date
- Item Tax Code
- Purchasing Unit of Measure
- Buyer
- Authorization
- Facility
- Shop Order
- Operation
- Customer
- Customer Order
- CO Line Number
- Request Source
- Revision Level
- Program ID
- Manufacturer

- Item/Commodity
- Expected Cost
- Contract
- Exchange Rate
- MRP Reschedule Date
- Print Date/Flag
- Ack Request Date
- Ack Receive Date
- Last Transaction
- Ship Via
- Profit Center
- FOB Cd/Point
- GL Account
- Ship To number
- Ship Status
- Destination
- Currency
- Ship Via
- Spend Type
- Country of Origin

The system displays the Original Due Date and the MRP Reschedule Date in the time zone for the PO line warehouse.

Screen actions - PUR302

Commands	Description
F2=Exchange Rate	Access the Override Exchange Rate screen. You can view the exchange rate between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro. The screen displays the multiplier exchange rate and divisor exchange rate. The system displays this screen action if Multiple Currencies is installed and turned on for Purchasing, euro support is enabled in Multi-Currency System Parameters, MLT800, and the vendor record contains an alternate currency.
F14=Control No. Schedule	Access the Control Number Schedule Fields screen. The system displays this screen action only if the item is a control number item. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View or maintain control number scheduling fields

Use the Control Number Schedule Fields screen to view the control number scheduling fields.

Screen actions - PUR302D-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. 22)* in the overview information in this document.

Contract/quote information, PUR303D

Use Contract/Quote Information to display contract/quote information for the selected quote record.

Access: F4 from Quotes Inquiry (PUR300-06)

View contract/quote information

This screen displays contract/quote information for the selected quote record.

Infor LX displays the following contract/quote fields:

- Purchasing Unit of Measure
- Vendor Item Number
- Vendor Lead Time
- Contract Number
- Contract Quantity
- Quantity Ordered (Contract-to-date)
- Quantity Received (Contract-to-date)
- Quantity Costed (Contract-to-date)
- Last Order Date
- Last Receipt Date
- Facility to which quote applies

Screen actions - PUR303D-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. 22)* in the overview information in this document.

Vendor history list, WINHVHD

Use Vendor History List to display the vendor history records.

View the vendor history

The Vendor History List screen displays vendor history records. This screen lists information by commodity/item number for the vendor specified in the calling program. For each record, Infor LX displays the facility, YTD amount for the last year, YTD quantity for the last year, and the last cost of the item on the last date recorded.

Field descriptions - WINHVHD

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.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Commodity/Item (1,0) (35,A):	Specify the item/commodity code and number to search for/position to. If the value to specify in the Item Number field is a commodity code, specify 1 for commodity. If the value to specify in the Item Number field is an item code, specify 0 for item.
	Specify the item number or commodity code for which you want to view information.

Screen actions - WINHVHD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Vendor alpha look-up, PUR310D

Use Vendor Alpha Look-up, PUR310D, to review existing vendor numbers and their address and contact information.

If you access this program through one of the other purchasing programs, such as Purchasing Inquiry, PUR300, Purchase Order Release/Maintenance, PUR500, you can select a vendor number to transfer back to the original calling program.

Access: Menu PUR02, Menu ACP, F15 from Purchase Order Maintenance, PUR500, or Requisition Release, PUR650

View vendor information

Field descriptions - PUR310D-01

Fields	Description
Name (10,A):	Specify the alpha lookup key of the vendor at which to start the display and press Enter. Infor LX displays all vendors with an alpha lookup key equal to or greater than the value you specify. You assign alpha lookup keys to vendors in IDF Vendor.
	The value specified here does not have to be a complete alpha lookup key as specified in IDF Vendor; you can specify the first few characters only. The search string is case sensitive; you must match upper- and lowercase characters for as much of the lookup key as you specify.
Postal Code (9,A):	Specify a postal code at which to start the display and press Enter. Infor LX displays all vendors with a postal code equal to or greater than the value that you specify.
Line action:	The following line action is available:

9=Select

Specify 9 in the first column of the line that contains the vendor to transfer back to the original program. You can specify only one vendor at a time.

Act (1,A):

You can specify a value in this field only if you access Vendor Alpha Look-up from another program.

Specify the number for the line action to perform and press Enter.

9=Select

Specify 9 in the first column of the line that contains the vendor to transfer back to the original program. You can specify only one vendor at a time.

GRN inquiry, header information, PUR312D1

Use GRN Inquiry, PUR312D1, to determine the status of any receipt. This header inquiry shows whether the GRN is invoiced, the receipt details, and the purchase order line details.

Use F13, Filters, to see only unmatched GRNs, only matched GRNs, or all GRNs. You can also use the filters screen to change the sequence selections.

Access: PUR02

Display GRN header information, first sequence

When you access GRN Inquiry, PUR312D1, from a menu, the system displays the GRN Header Inquiry screen, PUR312D1-01. This screen displays the GRN header information in vendor/entry date/advice note number sequence.

Field descriptions - PUR312D1-01

Fields	Description
Line action (2,0):	The following line actions are available: **10=GRN Lines** Display lines for the GRN.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Vendor Number (8,0):   Specify the vendor number.

Entry Date (8,0):   Specify the entry date of the advice note that you select.

Advice Note (35,A):   Specify the advice note that you select.

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.

Status: This field displays the current status of the GRN.

A value of *MATCHED indicates that all GRN lines are fully matched. CLOSED indicates that the GRN has been closed manually. A blank field indicates that the GRN is still open - some or all GRN lines are not fully matched.

Screen actions - PUR312D1-01

Commands	Description
F13=Filters	Access the GRN Filters screen. Use this screen to select sort and sequencing options.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter GRN information

Use the GRN Filters screen, PUR312D1-02,to specify the sort options and to specify the sequence in which to display the GRN information. You can display uninvoiced GRNs, invoiced GRNs, or both.

Field descriptions - PUR312D1-02

Fields	Description
Sort (1,0):	Specify a sort option. Specify one of the following values:

Valid choices

- **1, Uninvoiced**

  Display active GRNs.

- **2, Invoiced**

  Display inactive GRNs.

- **3, All**

  Display both active and inactive GRNs.

GRN/ASN Sort (1,0):   Specify 1 to restrict the selection to GRN records or 2 to restrict the selection to ASN records.

Sequence (1,0):   Specify one of the following values:

Valid choices

- **1**

  Vendor/Entry Date/Advice Note Number. Display the GRN Header Inquiry screen, PUR312D1-01, with the records in ascending order.

- **2**

  Entry Date/Vendor/Advice Note Number. Display the GRN Header Inquiry screen, PUR312D1-03, with the records in ascending order.

- **3**

  Advice Note Number/Advice Note Date/Vendor. Display the GRN Header Inquiry screen, PUR312D1-04, with the records in ascending order.

- **4**

  Advice Note Date/Advice Note Number/Vendor. Display the GRN Header Inquiry screen, PUR312D1-05, with the records in ascending order.

- **5**

  GRN Number. Display the GRN Header Inquiry screen, PUR312D1-06, with the records in ascending order.

Screen actions - PUR312D1-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Display GRN header information, second sequence

On the GRN Header Inquiry screen, PUR312D1-01, use F13, Filters, to change the sequence to 2 to display the GRN Header Inquiry screen, PUR312D1-03. This screen displays the information in entry date/vendor/advice note number sequence.

Field descriptions - PUR312D1-03

Fields	Description
Line actions:	The following line actions are available on this screen:
	10=GRN Lines.
	Display lines for the GRN.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
Entry Date (8,0):	Specify the entry date of the advice note to select together with a valid line action.
Vendor (8,0):	Specify the vendor number for the advice note to select.
Advice Note (35,A):	Specify the advice note to select.
Status:	This field displays the current status of the GRN.
	A value of *MATCHED indicates that all GRN lines are fully matched. CLOSED indicates that the GRN has been closed manually. A blank field indicates that the GRN is still open - some or all GRN lines are not fully matched.

Screen actions - PUR312D1-03

Commands	Description
F13=Filters	Access the GRN Filters screen. Use this screen to select sort and sequencing options.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Display GRN header information, third sequence

On the GRN Inquiry screen, PUR312D1-01, use F13, Filters, to change the sequence to 3 to display the GRN Header Inquiry screen, PUR312D1-04. This screen displays the information in advice note number/advice note date/vendor sequence.

Field descriptions - PUR312D1-04

Fields	Description
Line actions:	The following line actions are available on this screen:
	10=GRN Lines
	Display lines for the GRN.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
Advice Note (35,A):	Specify the advice note to select.
Advice Note Date (8,0):	Specify the date of the advice note to select.
Vendor (8,0):	Specify the vendor number for the advice note to select together with a valid line action.
Status:	This field displays the current status of the GRN.

A value of *MATCHED indicates that all GRN lines are fully matched. CLOSED indicates that the GRN has been closed manually. A blank field indicates that the GRN is still open - some or all GRN lines are not fully matched.

Screen actions - PUR312D1-04

Commands	Description
F13=Filters	Access the GRN Filters screen. Use this screen to select sort and sequencing options.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Display GRN header information, fourth sequence

On the GRN Inquiry screen, PUR312D1-01, use F13, Filters, to change the sequence to 4 to display the GRN Header Inquiry screen, PUR312D1-05. This screen displays the information in advice note date/advice note number/vendor sequence.

Field descriptions - PUR312D1-05

Fields	Description
Line actions:	The following line actions are available on this screen:
	10=GRN Lines
	Display lines for the GRN.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.
Advice Note Date (8,0):	Specify the date of the advice note to select.
Advice Note (35,A):	Specify the advice note to select.

Vendor (8,0):   Specify the vendor number for the advice note to select.

Status: This field displays the current status of the GRN.

A value of *MATCHED indicates that all GRN lines are fully matched. CLOSED indicates that the GRN has been closed manually. A blank field indicates that the GRN is still open - some or all GRN lines are not fully matched.

Screen actions - PUR312D1-05

Commands	Description
F13=Filters	Access the GRN Filters screen. Use this screen to select sort and sequencing options. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Display GRN header information, fifth sequence

On the GRN Inquiry screen, PUR312D1-01, use F13, Filters, to change the sequence to 5 to display the GRN Header Inquiry screen, PUR312D1-06. This screen displays the information in GRN number sequence.

Field descriptions - PUR312D1-06

Fields	Description
Action Codes:	The following line actions are available on this screen: **10=GRN Lines** Display lines for the GRN. All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

GRN Number (10,0):   Specify the Goods Receipt Notice Number (GRN) to select.

Status: This field displays the current status of the GRN.

A value of *MATCHED indicates that all GRN lines are fully matched. CLOSED indicates that the GRN has been closed manually. A blank field indicates that the GRN is still open - some or all GRN lines are not fully matched.

Screen actions - PUR312D1-06

Commands	Description
F13=Filters	Access the GRN Filters screen. Use this screen to select sort and sequencing options.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN inquiry, detail information, PUR312D2

Use the GRN detail inquiry program to display details for the GRN at the header level.

Access: Line action 5 from the GRN Header Inquiry screen, PUR312D1-01

Display GRN detail header information

This screen displays the details held against the GRN at header level. This includes Vendor details along with the totals received and invoiced.

Field descriptions - PUR312D2-01

Fields	Description
Currency Code (3,A):	The screen displays the type of currency used to display the Total GRN Received and Invoiced values. This will be either Base or Alternate.
Advice Note No. (35,A):	The screen displays the Vendor's Advice Note number, as recorded during goods receipt.

Advice Note Date (8,0): This screen displays the Vendor's Advice Note Date, as recorded during goods receipt.

Vendor Number (8,0): The screen displays the Vendor Number that supplied the goods received against the GRN.

GRN Number (10,0): The screen displays the GRN number assigned by the system during goods receipt.

Vendor Name (50,A): The screen displays the name of the Vendor that supplied the goods received against the GRN.

Total Tickets (6,0): The screen displays the total number of receipt tickets issued for this GRN.

Vendor Address (50,A): The screen displays the address of the Vendor that supplied the goods received against this GRN. Up to six address lines are available.

Vendor Address (50,A): The screen displays the address of the Vendor that supplied the goods received against this GRN. Up to six address lines are available.

Vendor Address State (50,A): The screen displays the state information of the Vendor that supplied the goods received against this GRN.

Vendor Address Postal (50,A): The screen displays the postal code of the Vendor that supplied the goods received against this GRN.

Total Received Quantity (11,3): The screen displays the total quantity of goods received against this GRN.

Total Received Value (15,2): The screen displays the total value of goods received for this GRN in the currently selected currency.

Entry Date (8,0): The screen displays the date that the GRN was raised.

Invoice Number (10,A): The screen displays the invoice number that the GRN has been matched to.

Invoice Status (10,0): The screen displays status of the invoice that the GRN has been matched to.

A status of *MATCHED indicates that all GRN lines have been matched. A status of *CLOSED indicates that the GRN (and thus the invoice) has been closed manually. If there is no value in this field, it indicates that invoicing has not been done for this GRN.

Total Invoiced Quantity (11,3): The screen displays the total quantity of goods invoiced against this GRN.

Total Invoiced Value (15,2): The screen displays the total value of goods invoiced against this GRN in the currently selected currency.

Screen actions - PUR312D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN inquiry, lines, PUR312D3

The GRN Detail inquiry list shows brief details of the lines associated with the selected GRN, including line number, purchase order number and PO line number, item, received quantity in purchasing unit of measure, currency, status and value of the received quantity.

If you have dynamic weights and measures functionality activated in Order Entry system parameters, and this is a DWM item, Infor LX also displays the received quantity expressed in the equivalent dual unit of measure value. You set the literal for this field in Order Entry system parameters.

Access: Line action 10, GRN Lines, from the GRN Header Inquiry screen, PUR312D1-01.

Display purchase order line information for a GRN

Use the GRN Line Inquiry screen, PUR312D3-01, to display purchase order line information for a GRN.

Field descriptions-PUR312D3-01

Fields	Description
Advice Note (35,A):	The screen displays the vendor's advice note recorded during goods receipt against the GRN selected on the previous screen.
GRN Number (10,0):	The screen displays the GRN selected on the previous screen.
Vendor (8,0):	The screen displays the vendor number that supplied the goods received against the GRN selected on the previous screen.

Vendor Name (50,A): The screen displays the name of the vendor that supplied the goods received against the GRN selected on the previous screen.

Line action: All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

GRN Line Number (4,0): Specify the GRN line number.

Status: This field displays the status of the GRN line, Open or Complete. A line appears as Complete if it was matched or if the GRN was manually closed. A status of Open indicates that the line has not yet been matched or closed.

Screen actions-PUR312D3-01

Commands	Description
F15=Packaging Inquiry	Access Packaging Master Maintenance, OLM600D1, in inquiry mode.
F16=Base Currency	Toggle between base currency, transaction currency, and alternate currency.

GRN line inquiry, detail, PUR312D4

GRN Line Inquiry, Detail gives the user visibility of the detail information for a selected GRN Line.

Relevant details from the associated purchase order line are also shown along with invoice details.

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 quantities expressed in the equivalent Dual Unit of Measure values.

Access: GRN Line Inquiry, PUR312D3

Display purchase order line detail information for a GRN

Use this screen to view detail information for a selected GRN line. You can also view relevant purchase order line and invoice details.

Field descriptions - PUR312D4-01

Fields	Description
Currency (3,A):	The screen displays the currency in which the GRN Receipt Value and the purchase order Expected Unit Cost is currently shown.
Advice Note No. (35,A):	The screen displays the vendor's advice note recorded during goods receipt against the GRN line selected on the previous screen.
Advice Note Date (8,0):	This screen displays the Vendor's Advice Note Date, as recorded during goods receipt against the GRN line selected on the previous screen.
GRN Number (10,0):	The screen displays the GRN selected on the previous screen.
Vendor Number (8,0):	The screen displays the vendor number associated with the GRN line selected on the previous screen.
GRN Line Number (4,0):	The screen displays the GRN line number selected on the previous screen.
Purchase Order Number (9,0):	The screen displays the purchase order number associated with the GRN line selected on the previous screen.
Purchase Order Number Line (4,0):	The screen displays the purchase order line associated with the GRN line selected on the previous screen.
Item Number (35,A):	The screen displays the item received against the selected GRN line.
Quantity Ordered (11,3):	The screen displays the original quantity ordered on the purchase order line.
<Weight> Ordered:	For DWM items, Infor LX displays the dual unit of measure value equivalent to the original quantity ordered.
Received Quantity (11,3):	The screen displays the quantity received against the GRN line selected on the previous screen.
Received <Wght>:	Infor LX displays the dual unit of measure value equivalent to the quantity received against the GRN line selected on the previous screen.
Quantity Received (11,3):	The screen displays the quantity received against the purchase order line.
<Weight> Received:	Infor LX displays the dual unit of measure value equivalent to the quantity received against the GRN line selected on the previous screen.

Receipt Unit of Measure (2,A): The screen displays the unit of measure that the GRN line quantity was received in.

Purchasing Unit of Measure (2,A): The screen displays the unit of measure that the purchase order line quantity was ordered in.

Receipt Value (15,2): The screen displays the value of the goods received against the selected GRN line in the currently selected currency.

Expected Cost (15,5): The screen displays the purchase order line expected unit cost for the receipt.

User ID (10,A): The screen displays the user ID of the person who entered the GRN line onto the system.

Due Date (8,0): The screen displays the date that the purchase order line is due.

The date is in the time zone for the PO line warehouse.

Entry Date (8,0): The screen displays the date that the GRN line was entered onto the system.

Authorization Code (3,A): The screen displays the purchase order authorization code.

Entry Time (6,0): The screen displays the time that the GRN line was entered onto the system.

Quantity in Inspection (11,3): The screen displays the purchase order line quantity received into inspection.

<Wght> in Inspection: Infor LX displays the dual unit of measure value equivalent to the purchase order line quantity received into inspection.

Last Ticket Number (6,0): The screen displays the last ticket number assigned to the selected GRN line.

Invoiced Status (12,A): The screen displays the status of the invoice assigned to the selected GRN. This can be UNMATCHED, PART MATCHED, MATCHED, or CLOSED.

A status of *MATCHED indicates that the GRN line has been fully matched. A status of PART MATCHED indicates that the GRN line has been partially received and/or partially costed. A status of *CLOSED indicates that the GRN (and thus the invoice) has been closed manually.

Invoiced Quantity (11,3): The screen displays the quantity invoiced against the selected GRN line.

Invoiced <Wght>: Infor LX displays the dual unit of measure value equivalent to the quantity invoiced against the selected GRN line.

Invoice Number (20,A): The screen displays the invoice number assigned to the selected GRN line.

Base Invoiced Value (15,2): The screen displays the base currency value of the invoice assigned to the selected GRN line.

Alternate Invoice Value (15,2): The screen displays the value of the invoices assigned to the selected GRN line in the Alternate currency.

Screen actions-PUR312D4-01

Commands	Description
F15=Packaging Inquiry	Access Packaging Master Maintenance, OLM600D1, in inquiry mode.
F16=Base Currency	Toggle between base currency, transaction currency, and alternate currency.

Purchase order/GRN inquiry, PUR313D1

Use Purchase Order/GRN Inquiry, PUR313D1, to display a list of all the Goods Receipt Notes (GRN) that contain at least one line for a specific purchase order. If you specify a purchase order number and press Enter, the screen lists the GRNs for that purchase order by advice note date/advice note number.

Display GRNS for a purchase order

This screen displays the GRNs with at least one line for a specific purchase order.

Field descriptions - PUR313D1-01

Fields	Description
PO Number (9,0):	Specify a valid purchase order number.
Advice Note Date (8,0):	This field displays the date the advice note was created.
Advice Note Number (35,A):	This field displays the advice note numbers associated with the purchase order.
GRN Number (10,0):	This field displays the GRN numbers associated with the purchase order.
Status (9,A):	If the status is *Matched, the purchase order is invoiced. If the status is blank, the purchase order is not invoiced.

Screen actions - PUR313D1-01

Commands	Description
All Screen Actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Ship-to selection, PUR320

Ship To Selection displays ship-to name and address information for requisitions and purchase orders.

Access: F4 from Purchase Order Lines Maintenance detail, PUR500-07, or Purchase Order Header Maintenance, PUR500-05.

Select ship-to information

Use the Ship To Selection screen, PUR320-01, to display and select ship-to name and address information for requisitions and purchase orders.

Field descriptions - PUR320-01

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. **9=Select** Return to the original screen with the selected record. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.
Ship-To Number (6,A):	Specify one of the following values based on ship-to type: **Valid choices** - **0** Specify a ship-to number (4,0) that corresponds to a ship-to master (EST) record.

- **1**

  Specify a customer number (8,0) that corresponds to a customer master (RCM) record.

- **2**

  Specify a vendor number (5,0) that corresponds to a vendor master (AVM) record.

- **3**

  Specify a warehouse code (2,A) that corresponds to a warehouse master (IWM) record.

Name (50,A):   This field displays the name defined for the ship-to record.

Screen actions - PUR320-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View the ship-to address

If you specify line action 5 on the Ship To Selection screen, PUR320-01, Infor LX displays the Ship-To Select Name/Address Master screen. This screen displays the purchase order number, line number, ship-to type, ship-to number, and address information for the selected record.

The system displays the name from one of the following programs, based on ship-to type:

- For Ship-to type 0, the Ship-to from Customer Address Master Maintenance, ORD100
- For Ship-to type 1, the Customer Ship-To from IDF Customer
- For Ship-to type 2, the Vendor Ship-To from IDF Vendor
- For Ship-to type 3, the Warehouse Ship-To from Warehouse Master Maintenance, INV110

The system displays the company number from the following files:

- For Ship-to type 0, the company number is displayed as zero.
- For Ship-to type 1, the company number source is IDF Customer.
- For Ship-to type 2, the company number source is IDF Vendor.
- For Ship-to type 3, the company number source is the default company from Warehouse Master Maintenance, INV110.

Screen actions - PUR320-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter ship-to information

If you use F13, Filters, from the Ship To Selection screen, Infor LX displays the Ship-To Select Filter screen, PUR320-03.

Field descriptions - PUR320-03

Fields	Description
Select Type Filter (1,A):	Choose from among the following Ship-To Type options:

Valid choices

- **0**

  Ship-To Master file, EST
- **1**

  Customer Master file, RCM
- **2**

  Vendor Master file, AVM
- **3**

  Warehouse Master file, IWM

Select Sequence Filter (1,A):	Specify 1 to sequence ship-to records by ship-to number or 2 to sequence alphabetically by ship-to name.
Select Records Filter (1,A):	Specify 1 to display active ship-to records only or 2 for all records.

Screen actions - PUR320-03

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Re-price purchase orders from quotes, PUR490D

Use Re-price Purchase Orders from Quotes, PUR490D, to reprice purchase order lines for the vendor and facilities you specify.

The program searches the Vendor Quote file with the following hierarchy to determine the applicable quote for a given scheduled (contract) purchase order line:

1. Facility-Specific Contract Price

Infor LX looks for the following values:

Item/Vendor Number/Currency/Facility/Quote Effective Date/Contract Number

2. Global Contract Price

Infor LX looks for the following values:

Item/Vendor Number/Currency/Blank Facility/Quote Effective Date/Contract

3. Facility Specific Non-Scheduled Price

Infor LX looks for the following values:

Item/Vendor Number/Currency/ Facility/Quote Effective Date/Blank Contract

4. Global Non-Scheduled Price

Infor LX looks for the following values:

Item/Vendor Number/Currency/Blank Facility/Quote Effective Date/Blank Contract

Note: If the PO line is non-scheduled (contract is blank), the program uses only search hierarchies 3 and 4 to price the line.

The system does not reprice purchase order lines that do not match at least one of the key field combinations above. The Re-Price Purchase Orders from Quotes program, PUR490B, does not use the Cost Master file, CMF, to re-price if you use search combinations 1-4.

Access: PUR

Reprice purchase order lines

Use the Re-Price Purchase Orders From Quotes selection screen, PUR490D-01, to specify the selection criteria to reprice purchase order lines.

Field descriptions - PUR490D-01

Fields	Description
Vendor Number (8,0):	Specify the number of the vendor for which to reprice purchase order lines.
Facility (3,A):	Specify a facility to which to restrict the repricing for this vendor. If you leave this field blank, Infor LX reprices all purchase order lines for the specified vendor.
Quote Price Date (1,0):	Specify the date to use to check against the quote effective date. Specify 0 to use the vendor delivery date or 1 to use the due 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 - PUR490D-01

Commands	Description
F6=Accept	Confirm the information entered on the screen. The system then passes the vendor and facility as parameters to the processing program, which reprices purchase order lines for the vendor and facility specified.
F15=Vendor Alpha Lookup	Access Vendor Alpha Look-up, PUR310D, to see a list of vendor numbers If you select a number, the system returns the value to the Re-Price Purchase Orders from Quotes screen, PUR490D-01.
F16=Purchasing Inquiry	Access Purchasing Inquiry, PUR300D1.
F17=Vendor Quotes	Access Vendor Quotes, PUR150D1.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

PO or requisition release/maintenance, PUR500C

Use Purchase Order Release/Maintenance, PUR500C, or Requisition Maintenance, PUR600C, to maintain and release purchase orders or requisitions. Use Requisition Release, PUR650C, to review individual requisitions created through Requisition Maintenance, PUR600, and to release those requisitions into purchase orders.

Purchase Orders

The system automatically assigns purchase order numbers to newly-created purchase orders. This system increments the value in the Next purchase order number for automatic PO number generation field in Purchasing System Parameters.

Preliminary purchase orders are indicated by an asterisk (*) before the order number.

The system indicates SMI (Supplier Managed Inventory) purchase orders by an ampersand (&) before the order number.

Note: Do not create purchase orders with managed and non-managed warehouses on the same PO. Warehouse Management requires that all lines on a PO are for the same managed warehouse.

You must specify the item number and indicate whether the purchase order is for an outside operation that is included in the item's routing. Shop Floor Control, SFC, and Cost Accounting, CST, use routings. Use Advanced Process Industries, API, to properly cost outside operations on co/by products or potency items.

If you manually assign a number to a purchase order, Infor LX verifies that the number has not been previously used, or is not currently in use.

You must have security clearance for the mass release warehouse and vendor company to use this program.

Infor LX automatically prints the Purchase Order Audit report for all purchase order headers, lines, and special charges that are created, deleted, revised or closed through Purchase Order Release/Maintenance, PUR500. The following conditions apply:

- The purchase order header always prints, unless you use line action 6 from the Purchase Order Line Selection screen, PUR500-02, to request a line print.
- All associated special charges print with each line.
- The associated line automatically prints with revised special charge lines.
- For create, revise, copy, delete, or close transactions, the audit report includes all lines and special charges.

The system consistently rounds the amount fields calculated or displayed in this program based on the currency rounding method and the round-to position you specified. You specify a rounding method and round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies, MLT.

This rounding process affects calculated amount totals such as invoice total, taxes total, and amounts in journals. However, the rounding process does not affect unit cost or unit selling prices.

Access: Menu PUR, F14 from DRP Inquiry, DRP300, or F10 from MRP Inquiry, MRP300

Requisitions

Use Requisition Maintenance to maintain requisitions, from which you can create purchase orders in PO Consolidation/Release, PUR640, or Requisition Release, PUR650. The system then marks the requisition complete. When you use Month End Close, PUR900, the system purges completed requisitions.

You can also create purchase orders without requisitions in PO Release/Maintenance, PUR500. The purchase orders that you create through that option are not associated with requisitions.

You can print all open requisitions , that is, those requisitions that you did not change to purchase orders, in Requisition Print, PUR620.

Access: Menu PUR

Add, print, or select a purchase order/requisition

Use the Purchase Order/Requisition Selection screen, PUR500/600-01, to add or print a purchase order or requisition, or to select a purchase order/requisition to maintain or view.

Field descriptions - PUR500/600-01

Fields	Description
Line actions :	The following line actions are available:
	10=Copy and Reprice
	Infor LX displays the Copy From record on the Purchase Order/Requisition Header Maintenance screen, PUR500/600-05, so you can change desired fields on the Copy To record. Infor LX automatically reprices system-priced purchase order/requisition lines from the Copy From record; Infor LX does not automatically reprice manually-priced order lines from the Copy From record. To reprice manually-priced records in the Copy To record, clear the default price and press Enter.
	11=Revise Lines
	Infor LX displays the Purchase Order/Requisition Lines Maintenance screen, PUR500/600-06, so you can change lines on the purchase order.
	12=Close
	Close a purchase order/requisition with completed or unprinted lines.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

Purchase Order Number (9,0): Specify the purchase order/requisition number for the desired action. If you add a new purchase order/requisition, you can specify a number in this field; if you want Infor LX to assign the number, leave this field blank. Preliminary purchase orders are indicated with an asterisk (*) in front of the PO number.

Vendor (8,0): Specify the vendor number for the desired action.

Ship From (4,0): Specify the code to identify the address location to use for this vendor in Purchase Order entry. Use the Address Master in Configurable Order Management to maintain ship-from numbers.

Screen actions - PUR500/600-01

Commands	Description
F13=Filters	Access the Filters Options screen to select from the following sequences:
	1=All purchase orders/requisitions by PO number
	2=Active purchase orders/requisitions by PO number
	3=Active purchase orders/requisitions by Vendor number
	4=All purchase order/requisition lines by PO and line
	5=Active PO/requisition lines by PO/requisition and line
	6=Active PO/requisition lines by commodity code or item number
	7=Active purchase order/requisition lines by Vendor number
	8=Active purchase orders by Vendor number and Ship From address
	9=All PO Lines by PO/Orig Ln/Line
F14=Purchase Order Inquiry	Access Purchasing Inquiry, PUR300, to review existing purchase order information. You cannot transfer the information back to this program.
F15=Vendor Alpha Lookup	Access Vendor Alpha Lookup, PUR310, to search for a vendor number to use in this program. You cannot, however, transfer the vendor number back to this program at this time. For further instructions to search for a vendor

number, refer to the section on Address Master Maintenance, PUR310, in this document.

F16=Full Create

Access the Purchase Order Creation screen, PUR500-04. This screen action is not available from Requisition Maintenance.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, print, or select a purchase order/requisition line

If you specify a sequence by purchase order/requisition line, selections 4 through 7 and 9, on the purchase order Filter Options screen, Infor LX displays the Purchase Order/Requisition Line Selection screen, PUR500/600-02.

The Status field on this screen displays the purchase order/requisition header status.

Use this screen to add or print a purchase order/requisition line or to select a purchase order/requisition line to maintain or view.

Field descriptions - PUR500-02

Fields	Description
Line actions:	The following line actions are available:
	4=Delete
	If you specify line action 4 to delete an existing purchase order/requisition line, the system logically deletes the line when you exit from Purchase Order/ Requisition Release/Maintenance, PUR500/600. If the line is the last line of the purchase order/requisition, the system physically deletes the line.
	11=Revise Header
	Revise the header for the selected line. Infor LX displays the Purchase Order/ Requisition Header Maintenance screen, PUR500/600-05.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.
Act (2,0):	Specify the number for the line action to perform. To use the first line, specify the line action and at least one key field value.

4=Delete

If you specify line action 4 to delete an existing purchase order/requisition line, the system logically deletes the line when you exit from Purchase Order/Requisition Release/Maintenance, PUR500/600. If the line is the last line of the purchase order/requisition, the system physically deletes the line.

11=Revise Header

Revise the header for the selected line. Infor LX displays the Purchase Order/Requisition Header Maintenance screen, PUR500/600-05.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Purchase Order (9,0): Specify the purchase order/requisition number for the desired action. If you add a new purchase order/requisition, you can specify a number in this field; if you want Infor LX to assign the number, leave this field blank.

Line (4,0): Specify the purchase order/requisition line number.

Item/Commodity Type Code (1,A): Specify 0 for an item number or 1 for a commodity code.

Note: If the commodity code is a service item (commodity type=1), the system bypasses the receiving process. Infor LX automatically moves the order quantity to the received quantity and changes the status code to 2, fully received/not fully costed.

Commodity/Item Specify the item number or commodity code for this purchase order/requisition line.

Note: If you receive into a warehouse type 4, an Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Vendor (8,0): Specify the vendor number for this purchase order/requisition line.

Screen actions - PUR500-02

Commands	Description
F11=Fold	Display additional fields. If you use F11 to fold the screen, Infor LX displays additional fields:
	If this drop-ship purchase order line is tied to a customer order, the system displays the following information:
	Customer number
	Customer order
	Customer order line number
	If this drop-ship purchase order line is tied to a shop order, the customer number is blank and the system displays the shop order and operation numbers.
F13=Filters	Display the Filter Options screen to select from among the following sequences:
	All purchase orders/requisitions by PO/requisition number
	Active purchase orders/requisitions by PO/requisition number
	Active purchase orders/requisitions by vendor number
	All purchase order/requisition lines by PO/requisition and line
	Active purchase order/requisition lines by PO/requisition and line
	Active PO/requisition lines by commodity code or item number
	Active purchase order/requisition lines by vendor number
	Active POs by vendor/ship from
	All PO lines by PO/original line/line
F14=Purchase Order Inquiry	Access Purchasing Inquiry, PUR300, to review existing purchase order information. You cannot transfer this information back to this program.
F15=Vendor Alpha Lookup	Access Vendor Alpha Lookup, PUR310, from which you can search for a vendor number to use in this program. You cannot, however, transfer the vendor number back to this program at this time. To search for a vendor number, refer to the section on PUR310 in this document.
F16=Full Create	Access the Purchase Order Creation screen, PUR500-04. This screen action is not available from Requisition Maintenance.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter purchase order information

If you use F13, Filters, from the Purchase Order/Requisition Selection screen, PUR500/600-01 or the Purchase Order/Requisition Line Selection screen, PUR500/600-02, Infor LX displays the purchase order/requisition Filter Options screen. Use this screen to resequence the records displayed on Purchase Order/Requisition Selection or Purchase Order/Requisition Line Selection screens.

Field descriptions - Filters

Fields	Description
Sequence method (1,0):	Specify one of the following sequence methods and press Enter. Sequences 8 and 9 are not available from Requisition Maintenance.

- 1=All purchase orders by PO number
- 2=Active purchase orders by PO number
- 3=Active purchase orders by Vendor number
- 4=All purchase order lines by PO and line
- 5=Active purchase order lines by PO and line
- 6=Active PO lines by commodity code or item number
- 7=Active purchase order lines by Vendor number
- 8=Active purchase order lines by Vendor/Ship From number
- 9=All PO Lines by PO/Original Line/Line

For sequence methods 1 through 3 and 8, the system displays the Purchase Order/Requisition Selection screen, PUR500/600-01. For sequence methods

4 through 7 and 9, the system displays the Purchase Order/Requisition Line Selection screen, PUR500/600-02.

Screen actions - Filters

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Create a purchase order

If you use F16, Full Create, from the Purchase Order Selection screen, PUR500-01, or the Purchase Order Line Selection screen, PUR500-02, Infor LX displays the Purchase Order Creation screen, PUR500-04.

Use this screen to specify purchase order line data.

Field descriptions - PUR500-04

Fields	Description
Line actions :	The following line actions are available: **1=Create PO** Create a new purchase order from the specified record. If you specify line action 1 next to multiple lines with the same vendor, the system creates a single purchase order with the selected lines. **17=Select Quote** Access the Quote Inquiry for item or commodity screen, PUR300D6-01, to select a vendor based on available price breaks.
Act (2,0):	Specify the number for the line action to perform. **1=Create PO** Create a new purchase order from the selected record.

If you specify line action 1 next to multiple lines with the same vendor, the system creates a single purchase order with the selected lines.

17=Select Quote

Access the Quote Inquiry for item or commodity screen, PUR300D6-01, to select a vendor based on available price breaks.

Item/Commodity Type Code (1,A): Specify 0 for an item number or 1 for a commodity code.

Commodity/Item (35,A): Specify the item number or commodity code for this purchase order line.

If you receive into a warehouse type 4, Warehouse BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Quantity (11,3): Specify the item or commodity quantity for this purchase order line.

Facility (3,A): Specify the code for the facility to receive the ordered items.

Vendor (8,0): Specify the vendor number for this purchase order line.

Screen actions - PUR500-04

Commands	Description
F14=Purchase Order Inquiry	Access Purchasing Inquiry, PUR300, to review existing purchase order information. You cannot transfer this information back to this program.
F15=Vendor Alpha Lookup	Access Vendor Alpha Lookup, PUR310, to search for a vendor number to use in this program. You cannot, however, transfer the vendor number back to this program at this time. To search for a vendor number, refer to the section on PUR310 in this document.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add, maintain, or view purchase order/requisition header information

If you continue with Purchase Order/Requisition Maintenance, Infor LX displays the Purchase Order/Requisition Header Maintenance screen, PUR500/600-05.

If you press Enter on this screen, Infor LX displays ship-to information for the PO/requisition. You can maintain the information.

The system uses the values from the initial screen for the following fields:

- Vendor Number
- Vendor Name
- PO Number/Requisition
- Entry Date
- Status
- (Over authorization limit status indicator)
- Company
- Last Change Date
- Close Date
- Print Date

You can change the value for the PO Number/Requisition in Create or Copy mode.

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

If you have Dynamic Weights and Measures functionality activated in Order Entry System Parameters, and have DWM items in your purchase order/requisition, please note that cost presentation requires additional calculation for these lines.

Unit costs presented on a purchase order/requisition line can come from a manually entered unit cost, a vendor quote, or the item's standard cost. If the item is a DWM item, you enter standard costs in IDF Item Cost, in the item's DWM Pricing unit of measure, not the stocking unit of measure. Vendor quotes are not changed by DWM, so you enter quotes in the DWM item's purchasing unit of measure.

The system always displays quantities in Purchasing in the item's purchasing unit of measure. For the quantity on a PO/requisition line, the system uses the purchasing unit of measure. You can specify the stocking unit of measure when you create a PO/requisition line; however, the system converts the quantity back to the purchasing unit of measure when you accept the purchase order/requisition.

For DWM items, line cost extension and the unit cost presentation require additional calculation, as shown in the following example:

An item might be stocked in PC (piece), purchased in a CS (case) that contains 5 PC, has a DWM pricing unit of measure of LB (pound), an average actual weight of 3.33 LB per PC, and a standard cost of $5.00 per LB. If the item has a vendor quote of $80.00 per CS, the result is the PO/requisition line below:

1 CS at $ 4.80480/LB=$80.00

In the equation above, the vendor quote of $80.00/ CS is used and the unit cost is recalculated to display in the cost per DWM pricing unit of measure of LB.

1 CS=5 PC at 3.33 lb=16.65 lb. $80.00 / 16.65 LB=$4.80480/LB.

If 1 PC (stocking unit of measure) was purchased, the result is the PO/requisition line below:

1 PC at $5.00/LB=$16.65.

One PC weighs 3.33 LB at $5.00 LB standard cost and extends to $16.65.

Field descriptions - PUR500/600-05

Fields	Description
Ship From (4,0):	Specify the location from which to ship the goods. The system uses the vendor ship-from address selected on the Purchase Order/Requisition Selection screen, PUR500/600-01, as the default value. This field is invalid if the ship-to address type is 4 (Manual entry of the destination address), and the postal code and/or country are blank.
Revision Date (8,0):	Specify a revision date for this purchase order/requisition.
Preliminary PO (1,0):	Specify 1 if this is a preliminary PO. You cannot receive or cost a preliminary PO; however, you can see a preliminary PO in MRP and DRP generations, inquiries, and planned order maintenance programs.
	If you specify 1 but did not specify a vendor number, the system checks the vendor number to make sure preliminary POs are allowed if you release requisitions.
	This field is only in Purchase Order Maintenance.
Revision (10,A):	Specify a revision number for this purchase order/requisition. This is a user-defined field you can use to track changes made to this PO/requisition.
	Note: The value in this field must be numeric if this is a scheduled PO. Non-scheduled POs can have alphanumeric values.
Ship-to (3,A) (4,0) (8,0):	Specify the ship-to code for this purchase order or requisition. This code references the shipping address for the warehouse or other location where the

purchased material is shipped. You can then prompt or enter either the ship-to number, customer number, vendor number, or warehouse. Infor LX displays the appropriate name and address information. You maintain ship-to locations in Ship-to Maintenance, PUR130.

Note: If a customer order drop ship request is converted to a PO, the system populates the ship-to code with the customer number. The system uses the ship-to address lines from the shipping information screen of the original customer order (ECH file).

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Ship-to Type codes (1,A):

Specify one of the following ship-to codes:

- 0=Ship-to number from Ship-to Master file, EST
- 1=Customer number from Customer Master file, RCM
- 2=Vendor number from Vendor Master file, AVM
- 3=Warehouse from Warehouse Master file, IWM
- 4=(Blank) Manually-entered ship-to information, name and address, from the Purchase Order/Requisition Header Maintenance screen, PUR500/600-05
- 5=Customer drop-shipment only

Note: Ship-to type 0 always has a customer number of 99999999.

The system automatically assigns ship-to type 5 if you convert a customer drop ship request to a purchase order. You cannot manually create a purchase order from a customer drop ship request.

Note: If you revise the ship-to type to 4 and clear the ship-to number to manually specify an address on the header screen, the system uses the new address for any purchase order/requisition lines that you add. However, the new address does not apply to any existing purchase order/requisition lines if you change their ship-to type to 4 and clear the ship-to number on the Purchase Order/Requisition Lines Maintenance detail screen, PUR500/600-07. To change the manually entered ship-to address for those previously entered lines, use line action 14 to access the Ship-To Maintenance screen and specify the address individually for each line.

The system uses all other ship-to types that you revise on the header screen for both new purchase order/requisition lines and existing purchase order/ requisition lines if you clear the ship-to type and number at the line detail level.

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

Name (30,A):
Infor LX displays the name, truncated to 30 characters. If you press Enter, Infor LX displays the Warehouse Master Address screen with the full address and contact information. You can maintain the address information on that screen.

Attention (50,A):
Infor LX displays the attention to information.

Means of Transport (4,A):
This is a user-defined field only for the Intrastat Report. Specify the code that identifies the actual means of transport for goods delivered. For example, if the means of transport code is Sea, the corresponding mode of transport code is 1. Infor LX adds this code to the Purchase Order/Requisition Header file. The Means of Transportation Master file uses this code to obtain the re-lated mode of transport code. If you use EU Intrastat reporting, (set in System Parameters) you must specify a value in this field.

Any change you make to the means of transport code affects the inbound delivery. To recover, move the affected inbound delivery to another delivery after you press Enter.

Note: You must set up the Mode of Transport Master file, MODETRN, in Table Definition Maintenance, SYS105D2-01.

Country of Consign-ment (4,A):
Specify the code that identifies the EC country from which goods originate. Infor LX adds the Country of Consignment file to the Purchase Order/Requi-sition Header file, then validates it against the Country Code Master file.

Note: You must set up the Country Code Master file, COUNTRY, in Table Definition Maintenance, SYS105D2-01.

Delivery Terms (3,A):
Specify the code to identify the terms of delivery. If you use EU Intrastat re-porting, you must specify a value in this field. Infor LX validates this code against the EC-recognized terms. To accommodate this reporting requirement,

Infor LX adds the Delivery Terms field to the Purchase Order/Requisition Header file. Infor LX then validates this code against the Delivery Terms Master file.

Bill-to (4,0): Specify any valid ship-to number to bill for this purchase order, if different from the actual ship-to number. If blank, Infor LX uses the company master address as the bill-to address.

Facility (3,A): Specify the code for the facility to receive the ordered items.

Warehouse (3,A): Specify the code for the warehouse to receive the ordered items.

Note: Facility and warehouse are optional at the header level. If you specify a warehouse, then all lines must be for that warehouse. If you specify a facility, but not a warehouse, the lines can be for any warehouse in that facility.

Buyer (3,A): The system uses the buyer code from Purchase Order Consolidation/Release, PUR640. You can override this value. The system uses the buyer code to process the Open Purchase Orders by Buyer/Item report, PUR204.

Ship Via (10,A): Specify the preferred or mandatory shipper or the mode of transport to use to move the purchased materials to the manufacturing facility. This is a user-defined, reference field only.

Ship Status (30,A): Specify a description of the shipment or other notes. This field is reference only.

Ack Request Date (8,0): Specify the date you request acknowledgment of the purchase order.

Print/Date Flag (1,0): This value indicates the print status and the last print date of the purchase order/requisition. The following values are valid:

Valid choices

- **0**

  No, not printed, available for print
- **1**

  Yes, printed, not available for print
- **2**

  Amend, reset lines back to not printed

- **3**

  Order will reprint by the Scheduled PO Document Print program. The system assigns this value if the Print Flag status in Contract Detail Maintenance is set to 2=Amend.

FOB Code (1,A): Specify the FOB code to use with the FOB Point field to define the point of control for freight liability, payment, and collection method.

Examples of FOB codes:

- 1=FOB Destination, Freight Collect and Allowed
- 2=FOB Destination, Freight Collect
- 3=FOB Destination, Freight Prepaid
- 4=FOB Origin, Freight Prepaid and Charged Back
- 5=FOB Origin, Freight is Prepaid
- 6=FOB Origin, Freight is Collect

Ack Receive Date (8,0): Specify the date the acknowledgment is received.

FOB Point (15,A): Specify the FOB delivery location or other shipping destination. This field is reference only.

Vendor Tax Code (5,A): Specify the vendor tax code to apply to this line of the purchase order/requisition. The system uses the vendor's tax code from the Vendor Master file, but you can override the value. The system uses vendor tax codes with item tax codes to define tax rate tables, set up in Tax Rate Table Maintenance, SYS150. If this combination of vendor/item tax codes matches a combination found on a requisition, Infor LX accesses the specific tax rate table to apply taxes.

Destination (30,A): Specify the destination or other shipping information to assist with disposition of the goods after receipt. This field is reference only for items; it is printed on the traveler ticket for commodity codes.

Terms code (2,0): Specify the vendor terms code to apply to this purchase order/requisition. The system uses the supplying vendor's terms code from the Vendor Master file, but you can override the value. You maintain terms codes in Terms Code Maintenance, ACP160, and assign vendors in IDF Vendor.

Comment (30,A): Specify any user-defined comment to describe the goods. The system stores the comment in the Item Transaction History file, ITH, and prints the comment on purchasing reports.

The system displays the Currency, Exchange Rate, and Exchange Rate Date fields only for the following scenarios:

1, Multiple Currencies is installed on your system and

2, The Accounts Payable and/or Purchasing field in Multi-Currency System Parameters is set to Yes in Multiple Currency Parameters, MLT800, and

3, The company is a multiple currencies company.

Currency (3,A):

Specify the code of the currency you use for all lines of the purchase order/ requisition.

The system uses the currency code with the vendor number, item number, and date entered fields to determine whether a vendor quote exists to apply to this purchase order/requisition.

Exchange Rate (15,7):

If your system is not euro enabled, specify the exchange rate to use for this purchase order/requisition. The system uses the current spot rate in effect for the purchase order/requisition vendor's default currency (the from currency) and the currency of the ordering company (the to currency). This is not the rate that the system uses to calculate expected cost from standard cost. The rate to cost for standard cost is the current spot rate in effect for the global currency (from currency) and the currency on this purchase order/requisition (to currency).

If Infor LX Accounts Payable is not installed, you must manually specify the correct exchange rate in your payables system.

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

(Exchange Rate Override Date) (8,0):

If the value in this field is 0/00/00, the default value, Infor LX uses the exchange rate in effect at the time the requisition or purchase order is created. Specify another date to override the exchange rate date.

Country Code (2,A):

Infor LX displays the company or ship-to country code in this field. You can override this code. If you use EU Intrastat reporting, set in System Parameters, you must specify a value in this field.

Registration Number (25,A):

Infor LX displays the company or ship-to registration number in this field. You can override this number. If you use EU Intrastat reporting, you must specify a value in this field. The registration number and country code form the EC VAT number.

Edi (1,0):

Infor LX displays 1 if the item is selected for EDI processing. You can maintain this field at both the header and line levels. If you change the value in this field at the line level, Infor LX automatically changes the value in this field.

Carrier (6/A):   Specify the code to identify who provides transportation of the goods to ship. The user can prompt for carriers that have a valid rate set up to calculate inbound deliveries for the warehouse, means of transportation, and destination zip code. If you select a carrier that does not have a rate defined, errors can occur when the system calculates delivery charges. Infor LX validates this field against the LCM file. If the ship-from is greater than zero, the system uses the value from the EST file; otherwise, the system uses the value from the AVM file.

Any change you make to the carrier code affects the inbound delivery. To recover, move the affected inbound delivery to another delivery after you press Enter.

Estimated Packaging Costs: Infor LX displays the total cost of all packaging items for this PO/requisition.

Return to Address (4,0):   Specify the vendor address to which you can ship returned goods or packaging. The address must be a valid type 7 address. You maintain addresses in Address Master Maintenance program, ORD100.

Screen actions - PUR500/600-05

Commands	Description
F2=Exchange Rate	Access the Override Exchange Rate screen. The system displays this screen action if Multiple Currencies is installed and turned on for Purchasing, and euro support is enabled in Multi-Currency System Parameters, MLT800. In this case, the Exchange Rate field on the screen is display-only. On the Override Exchange Rate screen, you can maintain the exchange rate between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro. The screen displays the multiplier exchange rate and divisor exchange rate.
F15=PO/Req Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes.
	To manually enter the purchase order/requisition number and not allow the system to use the next number, you must enter the purchase order/requisition number before you use F15.
F16=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain notes.
F17=PO Inquiry	Access Purchase Order Inquiry, PUR300.
F19=Return to Address	Display the return-to address on the Return to Vendor Address screen.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add or maintain purchase order/requisition lines

If you continue with Purchase Order Maintenance, Infor LX displays the Purchase Order/Requisition Lines Maintenance screen, PUR500/600-06. Use F20, Detail, to display the Purchase Order/Requisition Lines Maintenance detail screen, PUR500/600-07. Here you can add, delete, and revise purchase order/requisition lines.

Caution: Infor LX allows you to create orders with up to 9999 lines; however, you can negatively impact system performance if you create a large number of extremely long orders.

The following Purchase Order/Requisition Header fields are display-only. However, you can change information for individual purchase order/requisition lines on the detail screen.

- Purchase Order/Requisition Number
- Revision Number
- Vendor Number and Name
- Currency Code
- Number of lines on the purchase order/requisition
- Purchase Order/Requisition Status
- Over Authorization Flag
- Ship-To Type, Ship-To Number and Name
- Purchase Order/Requisition Amount
- Buyer Code
- Bill-To Number
- Facility Code and Warehouse
- Exchange Rate

If you have Dynamic Weights and Measures functionality activated in Order Entry System Parameters, and have DWM items in your purchase order/requisition, please note that cost presentation requires additional calculation for these lines.

Unit costs presented on a purchase order/requisition line can come from a manually entered unit cost, a vendor quote, or the item's standard cost. If the item is a DWM item, you enter standard costs in IDF Item Cost, in the item's DWM Pricing unit of measure, not the stocking unit of measure. Vendor quotes are not changed by DWM, so you enter quotes in the DWM item's purchasing unit of measure.

The system always displays quantities in Purchasing in the item's purchasing unit of measure. For the quantity on a PO/requisition line, the system uses the purchasing unit of measure. You can specify the stocking unit of measure when you create a PO/requisition line; however, the system converts the quantity back to the purchasing unit of measure when you accept the purchase order/requisition.

For DWM items, line cost extension and the unit cost presentation requires additional calculation, as shown in the following example:

An item is stocked in PC (piece), purchased in a CS (case) that contains 5 PC, has a DWM pricing unit of measure of LB (pound), an average actual weight of 3.33 LB per PC, and a standard cost of $5.00 per LB. If the item had a vendor quote of $80.00 per CS, the result is the PO/requisition line below:

1 CS at $ 4.80480/LB=$80.00

In the equation above, the vendor quote of $80.00/ CS is used and the unit cost is recalculated to display in the cost per DWM pricing unit of measure of LB.

1 CS=5 PC at 3.33 lb=16.65 lb. $80.00/16.65 LB=$4.80480/LB.

If 1 PC (stocking unit of measure) is purchased, the result is the PO/requisition line below:

1 PC at $5.00/LB=$16.65.

One PC weighs 3.33 LB at $5.00 LB standard cost and extends to $16.65.

Field descriptions - PUR500/600-06

Fields	Description
Line actions:	The following line actions are available:
	10=Special Chg
	Add a special charge line. If you specify this line action, Infor LX copies the line so that you can reprice the item. You can specify special charges only for valid item or commodity codes. The special charges must exist in the special charge table.
	11=Notes
	Access the Note Mode Selection (SYS255D) screen to view or maintain notes.
	12=Alternates
	Display alternate items defined for this item/customer on the Manufacturing Use Alternate Item Selection screen.
	13=History
	Access the Vendor History List screen, WINHVH.
	14=Ship To
	Access the Ship-To Maintenance screen, PUR500-11.
	Note: If you revise the ship-to type to 4 and clear the ship-to number to manually specify an address on the header screen, the system uses the new address for any purchase order/requisition lines that you add. However, the new address does not apply to any existing purchase order/requisition lines if you

change their ship-to type to 4 and clear the ship-to number on the Purchase Order/Requisition Lines Maintenance detail screen, PUR500-07. To change the manually entered ship-to address for those previously entered lines, use line action 14 to access the Ship-To Maintenance screen and specify the address individually for each line.

The system uses all other ship-to types that you revise on the header screen for both new purchase order/requisition lines and existing purchase order/requisition lines if you clear the ship-to type and number at the line detail level.

15=Detail

Display the detail for this purchase order/requisition line on the Purchase Order/Requisition Lines Detail Maintenance screen, PUR500-09.

16=Close

Close the specified purchase order/requisition line. The system closes the line if you use F6 to accept.

17=Select Quote

Display active quotes for the selected vendor number, and item number/commodity code on Purchase Order Inquiry, PUR300.

To create a line, specify the information on an open line. To revise a line, specify the revision over the existing data.

18=Mat Status Inq

View the Material Status Inquiry screen, INV300D-02.

20=Item Notes

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

21=Pegging

Access Planning/Pegging Inquiry, MRP300D.

22=Split Line

Access the Split Lines Maintenance screen, PUR500-08. This function is not available in Create mode.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Act (2,0):

Specify the number for the line action to perform and press Enter.

10=Special Chg

Add a special charge line. If you specify this line action, Infor LX copies the line so that you can reprice the item. You can specify special charges only for valid item or commodity codes. The special charges must exist in the special charge table.

11=Notes

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

12=Alternates

Display alternate items defined for this item/customer on the Manufacturing Use Alternate Item Selection screen.

13=History

Access the Vendor History List screen, WINHVH.

14=Ship To

Access the Ship-To Maintenance screen, PUR500-11.

Note: If you revise the ship-to type to 4 and clear the ship-to number to manually specify an address on the header screen, the system uses the new address for any purchase order lines that you add. However, the new address does not apply to any existing purchase order lines if you change their ship-to type to 4 and clear the ship-to number on the Purchase Order Lines Maintenance detail screen, PUR500-07. To change the manually entered ship-to address for those previously entered lines, use line action 14 to access the Ship-To Maintenance screen and specify the address individually for each line.

The system uses all other ship-to types that you revise on the header screen for both new purchase order lines and existing purchase order lines if you clear the ship-to type and number at the line detail level.

15=Detail

Display the detail for this purchase order line on the Purchase Order Lines Detail Maintenance screen, PUR500-09.

16=Close

Close the specified purchase order line. The system closes the line if you use F6 to accept.

17=Select Quote

Display active quotes for the selected vendor number, and item number/ commodity code on Purchase Order Inquiry, PUR300.

To create a line, specify the information on an open line. To revise a line, specify the revision over the existing data.

18=Mat Status Inq

View the Material Status Inquiry screen, INV300D-02.

20=Item Notes

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

21=Pegging

Access Planning/Pegging Inquiry, MRP300D.

22=Split Line

Access the Split Lines Maintenance screen, PUR500-08. This function is not available in Create mode.

(Item/Commodity Type Code) (1,A): Specify 0 for an item number, or 1 for a commodity code.

Commodity/Item - Cost/ Unit The first line of the record shows the Commodity/Item field. Specify the item number or commodity code for this purchase order/requisition line.

Note: To revise the item number after you accept the order but before you print or receive the order, delete the line and add a new line with the new item number. Infor LX then enters the item description, UOM, and tax code for the item.

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing

- ■ Container-Controlled Item

The second line of the record shows the Cost/Unit field. Specify the cost per unit for this item or commodity. This field contains the expected cost of this item per purchasing unit. Infor LX processes this field are as follows.

1. Infor LX accesses the Vendor Quote Master file to retrieve an appropriate value for the vendor, item, quantity, and due date, and if Multiple Currencies is installed, the currency specified. If more than one quote exists, Infor LX uses the quote with the latest effective date. This program uses the latest unscheduled contract quote that exists for the facility in the header for the item/vendor/date combination. If no unscheduled contract quote exists for the item/vendor/date in the facility, then the program uses the latest global quote for the item/vendor/date.

2. If a vendor quote does not exist for this item, Infor LX retrieves the standard cost value from the Cost Master file, CMF, for either facility or global costing. If Multiple Currencies is installed, the system multiplies the standard cost by the global to transaction currency exchange rate. The resulting value becomes the expected unit cost.

However, if you override a value here, or if one already exists, Infor LX does not automatically update this entry. If, for example, a lower quote was received after this entry was already made, Infor LX does not retrieve it.

To override the expected cost, press Field Exit to clear the existing expected cost figure, then specify the new expected cost. If you create or revise a purchase order/requisition for an outside operation, you can specify the cost per unit manually to overwrite the default cost that comes from the outside operation item routing master.

Use F4 to display the Item Quotes screen, WINHQT. This screen lists quantity price breaks by vendor number and quote date range and if Multiple Currencies is installed, the currency for this item. The screen lists all quotes for the item if a new purchase order/requisition is created and the vendor is not specified for the purchase order/requisition.

If the price is from a quote, Infor LX checks your user ID authority to change this price before you can make the change.

Due Date (8,0):

For inventory items, Infor LX adds the number of days lead time from this item's Item Master record or Warehouse Planning Data to the purchase order/requisition entry date to calculate this date for new manually-entered purchase order/requisition lines.

Lead time is expressed in actual work days.

Note: If you use a shop calendar, you can add additional lead time if the calculated due date falls on a non-work day defined in the shop calendar.

Specify the date in the time zone for the line warehouse.

The system compares this date to the vendor quote effective dates to determine whether a given quote is valid for pricing on this date.

For non-inventory items, Infor LX adds the contract lead time days to the entry date to calculate this date.

You can override this date, if necessary. The system uses this date to process the Open Purchase Orders by Item/Due Date report, PUR202, and Open Purchase Orders by Commodity Code/Due Date report, PUR205.

If you override the due date, and want Infor LX to determine the expected cost/unit based on the new due date and vendor quotes, you must clear the current expected cost/unit amount before you press Enter.

Note: The delivery date, not the line due date, displays as the due date for the line if you print the purchase order/requisition. If you override the due date, you must clear the displayed delivery date to have the system recalculate this field automatically.

Quantity Ordered (11,3): Specify the quantity of this item or commodity to order in purchasing units of measure. Infor LX uses this value with the vendor's quote from the Vendor Quote Master file to determine the expected cost.

The default value is the lot size from Facility Items, if this record exists. If no record exists for this item and facility combination in Facility Planning Data, the default value is the item's standard lot size from the Item Master file. In the latter case, if this purchase order/requisition is accepted, the system creates a facility/item record in Facility Planning Data. The system uses the lot size from the item's Item Master record as the lot size value.

Note: If a purchase order/requisition line is fully received in Purchase Receipts, PUR550, you cannot reduce the quantity of the line. However, you can increase the quantity ordered in this line, even if the line is already fully received.

Unit of Measure (2,A): For items, Infor LX uses the purchasing unit of measure for this item as defined in the Item Master file. You can change this value to the stocking unit of measure as defined in the Item Master.

Program ID (10,A): The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the program ID to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value must exist in the Commitments file, TMC.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Spend Type (2,A):

The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the spend type to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value in this field must exist in the Commitments file, TMC.

For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Screen actions - PUR500/600-06

Commands	Description
F13=Filters	Display the Filter Options screen and select how to display the records.
	0=All Lines by line number
	1=All Lines; Open lines first
	2=All Lines by oldest date
	3=All Lines by line status, oldest date
	4=All PO Lines by Original Line Number
F15=PO Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain PO notes.
F16=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.
F17=PO Inquiry	Access Purchase Order Inquiry, PUR300.
F18=Jump	Access the Jump To New Line screen on which you can specify a line number to reposition the display.
F19=Packaging Inquiry	Access the Packaging Master Maintenance screen, OLM600D1-01.

F20=Detail
Access the Purchase Order/Requisition Lines Maintenance detail screen, PUR500-07, from the initial Purchase Order/Requisition Lines Maintenance screen, PUR500-06.

F22=Header
Access the Purchase Order/Requisition Header Maintenance screen, PUR500-05.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter purchase order/requisition line information

Use the Filter Options screen to specify the sequence in which Infor LX displays PO/requisition lines on your screen. The default sequence is by original line. Specify one of the following sequence methods:

- 0=All Lines by line number
- 1=All Lines; Open lines first
- 2=All Lines by oldest date
- 3=All Lines by line status, oldest date
- 4=All PO Lines by Original Line Number

If you change the sequence, the system does not reset the sequence until you return to this screen to specify a new sequence.

View quotes for a purchase order/requisition line

If you prompt on the Cost/Unit field on the Purchase Order/Requisition Lines Maintenance screen, PUR500-06, Infor LX displays the Item Quote List screen, which shows all quotes that apply to a purchase order/requisition line.

This screen lists quantity price breaks by vendor number and quote date range and if Multiple Currencies is installed, the currency for this item. The screen lists all quotes for the item if you create a new purchase order/requisition and the vendor is not specified. The screen displays the contract number, if applicable, and, for a facility-specific quote, the facility to which this quote is restricted.

Screen actions - WINHQTD

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Maintain purchase order/requisition line details

If you use F20, Detail, on the Purchase Order/Requisition Lines Maintenance screen, PUR500/600-06, Infor LX displays the Purchase Order/Requisition Lines Maintenance detail screen, PUR500/600-07.

This screen has the following display-only fields:

- Purchase Order/Requisition Number and Line Number
- Status
- Vendor number and name
- Ship To number and name
- Bill To
- Buyer
- Facility
- Currency
- Amount
- Warehouse
- Exchange Rate
- Commodity Type Code/Item

Note: Depending on Purchasing parameters set, you may not be able to create purchase order/requisition lines unless you set up Item/Vendor records for the lines in Item/Vendor Quality Maintenance, PUR120D. For a detailed explanation of these parameters and their effect, see the help text for the parameter fields in Purchasing Parameters, PUR820D-05.

Caution: Infor LX allows you to create orders with up to 9999 lines; however, you can negatively impact system performance if you create a large number of extremely long orders.

Field descriptions - PUR500/600-07

Fields	Description
Line actions:	The following line actions are available:

10=Special Chg

Add a special charge line. If you specify this line action, Infor LX copies the line so that you can reprice the item. You can specify special charges only for valid item or commodity codes. The special charges must exist in the special charge table.

11=Notes

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

12=Alternates

Display alternate items defined for this item/customer on the Manufacturing Use Alternate Item Selection screen, WINIAI.

13=History

In Create mode, access the Vendor History List screen, WINHVH.

14=Ship To

Access the Ship-To Maintenance screen.

15=Detail

Display the detail for this purchase order/requisition line on the Purchase Order/Requisition Lines Detail Maintenance screen, PUR500/600-09.

16=Close

Close the specified purchase order/requisition line. If you use F6 to accept, the system closes the line.

17=Select Quote

Display active quotes for the selected vendor number, and item number/commodity code on the Quotes Inquiry for item or commodity screen, PUR300D6-01.

To create a line, specify the information on the line. To revise a line, specify the revision over the existing data.

18=Mat Status Inquiry

Access the Material Status Inquiry - Summary screen, INV300D-02.

20=Item Notes

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

21=Planning and Pegging

Access Planning/Pegging Inquiry, MRP300D.

22=Split Line

Access the Split Lines Maintenance screen, PUR500-08. This line action is not available in Create mode or for requisitions.

Note: If transactions have already occurred against a PO line, you cannot split the line.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Act (2,0):

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

10=Special Chg

Add a special charge line. If you specify this line action, Infor LX copies the line so that you can reprice the item. You can specify special charges only for valid item or commodity codes. The special charges must exist in the special charge table.

11=Notes

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

12=Alternates

Display alternate items defined for this item/customer on the Manufacturing Use Alternate Item Selection screen, WINIAI.

13=History

In Create mode, access the Vendor History List screen, WINHVH.

14=Ship To

Access the Ship-To Maintenance screen, PUR500-11.

15=Detail

Display the detail for this purchase order/requisition line on the Purchase Order/Requisition Lines Detail Maintenance screen, PUR500-09.

16=Close

Close the specified purchase order/requisition line. If you use F6 to accept, the system closes the line.

17=Select Quote

Display active quotes for the selected vendor number, and item number/commodity code on the Quotes Inquiry for item or commodity screen, PUR300D6-01.

To create a line, specify the information on the line. To revise a line, specify the revision over the existing data.

18=Mat Status Inquiry

Access the Material Status Inquiry - Summary screen, INV300D-02.

20=Item Notes

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

21=Planning and Pegging

Access Planning/Pegging Inquiry, MRP300D.

22=Split Line

Access the Split Lines Maintenance screen, PUR500-08. This line action is not available in Create mode or for requisitions.

Note: If transactions have already occurred against a PO line, you cannot split the line.

Due Date (8,0):

For inventory items, Infor LX adds the number of days lead time from this item's Item Master record or warehouse planning data to the purchase order/requisition entry date to calculate this date for new manually-entered purchase order/requisition lines.

Lead time is expressed in actual work days.

Specify the date in the time zone for the line warehouse, or if no warehouse exists, specify the date in the time zone for the facility.

Note: If you use a shop calendar, you can add additional lead time if the calculated due date falls on a non-work day defined in the shop calendar.

This date is compared to the vendor quote effective dates to determine whether a given quote is valid for pricing on this date.

For non-inventory items, Infor LX adds the contract lead time days to the entry date to calculate this date.

You can override this date, if necessary. The system uses this date to process the Open Purchase Orders by Item/Due Date report, PUR202, and Open Purchase Orders by Commodity Code/Due Date report, PUR205.

If you override the due date, and want Infor LX to determine the expected cost/unit based on the new due date and vendor quotes, you must clear the current expected cost/unit amount before you press Enter.

Note: The system displays the delivery date, not the line due date, as the due date for the line if you print the purchase order/requisition. If you override the due date, you must clear the displayed delivery date if you want the system to recalculate this field automatically.

Quantity (11,3): Specify the quantity of this item or commodity to order in purchasing units of measure. Infor LX uses this value with the vendor's quote from the Vendor Quote Master file to determine the expected cost.

The default value is the item's standard lot size from the Item Master file, or the quantity passed from Purchase Order Consolidation/Release, PUR640, or from planning data.

Unit of Measure (2,A): Infor LX uses the default purchasing unit of measure for this item or commodity code. If you override the purchasing unit of measure, the system automatically converts the unit of measure if a conversion is defined for the two units of measure.

Cost/Unit (15,5): This field displays the expected cost of this item per purchasing unit. The default values for this field are as follows.

1

Infor LX accesses the Vendor Quote Master file to retrieve an appropriate value for the vendor, item, quantity, and due date and if Multiple Currencies is installed, the currency specified. If more than one quote exists, Infor LX uses the item's lowest quote for the vendor, quantity, due date, and currency specified.

This program uses the lowest unscheduled contract quote for the item/vendor/date combination that exists for the facility in the header. If no unscheduled contract quote exists for the item/vendor/date in the facility then the system uses the lowest global quote for the item/vendor/date.

2

If a vendor quote does not exist for this item, Infor LX retrieves the standard cost value from the Cost Master file, CMF, for either facility or global costing.

If Multiple Currencies is installed, the system multiplies the standard cost by the global to transaction currency exchange rate. The value that results is the expected unit cost.

However, if you override a value here, or if you update a purchase order/requisition and a value already exists, Infor LX does not automatically update this value. If, for example, you receive a lower quote after you specify the cost, Infor LX does not retrieve the updated cost.

To override the expected cost, press Field Exit to clear the existing expected cost figure, then specify the new expected cost.

Use F4 to display the Item Quotes screen, WINHQT. This screen lists quantity price breaks by vendor number and quote date range and if Multiple Currencies is installed, the currency for this item. The screen lists all quotes for the item if a new purchase order/requisition is created and the vendor is not specified for the purchase order/requisition.

Note: If the price is from a quote, Infor LX checks your user ID authority to change this price before you can make the change.

(Commodity Code/Item Description) (50,A): Infor LX displays the description defined for the item number or commodity code.

Warehouse (3,A): The system uses the warehouse from the purchase order/requisition header. If the header warehouse is blank, you must specify a warehouse for this purchase order/requisition line.

Note: Do not create purchase orders/requisitions with managed and non-managed warehouses on the same PO/requisition. Warehouse Management requires that all lines on a PO/requisition are for the same managed warehouse.

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

You cannot change an MRO warehouse, type=6, on a requisition line. The System of Record (SOR) for requisitions specifies the MRO warehouse on an incoming message. The SOR must send a new message to change the MRO warehouse on a requisition. If you use F4=Prompt on the warehouse field, and the warehouse on the requisition line is an MRO warehouse, the system displays the warehouse list window but without action 1=Select.

Ship-To (1,0) (8,A):   The system uses the ship-to type and ship-to number from the purchase order/ requisition header. You can override the ship-to information for one or more purchase order/requisition lines.

Contract Number (10,A):   Infor LX displays the contract number associated with this line of the purchase order/requisition. You can change this field but the contract number specified must exist. The system uses the contract number to link to the Contract Header and Detail lines files to update the quantity and values ordered or received.

For unscheduled contracts, if a valid quote exists for this item and the quote is linked to a contract, Infor LX automatically populates this field with the contract number. You can maintain quotes in Vendor Quote Maintenance, PUR150. If there is no quote linked to the unscheduled contract, you must assign the contract number manually.

Nature of Transaction (2,N):   Specify the code to identify the nature of the transaction.

Infor LX validates this code against EC-recognized codes. If you use EU Intrastat reporting, set in System Parameters, you must specify a value in this field. The following first digit codes are valid:

1

All transactions that involve actual or intended change of ownership in exchange for consideration. These transactions include capital leasing activities and movements of stock within the same legal entity.

2

Returned and replaced goods.

3

Free-of-charge transactions that involve permanent change or ownership.

4

Goods delivered for processing or repair.

5

Goods returned following processing or repair.

6

Goods moved without a transfer of ownership for hire, operating leases, or other temporary use.

7

Joint defense projects or other inter-governmental productions programs.

8

Building materials and equipment as part of a general construction or engineering contract. Declare the value of materials and equipment, not that of the contract.

9

All other transactions.

The following second digit codes are valid:

0

All cases where 6, 7, or 8 listed below do not apply.

6

Credit notes.

7

Transactions included on supplementary declarations that are not required in boxes 8 or 9 on VAT returns for the same period.

8

Transactions included in boxes 8 or 9 on VAT returns that are not required on supplemental declarations.

Note: You are not required to use second digit codes 6, 7, or 8; however, we recommend these codes for VAT reconciliation purposes.

Infor LX adds the Nature of Transaction field to the Purchase Order and Requisition Lines file. The Nature of Transaction Code Table file then validates this code.

Price Source (1,0):   Infor LX displays the price source code for the estimated cost for this item. The following values are valid:

0

No price entered. This is the default price source code for non-inventory items if you did not specify a price and no valid contract/quote exists.

1

Contract/Quote Price. The system obtains the price from a valid contract/quote.

2

Standard Cost from the Item Master. This is the default price source code for inventory items if no price was entered and no valid contract/quote exists. Infor LX uses facility standard cost first, if it exists.

Note: Standard cost on the Item Master is the global standard cost for the item, for example, non-facility. If there is a facility-specific standard cost, and the PO/Item is entered for that facility, Purchase Order Release/Maintenance, PUR500, uses the facility-specific cost.

3

Manually-entered price.

4

Manually-entered zero price.

You can change the price source. You can change the code to a 4, which manually sets the purchase order line price to zero or you can change the code to a 0, which reprices the purchase order/requisition line, and can change the price code to reflect the price origin.

Extended Cost (15,2): The system calculates the extended cost, Quantity x Cost/Unit, for this purchase order line.

The system displays quantities in Purchasing in the item's purchasing unit of measure. The quantity on a PO line defaults to the purchasing unit of measure. If you enter the stocking unit of measure when you create a PO line, the system converts the stocking unit of measure to the Purchasing unit of measure when you accept the purchase order.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

The cost for Dynamic Weights and Measures items requires additional calculation. If the item is a DWM item, standard costs are entered in IDF Item Cost, in the item's DWM Pricing unit of measure, not the stocking unit of measure. Vendor quotes for DWM items are entered in the DWM item's purchasing unit of measure. The following examples demonstrate the extended cost calculation for a DWM item:

Stocking U/M	PC
Purchasing U/M	CS (5 PC/CS)
DWM Pricing U/M	LB
Aver. actual weight	3.33 LB/PC
Standard cost	$5.00/LB

If the item had a vendor quote of $80.00 per CS, the system calculates the following value for the PO line:

1 CS at $ 4.80480/LB = $80.00

To get this value, the system uses the vendor quote of $80.00/ CS and recalculates the unit cost using the DWM pricing unit of measure (LB):

1 CS = 5 PC at 3.33 lb = 16.65 lb.

$80.00 / 16.65 LB = $4.80480/LB.

If you purchase 1 PC, the stocking unit of measure, the system calculates the following value for the PO line:

1 PC at 3.33 LB x $5.00/LB = $16.65.

Program ID (10,A):

The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the program ID to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value must exist in the Commitments file, TMC.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Spend Type (2,A):

The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the spend type to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value in this field must exist in the Commitments file, TMC.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Screen actions - PUR500/600-07

Commands	Description
F13=Filters	Display the Filter Options screen and select how to display the records.
	0=All Lines by line number
	1=All Lines; Open lines first
	2=All Lines by oldest date
	3=All Lines by line status, oldest date

4=All PO Lines by Original Line Number

F15=PO/Req Notes   Access the Note Mode Selection (SYS255D) screen to view or maintain PO/Req notes.

F16=Vendor Notes   Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.

F17=PO Inquiry   Access Purchase Order Inquiry, PUR300.

F18=Jump   Access the Jump To New Line screen on which you can specify a line number to reposition the display.

F19=Packaging Inquiry   Access Packaging Master Maintenance, OLM600, in inquiry mode.

F20=Summary   Access the initial Purchase Order/Requisition Lines Maintenance screen, PUR500/600-06.

F22=Header   Access the Purchase Order/Requisition Header Maintenance screen, PUR500/600-05.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Jump to a new line number

Infor LX displays the Jump To New Line screen. Use this screen to reposition the order to another line.

Field descriptions - Jump Line

Fields	Description
New Line Number (4,0):	Specify a new line number and press Enter. Infor LX repositions the screen with the specified line number at the top of the display.

Screen actions - Jump Line

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Split PO lines

Use the Line Splitting Maintenance screen, PUR500-08, to split existing PO lines into two or more new purchase order lines that are tied to the original line. If a supplier splits a line into separate lines due to separate delivery dates or quantities, the new lines that show new due dates and quantities are linked to the line from which they were split.

Specify the due date and the delivery date in the time zone for the line warehouse.

You cannot split a line if transactions have already occurred against it.

The system uses the values from the original purchase order line and PO header. The following fields are display only:

- PO
- Vendor
- Status
- Ship To
- Buyer
- Bill To
- Facility
- Warehouse
- Currency
- Line number (of the original line)
- Quantity (of the original line)

Access: Line action 22, Split Line from Purchase Order Lines Maintenance

Field descriptions - PUR500-08

Fields	Description
Rev (Revision) (10,A):	Specify a revision number for this purchase order. This is a user-defined field you can use to track changes made to this PO.
Lines to Add (4,0):	This field is optional if you specify a value in the Qty Per (quantity per line) field. Specify the number of extra lines to add to the PO for the selected original line. If you specify a number of lines but do not specify a quantity per, Infor LX divides the quantity from the original purchase order line equally among the original and additional lines. If this split results in some original quantity not included in a line, Infor LX looks at the Delete Remainder field. If the value in that field is Yes, the system discards the excess quantity. If the value in that field is No, Infor LX creates an additional line to hold the leftover quantity.
	Example: The original PO line has a quantity of 1000. You want three shipments, so you request two new lines for a total of three lines. If you divide the total quantity of one thousand among the three lines, each line has a quantity of 333, with one unit unaccounted for. Infor LX looks at the Delete Remainder setting. If Yes, Infor LX deletes the leftover unit from the PO, which leaves the PO with three lines that each have a quantity of 333. If the Delete Remainder setting is No, Infor LX automatically creates a fourth PO line with a quantity of 1, which accounts for that leftover quantity.
	Note: The total quantity of the PO lines created cannot exceed the quantity of the original purchase order line. If you specify values in both the Lines to Add and the Quantity Per fields and the calculation of Quantity Per for Lines to Add plus 1 (the original line with adjusted quantity) causes you to exceed the quantity of the original PO line, Infor LX sends an error and does not create the lines. Adjust your field values.
	Note: Infor LX breaks the total quantity into fractional values to the third decimal position if necessary, unless the Discrete field in IDF Enterprise Item - Demand tab, is set to Y. If the value is Y, Infor LX rounds the quantity down to the nearest whole number.
Qty Per (Quantity per Line) (11,3):	This field is optional if you specify a value in the Lines to Add field. The value in the Quantity Per field causes Infor LX to calculate the number of lines to add to fulfill the requested quantity per line without exceeding the total quantity of the original PO line. If the Delete Remainder field is set to Yes, Infor LX divides the original line quantity by the quantity per value to determine total number of lines needed, then creates the total lines needed minus 1 (because the first line already exists). The system discards any quantity left over. If the Delete Remainder flag is turned off, Infor LX will add one additional line to hold only the leftover quantity.

Example: Original line quantity is 1000 units. Quantity Per line is 333, Delete Remainder flag is off. Infor LX calculates that it can fill three lines total (1000 divided by 333) with one quantity unit left over. It adds two lines which, along with the original line, each receive the specified Quantity Per of 333. Then it creates an additional line with quantity of 1, the leftover quantity unit. If the Delete Remainder flag is turned on, the process is identical except that Infor LX does not create the line for the leftover unit - it simply discards the line from the PO, which results in a total amount of 999 rather than the original line quantity of 1000.

Note: The total quantity of the PO lines created cannot exceed the quantity of the original purchase order line. If you specify values in both the Lines to Add and the Quantity Per fields and the calculation of Quantity Per for Lines to Add plus 1 (the original line with adjusted quantity) causes you to exceed the quantity of the original PO line, Infor LX sends an error and does not create the lines. Adjust your field values.

Delete Remainder (1,0): The value in the Delete Remainder field determines the processing if the value in the Lines to Add field or the value in the Quantity Per field does not calculate to exactly the same total quantity as the original PO line. If you divide the original quantity by the total number of lines and have some units of quantity left over, Infor LX uses this value to determine whether to discard the leftover quantity units from the PO or to create an additional PO line to hold just that leftover quantity. Specify No if you want to create the additional line. Specify Yes to discard the leftover quantity units.

Screen actions - PUR500-08

Commands	Description
F16=Mat Sts Inq	Access the Material Status Inquiry - Summary screen, INV300D-02, to review the status of your inventory stock.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Add or maintain additional details for purchase order/requisition lines

If you specify line action 15 from either of the Purchase Order/Requisition Lines Maintenance screens, PUR500/600-06 or PUR500/600-07, Infor LX displays the Purchase Order/Requisition Lines Detail Maintenance screen, PUR500/600-09.

The system displays the following fields only if the item is a packaging item:

- Packaging Item Type
- Receipt Price Option
- Packaging for Line

The system displays the Estimated Packaging Costs field only if the item is an inventory item.

Infor LX displays the following fields selected from the previous screen:

- Purchase Order Number and Line Number
- Status
- Vendor Number, Vendor Name and Vendor Company
- Item/Commodity Type Code
- Item Number or Commodity Code and description
- Item Order Quantity
- Item Purchasing Unit of Measure
- Item Cost/Unit
- Due Date, displayed in time zone for the warehouse
- Facility
- Warehouse
- Warehouse Company

Field descriptions - PUR500/600-09

Fields	Description
Contract Number (10,A):	Infor LX displays the contract number for scheduled purchase orders. You cannot change the value.
Price Source (1,0):	Infor LX displays the price source code for the estimated cost for this item. The following values are valid: 0 No price entered. This is the default price source code for non-inventory items if you did not specify a price and no valid contract/quote exists. 1 Contract/Quote Price. The price was obtained from a valid contract/quote. 2 Standard Cost from the Item Master. This is the default price source code for inventory items if you did not specify a price and no valid contract/quote exists. Infor LX uses facility standard cost first, if it exists. Note: Standard cost on the Item Master is the global standard cost for the item, that is, non-facility. If a facility-specific standard cost exists, and you

enter the PO/Item for that facility, Purchase Order/Requisition Release/ Maintenance, PUR500/600, uses the facility-specific cost.

3

Manually-entered price.

4

Manually-entered zero price.

GL Account (20,A): Although Infor LX displays this field, the information in the field has no effect on the journal entries you create. Infor LX resolves models in Advanced Transaction Processing (ATP) to create journal entry lines.

Manufacturer (8,A): Infor LX displays the manufacturer for this line item. You can change this value only if no receipts, not even partial receipts, were processed against this purchase order line. Blank is a valid value in this field.

Program ID (10,A): The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the program ID to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value must exist in the Commitments file, TMC.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Spend Type (2,A): The system displays this field only if Trade Funds Management (TFM) is installed.

Specify the spend type to use to update a commitment with the amount of this purchase order/requisition line, including tax. Purchase order entry updates the accumulated amount of the commitment. The value in this field must exist in the Commitments file, TMC.

Note: For requisition lines, the system does not update the commitment until you convert the requisition to a purchase order.

Rev Level (revision level) (35,A): This field identifies the item's revision level at the time the purchase order/ requisition was created. The revision level is a user-defined field maintained in the Item Master. The system stores the value along with the purchase order/ requisition. The system uses revision levels in the item master to manually track those changes to the item that do not require a new item number. The revision level here allows you to identify the level the item was at when ordered.

Request Source (6,A): The system uses the requisition number if the purchase order was created through Purchase Order Consolidation/Release, PUR640, or Requisition Release, PUR650. This field displays ****** for summary lines.

Profit Center (10,A): ERP LX does not use this field. Use this field for user-defined data. This field formerly held the profit center.

Item Tax Code (5,A): Specify the item tax code for this purchase order/requisition line.

Customer Number (8,0): To link this purchase order/requisition line to a customer, specify the customer number.

Customer Order (9,0): To link this purchase order/requisition line to a customer order line, specify the customer order number.

Customer Order Line Number (4,0): To link this purchase order/requisition line to a customer order line, specify the order line number.

Delivery Date (8,0): Specify the date in the time zone for the warehouse.

For inventory items, Infor LX subtracts the number of inspection days from the due date to calculate this date. If the calculated date falls on a non-work day defined in the shop calendar, you can subtract additional days. The number of inspection days is set on the Purchasing System Parameters screen, PUR820D-01. The due date is determined as described below in the Due Date field; however, if you override the due date, you must clear the displayed delivery date if you want the system to recalculate this field automatically.

Note: If the calculated vendor delivery date falls before the current date, Infor LX substitutes the current date, even if the date is defined as a non-work day in the shop calendar.

For drop-ship items, the delivery date is the same as the due date. If the vendor requires an inspection, you must allow enough time for the inspection when you specify the request date in Order Entry, ORD700.

For non-inventory items, Infor LX adds the contract lead time to the entry date to calculate this date.

You can override this date, if necessary. The system uses this date to process the Open Purchase Orders by Expected Delivery Date report, PUR260.

Note: The system displays the delivery date, not the line due date, as the due date for the line if you print the purchase order/requisition. If you override the due date, you must clear the displayed delivery date if you want the system to recalculate this field automatically.

Outside Operation (1,A):

The system uses No as the default value for regular purchase order/requisition lines.

Note: If the value in this field is No, you cannot specify a value in the Shop Order or Operation fields, as these fields apply only to outside operations.

Specify Yes if this purchase order/requisition line is an outside operation. You must then specify a valid shop order and operation on this screen, and you must specify the operation as an outside operation in the standard routing.

If this field specifies Yes, purchase order/requisition receipt transactions for this line automatically override the Affect Shop Order field defined for that transaction effect in Transaction Effect Maintenance, INV150.

Shop Order Number (9,0):

This field is required if the Outside Operation field specifies Yes. Specify the shop order number for this line item. You must specify a shop order that exists in the Shop Order file, FSO.

Note: The line item must be an item/commodity type 0 item.

Buyer (3,A):

The system uses the buyer code from the purchase order/requisition header. For inventory items, Infor LX uses the buyer code from the Item Master if the buyer code from the purchase order/requisition header is blank.

Operation (3,0):

This field is required if the value in the Outside Operation field specifies Yes. Specify the operation number for this line item. The shop order/operation must exist in the Operation file, FOD. The item/operation must exist on the routing and you must add the cost of the outside operation to the FRT file.

MRP Reschedule Date (8,0):

This field contains the date the MRP system suggests as the due date for the purchase order/requisition, if MRP or MPS Generation was run after the purchase order/requisition line was created. The system displays this date on all MRP reports and inquiries until the item is replanned. This is the new due date planned by MRP.

You can change this date. However, a date change here has no effect on MRP processing, because MRP expects the goods to be available on the due date of the purchase order/requisition.

Specify the date in the time zone for the warehouse.

Vendors Item (35,A):

The system uses the value from a valid contract/quote for the line item based on the item, vendor, type, start date, and expiration date. If no valid vendor quote exists, Infor LX uses the vendor item number from the Vendor Item History file, HVH, if any. This field is optional; you can change the value.

Print Date (8,0):

Infor LX displays the date the purchase order/requisition line was last printed. If the line was not printed, the system uses zeros as the default value.

Initials (3,A): This is a user-defined field. You can change the value during Purchase Order/ Requisition Maintenance.

Acknowledgment Request Date (8,0): In Requisition Release Mode, the system uses the value from the requisition; the system uses zeros as the default value in other modes. This date cannot be earlier than the current date.

Ship Via (10,A): Specify the preferred or mandatory shipper or shipping method. This field is reference only.

Acknowledgment Receive Date (8,0): In Requisition Release Mode, the system uses the value from the requisition; The system uses zeros as the default value in other modes. This date cannot be earlier than the current date.

Ship Status (30,A): Specify the item's last known shipment status. This field is reference only.

Last Transaction Date (8,0): Infor LX displays the last transaction date for this purchase order or requisition.

FOB Code (1,0): The system uses this field with the FOB Point field to define the point of control for freight liability, payment and collection method.

Examples of FOB codes:

- 1=FOB Destination, Freight Collect and Allowed
- 2=FOB Destination, Freight Collect
- 3=FOB Destination, Freight Prepaid
- 4=FOB Origin, Freight Prepaid and Charged Back
- 5=FOB Origin, Freight is Prepaid
- 6=FOB Origin, Freight is Collect

(FOB) Point (30,A): Specify the FOB delivery location or other shipping destination. This field is reference only.

Close Date (8,0): This field displays zeros for open purchase order/requisition lines or the close date for closed PO/requisition lines.

Country of Origin (4,A): Infor LX displays the country of origin for this line item. You can change this value only if no receipts, not even partial receipts, have been processed against this purchase order/requisition line.

The value in this field must exist in the Country Master file, LCN.

Destination (30,A): Specify the destination or other shipping information to assist with disposition of the goods after they are received. This field is reference only for items; the destination is printed on the traveler ticket for commodity codes.

Revision Level (35,A)
In Create mode, this field uses the revision number from the Item Master file, IIM, but you can override this process. This field is optional for commodity codes.

The revision level is a user-defined field maintained in the Item Master. The system stores the value along with the purchase order/requisition. The system uses revision levels in the item master to manually track those changes to the item that do not require a new item number. The revision level here allows you to identify the level the item was at when ordered.

Comment (30,A):
Specify any user-defined comment to describe the goods. The system stores this comment in the Item Transaction History file, ITH, and prints the comment on purchasing reports.

Print Flag (1,0):
Infor LX displays 1 if the purchase order/requisition line has been printed.

EDI flag (1,0):
Infor LX displays 1 if the item is selected for EDI processing. If you change the value in this field, Infor LX also automatically changes the value in this field on the purchase order/requisition header.

Packaging Item Type:
The system displays this field if the PO line item is a packaging item associated with an inventory line on the PO. You specify the packaging type in IDF Enterprise Item. You associate packaging items with inventory items in Packaging Master, OLM600.

1=Regular Packaging

2=Reusable packaging

3=Green packaging

Estimated Packaging Cost:
The system displays this field if this is an inventory item that has associated packaging items. You associate packaging items with inventory items in Packaging Master, OLM600. This field displays the estimated costs of all the packaging items associated with this inventory item.

Packaging for Line:
The system displays this field only if the item is a packaging item with a receipt price option of 5, 6, or 7. This field refers to the inventory line item on the PO that is associated with this packaging item. You specify the packaging type in IDF Enterprise Item. You associate packaging items with inventory items and you specify the receipt price option in Packaging Master, OLM600.

Receipt Price Option:
The system displays this field only if the item is a packaging item and has one of the following values. You specify the receipt price option in Packaging Master, OLM600.

5=Standard Cost

6=Quote

7=No pricing

Screen actions - PUR500-09

Commands	Description
F14=Control No. Schedule	Access the Control Number Schedule Fields screen. The system displays this screen action only if the item is a control number item.
F15=Packaging Inquiry	Access Packaging Master, OLM600, in inquiry mode.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Special charge maintenance, PUR500D5

If you specify line action 10 in Purchase Order Maintenance, Infor LX displays the Special Charges Maintenance screen.

Add special charges

Use the Special Charges Maintenance screen to add special charges for a purchase order line. This screen displays the following fields from the individual purchase order line to which these special charges are attached:

- Purchase Order/Requisition Number
- Purchase Order/Requisition Line Number
- Vendor Currency
- Quantity
- Warehouse
- Exchange Rate

Field descriptions - PUR500-10

Fields	Description
Sequence Number (3,0):	The program assigns special charge lines sequentially. To delete a special charge line, press Field Exit for all fields in the line to delete, then press Enter.

Infor LX physically deletes the blank special charge line and resequences the remaining special charges.

Special Charge (35,A): Specify the special charge code. You can specify special charges only for valid item or commodity codes. The special charges must exist in the special charge table.

F/C (Fixed Charge flag) (1,0): Infor LX displays the fixed charge flag defined for this special charge. If the fixed charge flag is 0, Infor LX multiplies the special charge amount times the number of units for this purchase order/requisition line. If the fixed charge flag is 1, the quantity uses 1 for the extended amount calculation.

Item Tax Code (5,A): Infor LX displays the item tax code defined for this special charge in Special Charge Maintenance, PUR181. You can override the item tax code.

Amount/Each (15,2): Specify the amount of the special charge.

Extended Amount (15,2): Infor LX calculates the extended amount of this special charge. If the fixed charge flag is 0, Infor LX multiplies the special charge amount times the number of units for this purchase order/requisition line. If the fixed charge flag is 1, the system uses 1 for the extended amount calculation.

Expense Account (20,A): Although Infor LX displays this field, the information in the field has no effect on the journal entries you create. Infor LX resolves models in Advanced Transaction Processing (ATP) to create journal entry lines.

Screen actions - PUR500-10

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Ship-to maintenance, PUR500D6

If you specify line action 14 in Purchase Order Maintenance, Infor LX displays the Ship-To Maintenance screen.

Maintain ship-to information for a purchase order/requisition line

Use the Ship-To Maintenance screen to change the ship-to information for a purchase order/requisition or purchase order/requisition line.

Infor LX displays the purchase order/requisition number, line number, and ship-to number selected from the previous screen.

The system also displays this screen if you specify a ship-to type 0 and the ship-to number does not already exist as a purchasing ship-to in the Ship-to Master file, EST. In this case, the system uses the information you specify on this screen to create a new purchasing ship-to record in the Ship-To Master file.

Field descriptions - PUR500-11

Fields	Description
Ship-To Name (50,A):	Specify the name or address information for this ship-to.
Attention To (50,A):	Specify the name or address information for this ship-to.
Address Line 1(50,A):	Specify the name or address information for this ship-to. The first address line cannot be blank.
Address Line 2 (50,A):	Specify the name or address information for this ship-to.
Address Lines 3 (50,A):	Specify the name or address information for this ship-to.
State (3,A):	Specify the name or address information for this ship-to.
Post (10,A):	Specify the name or address information for this ship-to.
Country (4,A):	Specify the name or address information for this ship-to. If you use EU Intrastat reporting, set in System Parameters, you must specify a value in this field.

Screen actions - PUR500-11

Commands	Description
F10=Language Over-rides	Display the Purchase Order or Requisition Language Override screen, PUR765D-01. Select an order and a ship to name and the language for translation.

All other screen actions on this screen perform standard Infor LX functions.
See *Generic help text for screen actions (p. 22)* in the overview information
in this document.

Filter purchase order/requisition line information

Use the Filter Options screen to specify the sequence in which Infor LX displays PO/requisition lines on
your screen. The default sequence is by original line. Specify one of the following sequence methods:

- 0=All Lines by line number
- 1=All Lines; Open lines first
- 2=All Lines by oldest date
- 3=All Lines by line status, oldest date
- 4=All PO Lines by Original Line Number

If you change the sequence, the system does not reset the sequence until you return to this screen to
specify a new sequence.

Screen actions - Filters

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Ship-to phone maintenance, PUR500D7

Infor LX displays and allows the user to maintain the phone number, fax number, and E-mail address
for the ship-to number specified on the Purchase Order Header or Requisition Header screens. The
system saves the changes specified on this screen on the purchase order or requisition record. The
system does not update the Ship-To master file with these changes.

Maintain ship-to contact information for a purchase order

If you use F18, Ship-To Inquiry, from the Purchase Order/Requisition Header Maintenance screen,
PUR500/600-05, the system displays the Ship-To Phone Maintenance screen.

Field descriptions - PUR500D7

Fields	Description
Phone Number (25,A):	Specify the phone number for the ship-to number to use for this PO/requisition.
Fax Number (25,A):	Specify the fax number for the ship-to number to use for this PO/requisition.
E-Mail Address (80,A):	Specify the E-mail address for the ship-to number to use for this PO/requisition.

Screen actions - PUR500D7

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Purchase order print, PUR520D

Purchase Order Print, PUR520D, prints purchase orders for which the print setting is blank, such as new lines that you added in Purchase Order Release/Maintenance, PUR500, or old lines that you changed to a blank in PUR500.

To print a purchase order, you must have authorization for the amount of the purchase order established in Authorization File Maintenance, PUR170.

This program does not print purchase orders associated with a contract.

Use Scheduled PO Document Print, PUR524D, to print purchase orders associated with a contract.

Note: The system displays the delivery date, not the line due date, as the due date for the line if you print the purchase order. If you override the due date, you must clear the displayed delivery date if you want the system to recalculate this field automatically.

The system prints the taxes on the purchase orders. To calculate the taxes, the system uses the vendor tax code, the item tax code, and the warehouse code associated with each purchase order. Infor LX first accesses the tax rate table based on the three preceding parameters. If a code does not exist for a specific warehouse, then Infor LX searches for the vendor and item tax codes only.

Infor LX searches through each of the tax rate codes in the table to find the rate code effective as of the invoice date. The system then applies the applicable tax rate.

Note: If the vendor for a purchase order or requisition is eligible for alternate currency processing, the purchase order or requisition prints with two sets of tax and PO totals: first, the values print in the transaction currency, then additional lines print with the same values converted into the vendor's alternate

currency. To be eligible, the vendor master record for this vendor must contain a valid currency code and the Print Display Flag field in the vendor master record must be Yes. For requisitions that do not have a vendor specified, no alternate currency information prints.

Print a purchase order report

Use the Print Purchase Orders screen, PUR520D-01, to specify the selection criteria for the report.

Field descriptions - PUR520D-01

Fields	Description
Company to Print (3,0):	Specify the code of the company for which to print purchase orders. Purchase orders print for all warehouses assigned to this company. Leave this field blank to include all companies.
Facility (3,A):	Specify the code of the facility for which to print purchase orders. Purchase orders print for all warehouses assigned to this facility. Leave this field blank to include all facilities.
From Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. These fields depend on your entries in the preceding Company and Facility fields. If you specify a company number or facility code, the report includes only purchase orders for that company or facility code and this range of warehouses. If you leave the Company or Facility field blank, the report includes purchase orders for all companies or facilities with warehouse destinations in this range.
To Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document. These fields depend on your entries in the preceding Company and Facility fields. If you specify a company number or facility code, the report includes only purchase orders for that company or facility code and this range of warehouses. If you leave the Company or Facility field blank, the report includes purchase orders for all companies or facilities with warehouse destinations in this range .

From Purchase Order (9,A):

Specify a range of values to limit the purchase orders to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

The report includes purchase orders in the selected range as limited by this field and other selection criteria specified in this screen.

To Purchase Order (9,A):

Specify a range of values to limit the purchase orders to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

The report includes purchase orders in the selected range as limited by this field and other selection criteria specified in this screen.

Buyer Code (3,A):

Changed: *MR80114 Updated the help text based on the System Parameter (SYS820D-05)*

Changed: *MR81215 modified the Paragarph with default buyer "for" and changed SYS820D-05 to PUR820D-05*

Specify the buyer code for which to print purchase orders. Leave this field blank to include all buyers. This field is dependent on the entries in the Company, Facility, and Warehouse fields.

> **Note**
>
> This value is based on the Default Buyer for PO Prints field in System Parameters (PUR820D-05). If this value is blank, purchase orders of all the buyers are printed.
>
> You can modify the value in this field if an invalid or unused buyer code is specified in the Default Buyer for PO Prints field in System Parameters (PUR820D-05).

Sample PO Print (0=Print, 1=Sample print) (1,A):

This field indicates whether this is a final or sample purchase order print. The sample print does not update the purchase order's print setting or maintenance date.

Specify one of the following values:

0	Print the PO
1	Print a sample PO

If you specify Print but the PO is on hold for the next user's approval, the system will not print the PO.

Screen actions - PUR520D-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. 22)* in the overview information in this document.

Scheduled purchase order document print, PUR524D

Use Scheduled PO Document Print, PUR524D, to print item and quote details for new scheduled purchase orders or scheduled purchase order amendments. A scheduled purchase order must have been defined within the Contract Item Details file.

Access: Menu PUR03

Print a scheduled purchase order report

Use the Scheduled P.O. Document Print screen, PUR524D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR524D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
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 Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.

To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
From Item (35,A):	Specify a range of values to limit the item numbers to include in the report.
To Item (35,A):	Specify a range of values to limit the item numbers to include in the report.
Clause for this run (3,A):	Specify a clause code to print on all POs for this print run. Note that this does not permanently associate the clause with the POs.
Quotes to Print (1,0):	Specify 0 to limit quotes in the report to those associated with specific contracts. Specify 1 to print all valid quotes for the vendors.
Type of run (0, 1 or 2):	Specify 0 to print only new POs, 1 to print only amended orders, or 2, the default value, to print both.
Run Time Parameter (0 or 1):	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 - PUR524D-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. 22)* in the overview information in this document.

Procurement authorization, PUR530

Use Procurement Authorization, PUR530, to review all purchase orders that require your approval, or to review outstanding unapproved purchase orders you requested.

The amount fields calculated or displayed in this program are consistently rounded based on the currency rounding method and the round-to position you specified. Specify a rounding method and round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies (MLT).

This rounding process affects calculated amount totals such as invoice total, taxes total, and amounts in journals. However, the rounding process does not affect unit cost or unit selling prices.

Access: Menu PUR

Review procurement authorizations

Use the Procurement Authorization selection screen, PUR530-01, to display or review all procurement authorizations for the user.

Field descriptions - PUR530-01

Fields	Description
Line actions:	The following line actions are available:
	10=Review for Approval
	Review all unapproved purchase orders and requisitions for the selected user.
	11=Review Unapproved
	Display all outstanding purchase orders and requisitions for the selected user.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Act (2,0):

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

10=Review for Approval

Review all unapproved purchase orders and requisitions for the selected user.

11=Review Unapproved

Display all outstanding purchase orders and requisitions for the selected user.

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

Company (3,0):

Infor LX displays the company number for this authorized user.

The system displays only those companies to which the requesting user is authorized.

Name (50,A):

Infor LX displays the name of the company.

Screen actions - PUR530-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

View or approve purchase orders

If you specify line action 10, Review for Approval, or line action 11, Review Unapproved, Infor LX displays the Procurement Authorization approval screen, PUR530-02, which lists open purchase orders and requisitions for the selected company. If you specify 10 to access this screen, you can approve the purchase orders.

The system indicates preliminary purchase orders with an asterisk (*) before the order number.

This screen displays the company number, user name, and description from the selection screen. This screen also includes the following display-only fields:

- Approval Limit, which you define in Authorization Maintenance, PUR170

- Currency Code, which is the base currency code defined for the selected company. The system displays this field if Multiple Currencies for Purchasing is turned on in System Parameters.
- Approval type, which is 1 for approval required for inventory items only, 2 for approval required for non-inventory items only, or 3 for approval required for both inventory and non-inventory items
- Number, which is the unapproved purchase order number or requisition number for the selected line
- P/r. The system displays P if the value in the Number field is a purchase order, or R if it is a requisition.
- S. The system displays the purchase order line status code, which is 0 for a new purchase order, or not fully received and not fully costed, 1 for not fully received but fully costed, 2 for fully received but not fully costed, or 3 for PO line closed, fully received and fully costed.
- Requester, which is the user name of the last approver for this purchase order. If there is no last approver, the system displays the name of the user who requested the purchase order or requisition.
- Approver, which is the user name of the next level approver defined for the name in the Requester field
- Entered, which is the entry date of the purchase order or requisition
- Vendor, which is the vendor number for this purchase order or requisition
- Approval amount, which is the amount of the purchase order or requisition

If you use F20, Detail, Infor LX displays the following display-only fields:

- Ship-to,
- Name
- Facility
- Warehouse

Field descriptions - PUR530-02

Fields	Description
Act (2,0):	Specify the number for the line action to perform and press Enter.
	11=Approve
	Approve the selected purchase order or requisition. Infor LX displays a message if an additional level of approval is required.
	12=Display Lines
	Display the lines for the selected purchase order or requisition on the Purchasing Inquiry for PO or vendor screen, PUR300D3-01.

13=Notes

<div style="border:1px solid #ccc; background:#ffffcc;">

Added: *MR77613/REQ 526 Added new line action to access notes during procurement authorization in the PUR530-02*

</div>

Display the notes associated with the selected purchase order or purchase requisition during the approval of purchase order/requisition.

Screen actions - PUR530-02

Commands	Description
F14=Purchase Order Inquiry	Access Purchase Order Inquiry, PUR300.
F20=Detail	View additional fields on this screen.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Scheduled production schedule print, PUR540D

Use Scheduled Production Schedule Print, PUR540D, to print schedules for production type purchased items.

You can request schedules to print at any time. The system writes the schedule information to a Schedule History file, which you can use for subsequent analysis. The Schedule History file keeps a record of each schedule print. If you request multiple prints of the same schedule on the same day, the report includes the run times for the jobs.

Each time you print a schedule for production type items, the system dynamically recalculates schedule requirements to include the last receipt of each item, current open purchase order quantities, and the latest MRP planned and firm planned requirements.

The system adds together any past due purchase orders lines, MRP planned orders, or MRP firm-planned orders, which show as one figure on the Schedule, ARREARS.

Within the schedule horizon, defined as a number of calendar days within the Item Master file and/or Item Facility file for each item, the schedule only prints quantities from open purchase order lines for each scheduled purchase order. Outside of the schedule horizon, the schedule prints requirements from purchase order lines, MRP planned orders, and MRP firm planned orders. If you defined vendor split rules for multi-sourced items, the system factors in the MRP planned and firm planned requirements.

The system applies the following logic to adjust MRP requirements to print outside the schedule horizon. The system does not adjust purchase order line vendor due dates.

The system adds the scheduled horizon to the issue date to calculate the vendor due date and looks up the derived date in the Week/Dates Cross Reference file to ensure that the due date is a valid date. Requirements for which the calculated vendor due date falls before the first valid date print as if the vendor due date is calculated as the first valid date. Requirements for which the calculated vendor due date is after the first valid date print individually on the date of the calculated vendor due date.

The flexible layout allows multiple items per page, and only prints date buckets if there is a non-zero requirement. Date buckets are user-defined. Purchase order and item notes print if specified as Print on the PO and you can print a one-time clause at vendor or item level.

You determine the type of production schedule to print at the system level.

Access: Menu PUR

Print a production schedule report

Use the Production Schedule Print screen, PUR540D, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR540D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
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 Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.

From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order 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.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
Issue Date (8,0):	Specify the date to include on the schedules as the issue or release date. Note: the Production Schedule print takes any date you specify as the issue date and calculates requirement bucket dates from that issue date. For example, if you set up buckets for a set period, such as weekly, but specify one issue date that is a Monday, and the next time the schedule runs, the issue date is a Wednesday, the buckets are not comparable. What was a Monday to Sunday bucket before becomes a Wednesday to Tuesday bucket and the requirements seem to have moved.
Print Frequency Codes (5 x 1,A):	Specify up to five user-defined print frequency codes to print schedules that have these codes defined in the Contract Details file. For example, you can print schedules for some items on a weekly basis and for others on a monthly basis. You can specify W, for weekly, in this field for some items and M, for monthly, for other items if you defined codes W and M in the Contract Details file.
Pre-list or Update (1,A):	Specify 0 for pre-list and update or 1, the default value, for pre-list only. To see how the schedule looks before you create EDI or fax output or affect schedule history, run the production schedule as pre-list only; this prints all schedules for any release method on the standard layout print, but does not generate or update any files.
One-time clause (3,A):	Specify the clause code to print for this run.
Per item (1,A):	Specify 0 if you did not enter a one time clause or you do not want the clause to print on the schedule the first time each item prints for each vendor. Specify 1 to print the entered clause code text the first time each item prints for each vendor.

Per vendor (1,A):	Specify 0 if you did not enter a one time clause or you do not want the clause to print on the schedule the first time each vendor prints. Specify 1 to print the entered clause code text the first time the vendor prints.
Production Schedule only (1,0):	Specify Yes to create only the Production Schedule print spool file. Specify 0 to generate all four available spool files: EDI Audit, Production Schedule, Print Audit, and Fax Report.
Run Time Parameter (0 or 1):	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 - PUR540D-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. 22)* in the overview information in this document.

Scheduled consumable schedule print, PUR542D

Use Scheduled Consumable Schedule Print, PUR542D, to print schedules for consumable items such as janitorial supplies. The system prints the items on the consumable schedule rather than the production schedule.

To print a schedule with this option, you must first define a print code of 2 for the order, item, and warehouse combination within Contract Detail Maintenance.

Note that unlike schedules for production type items, consumable type schedules can print only once for each new requirement. If for any reason you must reprint a consumable type schedule, change the Print Flag value against the relevant purchase order lines from 1 to 2 in Purchase Order Maintenance, and then request a consumable schedule print.

Access: Menu PUR

Print a consumable schedule report

Use the Consumable Schedule Print screen, PUR542D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR542D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
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 Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order 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.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
Print Frequency Codes (1,A):	Specify up to five user-defined print frequency codes to print only schedules for which you defined the codes in the Contract Details file. For example, you can print schedules for some items on a weekly basis and others on a

monthly basis. You can specify W, for weekly, in this field for some items and M, for monthly, for other items.

Run Time Parameter (0 or 1): 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 - PUR542D-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. 22)* in the overview information in this document.

Purchase receipts, PUR550D1

Use Purchase Receipts, PUR550D1, to record the goods received from vendors into inventory. Purchase Receipts is a specialized inventory transaction program designed specifically for purchase order transactions. You can perform general inventory transactions through the Transaction Posting option in Inventory Transactions, INV500, which is also available from the Purchasing menu, PUR.

When you access this program, the system displays the available purchasing/inventory transactions that you defined through Transaction Effect Maintenance, INV150. The system displays only transactions set up to affect purchasing. Those transactions have a Y entered in the Check Purchase Order field on the Transaction Effect Maintenance screen, INV150-02.

This program updates the Vendor History file with the transaction totals entered here. The system stores these totals by vendor and item number.

The system records purchase order receipts by purchase order number. Infor LX treats each line of the purchase order as a separate inventory transaction. The effects defined for the specified transaction type actually occur when you exit this program.

If a purchase order line has a corresponding delivery line in planned status, Infor LX adds the received quantity to any amount previously received to update the delivery line and then changes the status to Received. If a purchase order does not have a corresponding delivery line in planned status, Infor LX creates a new delivery, delivery order, and delivery line for each purchase order line.

Note: A Purchasing system parameter enables you to prohibit acceptance of an item or commodity in a purchase order line if a valid/approved item or commodity/vendor record does not exist in the Item/Vendor Master file, HAV. If the parameter is set to Validate only, a line that contains an invalid item/vendor combination generates an error message, but is still received. If the parameter is set to Validate, stop PO create and Rec, the system does not process the receipt. To receive the item or

commodity, you must use an N transaction to require review by the Quality group to perform a manual rejection to inspection.

Purchase Order Receipts accesses the Routing Operation file and calculates the total number of hours required to inspect each type of good. The program also accesses the Item Master file and the shop floor calendar to adjust the manufacturing lead time of the goods to include the inspection time. Therefore, you can determine when you must receive the goods to allow for inspection and availability on the shop floor without a delay in the production schedule. The system makes this calculation without regard to other items that await inspection.

The system consistently rounds the amount fields calculated or displayed in this program based on the currency rounding method and the round-to position you specified. You specify a rounding method and round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies, MLT. This rounding process affects calculated amount totals such as invoice total, taxes total, and amounts in journals. However, the rounding process does not affect unit cost or unit selling prices.

If you use the Receive All flag in PUR550D1-01, then the default value in the Receive Quantity fields is equal to the remaining quantity to be received. For DWM items, the default value in the Receive Weight fields is the remaining weight to be received.

Note: If the warehouse type for a warehouse specified on the purchase order line is type 4 or type 5, you cannot receive items to this warehouse directly online. Processing is in the warehouse and the information is sent to ERP LX.

Access: Menu PUR

Select a transaction type and purchase order

Use the Purchase Order Receipts selection screen, PUR550D1-01, to select a purchase order transaction type and a purchase order to receive.

Field descriptions - PUR550D1-01

Fields	Description
Transaction Type (2,A):	The system displays the purchasing/inventory transaction type codes that affect purchase orders. You set up and maintain these transaction types in Transaction Effects Maintenance, INV150.
	Specify the transaction type to process this purchase order receipt. The transaction type used determines the input and display-only fields on the following screen.
Purchase Order (9,0):	Specify the purchase order number to which to apply the receipts. You can specify a purchase order that was not received and one to which receipts were posted.

Reason Code (2,A):   Specify the transaction reason code that applies to this transaction. You maintain transaction reason codes in Reason Code Maintenance, INV140. You can have more than one reason code for each transaction type, so that you can split the transaction further and identify it separately.

Inquiries and printed reports that contain this transaction display the reason code description.

Comment (35,A):   Specify any comment associated with this transaction. The system displays the comment on purchasing inquiries and reports and the inventory transaction history.

Transaction Date (8,0):   If you produce inventory transaction reports, you can limit the selection of transactions on the report by the transaction date you specify.

Item (35,A):   Specify an item number. On the next screen, you can select only lines with that item for processing.

All Lines (1,A):   Specify 0 to select lines that have not been fully received. Specify 1 to select all lines, including fully received lines.

Note that if the transaction type has any one of the following transaction effects set to Y in Transaction Effect Maintenance, INV150, Infor LX overrides the user input and sets the All Lines field to 1.

- Affect Actual Cost
- Affect PO Cost
- Cost Adjustment
- Cost/Price Entry

Receive All (1,A)   If you specify 0, the default value for the Received Quantity and Received Weight is zero for each line. If you specify 1, the Received Quantity and Received Weight fields are populated with the open value for each line.

Note: The default value in the Receive All field is determined by the value in the Default option for Receive All processing field in PUR820D-04.

Advice Note Date (8,0)   Specify an advice note date for the receipt. The system writes this date to the Item Transaction History file. This field is required for scheduled purchase orders. If you specify a receipt for an existing advice note, the advice note date must match the date originally entered.

Advice Note (35,A):   You can specify an advice note number for the receipt: the system records the number in the Item Transaction History file. This field is mandatory for scheduled purchase orders.

Use F4=Prompt to display the Advice Note Selection screen, PUR550D1-02. Use this screen to select the ASN and GRNs to process.

Screen actions - PUR550D1-01

Commands	Description
F10=GRN Inquiry	Access the GRN Header Inquiry selection screen, PUR312D1-01.
F16=GRN Print	Access the GRN Print Selection screen, PUR212D-01.
F17=Item/Vendor Quality	Access the Item/Vendor Quality Maintenance Selection screen, PUR120D1-01. You must have user authority to use this screen action. Use F3 from the screens of Item/Vendor Quality Maintenance to return to this screen.
F18=PO Inquiry	Access the Purchasing Inquiry, PUR300, to review existing purchase order information. You cannot transfer the information back to this program.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Select multiple advice notes

The system displays the Advice Note Selection screen, PUR550D1-02, if you prompt on Advice Note from the Purchase Order Receipts screen, PUR550D1-01.

The information in the following fields is from the Goods Receipt Header file, HGH:

- Advice Note Date
- Advice Note Number
- PO Number
- GRN Number
- Receipt Date

The system does not display an advice note that is in use by another workstation.

Field descriptions - PUR550D1-02

Fields	Description
Vendor From (8,A):	Specify a vendor to limit the list to advice notes for a range of vendors. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Vendor To (8,A):	Specify a vendor to limit the list to advice notes for a range of vendors. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Advice Note Number From (35,A):	Specify a range of values to limit the advice note numbers to display. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Advice Note Number To (35,A):	Specify a range of values to limit the advice note numbers to display. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Advice Note Date From (8,0):	Specify a date to limit the list of advice notes to a date range. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Advice Note Date To (8,0):	Specify a date to limit the list of advice notes to a date range. This range field uses extreme values by default. For information on range fields, see *Ranges* in the overview section of this document.
Record Type (1,0):	Specify the type of record to display in the list. 1=GRN 2=ASN
Line actions:	The following line actions are available on the PUR550D1-02 screen: **11=Select** Select an individual advice note to process.
Act (2,0):	Specify the number for the line action to perform and press Enter.

Screen actions - PUR550D1-02

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Receive a purchase order

After you select the purchase order receipts transaction type and indicate the purchase order on the Purchase Order Receipts selection screen, PUR550D1-01, Infor LX displays the Purchase Order Receipts line maintenance screen, PUR550D2-02. If you specify line action 9, the system displays the Purchasing Order Receipts Line Detail screen, PUR550D2-06.

If the warehouse type for a warehouse specified on the purchase order line is type 4 or 5, the receipt is performed in the warehousing product and the information is sent to PUR550D in a BOD message.

If you perform a negative receipt on a fully received line, status 2, the system reduces your purchase order header and line quantities correspondingly. To prevent reduction of the quantity in your purchase order, manually change the line status in Purchasing Receipts to 1, not fully received, before you accept the negative receipt quantity on the line.

The system displays the quantity currently in inspection instead of quantity received if the transaction effect record for the specified transaction type decrements quantity in inspection. You cannot receive more from inspection than is currently in inspection. If you reject a quantity in inspection, the system deducts the amount rejected from the quantity in inspection and adds the amount to the quantity rejected. However, you cannot perform a transaction that causes a negative value in the Quantity Rejected or Quantity in Inspection fields.

Warning: If you use a QR transaction to reject a quantity in inspection, do not specify the quantity to reject in the Quantity in Inspection field. You must specify the quantity in the Quantity Rejected field; otherwise, the system reduces the Quantity in Inspection value, but does not correspondingly increase the Quantity Rejected value. If you specify the value to reject in the Quantity Rejected field, the system updates both values correctly.

If you specify a value in the Container field on this screen, Infor LX places all of the received quantity into that container. If the container master record does not exist, Infor LX creates a record with a blank type.

If you reject a quantity on a purchase order line Infor LX prints a delivery note if so specified for the receiving/rejecting warehouse in Warehouse Master Maintenance, INV110D2.

The following fields are display-only fields on the Purchase Order Receipts line maintenance screen, PUR550D2-02 and the Purchasing Order Receipts Line Detail screen, PUR550D2-06:

- Transaction Type
- Transaction Date
- Purchase Order Number

- Reason Code
- Currency Code
- Comment
- Vendor Number
- Line Number
- Sequence
- Item/Commodity
- Description
- Warehouse (on the PO line)

The following fields are display-only fields on the Purchasing Order Receipts Line Detail screen, PUR550D2-06:

- Exchange Rate
- Status
- Vendor Delivery Date
- Drop Ship
- Country of Origin
- Location
- U/M
- Receiver Ticket
- Qty Ordered
- Qty Received
- <Wgt> Received
- Qty Rejected
- <Wgt> Rejected
- Weight
- Requestor
- Notes
- Lot No./QMS Seq
- Box Size
- Container
- Costed Quantity
- Costed Amount

The Due Date on screen PUR550D2-02 and the Vendor Delivery Date on screen PUR550D2-06 display the date in the time zone for the warehouse.

Field descriptions - PUR550D2-02/06

Fields	Description
Line actions:	The following line actions are available:

9=Detail

Access the Purchasing Order Receipts Line Detail screen, PUR550D2-06.

10=Packaging Inquiry

Access Packaging Maintenance, OLM600, in inquiry mode.

11=Delivery Number Inquiry

Access the Inbound Delivery Listing screen and select a delivery number to associate with this line receipt. The system displays this screen action if you Specify Yes in the Receive Purchase Order by Delivery field in Inbound Delivery Parameter Generation, ILM820.

20=Item Notes

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

Act (2,0): Specify the number for the line action to perform and press Enter.

Exchange Rate (15,7): If your system is not euro enabled, specify the exchange rate to use for this purchase order. The system uses the current spot rate in effect for the purchase order vendor's default currency, the from currency, and the currency of the ordering company, the to currency. This is not the rate used to calculate expected cost from standard cost. The rate to cost for standard cost is the current spot rate in effect for the global currency (from currency) and the currency on this purchase order (to currency).

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

Location (10,A): Specify the code for the location to receive the stock. You set up locations within warehouses. The system uses the following hierarchy to populate the Location field:

- Forced Location in Location Master, INV170
- Forced Location in Override Location, JIT100
- Default Location in IDF Enterprise Item
- Default Location in Location Master, INV170

- Default Location Override Location, JIT110
- Default Receiving Location in Warehouse Master, INV110

The system displays this field only if the specified transaction type requires a stocking location.

Lot Number/QMS Sequence (25,A):

The system displays this field only if the transaction effect record for the specified transaction type requires a lot or QMS non-lot-item sequence number. Specify the lot number or QMS sequence number to receive the stock. This is a required field for lot-controlled or QMS-sequence-controlled items.

QMS sequence numbers are only relevant if you enabled non-lot-controlled QMS items in your environment.

If the Require Receipt from Inspection to Stock Lot Match field is Yes in Purchasing System Parameters, Infor LX validates the lot number specified here against the lot number generated in receipt to inspection. In this case, if you receive items from inspection for this line, you must specify the lot number generated during the receipt to inspection transaction for the line, or one of the lot numbers, if you previously received this line to inspection in partial shipments. Refer to the receiver ticket generated during receipt to inspection, or use Material Status Inquiry to view the existing lot numbers for this item.

If you do not specify lot potency at the time you create the lot, the system uses the same value as the item potency.

If the Allow Multiple Items per Lot field is Yes in Advanced Process Industries Parameters, then you can assign the same lot number to multiple items. This setting affects all facilities. You must use multiple items per lot throughout Infor LX. Interwarehouse, location, and lot transfers must be consistent. The same is true for transaction processing.

Some industries need multiple items per lot because you can generate many co-products and by-products and grades of finished product from a given batch of material. Other industries require a single item per lot because of hazardous materials, controlled substances, high monetary value, or a short shelf life. Single-item lot combinations provide simpler tracing of lot history and material use.

Status (1,0):

Infor LX displays the purchase order line status code. You can overwrite the status manually. For example, change the status to 2 to close a purchase order or a purchase order line after you receive a partial quantity of an item that you will not backorder.

0

New purchase order, or not fully received and not fully costed

1

Not fully received but fully costed

2

Fully received but not fully costed

3

PO line closed, all lines fully received and fully costed

Qty Received (11,3): Specify the total quantity received of the item, including any rejected amount.

If you perform a negative receipt on a fully received line (status 2), the system reduces your purchase order header and line quantities correspondingly. To prevent reduction of the quantity in your purchase order, manually change the line status in Purchasing Receipts to 1 (not fully received) before you accept the negative receipt quantity on the line.

If this is a drop shipment order line (indicated by DS or 1), then you can specify an amount only if the transaction type does not affect inventory balances or the quantity in inspection.

If the transaction type that you specified on the previous screen uses the spread receipts functionality, specify the quantity to spread only on the first line for that item.

Depending on the value in the Affect PO Qty in Inspection field in the Transaction Effect Master file, the system uses the following equations to update the Open Purchase Orders file, HPO:

- If the Affect PO Qty field is blank, Qty Received - Qty Rejected=A, A + old qty rec'd*=new qty rec'd*
- If the value in the Affect PO Qty field is positive (+), Qty Received - Qty Rejected = A, A plus old qty in inspection * = new qty in inspection*
- If the value in the Affect PO Qty field is negative (-), Qty Inspected - Qty Rejected = A, A + old qty rec'd*=new qty rec'd* and old qty in Insp* - Qty Inspected= new qty in inspection

*=Open Purchase Order Detail (HPO) file field.

Depending on the field, specify the number of items that have been either inspected or received to stock. The system stores this entry in the Vendor History file.

<Wgt> Received (13,4): If the item is a DWM dynamic item, you must specify a dual measure value if you specified a value in the Qty Received field. If the item is a DWM standard item, the system uses the dual measure value from the Item Master file. The system performs a tolerance check for the dual measure value if you set up tolerance ranges in the Item Master record. If the tolerance check fails, you receive an error message that you can override with F16.

Qty Rejected (11,3):   Specify the number of rejected units after inspection/receipt. Infor LX stores this value in the Vendor History file. Infor LX retrieves the quantity already received and adds that quantity to the quantity received in this transaction; then Infor LX subtracts the quantity rejected in this transaction from the total received quantity. You cannot reject a quantity greater than the sum of all units received in this and previous transactions.

<Wgt> Rejected (13,4):   If the item is a DWM dynamic item, you must specify a dual measure value if you specified a value in the Qty Rejected field. If the item is a DWM standard item, the system uses the dual measure value from the Item Master file. The system performs a tolerance check for the dual measure value if you set up the tolerance ranges in the Item Master record. If the tolerance check fails, you receive an error message that you can override with F16.

U/m (2,A):   Specify the unit of measure for the quantity received and quantity rejected fields. This value must be equal to either the purchasing or stocking unit of measure.

Purchase Receipts, PUR550D, uses purchasing unit of measure conversion in the Item Master File, IIM, to convert to stocking from inventory update and to purchasing for PO quantity update.

Wh (Warehouse) (3,A):   Specify the code of the warehouse to receive the goods, if different than the displayed warehouse code.

The system displays this field only if the specified transaction type requires a stocking warehouse.

Costed Qty: This field displays the quantity of this purchase order line that is received and costed as the result of an invoice for the goods.

The system displays this field only if the received purchase order affects costs for the specified transaction type.

Note: If you use transaction type C, PO Invoice Receipts, you must specify a value in both the Costed Quantity and Costed Amount fields.

Costed Amount: This field contains the amount of the invoice for this purchase order receipt.

The system displays this field only if the received purchase order affects costs for the specified transaction type.

Note: If you use transaction type C, PO Invoice Receipts, you must specify a value in both the Costed Quantity and Costed Amount fields.

Receiver Ticket Number (6,0):   The system displays this field for all receipt transactions. You can specify a value only for the following transactions:

- From vendor to stock
- From inspection to stock
- From inspection to vendor
- From stock to vendor

If you do not specify the original receiver ticket number for the goods, Infor LX assigns a receiver ticket number.

Manufacturer (8,A):

You must specify a value for quality assurance-controlled items. This field is optional for non QA-controlled items.

If Quality Management System is installed, prompt on this field to access the Manufacturer/Item Listing screen of Manufacturer/Item Maintenance, QMS105. You can view the available and appropriate manufacturer codes to specify manually in Purchase Order Receipts, PUR550D2.

The value in this field updates the Lot Master file, ILN, and the Item Transaction file, ITH, regardless of whether the item is defined as a quality-controlled item.

If the purchase order line that you receive specifies a manufacturer, you cannot change the value. If no manufacturer is specified for the PO line, the system uses the value from the item master; if the item master does not contain a value, the system uses a blank field. You can specify a valid manufacturer to override a blank value. If the Manufacturer field is not blank, Infor LX validates as follows:

1. If the Require Item/Vendor Relationship parameter is set to 1, validate, or 2, stop PO receipts, you cannot post the receipt unless you specify a valid item/vendor/facility/manufacturer combination that exists in the Vendor/Item Quality file, HAV. Also, the PO receipt date must fall within the HAV effective and discontinue dates. If no matching HAV record exists, you will receive an error message that you can override if you have the parameter Require Item/Vendor Relationship set to 1= validate. If you have the parameter set to 2=stop PO receipts, you will get an error message that you cannot post the receipt until you define an item/vendor record for the manufacturer.

2. If the Require Item/Vendor Relationship parameter is set to 0, the item/manufacturer combination is checked against the QMI file (QMS installed) or QMM file (QMS not installed), and the system issues an error message if no match exists.

3. Or, if you specify a lot number during line receipt, you cannot continue with the receipt unless the manufacturer for the lot matches the manufacturer for the line receipt. To continue, specify a lot number with a match or create a new lot through the receipt transaction.

Lot (25,A):
You must specify a value for quality assurance lot-controlled items. Specify the original manufacturer's assigned lot number.

The value in this field updates the Lot Master file, ILN, and the Item Transaction file, ITH, regardless of whether the item is defined as a quality-controlled item.

Date (8,0):
Specify the date the product was manufactured. You must specify a value in this field for quality assurance controlled items; this field is optional for non-QA-controlled items.

The value in this field updates the Lot Master file, ILN, and the Item Transaction file, ITH, regardless of whether the item is defined as a quality-controlled item.

No. of Containers (5,0): You must specify a value in this field for quality assurance controlled items. Specify the number of containers for the sample generation.

Container (10,A):
If this transaction is for a container controlled item, specify the container code. If you do not specify a code, Infor LX creates a container code.

Note: If you post a transaction that you defined in Transaction Effect Maintenance, INV150, to affect both the purchase order cost and the purchase order quantity, Infor LX updates the Transaction History file with a receipt/reject transaction. Infor LX does not create a costing transaction on the Transaction History file.

However, if you set up the transaction to affect purchase order costing and not the purchase order quantity, Infor LX updates the Transaction History file with a costing transaction.

Vendor Lot No. (25,A): Specify a vendor lot number. The system displays this field only if the purchase order contains a lot controlled item. This field updates the Lot Master File, ILN.

Expiration Date (8,0): Specify the expiration date for the lot. This date updates the lot master if the current lot expiration date in the lot master is 99/99/99 or 0/00/00.

Country of Origin (4,A): Specify the country of origin for this purchase order line. If the Country of Origin Processing parameter in Purchasing System Parameters, PUR820D, is disabled, this field is optional. If you specify a value in this field, however, the system validates the value against the Country Master file, LCN. If the Country of Origin Processing parameter is enabled, you must specify a valid country of origin. The system validates the value against the purchase order record, HPO, and if the values do not match, the system issues an error message. You can use F14 to override the message and accept the value.

Note: If you specify an existing lot number during receipt of the line, the system checks the receipt country of origin against the lot's country of origin. You

cannot continue with the purchase receipt unless you specify a lot with a matching country of origin, or unless the receipt transaction creates a new lot.

Box Size (11,3):

Specify the quantity of the item to define as a standard box. The system uses the value from the Purchase Order Lines record, HPO, for box-sized items. If the item is not box sized, the system does not display this field.

If the item is box sized and the box quantity field in Purchase Order Lines is zero, the system uses the value from the Item Facility Planning record, CIC. If no CIC record exists, the system uses the value from the Item Master.

Delivery (15,0):

Specify the delivery number to use for this receipt. The delivery number is required if you perform receipts by delivery.

Screen actions - PUR550D2-02/06

Commands	Description
Enter	You can continue to enter purchase order receipts transactions. If you have no other receipts to record, use F3 to exit. The system then posts the receipts and you receive a printed audit trail of your transactions.
F2=Exchange Rate	Access the Override Exchange Rate screen. The system displays this screen action if Multiple Currencies is installed and turned on for Purchasing, and euro support is enabled in Multi-Currency System Parameters, MLT800. In this case, the Exchange Rate field on the screen is display-only. On the Override Exchange Rate screen, you can maintain the exchange rate between national currencies of countries that do not participate in the move to a single currency, the euro, or between the national currency of a non-participating country and the euro. The screen displays the multiplier exchange rate and divisor exchange rate. Note: For a container control item, press Enter to access the container information screen and specify the number of containers or the quantity per container to determine the number of containers to automatically generate.
F9=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.
F10=Pegging	Access the Planning/Pegging Inquiry screen, MRP300D2-01.
F11=Open Lines/All Lines	Toggle between a display of all lines, that is, both incompletely and fully received lines, and incomplete lines.

You can display all lines only if the following transaction effects are set to Yes: Affect Actual Cost, Affect PO Cost, Cost Adjustment, and Cost/Price Entry. If the purchase order is a drop ship, you can only display incomplete lines.

F13=Filters

Access the Filter Options screen, where you can choose the sequence in which Infor LX displays PO lines on your screen.

0=All PO Lines by Line Number

1=All Incomplete PO Lines

2=All PO Lines by Oldest Date

3=All PO Lines by Incomp/Oldest Date

4=All PO Lines by Original Line Number

F15=Warehouse Inquiry Access the Warehouse Inquiry screen, INV330D-01 , from which you can search for a warehouse code to use on this screen. For more information, see the Inventory document.

F17=Material Status Inquiry Access the Material Status Inquiry - Summary screen, INV300D-02.

F18=PO Inquiry

Access the Purchasing Inquiry selection screen, PUR300D1-01.

F21=PO Notes

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

F22=Jump

Access the Jump To New Line screen on which you can specify a line number to reposition the list.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter purchase receipt information

Use the Filter Options screen to specify the sequence in which Infor LX displays PO lines on your screen. The default sequence is by original line. Specify one of the following sequence methods:

- 0=Default to display by line sequence
- 1=Display Incomplete PO Lines first
- 2=Display PO Lines by Oldest Date
- 3=Display PO Lines by Incomplete & Oldest Date
- 4=All PO Lines by Original Line Number

If you change the sequence, the system does not reset the sequence until you return to this screen to specify a new sequence.

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. 22)* in the overview information in this document.

Open GRN

The Open GRN popup appears only if the following conditions are met:

- You are creating a negative cost or negative receipt transaction.
- You set the Company Master field or the Purchasing System Parameters field Allow opening GRN with a negative transaction to a value of 2, which allows a matched/closed GRN to be manually reopened.
- The purchase receipt transaction includes an ASN.

The value in the Open GRN field defaults to 0=No. If you change it to 1=Yes and use F6=Accept, you return to the Purchase Order Receipts screen, PUR550D2-02. After you create the negative transaction with Enter, the process reopens the GRN and cost records and updates them appropriately.

Specify quantity for container controlled items

To continue with purchase order receipts for mass container entry of a container-controlled item, press Enter on the Purchase Order Receipts line maintenance screen, PUR550D2-02. Infor LX displays the Mass Container Entry screen, PUR550D3-04. The header information is display-only.

If DWM is installed and this is a DWM item, this screen calculates the total dual measure value <Weight> and container dual measure value <Weight> field values that correspond to the Quantity field values and displays them. The system uses the container weight and the weight received values from the Purchase Order Receipts line maintenance screen, PUR550D2-02.

You can specify values for the Qty per Container and Container Type fields and the system then creates the appropriate number of container records. You can also specify specific existing container numbers, quantities, and dual measure values for each container. If the item is a DWM dynamic item, you must specify the individual dual measure value for each container. If the item is a DWM standard item, the system uses the dual measure value from the standard dual measure in the Item Master record.

The system performs a dual measure tolerance check if you set up the tolerance ranges in the Item Master record. If the tolerance check fails, the system displays an error message. You can use F17 to override the DWM tolerance check.

Field descriptions - PUR550D3-04

Fields	Description
Quantity (11,4):	Infor LX displays the quantity you entered on the previous screen.
<Weight> (11,4):	Infor LX displays the dual unit of measure value that corresponds to the quantity you entered on the previous screen.
Qty Per Cont (11,3):	To distribute the received items equally in containers, specify the quantity per container. After you specify a container type, Infor LX displays the container ID, type, and quantity based on your entry in this field.
	Note 9999 is the maximum number of containers that you can generate at one time.
	If the item is a dynamic DWM item, Infor LX divides the total weight entered on the previous screen by the total quantity to arrive at an average weight per unit. Depending on the quantity per container, the quantity times the average weight calculated populates the Weight fields for each container. You must then adjust the individual container weights as required. If the item is a DWM standard item, the system uses the standard measure as the default value.
Cont Type (10,A):	Specify the container type for this item.
Quantity (11,3):	If you specified a quantity in the Qty Per Cont field, Infor LX displays the quantities. You can override the information in this field. If you did not specify a quantity in the Qty Per Cont field, specify the quantity for this container.
Line actions:	The following line action is available if the container-controlled item is also serial number controlled:
	22=Serial Numbers
	If the item is serial number controlled, PUR599D-01 is displayed. Use this screen to select the serial numbers assigned to this item.
Act (2,0):	This field is available if the item is container controlled and serial number controlled. Specify the number for the line action to perform and press Enter.
Cont I/D (10,0):	If you specified a quantity in the Qty Per Cont field, Infor LX assigns the identification for the containers. You can override the information in this field. If you did not specify a quantity in the Qty Per Cont field or you do not want Infor LX to assign the container ID, specify a container ID.
Cont Type (10,A):	Specify the container type for this item.

Quantity (11,3): If you specified a quantity in the Qty Per Cont field, Infor LX displays the quantities. You can override the information in this field. If you did not specify a quantity in the Qty Per Cont field, specify the quantity for this container.

\<Weight\> for this Container If you manually specified a quantity for this container, specify the dual measure value corresponding to the quantity here. For DWM dynamic items, you may need to adjust the dual measure value if the value is the result of your entry in the Qty per Cont field.

Screen actions - PUR550D3-04

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Packaging receipts, PUR550D4

Use this program to receive packaging material for items

Receive packaging for items

If you enter a quantity received for an item with a Packaging Master record, the system displays the Purchase Order Receipts Packaging Items screen, PUR550D4-01. Use this screen to receive packaging items.

Field descriptions - PUR550D4-01

Fields	Description
Transaction:	Infor LX displays the type of transaction for this PO receipt.
Transaction Description:	Infor LX displays a description of the transaction.
Transaction Date:	Infor LX displays the date of the transaction.
Purchase Order Number:	Infor LX displays the PO number.

PO Line:	Infor LX displays the line number for this PO.
Item Number:	The system displays the item number of the inventory item to receive or the item number of the packaging item to receive.
Item Description:	Infor LX displays a description of the item.
Warehouse:	The system displays the warehouse where the inventory item was received.
Location:	The system displays the location within the warehouse where the inventory or packaging item was received.
Unit of Measure:	The system displays the purchasing unit of measure.
Quantity Received:	The system displays the quantity of the inventory item you have received for this PO.
Costed Quantity:	The system displays this field only for certain transaction types. The costed quantity is the quantity for which you want to determine the total cost. This quantity is equal to the quantity received minus the quantity rejected.
Costed Amount:	The system displays this field only for certain transaction types. This quantity is the total cost for the quantity you specified in the Costed Quantity field.
Line actions:	The following line actions are available:

14=Item Lookup

Display a list of items and their descriptions.

15=Location Lookup

Display a list of locations and their descriptions.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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=Item Lookup

Display a list of items and their descriptions.

15=Location Lookup

Display a list of locations and their descriptions.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Quantity Received: Specify the amount of the packaging item received.

Receipt Price Option: Specify the receipt price option. You set the receipt price option in Packaging Master, OLM600.

5=Standard Cost

6=Quote

7=No pricing

Lot/QMS (25,A): Specify the lot number the packaging item is received into. If the item is a non-lot-controlled QMS item, the system displays this field as QMS. Specify the QMS sequence number used to track this inventory of the item through the QMS processing.

QMS sequence numbers are only relevant if non-lot-controlled QMS items are enabled in your environment.

Screen actions - PUR550D4-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Family group add new items, PUR556D

Use the Family Group Add New Items program, PUR556D, to add new items to a purchasing family group contract. Typically, you run this program once a day. After you run the program, Infor LX populates the Purchasing Group Code Add New Items Last Run Date field on the Purchasing System Parameters screen, PUR820D-03.

Add new items to a family group contract

Use the Purchase Family Group Contract Add New Items screen, PUR556D-01, to add new items to existing valid contracts and quotes.

Field descriptions - PUR556D-01

Fields	Description
Add New Items to Existing Valid Contracts and Quotes? (1,0):	Specify Yes to run the program and add the items to existing valid contracts and quotes. Otherwise, specify No.

Screen actions - PUR556D-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. 22)* in the overview information in this document.

Item/vendor quality history, PUR560D1

Use Item/Vendor Quality History, PUR560D1, to update an Item/Vendor record with the test date and results of inspection testing. All of the fields displayed on the selection screen are keys, but Fac (facility) and Mfgr (manufacturer) are optional.

Access: PUR

Select an item/vendor quality history record to view or maintain

Only records created through Item/Vendor Quality Maintenance, PUR120, display on the Item/Vendor Quality History Maintenance Selection screen PUR560D1-01. All information on this screen comes from the Item/Vendor Master file.

Use this screen to select an item/vendor history quality record to view or maintain.

Field descriptions - PUR560D1-01

Fields	Description
Line action:	The following line actions are available:

11=Select

Select the record to work with. Specify the line action and press Enter to add inspection test results to the Item/Vendor Quality record.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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.

11=Select

Select the record to work with. Specify the line action and press Enter to add inspection test results to the Item/Vendor Quality record.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Item/Commodity Flag (1,0):
Specify 0 to indicate an item or 1 for a commodity.

Item/Commodity (35,A): Specify the item or commodity of the item/vendor record for which you want to maintain test results.

Vendor (8,0):
Specify the vendor number of the item/vendor record for which you want to maintain test results.

Facility (3,A):
If the record is facility specific, specify the facility of the item/vendor record for which you want to maintain test results.

Manufacturer (8,A):
Specify the manufacturer, if one is associated with the item/vendor record for which you want to maintain test results.

Effective Date (8,0):
Specify the effective date of the item/vendor record for which you want to maintain test results.

Discontinue Date (8,0): Specify the discontinue date of the item/vendor record for which you want to maintain test results.

Record Status (1,0):
This field indicates 1 for an active record or 0 for an inactive record.

Screen actions - PUR560D1-01

Commands	Description
F13=Filters	Display the Filter Options screen on which you can select how to display the records.
	1=All records by Item or Commodity/Vendor
	2=Active records by Item or Commodity/Vendor
	3=Active records by Vendor/Item or Commodity
F14=Item Alpha Lookup	Access the Item Alpha Lookup screen, INV350D-01.
F15=Vendor Alpha Lookup	Access the Vendor Alpha Lookup screen, PUR310D-01.
F16=Purchasing Inquiry	Access the Purchasing Inquiry selection screen, PUR300D1-01.
F17=Item Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain item notes.
F18=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain item notes.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Maintain test information in the item/vendor quality history record

If you specify a record on the selection screen and press Enter, or if you use F14, Inspection Results, from the Item Vendor Quality Maintenance screen, PUR120D2-01, the system displays the Item/Vendor Quality History Maintenance screen, PUR560D2-01.

Use this screen to update test dates and results for item/vendor quality records. The Item/Vendor Quality History program keeps a running history log of activity for the Item/Vendor/Facility or Commodity/Vendor/Facility record. The system uses the information in the Item Vendor Master file, HAV, created in Item/Vendor Quality Maintenance, PUR120D for all header information on this screen. You can only update user-defined quality fields on the Item Vendor Quality Maintenance screen, PUR120D2-01. If you update the test date and other related data on this screen and then press Enter, the program uses the data to update the Item/Vendor Quality History file, HQH.

Note: You cannot revise a record after you create the record. However, you can specify more than one set of test data per date. The data for the same date is controlled with line sequence numbers. To change an existing record, you must first delete the record and then replace it with another record.

The following header fields are display-only:

- Item/Commodity
- Facility
- Vendor
- Buyer
- Class
- Manufacturer
- Stocking Unit of Measure
- Purchasing Unit of Measure
- Effective Date
- Discontinue Date
- Vendor Quality Rating
- Next Inspection Date
- Next Cumulative Quantity
- Next Inspection Interval
- Quantity Cumulative Interval
- Days in Quarantine/Inspection
- Cumulative Quantity

Field descriptions - PUR560D2-01

Fields	Description
Line action:	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Act (2,0):	Specify the number for the action to perform and press Enter.
	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
Date (8,0):	Specify the test date for this set of results. This date cannot be later than the current date.
Seq (Sequence Number) (4,0):	The system automatically assigns the sequence number.
P/F (Pass/Fail) (1,0):	Specify 0 to indicate the test failed or 1 to indicate the test passed.
Receipt Qty (11,3):	Specify the quantity of the item or commodity received for test.

Lot (25,A):	Specify the lot number, if any, associated with this item or commodity/vendor record. The system does not validate lot numbers against existing lots.
Mfgr (Manufacturer) (8,A):	Specify a manufacturer associated with the quantity of the item or commodity tested. This field is user-defined and not validated.
Status (1,0):	The system displays the item or commodity/vendor status for each line.
Results (50,A):	Specify details that describe the test results.

Screen actions - PUR560D2-01

Commands	Description
F13=Filters	Display the Filter Options screen on which you can select how to display the records. 1=All records by Descending Date 2=Active records by Descending Date 3=Active records by Ascending Date
F15=Item Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain item notes.
F16=Vendor Notes	Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes. If you press Enter in this screen, the system processes the validations, updates the Item/Vendor Quality History file, HQH, and creates the audit trail. Use F12=Cancel to return to the Item/Vendor Quality History Selection screen, PUR560D1-01. All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Item/vendor quality history list, PUR565D

Use Item/Vendor Quality History List, PUR565D, to list all records created and maintained in the Item/Vendor Quality History program in accordance with the criteria you specify on this filter screen.

The system displays the records by test date and in descending order by sequence number, that is, the most recent entry is the earliest entry for a particular date.

Print an item/vendor quality history report

Use the Item/Vendor Quality History List screen, PUR565D-01, to specify the selection criteria for 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. These range fields use extreme values by default.

Field descriptions - PUR565D-01

Fields	Description
From/To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
From/To Commodity Code (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From/To Vendor Number (8,0):	Specify a range of values to limit the vendor numbers to include in the report.
From/To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
From/To Manufacturer (8,A):	Specify a range of values to limit the manufacturer codes to include in the report.
From/To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From/To Item Class (5,A):	Specify a range of values to limit the item class codes to include in the report.
Effective Record Date (8,0):	Specify the effective record date to filter records included in the Item/Vendor Quality List. Leave this field blank to include all records, or specify a date to limit the report to only valid/approved records that include this date in their effective range.
Print Notes (1,A):	Indicate whether to print quality notes for the selected records. Specify one of the following values:

Valid choices

- **0**

  No, do not print notes
- **1**

  Yes, but print only Pass Criteria notes
- **2**

  Yes, but print only Sample/Test notes
- **3**

  Yes, print both Pass Criteria and Sample/Test notes

Report Sequence (1,A): Specify how to sort the information in the report. Specify one of the following values:

1=Item/Facility/Vendor/Manufacturer

2=Facility/Item/Vendor/Manufacturer

3=Vendor/Item/Facility/Manufacturer

4=Buyer/Vendor/Item/Facility/Manufacturer

For example, if you specify 1, the system sorts the information first by item, then by facility, then by vendor, and then by manufacturer.

Note: In the values listed above, item represents commodity for commodity records.

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 - PUR565D-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. 22)* in the overview information in this document.

Requisition print, PUR620D

Use Requisition Print, PUR620D, to print requisitions for which the print setting is blank, for example, for new lines that you add or old lines that you change to blank in Requisition Maintenance, PUR600.

The Requisition Lines Maintenance delivery date, not the line due date, is the due date that prints on the requisition.

Note: If the vendor for a purchase order or requisition is eligible for alternate currency processing, the purchase order or requisition prints with two sets of tax and PO totals: first the values print in the transaction currency, then additional lines print with the same values converted into the vendor's alternate currency. To be eligible, the vendor master record for this vendor must contain a valid currency code and the value in the Print Display Flag field in the vendor master record must be 1, enabled. For requisitions that do not have a vendor specified, no alternate currency information prints.

Access: Menu PUR

Print a requisition report

Use the Print Requisitions screen, PUR620D-01, to specify the selection criteria for the report.

Field descriptions - PUR620D-01

Fields	Description
Company to Print (3,0):	Specify the code of the company for which to print requisitions. Requisitions print for all warehouses assigned to this company. Leave this field blank to include all companies.
Facility (3,A):	Specify the code of the facility for which to print requisitions. Requisitions print for all warehouses assigned to this facility. Leave this field blank to include all facilities.

From Warehouse (3,A):
Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

This field is dependent on your entries in the preceding Company and Facility fields. If you specify a company number or facility code, the report includes only requisitions for that company or facility code and this range of warehouses. If you leave the Company or Facility field blank, the report includes requisitions for all companies or facilities with warehouse destinations in this range.

To Warehouse (3,A):
Specify a range of values to limit the warehouses to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

This field is dependent on your entries in the preceding Company and Facility fields. If you specify a company number or facility code, the report includes only requisitions for that company or facility code and this range of warehouses. If you leave the Company or Facility field blank, the report includes requisitions for all companies or facilities with warehouse destinations in this range.

From Requisition (9,0):
Specify a range of values to limit the requisitions to include in the report. See the overview information in this document.

The report includes requisitions in the selected range as limited by this field and other selection criteria specified in this screen.

To Requisition (9,0):
Specify a range of values to limit the requisitions to include in the report. For information on range fields, see the *Ranges* topic in the overview section of this document.

The report includes requisitions in the selected range as limited by this field and other selection criteria specified in this screen.

Buyer Code (3,A):

Changed: *MR80114 Updated the help text based on the System Parameter (SYS820D-05)*

Changed: *MR80788 Modified the help text based on the warranty defect solution*

Changed: *MR81215 modified the Paragarph with default buyer "for" and changed SYS820D-05 to PUR820D-05*

Specify the buyer code for which to print requisitions. Leave this field blank to include all buyers.

Note

This value is based on the Default Buyer for PO Prints field in the System Parameters (PUR820D-05). If this value is blank, purchase requisitions of all the buyers are printed.

You can modify the value in this field if an invalid or unused buyer code is specified in the Default Buyer for PO Prints field in System Parameters (PUR820D-05).

Sample Requisition Print (1,0):	Specify 1, the default value, to print sample requisitions. Specify 0 to print actual requisitions.
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 - PUR620D-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. 22)* in the overview information in this document.

PO/scheduled PO consolidate/release, PUR640B/641B

Use Purchase Order Consolidation/Release, PUR640B, to select and consolidate individual planned order lines and requisition lines into purchase order lines. Use Scheduled Purchase Order Consolidation/Release, PUR641B, to select and consolidate individual planned order lines and requisitions for scheduled contracts into scheduled purchase order lines.

When you consolidate requisitions or requisition lines to create a purchase order, the system adds the requisition to the HPX cross-reference file. When you purge a purchase order during month end close, PUR900D, the PO/Requisition cross-reference file records for that purchase order are also purged.

A Purchasing system parameter enables you to prohibit the consolidation of an item or commodity into a purchase order line if a valid/approved item or commodity/vendor record does not exist in the Item/Vendor Master file, HAV. If you revise purchase order lines, the lines are subject to revalidation to ensure that the associated item/vendor record is still valid. A record is valid if the vendor delivery date falls within the effective and discontinue dates of the matched item/vendor record.

If you use the vendor selection criteria, the system displays the following records:

- Requisitions with a vendor number
- Planned orders from a CIC record for which you specified a vendor

Purchase Order Consolidation/Release, PUR640

You can automatically consolidate multiple requisitions and planned order lines into one purchase order line if the vendor, item number, item/commodity type, warehouse, due date, ship-to, and profit center are the same. Infor LX validates the profit center, if one exists, on a requisition. You can select both inventory and commodity items to consolidate into a purchase order.

This program uses the lowest unscheduled contract quote for the item/vendor/date combination that exists for the facility to consolidate. If no unscheduled contract quote exists for the item/vendor/date in the facility, the program uses the lowest global quote for the item/vendor/date. If multiple quotes exist for the same vendor/item, the program uses the most recent quote start date.

If you change the quantity and/or vendor on a planned order/requisition line, to access a new quote, you must change the price source to 0.

Do not create purchase orders with managed and non-managed warehouses on the same PO. Warehouse Management requires that all lines on a PO are for the same managed warehouse.

Infor LX does not prompt you for a purchase order number; the system assigns purchase order numbers automatically according to the next available number in the System Parameter file.

Scheduled Purchase Order Consolidation/Release, PUR641

A scheduled purchase order is one for which a contract detail line exists. Nonscheduled contracts have no contract detail lines. You must consolidate purchase order lines for these unscheduled contracts in Purchase Order Consolidation/Release, PUR640.

This program does not create new purchase orders, but adds lines to the existing scheduled purchase orders.

If you specify a purchase order number, Infor LX selects all contract details with that purchase order number, which are active and have an appendable flag of 1. Infor LX selects all planned orders and requisitions for the items, facilities, and warehouses included in these contract details and displays them.

If you use the contract purchase order number as a filter on the selection screen, all requirements display the vendor from the purchase order, not the vendor used to create the requisition lines or planned orders.

If you specify any other combination of selection fields, Infor LX selects all contract details that match the selection, and which are active and have an appendable flag of 1. Infor LX selects all planned orders for the items, facilities, and warehouses included in these contract details and displays them.

Infor LX selects and displays planned orders for which the due date is outside of the effectivity date range on the contract detail, but does not permit you to consolidate these lines unless you change the due date.

In addition, you can specify the number of the warehouse in which to store the desired goods and an override due date for the goods. Infor LX verifies that all such entries are consistent with other contract detail file information.

To work correctly, you must specify both a facility and a warehouse on the consolidation screen; however the system appends the lines to a global scheduled contract if one exists for the vendor specified.

After you create a purchase order from a requisition, that requisition has completed its useful purpose. Therefore, the system marks the requisition as complete. Infor LX updates the Requisition Master file to show that the requisition is complete. The system purges complete requisitions from the file through

the Month End Close procedure, PUR900. You can also delete requisitions in PUR600. See Requisition Maintenance, PUR600.

You can limit the planned orders or requisitions that appear on the planned order or requisition selection either by purchase order number, facility, buyer code, planner code, vendor number, item number, or a range of dates, either a due date range or a planned release date range. The selection is sequenced by item number. The system sequences requisitions and planned orders for the same item first by requisition and date, and then by planned order and date.

You can manually specify the code for the vendor to eventually receive the purchase order. In addition, you can specify the number of the warehouse in which to store the desired goods, specify an override due date for the goods, and override the ship-to number displayed on the selection screen. Infor LX verifies that all such entries are consistent with other master file information.

Access: Menu PUR

Specify criteria for a purchase order consolidation and release

Use the PO Consolidation/Release specification screen, PUR640-01, to specify the criteria for a purchase order consolidation or release.

Field descriptions - PUR640-01

Fields	Description
Purchase Order Number (9,0):	Specify the PO number code by which to limit requisition selection. This field acts as a filter. If you specify a value, the system includes only those requisitions and requirements that match this filter for PO Consolidation/Release, that is, only requirements for the items on that contract PO.
	To include all items for all purchase orders, leave this field blank.
	The system displays this field only for Scheduled PO Consolidation/Release.
Facility (3,A):	Specify the facility code by which to limit requisition selection. This field acts as a filter. If you specify a value, the system includes only those requisitions that match this filter for PO Consolidation/Release.
	To include all items for all facilities, leave this field blank. You can specify a value for one, some, or all filter fields or leave all filter fields blank.
	Note: For costing, Infor LX retrieves a facility specific cost from the Cost Master file, CMF. If no facility cost exists, Infor LX retrieves the global cost from the CMF.

Buyer (3,A):
Specify the buyer code by which to limit requisition selection. This field acts as a filter. If you specify a value, the system includes only those requisitions that match this filter for PO Consolidation/Release.

To include all items for all buyers, leave this field blank. You can specify a value for one, some, or all filter fields or leave all filter fields blank.

A buyer can have global or facility-specific authorization. A global buyer is authorized to release purchase orders in all facilities within the company. A facility-specific buyer is authorized to release purchase orders in certain designated facilities within the company.

You set up buyers in Buyer/Planner Maintenance, INV111D1. If you leave the facility field blank when you create the buyer code, the buyer is a global buyer. If you populate the facility code, the buyer is authorized to the facility you specify. To authorize a buyer to multiple, but not all facilities, set up a separate record in Buyer/Planner Maintenance for each facility to authorize for this buyer.

Note: For costing, Infor LX retrieves a facility specific cost from the Cost Master file, CMF. If no facility cost exists, Infor LX retrieves the global cost from the CMF.

Planner (3,A):
Specify the planner code by which to limit requisition selection. This field acts as a filter. If you specify a value, the system includes only those requisitions that match this filter for PO Consolidation/Release.

To include all items for all planners, leave this field blank. You can specify a value for one, some, or all filter fields or leave all filter fields blank.

Vendor Number (8,0):
Specify the vendor number code by which to limit requisition selection. This field acts as a filter. If you specify a value, the system includes only those requisitions that match this filter for PO Consolidation/Release.

To include all items for all vendor numbers, leave this field blank. You can specify a value for one, some, or all filter fields or leave all filter fields blank.

Note: For costing, Infor LX retrieves a facility specific cost from the Cost Master file, CMF. If no facility cost exists, Infor LX retrieves the global cost from the CMF.

Lower Date (8,0):
Specify a date to limit the requisitions on the selection listing according to the requisition's due date or planned release date, as indicated in the Use Due or Plan Release Date field. You establish the dates for requisitions when you create requisitions in Requisition Maintenance, PUR600.

Specify a range of dates by which to select requisitions. Only requisitions for which due dates or planned release dates fall either on or between these dates are available for selection. This field uses extreme values by default.

Upper Date (8,0):

Specify a date to limit the requisitions on the selection listing according to the requisition's due date or planned release date, as indicated in the Use Due or Plan Release Date field. You establish the dates for requisitions when you create requisitions in Requisition Maintenance, PUR600.

Specify a range of dates by which to select requisitions. Only requisitions for which due dates or planned release dates fall either on or between these dates are available for selection. This field uses extreme values by default.

Use Due or Plan Release Date (1,A):

Specify D, due date, or R, plan release date, to indicate the date type by which to select requisitions. The system applies the date range in the preceding two fields against the date type in this field. This field is required.

(Item/Commodity Type) (1,0):

Specify the item or commodity type code for the following field:

Valid choices

- **0**

  Select planned orders and requisitions for inventory items.

- **1**

  Select requisitions for commodities.

- **2**

  Select all planned orders and requisitions for inventory items and all requisitions for commodities.

Begin at Item/Commodity (35,A):

Specify the item number or commodity code to begin the selection list. The list excludes items or commodities that are alphanumerically less than this value. You cannot view excluded items or commodities. To view requisitions for all items, leave this field blank.

Resupply Orders (1,A):

Specify Yes to include planned orders. Otherwise, specify No. You can include planned orders if some planned orders are really DRP-resupply orders and some are purchased items and you cannot tell which are which in facility mode.

Create Preliminary PO

Specify 1 to create a preliminary PO. Specify 0 to create a regular PO.

You cannot receive or cost a preliminary PO; however, you can see a preliminary PO in MRP and DRP generations, inquiries, and planned order maintenance programs.

The system displays this field only if the setting in the system parameters supports preliminary POs.

Screen actions - PUR640-01

Commands	Description
F14=Vendor Alpha	Access Vendor Alpha Lookup, PUR310D-01, from which you can search for and select a vendor number to transfer back to this screen.
F15=MRP Inquiry	Access MRP Planning/Pegging Inquiry, MRP300. You can only view this inquiry; you cannot transfer information back to this screen.
F16=Purchasing Inquiry	Access Purchasing Inquiry, PUR300D. You can only view this inquiry; you cannot transfer information back to this screen.
F17=Material Status Inquiry	View the Material Status Inquiry screen, INV300D-02.
F19=Vendor Notes Inquiry	Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Release planned orders or requisitions as PO lines

After you specify your selection criteria on the PO Consolidation/Release specification screen PUR640-01, Infor LX displays those purchase orders and requisitions that meet the criteria on the PO Consolidation/Release selection screen PUR640-02. Use this screen to specify the purchase orders to consolidate or release.

Note: The T (Type) field contains one of the following values, depending on the origin and the type of order line displayed:

- P=Planned order from MRP
- F=Firm planned order from MRP
- R=Requisition from PUR600

Field descriptions - PUR640-02

Fields	Description
Line actions:	The following line actions are available:

12=Vendor Prompt

Display a list of vendors on the Vendor Listing screen.

13=Facility Prompt

Display a list of facilities on the Facility List screen.

14=Warehouse Prompt

Display a list of warehouses on the Warehouse List screen.

15=Ship To Prompt

Display a list of ship-to numbers on the Ship To Selection screen, PUR320-01.

16=Contract Prompt

For scheduled POs only, display a list of contracts on the Item Quote List screen. You can prompt on contract only if the price source is 1.

17=Alternate Currency

Display values in the alternate currency, if one has been defined.

18=Buyer Prompt

View the Buyer List screen.

19=Contract Detail

For scheduled POs only, view the Contract Detail screen, PUR152D-02.

20=Item Notes

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

21=Alternate

Access Alternate Item List, INV185.

A (Action) (2,0): Specify the number for the line action to perform and press Enter. To use the first line, specify the line action and at least one key field value.

C/D (1,A): You can consolidate or delete individual planned order or requisition lines. Specify C to consolidate the line into a purchase order. Specify D to delete the line from consolidation, from the requisition/purchase order file, and from the planned/firm planned order file.

After you specify appropriate entries, press Enter to validate the vendor number, due date/release date, quantity, warehouse, and ship-to code. If all entries are valid, use F17, Consolidate/Del, to perform the specified action.

The system automatically consolidates lines selected for consolidation into a single purchase order line if the following fields are identical: Company, Vendor, Warehouse, Facility, Ship-To, Item Number, Profit Center, Due Date, Delivery Date, Estimated Cost, Currency Code, and Conversion Factor.

Each time you use F17, Infor LX stores the specified operation for that line or lines. Specify consolidation operations for only one purchase order at a time. After you specify all appropriate values on this screen, use F6. The actual consolidation or deletion takes place if you use F6 to exit this program from the PO Consolidation/Release selection screen, PUR640-01. After you exit the program in this manner, you can specify selection criteria to consolidate lines for a new purchase order.

For the following fields, the system uses the values found on the lines of the requisitions or the planned orders. If necessary, you can override these values.

Vendor (8,0): Specify vendor number for which to consolidate this line. The vendor number must be the same for all lines to consolidate into one purchase order. This field uses the primary vendor on the Item Master file for planned and firm planned orders.

Note: Specify at least one quote in Vendor Contract Quote Maintenance, PUR150, to avoid an error message if you use Purchase Order Consolidation/Release, PUR640.

Note: If you change the quantity or vendor or both on a planned order/requisition line, you must change the price source to 0 to access a new quote.

Infor LX uses information from the Requisition Master file or the Firm/Planned Order file to provide the default values for the following four fields. You manually override these entries.

Due Date (8,0):

This date field contains the anticipated delivery date according to the lead time established in the Item Master file for the specified item. The system uses an override lead time from the Facility Planning Data record associated with this item and warehouse if any exists. You can override the default date.

Specify the due date in the time zone for the line warehouse.

The default date in this field is established when you create the requisition in Requisition Maintenance, PUR600.

Infor LX uses this date to determine which quotes are valid so that it can retrieve an accurate price per purchasing unit when you exit the program.

Release Date (8,0):

This field displays the release date for the purchase order in the time zone for the warehouse.

Quantity (11,3):

Specify the quantity of purchasing units. Infor LX uses this value when it accesses the Vendor Quote Master file to determine expected cost per purchasing unit for the purchase order.

Note: If you change the quantity or vendor or both on a planned order/requisition line, you must change the price source to 0 to access a new quote.

Facility (3,A):

Infor LX displays the facility code associated with the warehouse for this line.

Wh (Warehouse) (3,A):

Specify the code of the receiving warehouse for this line of the purchase order. This field must contain a valid warehouse for consolidation to take place.

Note: Do not create purchase orders with managed and non-managed warehouses on the same PO. Warehouse Management requires that all lines on a PO are for the same managed warehouse.

If you receive into a warehouse type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items of the following types:

- Item Type 0, Phantom
- Item Type 3, Assortment
- Item Type 4, Kit
- Item Type 5, Planning Bill
- Item Type 6, non-Balancing
- Container-Controlled Item

You cannot change an MRO warehouse, type=6, on a requisition line. The System of Record (SOR) for requisitions specifies the MRO warehouse on an incoming message. The SOR must send a new message to change the MRO warehouse on a requisition. If you use action 14=Warehouse prompt, and the warehouse on the requisition line is an MRO warehouse, the system displays the warehouse list window but without action 1=Select.

Ship (Ship-to Type/ Number) (1,0)/(8,A):

Specify the ship-to type and number to identify the delivery address for this line of the purchase order.

Note: If the warehouse type for a warehouse specified on the purchase order line is type 4, Infor SCM Warehouse Management BOSS-controlled warehouse, you cannot receive items to this warehouse directly online, as processing occurs in the warehouse application. The receipt can only proceed if you call Purchase Receipts through an SMG, which transfers data back to Infor LX from Infor SCM Warehouse Management BOSS.

(Item/Commodity Description) (50,A):

Infor LX displays the description for the item or commodity code. You can change the description.

(Price Source Code) (1,0):

Infor LX displays the price source code for the estimated cost for this item.

Valid choices

- **0**

  No price entered. This is the default price source code for non-inventory items if no price is entered and no valid contract/quote exists.

- **1**

  Contract/Quote Price. The price is obtained from a valid contract/quote.

- **2**

  Standard Cost from the Facility specific cost on the Cost Master file (CMF), or if the facility cost does not exist, Infor LX retrieves the global cost from the CMF. This is the default price source code for inventory items if no price is entered and no valid contract/quote exists.

- **3**

  Manually-entered price. If you make this manual change, you must manually specify the price source code and the cost/unit. Infor LX does not update the code automatically. For identical items that you consolidate, if you manually change the price and price source code for one of these items, you must change the codes for all lines that have changes. If you change the first line, Infor LX does not use price source code and cost/unit of the first line selected for consolidation of all lines.

- **4**

  Manually-entered zero price. If you make this manual change, you must manually specify the price source code and the cost/unit. Infor LX does not automatically update the code. For identical items that you consolidate, if you manually change the price and price source code for one of these items, you must change the codes for all lines to consolidate. If you change the first line, Infor LX does not use price source code and cost/unit of the first line selected for consolidation of all lines.

Cost/Unit (15,5): Infor LX displays the expected cost for this purchase order line. You can manually specify the expected cost from Purchase Order Requisition Maintenance, PUR600, or you can derive the expected cost from standard costs and available quotes. If you change the cost/unit manually, be sure to manually update the Price Source Code to Code 3 or Code 4 also. Please note that for identical items to consolidate, if you manually change the price and price source code for one of these items, you must change the codes for all lines that have changes. If you change the first line, Infor LX does not use price source code and cost/unit of the first line selected for consolidation of all lines.

Currency (3,A): The system displays this field only if Multiple Currencies is installed, and uses the currency code from the Vendor Master record associated with the vendor for this purchase order. Specify the code of the currency that you use to cost the line of the purchase. The currency code must be the same for all lines to consolidate into one purchase order.

Buyer (3,A): The system displays the buyer code for this purchase order line or requisition line. You can override this code.

Contract (10,A): The system displays the contract number for this vendor quote. If you specify a different contract number, Infor LX reprices the line based on that contract's terms.

Item Tax Code (5,A): The system uses the tax code in the Item Master file of the item on this line of the purchase order. Specify the tax code associated with the item to purchase. The system uses this code with the vendor tax code to determine the amount of tax to apply to this line of the purchase order.

Vendor Tax Code (5,A): The system uses the vendor tax code from the requisition, if one exists. Specify the tax code associated with the supplying vendor. The system uses this code with the item tax code to determine the amount of tax to apply to this line of the purchase order.

Exchange Rate (15,7): The system displays this field only if Multiple Currencies is installed, and uses the spot rate in effect for the from currency code specified in the Currency field and the to (base) currency of the company associated with the warehouse specified in the Warehouse field above. You can override this exchange rate.

Program ID (10,A): The system displays this field only if Trade Funds Management (TFM) is installed.

The system uses the program ID to update a commitment with the amount of the purchase order line created, including tax. Purchase order entry updates the accumulated amount of the commitment. The value must exist in the Commitments file, TMC.

Spend Type (2,A): The system displays this field only if Trade Funds Management (TFM) is installed.

The system uses the spend type to update a commitment with the amount of the purchase order line created, including tax. Purchase order entry updates the accumulated amount of the commitment. The value in this field must exist in the Commitments file, TMC.

Control Number (10,A) Specify the control number.

This Level Control Number (10,A) Specify the control number for this level.

Parent Material Method (2,A) Specify the parent material method code.

Parent Routing Method (2,A) Specify the parent routing method code.

Screen actions - PUR640-02

Commands	Description
F6=Accept	Release the purchase orders that you select on this screen for consolidation/release and exit the program.
F14=Vnd Alpha	Access Vendor Alpha Lookup. You can only review the inquiry; you cannot transfer information back to this screen.
F15=MRP Inquiry	Access MRP Planning/Pegging Inquiry, MRP300. You can only review the inquiry; you cannot transfer information back to this screen.
F16=Purchasing Inquiry	Access Purchasing Inquiry, PUR300. You can only review the inquiry; you cannot transfer information back to this screen.
F17=Consolidate/Del	Instruct Infor LX to store the specified consolidation or delete operations on the specified lines. If you have specified some lines for deletion, you must use F17 a second time to confirm the command. After you use F17 a second time, the system stores the consolidation and deletion commands and redisplays the requisition line selection screen. However, you cannot further update the lines on a purchase order that were marked for either deletion or consolidation.
	When you create the purchase order, Infor LX accesses the System Parameter file to retrieve and assign the next available purchase order number. Also,

Infor LX retrieves the least expensive quote for the specified quantity from the Vendor Quote Master file.

If you use F17, the system stores the consolidation and delete commands. The system performs the actual consolidation or deletion when you use F6 to accept from the PO Consolidation/Release selection screen, PUR640-02. To accept the release, use F6. If you do not want to continue with the release, use F12 to cancel.

F18=Item/Vendor Quality   Access the Item/Vendor Quality Maintenance Selection screen, PUR120D1-01. You must have user authority to use this screen action. F3 from the Item/Vendor Quality Maintenance screens returns you to this screen.

F19=Vendor Notes Inquiry   Access the Note Mode Selection (SYS255D) screen to view or maintain vendor notes.

F20=Material Status   Access the Material Status Inquiry screen, INV300D-02.

All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Scheduled PO batch release, PUR651D

Scheduled PO Batch Release, PUR651D, allows the automatic release of MRP requirements to purchase order lines. This program uses the schedule horizon field from the Item Master file, the Vendor Master file, or the Facility Planning Data file, and the rules for multi-sourcing in the Vendor Split Rules file.

Note: If purchase order lines require validation for valid item/vendor records in the Item/Vendor Master, HAV, the system validates the lines in Contract Detail Maintenance, PUR152. However, Scheduled PO Batch Release validates again to make sure the item/vendor record is still valid at the time you run this program. The vendor delivery date must fall within the effective and discontinue dates of a matched item/vendor record.

The program looks for a match with a facility-specific item/vendor record first. If no record is found, the program looks for a match with an item/vendor record that has a global facility, that is, no facility specified.

This program offers you the following choices:

- Produce a pre-list only. The pre-list only option does not update any files; this option produces a report that shows order lines created if you run the auto release.
- Perform an automatic release only. This option creates purchase order lines but does not produce an audit report.
- Perform an automatic release and print the pre-list, which then acts as an audit trail.

You can use the pre-list to view what happens before you perform an automatic release and update the files.

The automatic release program converts all MRP requirements that fall within the schedule horizon for the selected items into purchase order lines.

You can specify the schedule horizon in any or all of the following files: the Item Master, the Vendor Master, and the Facility Planning Data files. The schedule horizon is in calendar days, not working days. If you do not specify a schedule horizon in any of these files, MRP uses only a single day as the horizon.

The automatic release splits requirements for an item across multiple vendors as defined within the Vendor Split Rules file. You can select to release only one vendor at a time through auto release and the program apportions the correct quantity to that one vendor, and leaves any remaining quantity as MRP planned or firm planned requirements.

You can specify a number of parameters to restrict the auto release to individual warehouses, buyers, vendors, or purchase order numbers.

Note: If you create a purchase order from a contract detail that has a blank warehouse, the system validates the user's user authority against the stocking warehouse for the item/facility assigned to the contract.

Access: Menu PUR

Specify criteria to release planned orders as scheduled POs

Use the Automatic Release selection screen, PUR651D, to specify the selection criteria to automatically release planned orders as scheduled POs.

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. These range fields use extreme values by default.

Field descriptions - PUR651D-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the release.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the release.
From Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the release.
To Warehouse (3,A):	Specify a range of values to limit the warehouses to include in the release.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the release.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the release.

From Planner (3,A):   Specify a range of values to limit the planner codes to include in the release.

To Planner (3,A):   Specify a range of values to limit the planner codes to include in the release.

From Vendor (8,0):   Specify a range of values to limit the vendor codes to include in the release.

To Vendor (8,0):   Specify a range of values to limit the vendor codes to include in the release.

From Commodity (35,A):   Specify a range of values to limit the commodity codes to include in the release.

To Commodity (35,A):   Specify a range of values to limit the commodity codes to include in the release.

From Purchase Order Number (9,0):   Specify a range of values to limit the purchase order numbers to include in the release.

To Purchase Order Number (9,0):   Specify a range of values to limit the purchase order numbers to include in the release.

From Item Number (35,A):   Specify a range of values to limit the item number codes to include in the release.

To Item Number (35,A):   Specify a range of values to limit the item number codes to include in the release.

Issue Date (8,0):   Specify the date to release MRP requirements. You cannot specify a date earlier than the current date.

Type of Run 1, 2 or 3. (1,0):   Specify one of the following values:

- 1 to print the pre-list
- 2 to release only
- 3 to release and print the pre-list, which acts as an audit trail

The pre-list lists those items affected by the selection criteria chosen and for which there are purchase order lines to create from MRP requirements. The report itself shows the following information:

- Vendor number
- Vendor name
- Item number
- Item description
- Warehouse
- P/O number
- Quantity ordered

- Due 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 - PUR651D-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. 22)* in the overview information in this document.

Drop shipment release, PUR660D

Use Drop Shipment Release, PUR660D, to process drop shipment requests, which were generated by order entry. This program can process the following requests:

- New PO is a request to create a new PO for drop shipment.
- Change is a request to change either the quantity or requested date for an existing PO for a drop shipment order.
- Cancel is a request to cancel the PO.

When you create a purchase order in Drop Shipment Release, the program uses PO Release/Maintenance processing. You can identify purchase orders created in this program by the ship-to type of 5, which indicates drop shipment.

Note: A Purchasing system parameter enables you to prohibit the acceptance of an item in a purchase order line if a valid/approved item or commodity/vendor record does not exist in the Item/Vendor Master file, HAV.

Infor LX selects records that meet the following criteria for drop ship release processing:

- Records that meet the selection parameters specified on the Drop Ship Release Prompt screen, PUR660-01
- Orders that passed pricing (price source code of 02 or greater) are selected for drop ship release. Orders with a price source code of 00=Not Priced, or 01=Failed Pricing, are not eligible for drop ship release.
- Orders on credit, margin, customer, or user hold cannot be selected for release. Infor LX does select orders that are released from hold manually or in batch.

The system consistently rounds the amount fields calculated or displayed in this program based on the currency rounding method and the round-to position you specified. Specify a rounding method and

round-to position on the Currency Code Maintenance screen, CLD107D2-01, in Multiple Currencies, MLT.

This rounding process affects calculated amount totals such as invoice total, taxes total, and amounts in journals. However, the rounding process does not affect unit cost or unit selling prices.

The first screen is a prompt screen to select criteria to restrict the drop shipment requests available for processing.

Note: All drop ship purchase order lines have a ship-to type 5. All ship-to type 5 purchase order lines are for drop shipments. Only Drop Shipment Release can create purchase order lines with a type 5 ship-to.

Access: Menu PUR

Specify criteria to view shipment requests

Use the Drop Ship Release Prompt selection screen, PUR660-01, to specify the criteria to view drop shipment requests.

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. These range fields use extreme values by default.

Field descriptions - PUR660-01

Fields	Description
Facility Range (3,A):	Specify a range of values to limit the facilities to process drop shipment requests.
Warehouse Range (3,A):	Specify a range of values to limit the warehouses to process drop shipment requests. You can only process requests for warehouses to which you are authorized.
Vendor Range (8,0):	Specify a range of values to limit the vendors to process drop shipment requests. New purchase order requests can have a zero vendor because you do not have to specify a vendor in order entry.
Customer Order Range (9,0):	Specify a range of customers for which drop shipment requests were generated.
Request date range (8,0):	Specify the range of request dates for drop shipment lines to process.

Screen actions - PUR660-01

Commands	Description
F16=Open Order Inquiry	Access Customer Order Inquiry, ORD300D1-01, from which you can search for orders and display information about those orders. You cannot select order numbers from this screen. You must manually specify order numbers in the Customer Order range fields.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Select drop shipment requests to release

After you press Enter on the Drop Ship Release Prompt selection screen, PUR660-01, the system displays the Drop Ship Release Select summary processing screen, PUR660-02. This screen lists all drop shipment requests within the ranges of the prompt specified on the previous screen. All quantities are in purchasing UOM.

Use F20, Detail, to view detail information for the drop ship requests on the Drop Ship Release Select detail processing screen, PUR660-03.

The following fields are display-only on the Drop Ship Release Select summary processing screen, PUR660-02:

- Item Number
- Customer Order Number
- Customer Order Line Number
- Customer Order Line Original Quantity Ordered

The following fields are display-only on the Drop Ship Release Select detail processing screen, PUR660-03:

- Item Number
- Action Requested (NEW PO, CHANGE, CANCEL)
- Customer Number
- Purchase Order Line Status
- Purchase Order Number
- Purchase Order Line Number
- Purchase Order Line Unit of Measure
- Sales Unit of Measure
- Revised Shipment Date
- Revised Quantity Ordered
- Customer Order Line Quantity Shipped
- Comment Lines

All quantities for Revised Quantity Ordered and Customer Order Line Quantity Shipped are in purchasing unit of measure.

The Original Request Date and the Revised Date are in the time zone for the line warehouse.

Field descriptions - PUR660-02 and PUR660-03

Fields	Description
Line action:	Specify the number for the line action to perform and press Enter.

1=Create PO

Create a single purchase order from multiple drop ship records. All records for which you specify this line action must have the same vendor number. To specify several vendors, process all lines for the first vendor, and then create a purchase order for the next vendor. The system then displays the Purchase Order Header Maintenance screen, PUR660-05.

If the vendor number is blank on the customer order, the system uses the following logic to choose a vendor number from the item's facility record, CIC, or Item Master record, IIM:

- Use the vendor number from the item's CIC record's primary vendor if not blank
- Use the vendor from the CIC secondary vendor if not blank
- Use the vendor from the IIM primary vendor if not blank
- Use the vendor from the IIM secondary vendor, if not blank; otherwise, leave blank.

Processing continues as in PO Release/Maintenance, but the system uses the lines you selected. If you add extra lines to a purchase order, the system does not designate the lines as drop shipment lines. You must handle the extra lines by regular PO processing.

Upon acceptance from the Purchase Order Lines Maintenance screen, PUR660-06, the system does not display the line on the Drop Ship Release Select summary processing screen, PUR660-02. The line is considered processed and the drop shipment line status on the customer order changes to 2, PO created.

2=Change PO

Change the purchase order line details or cancel PO lines for an existing drop ship purchase order. The system displays the Purchase Order Lines Maintenance screen, PUR660-06, on which you can make and accept the change.

Upon return to the Drop Ship Release Select summary processing screen, PUR660-02, you must then confirm the change to the purchase order line. Specify line action 13, Request Confirmed. If you specify this line action against a cancel PO request, upon return to the Drop Ship Release Select summary processing screen, PUR660-02, the system no longer displays the PO line because the line is considered processed and the drop shipment line status on the customer order changes to a 7, cancellation confirmed. Line action 2 is valid only against change or cancel PO requests.

12=Line Notes

The system displays the Customer Order Line Notes Maintenance screen, ORD140-02. Use this screen for communication between order entry professionals and the purchasing department. For example, you can specify reasons to deny requests. This line action is valid for all types of drop shipment requests.

13=Request Confirmed

Notify the order clerk that the requested change to the purchase order is made. Use this line action only after you make the change on the Purchase Order Lines Maintenance screen, PUR660-06. After you process this line action the system removes the line from the display. This action is valid only against change PO requests.

Note: After you make a change, you must specify line action 13 again to confirm the change.

14=Request Denied

Notify the order clerk that the request is denied. You can use this line action against change and cancel requests to signify that no change or cancellation is allowed against the requested purchase order. This action is valid only against change or cancel PO requests.

17=Select Quote

Access the Purchasing Quotes Inquiry screen, PUR300-06, for the item. Select a quote from this screen to assign the selected quote vendor, contract number, and contract price when you create a purchase order. This action is valid only for create PO requests.

Note: If you use F5, Refresh, F12, Cancel, F3, Exit, or F13, Filters, you will lose any line actions that you specified.

Act (2,A):

Specify the number for the line action to perform and press Enter.

1=Create PO

Create a single purchase order from multiple drop ship records. All records for which you specify this line action must have the same vendor number. To specify several vendors, process all lines for the first vendor, and then create a purchase order for the next vendor. The system then displays the Purchase Order Header Maintenance screen, PUR660-05.

If the vendor number is blank on the customer order, the system uses the following logic to choose a vendor number from the item's facility record, CIC, or Item Master record, IIM:

- Use the vendor number from the item's CIC record's primary vendor if not blank
- Use the vendor from the CIC secondary vendor if not blank
- Use the vendor from the IIM primary vendor if not blank
- Use the vendor from the IIM secondary vendor, if not blank; otherwise, leave blank.

Processing continues as in PO Release/Maintenance, but the system uses the lines you selected. If you add extra lines to a purchase order, the system does not designate the lines as drop shipment lines. You must handle the extra lines by regular PO processing.

Upon acceptance from the Purchase Order Lines Maintenance screen, PUR660-06, the system does not display the line on the Drop Ship Release Select summary processing screen, PUR660-02. The line is considered processed and the drop shipment line status on the customer order changes to 2, PO created.

2=Change PO

Change the purchase order line details or cancel PO lines for an existing drop ship purchase order. The system displays the Purchase Order Lines Maintenance screen, PUR660-06, on which you can make and accept the change.

Upon return to the Drop Ship Release Select summary processing screen, PUR660-02, you must then confirm the change to the purchase order line. Specify line action 13, Request Confirmed. If you specify this line action against a cancel PO request, upon return to the Drop Ship Release Select summary processing screen, PUR660-02, the system no longer displays the PO line because the line is considered processed and the drop shipment line status on the customer order changes to a 7, cancellation confirmed. Line action 2 is valid only against change or cancel PO requests.

12=Line Notes

The system displays the Customer Order Line Notes Maintenance screen, ORD140-02. Use this screen for communication between order entry profes-

sionals and the purchasing department. For example, you can specify reasons to deny requests. This line action is valid for all types of drop shipment requests.

13=Request Confirmed

Notify the order clerk that the requested change to the purchase order is made. Use this line action only after you make the change on the Purchase Order Lines Maintenance screen, PUR660-06. After you process this line action the system removes the line from the display. This action is valid only against change PO requests.

Note: After you make a change, you must specify line action 13 again to confirm the change.

14=Request Denied

Notify the order clerk that the request is denied. You can use this line action against change and cancel requests to signify that no change or cancellation is allowed against the requested purchase order. This action is valid only against change or cancel PO requests.

17=Select Quote

Access the Purchasing Quotes Inquiry screen, PUR300-06, for the item. Select a quote from this screen to assign the selected quote vendor, contract number, and contract price when you create a purchase order. This action is valid only for create PO requests.

Note: If you use F5, Refresh, F12, Cancel, F3, Exit, or F13, Filters, you will lose any line actions that you specified.

Vendor (8,0):

Specify the vendor number required to create PO transactions. This field is protected in any other type of request. You must use a valid vendor to create a PO.

All quantities for Customer Order Line Original Quantity Ordered and Customer Order Line Quantity Invoiced are in purchasing units of measure.

Screen actions - PUR660-02

Commands	Description
F5=Refresh	Redisplay the screen, without processing and clear any actions pending.
F13=Filters	Access the Filter Options screen to resequence the information on the processing screen.

F20=Detail	From the Drop Ship Release Select summary processing screen, PUR660-02, access the Drop Ship Release Select detail processing screen, PUR660-03.
F20=Summary	From the Drop Ship Release Select detail processing screen, PUR660-03, access the Drop Ship Release Select summary processing screen, PUR660-02.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Filter drop ship release information

If you use F13, Filters, Infor LX displays the Drop Ship Release Filter screen. Use this screen to resequence the information on the Drop Ship Release Select summary processing screen, PUR660-02, or the Drop Ship Release Select detail processing screen, PUR660-03 screen.

Field descriptions - PUR660-03

Fields	**Description**
Selection (1,0):	Specify one of the following sequences and then press Enter to resequence the information on the Drop Ship Release Select summary processing screen, PUR660-02, or the Drop Ship Release Select detail processing screen, PUR660-03:

- 1=Active requests by vendor/order/line and entered date
- 2=All requests by vendor/order/line and entered date
- 3=Active requests by customer order number/line/entered date

■ 4=Active requests by item/requested date/entered date

Screen actions - PUR660-03

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

PO or requisition language override, PUR765D

Use this program to enter the translations for ship to names and addresses as they appear on purchase orders and requisitions. The screen lists existing records in the Purchase Order MLS file, HPN. ERP LX adds the ship-to record to the HPN file when you add a ship-to number to an order or requisition and when you maintain the Name, Attention To or the six Address lines on the address maintenance screens in PUR500/PUR600.

ERP LX automatically creates MLS Language records depending on the entries for the Ship To Type and Number on the PO header or the PO line. ERP LX uses the corresponding master file for the type/number to copy MLS address records onto the PO both at the header and line level (HPN). For Ship To Type 4=Manual no master file MLS records exist. Use Action 1=Create to add the language records manually.

Access:

■ Menu PUR
■ F10=Language Override from the address maintenance screens in PUR500.

Add or select an address record

Use the Purchase Order/Requisition Language Override screen, PUR765D-01, to add or select an address record to translate.

Field descriptions - PUR765D-01

Fields	Description
Line actions	All line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* 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. 21)* in the overview information in this document.
Order (Req)/Line (9,0):	Specify the order or requistion and the line number to translate.
Language (3,A):	Specify the language to use in the translation.

Screen actions - PUR765D-01

Commands	Description
F13 = Filters	F13=Filters is not available if you access PUR765D through PUR500 or PUR600. Access the Filter Options screen to filter by purchase orders or requisitions. Select from the following sequences:
	1=Order/Line/Language - Active
	2=Order/Line/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. 22)* in the overview information in this document.

Filter options

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

Field descriptions - Filter

Fields	Description
Purchase Order or Requisition selection (1,0):	Specify one of the following options: 0=Purchase Orders 1=Requisitions
Record Selection (1,0):	Specify one of the following options to limit the list of records: 1=Order/Line/Language - Active 2=Order/Line/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. 22)* in the overview information in this document.

Enter translated address information

Use the Ship To Information - Language Maintenance screen, PUR765D-03, to enter the translated ship-to name and address for the order or requisition that you selected on the previous screen.

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

Field descriptions - PUR765D-03

Fields	Description
Order (Req) Number/ Line (8,0):	If you are in Create or Copy mode, specify the order or requisition and line number 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 To (30,A):   Specify the name of the contact in the selected language.

Address (50,A):   Specify the ship to address in the selected language.

Screen actions - PUR765D-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. 22)* in the overview information in this document.

Extract inbound ASN details, PUR770D

Use Extract Inbound ASN Details, PUR770D, to extract ASN data from ECM files and to create records in the Purchasing Goods Receipt Header, HGH, and Purchasing Goods Receipt Detail, HGD, files. The system uses this information on the PO Receipts screen.

The HGH and HGD records will not be updated for Type 5 warehouses. A Purchase Order Shipment record will be created in the Type 5 Warehouse when the inbound ASN data is received by that warehouse.

Create purchasing goods receipt notice

Use the Extract Inbound ASN Details screen, PUR770D-01, to specify filters for the selection of previously unprocessed inbound ASN records.

You can limit the selection to ranges of vendors, warehouses and ASN received 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. These range fields use extreme values by default.

Field descriptions - PUR770D-01

Fields	Description
Vendor From (8,0):	Specify a range of values to limit the vendor numbers to include in this selection of unprocessed inbound ASN records.
Vendor To (8,0):	Specify a range of values to limit the vendor numbers to include in this selection of unprocessed inbound ASN records.
Warehouse From (3,A):	Specify a range of values to limit the warehouse numbers to include in this selection of unprocessed inbound ASN records.
Warehouse To (3,A):	Specify a range of values to limit the warehouse numbers to include in this selection of unprocessed inbound ASN records.
From ASN Received Date (8,0):	Specify a range of values to limit the dates to include in this selection of unprocessed inbound ASN records.
To ASN Received Date (8,0):	Specify a range of values to limit the dates to include in this selection of unprocessed inbound ASN records.
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 - PUR770D-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. 22)* in the overview information in this document.

Month end close, PUR900D

Use Month End Close, PUR900D, to remove all completed requisitions from the system, to roll over current period totals into the current year totals, and to zero out current period totals in preparation for the next period. Perform this activity at the end of each accounting period to keep your files free from outdated requisitions.

You can also purge uncosted purchase orders; this option purges any purchase order notes or purchase order line notes associated with the purged POs. The system stores the purchasing transaction totals by vendor and item number in the Vendor History file.

You can also print a list of purged purchase orders and purged requisitions. The list of purged purchase orders prints in PO number sequence and includes the company, facility, warehouse, vendor, ship to, entry and close dates, and buyer.

This program deletes fully received/costed lines and also deletes individual lines from scheduled purchase orders that are marked for deletion and reports the lines on the Schedule PO Purge Report. The system renumbers any scheduled purchase orders found to have more than 750 lines.

The list of purged requisitions includes the requisition number and product, delivery date, MRP rescheduled date, date due to stock, quantity ordered, unit of measure, warehouse, status of print flag, expected cost, outside operation, order reference, ship to, and comments.

You can also purge completed (EDS) drop shipment request records. Drop shipments are shipments direct from the vendor to the customer. The purged requests are requests that you process and complete in Drop Shipment Release, PUR660. The system purges all completed drop ship request records.

Summary of Purge Rules for Regular Purchase Orders or Requisitions

The program does not purge POs and Requisitions if any one of the following conditions applies:

- Record is busy
- Close Date is later than Last Transaction Date the user entered
- Last Change Date is later than Last Transaction Date the user entered
- Entry Date is later than Last Transaction Date the user entered

If none of the four conditions above applies, the system checks the PO or Requisition against the following deletion rules. Each rule overrides any rules that precede it numerically. For example, if a PO qualifies for deletion according to rule 4, but should not be deleted according to rule 5, the record is not deleted.

1. PO not received or costed: Do not delete.
2. PO fully received but not costed and user did not set Purge uncosted POs flag to 1=Yes: Do not delete.
3. At least one line has been received or costed: Do not delete.
4. PO/Requisition is inactive: Delete.
5. PO is a drop ship type and the corresponding order is not fully invoiced: Do not delete.
6. Any line on the PO has an outside operation and there is a corresponding shop order record: Do not delete.

If the PO/Requisition is purged, the header and all lines are physically deleted, as well as the PO/Requisition cross-reference file (HPX) records for that purchase order.

Access: Menu PUR

Perform month end close

Use the Purchasing Month End Close selection screen, PUR900D-01, to specify the selection criteria for the month end close.

Field descriptions - PUR900D-01

Fields	Description
Close month (1,0):	Specify 0 = No to not close anything. Specify 1 = Close Only to only close the month end. Specify 2 = Close and Purge to close the month and purge qualifying records. Records are purged only if this option is selected.
Upper Last Transaction Date (8,0):	Specify the date of the last purchasing transaction to include in the month-end close to purge purchase orders.
	Infor LX automatically purges all completed purchase orders with a last transaction entry date, last change date, and closed date less than or equal to the date you specify if the other purge conditions above have been met.
	To ensure accurate item/vendor month-to-date totals, Infor recommends that you run Purchasing Month End Close, PUR900, once per month.
Purge uncosted POs (1,0):	Specify Yes to remove purchase orders that are not costed; otherwise specify No. You determine whether a given transaction affects the Cost Accounting system when you define the transaction through Transaction Effects Maintenance, INV150. If you specify Yes in the Aff PO Cost field of the given transaction type, Infor LX records the cost of the received items through Purchase Receipts, PUR550D, or Inventory Transactions, INV500.

To purge POs, you must meet the following conditions:

- All lines of the PO must have a last transaction date less than or equal to the upper transaction date specified in the previous field.
- All lines of the PO must have a quantity received greater than or equal to the quantity ordered.

If the value in this field is No, you must also meet the following conditions:

- To purge a PO, all lines of the PO must have a costed quantity greater than or equal to the quantity received.
- To purge a requisition, the requisition must be completely received and costed (purchase order header status=3).

Fields	Description
Print Purged Requisitions (1,0):	Specify Yes to print a list of purged requisitions. Otherwise specify No.

Print Purged POs (1,0): Specify Yes to print a list of purged purchase orders. Otherwise specify No.

Purge Completed Drop Ship Requests (1,0): Specify Yes to physically delete the tagged drop ship request records. Otherwise specify No.

Screen actions - PUR900D-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. 22)* in the overview information in this document.

Purchase order purge, PUR905D

Use Purchase Order Purge, PUR905D, to remove all completed purchase orders from the system. Perform this activity at the end of each accounting period to keep your files free from outdated purchase orders and requisitions. Use this program instead of Month End Close, PUR900D, if Facility Period End is supported in System Parameters, SYS822D-01.

You can also purge uncosted purchase orders; this option purges any purchase order notes or purchase order line notes associated with the purged POs. The system stores the purchasing transaction totals by vendor and item number in the Vendor History file.

You can also print a list of purged purchase orders and purged requisitions. The list of purged purchase orders prints in PO number sequence and includes the company, facility, warehouse, vendor, ship to, entry and close dates, and buyer.

This program deletes fully received/costed lines and also deletes individual lines from scheduled purchase orders that are marked for deletion and reports the lines on the Schedule PO Purge Report. The system renumbers any scheduled purchase orders found to have more than 750 lines.

The list of purged requisitions includes the requisition number and product, delivery date, MRP rescheduled date, date due to stock, quantity ordered, unit of measure, warehouse, status of print flag, expected cost, outside operation, order reference, ship to, and comments.

You can also purge completed (EDS) drop shipment request records. Drop shipments are shipments direct from the vendor to the customer. The purged requests are requests that you process and complete in Drop Shipment Release, PUR660. The system purges all completed drop ship request records.

Summary of Purge Rules for Regular Purchase Orders or Requisitions

The program does not purge POs and Requisitions if any one of the following conditions applies:

- Record is busy
- Close Date is later than Last Transaction Date the user entered
- Last Change Date is later than Last Transaction Date the user entered
- Entry Date is later than Last Transaction Date the user entered

If none of the four conditions above applies, the system checks the PO or Requisition against the following deletion rules. Each rule overrides any rules that precede it numerically. For example, if a PO qualifies for deletion according to rule 4, but should not be deleted according to rule 5, the record is not deleted.

1. PO not received or costed: Do not delete.
2. PO fully received but not costed and user did not set Purge uncosted POs flag to 1=Yes: Do not delete.
3. At least one line has been received or costed: Do not delete.
4. PO/Requisition is inactive: Delete.
5. PO is a drop ship type and the corresponding order is not fully invoiced: Do not delete.
6. Any line on the PO has an outside operation and there is a corresponding shop order record: Do not delete.

If the PO/Requisition is purged, the header and all lines are physically deleted, as well as the PO/Requisition cross-reference file (HPX) records for that purchase order.

Access: Menu PUR

Perform purchase order purge

Use the Purchase Order Purge screen, PUR905D-01, to specify the selection criteria for the purchase order purge.

Field descriptions - PUR905D-01

Fields	Description
Upper Last Transaction Date (8,0):	Specify the date of the last purchasing transaction to include in the month-end close to purge purchase orders.
	Infor LX automatically purges all completed purchase orders with a last transaction entry date, last change date, and closed date less than or equal to the date you specify if the other purge conditions above have been met.
	To ensure accurate item/vendor month-to-date totals, Infor recommends that you run Purchase Order Purge, PUR905D, once per month.
Purge uncosted POs (1,0):	Specify 1=Yes to remove purchase orders that are not costed; otherwise specify 0=No. You determine whether a given transaction affects the Cost

Accounting system when you define the transaction through Transaction Effects Maintenance, INV150. If you specify Yes in the Aff PO Cost field of the given transaction type, Infor LX records the cost of the received items through Purchase Receipts, PUR550D, or Inventory Transactions, INV500D1.

To purge POs, you must meet the following conditions:

- All lines of the PO must have a last transaction date less than or equal to the upper transaction date specified in the previous field.
- All lines of the PO must have a quantity received greater than or equal to the quantity ordered.

If the value in this field is No, you must also meet the following conditions:

- To purge a PO, all lines of the PO must have a costed quantity greater than or equal to the quantity received.
- To purge a requisition, the requisition must be completely received and costed (purchase order header status=3).

Print Purged Requisitions (1,0): Specify 1=Yes to print a list of purged requisitions. Otherwise specify 0=No.

Print Purged POs (1,0): Specify 1=Yes to print a list of purged purchase orders. Otherwise specify 0=No.

Purge Completed Drop Ship Requests (1,0): Specify 1=Yes to physically delete the tagged drop ship request records. Otherwise specify 0=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 select interactive processing, your session is unavailable for other tasks until the job finishes.

Screen actions - PUR905D-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. 22)* in the overview information in this document.

Year end close, PUR910D

Use Year End Close, PUR910D, to roll the current year totals for purchasing transactions into last year and to zero out the current year amount. The system stores these totals in the Vendor History file by vendor and item number.

Before you use this program, make sure that you perform the necessary file backups. Perform year end close at the end of every fiscal year to keep the respective fiscal year transaction totals accurate.

Access: Menu PUR

Perform year end close

Use the Purchasing Year-End Close screen, PUR910D-01, to perform the year end close.

Field descriptions - PUR910D-01

Fields	Description
Run purchasing year end close (3,A):	Specify Yes to perform the year-end procedure. Otherwise, specify No.

Screen actions - PUR910D-01

Commands	Description
Standard screen ac-tions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

P.O./Req In Use Maintenance, PUR940D

The Purchase Order/Requisition In Use Maintenance program, PUR9400D, allows you to clear the In Use status from purchase orders and requisitions

Use this program with caution. If your selection includes a user/program that is legitimately in use to access purchase order or requisition, you can cause unpredictable consequences if you run the program.

Access: PUR menu

Remove in-use status from p.o. or req.

Use the Purchase Order/Requisition In Use Maintenance screen, PUR940D-01, to select a purchase order or requisition to remove its In Use status.

This program should be used with caution. If any user/program is legitimately accessing the purchase order/requisition, or a program is in progress, unpredictable results can occur if you run this program.

Field descriptions -PUR940D-01

Fields	Description
Enter P.O. to Remove In Use Fields (8,0):	Specify the order number to release from In Use status so that you can process it.
Enter Req. Number to Remove In Use Fields (8,0):	Specify the requisition number to release from In Use status so that you can process it.

Screen actions - PUR940D-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. 22)* in the overview information in this document.

Scheduled PO history purge, PUR955D

Use Scheduled PO History Purge, PUR955D, to purge the schedule history from the files. You can specify a purge date or purge everything except the latest detail. If you specify a purge date, the system compares the purge date to the schedule date.

Access: Menu PUR

Purge schedule history information

Use the Schedule History Purge selection screen, PUR955D-01, to specify the selection criteria for the schedule history purge.

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. These range fields use extreme values by default.

Field descriptions - PUR955-01

Fields	Description
From Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
To Facility (3,A):	Specify a range of values to limit the facilities to include in the report.
From Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
To Warehouse (3,A):	Specify a range of values to limit the warehouse codes to include in the report.
From Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
To Buyer (3,A):	Specify a range of values to limit the buyer codes to include in the report.
From Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
To Planner (3,A):	Specify a range of values to limit the planner codes to include in the report.
From Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
To Vendor (8,0):	Specify a range of values to limit the vendor codes to include in the report.
From Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
To Commodity (35,A):	Specify a range of values to limit the commodity codes to include in the report.
From Purchase Order Number (9,0):	Specify a range of values to limit the purchase order numbers to include in the report.
To Purchase Order Number (9,0):	Specify a range of values to limit the purchase order 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.
To Item Number (35,A):	Specify a range of values to limit the item numbers to include in the report.
Purge Date (8,0):	Specify the date on which to purge the information.

Leave Latest (1,0):	Specify 0 to use the purge date specified above. Specify 1 to purge everything except the latest entry.
Run Time Parameter (0 or 1):	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 - PUR955-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

Close discontinued quotes, PUR990D

Use Close Discontinued Quotes, PUR990D, to specify discontinued vendor quotes to inactivate. You can specify a vendor and facility range to process and an upper limit discontinue date to include in the deactivation process.

Access: PUR

Select criteria to close discontinued quotes

Use the Close Discontinued Quotes selection screen, PUR990D-01, to specify the selection criteria to close discontinued quotes.

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. These range fields use extreme values by default.

Field descriptions - PUR990D-01

Fields	Description
Lower Vendor (8,0):	Specify a range of values to limit the vendor numbers to include in the discontinued vendor quotes that Infor LX deactivates.
Upper Vendor (8,0):	Specify a range of values to limit the vendor numbers to include in the discontinued vendor quotes that Infor LX deactivates.

Lower Facility (3,A):   Specify a range of values to limit the facilities to include in the discontinued vendor quotes that Infor LX deactivates.

Upper Facility (3,A):   Specify a range of values to limit the facilities to include in the discontinued vendor quotes that Infor LX deactivates.

Discontinue Date (8,0):   Specify the latest discontinue date to include to deactivate discontinued vendor quotes.

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 - PUR990D-01

Commands	Description
F6=Accept	Confirm the values on this screen and deactivate the selected quotes.
	All other screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN close - header list, PUR960D1

Use GRN Close, PUR960D1, to select GRN lines that have a status of unmatched or partially matched.

Use this process if an uncosted quantity exists against a GRN line for which there will never be another invoice, for example, if the supplier has forgotten to send an invoice.

Access: Purchasing Management Menu (PUR)

Select a GRN

Use the GRN Close - Header List screen, PUR960D1-01, to select a GRN for which to view lines.

Field descriptions - PUR960D1-01

Fields	Description
Line action:	The following line actions are available:

10=GRN Lines

Access the GRN Close - Detail List screen, PUR960D2-01, to view the lines for the selected GRN.

All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.

Vendor (8,0):	Specify the vendor number.
Entry Date (8,0):	Specify the entry date for the advice note you select.
Advice Note (35,A):	Specify the advice note to select.
Action Code (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.

Screen actions - PUR960D1-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN close - detail list, PUR960D2

Use the GRN Close detail list program to review GRN lines with a status of unmatched or partially matched.

Access: Line action 10 from GRN Close Processing - Header List (PUR960D1)

Select GRN lines to close

The GRN Close - Detail List screen, PUR960D2-01, lists all lines on the GRN selected, which have an uncosted quantity against them and could therefore be closed by this program. From this screen you select the lines to close.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment, and this is a DWM item, Infor LX displays the dual unit of measure value Received <Wght>, which is equivalent to the Received Qty values displayed in the subfile. The system does not display this field for non-DWM Items.

Field descriptions - PUR960D2-01

Fields	Description
Advice Note (35,A):	The system displays the advice note number of the GRN selected from the previous screen.
GRN Number (10,0):	The system displays the GRN number selected from the previous screen.
Vendor Number (8,0):	The system displays the vendor number of the selected GRN.
Vendor Name (50,A):	The system displays the vendor name of the selected GRN.
Line actions (2,0):	The following line actions are available:
	10=Close GRN Line
	Close this GRN line.
	All other line actions on this screen perform standard Infor LX functions. See *Generic help text for line actions (p. 21)* in the overview information in this document.
GRN Line Number (4,0):	Specify the GRN line number.
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.

Screen actions - PUR960D2-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN line close detail, PUR960D3

Use GRN close detail processing to view details for the line and to close the line.

Access: GRN Close Processing - Detail List (PUR960D2)

View details for a GRN line

The GRN Close - GRN Detail List screen, PUR960D3-01, displays all details that relate to the selected GRN line before you close the line. Use F6 to close the line or F12 or F3 to cancel the operation.

If you have Dynamic Weights and Measures functionality activated in your Infor LX environment, and this is a DWM item, Infor LX displays the dual unit of measure fields corresponding to Quantity fields in this screen. The system does not display these fields for non-DWM items.

Field descriptions - PUR960D3-01

Fields	Description
Vendor Number (8,0):	The system displays the vendor number of the GRN selected on the previous screen.
Advice Note (35,A):	The system displays the advice note number of the GRN selected on the previous screen.
Currency Code (3,A):	The system displays the currency for the order.
GRN Number (10,0):	The system displays the GRN number selected on the previous screen.
GRN Line Number (4,0):	The system displays the GRN line number selected on the previous screen.
Purchase Order (9,0):	The system displays the purchase order number to which the GRN is linked.
Purchase Order Line (4,0):	The system displays the purchase order line number against which the receipt was made.
Item Number (35,A):	The system displays the Infor LX item number from the original order.
Quantity Ordered (11,3):	The system displays the original order line quantity for the item.
<Weight> Ordered (11,4):	The system displays the DWM dual unit of measure equivalent to the value in the Quantity Ordered field.
Received Quantity (11,3):	The system displays the quantity received against the purchase order line in this receipt.
Received <Wght> (11,4):	The system displays the DWM dual unit of measure equivalent to the value in the Received Quantity field.
Quantity Received (11,3):	The system displays the total quantity received against the purchase order line.

\<Weight\> Received (11,4):   The system displays the DWM dual unit of measure equivalent to the value in the Quantity Received field.

Receipt Unit of Measure (2,A):   The system displays the unit of measure used to receive the goods, which may differ from the purchasing unit of measure.

Purchasing Unit of Measure (2,A):   The system displays the order unit of measure for the item.

Receipt Value (15,2):   The system displays the value of stock received against this GRN line.

Due Date (8,0):   The system displays the date that the stock is due for delivery.

The date is in the time zone for the line warehouse.

User ID (10,A):   The system displays the user ID of the person that created or last maintained the GRN.

Authorization Code (3,A):   The system displays the authorization code used against the purchase order.

Entry Date (8,0):   The system displays the date that the GRN was entered.

Quantity in Inspection (11,3):   The system displays the quantity that was received into the inspection area. This quantity is not available until you receive the quantity into stock.

\<Wght\> in Inspection (11,4):   The system displays the DWM dual unit of measure equivalent to the value in the Quantity in inspection field.

Entry Time (6,0):   The system displays the time that the GRN was entered.

Last Ticket Number (6,0):   The system displays the last ticket number generated against this GRN.

Invoice Status (12,A):   The screen displays the status of the invoice assigned to the selected GRN. The status can be unmatched, part matched, matched, or closed.

Invoiced Quantity (11,3):   The system displays the quantity that was invoiced against this GRN line.

Invoiced \<Wght\> (11,4):   The system displays the DWM dual unit of measure equivalent to the value in the Invoiced Quantity field.

Last Invoice Number (20,A):   The system displays the invoice number that relates to this GRN line.

Base Invoice Value (15,2): The system displays the value of invoiced goods against this GRN line in the base currency.

Alternate Invoiced Value (13,5): The system displays the value of invoiced goods against this GRN line in the alternate currency.

Screen actions - PUR960D3-01

Commands	Description
Standard screen actions	All screen actions on this screen perform standard Infor LX functions. See *Generic help text for screen actions (p. 22)* in the overview information in this document.

GRN purge, PUR965D

Use GRN Purge, PUR965D, to specify a range of dates and remove from the system any GRNs that fall within the range. The system removes only fully invoiced GRNs.

Access: Purchasing Management Menu (PUR)

Purge GRNs

Use the GRN Purge Selection screen, PUR965D-01, to specify the criteria for the purge.

Field descriptions - PUR965D-01

Fields	Description
Receipt Date From (8,0):	Specify the From receipt date. The system considers only GRNs that were received on or after this date for the purge.
Receipt Date To (8,0):	Specify the To receipt date. The system considers only GRNs that were received on or before this date for the purge.
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 - PUR965D-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. 22)* 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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