



# Infor LN User Guide for Price Stages

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## About this Guide

This document describes the purpose, setup, and use of price stages.

### Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the LN functionality will help you understand this guide.

### References

Use this guide as the primary reference for purchase master data. Use the current editions of these related references for information that is not covered in this guide:

- *User Guide for Sales Quotations*
- *User Guide for Sales Orders*
- *User Guide for Requests for Quotation (RFQs)*
- *User Guide for Purchase Orders*
- *User Guide for Purchase Contracts*
- *User Guide for Landed Costs*
- *User Guide for Pricing*

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This document is assembled from online Help topics.

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## Chapter 1: Overview

### Price stages - overview

In industries wherein price negotiations take a long time, you can use *price stages* to categorize the price based on the phase of the price-negotiation process. As long as the price is not final, price stages are used to allow the continuation of the order process, but with a restriction on the activities that you can perform during this process.

#### Example

Company X operates in a complex business environment that requires strict contract regulations and numerous negotiations between the parties involved. Consequently, final item prices are agreed upon several months after the start of the negotiations.

The price for item ZZ is estimated, but a long lead time is required for the related orders. Consequently, company X allows the start of work on order A, which includes item ZZ.

To restrict the order activities that can be performed for order A, these price stages are applicable:

- A price stage that prevents the release of the order to Warehousing if the price is still estimated and not provisional.
- A price stage that prevents the confirmation of the shipment if the price is still provisional and not final.

#### Master data

To set up price stages:

- 1 Specify *hold reasons* with the **Category** field set to **Price Stage Check** in the **Hold Reasons (tcmcs2110m000)** session.
- 2 Specify *blocking definitions* and link a hold reason to the blocking definition in the Blocking Definitions (tcmcs2111m000) session.
- 3 Specify *price stages* and link a blocking definition to the price stage in the Price Stages (tcmcs2112m000) session.

#### Business documents

Price stages can be linked to *price books* and various business documents.

#### Note:

The price stage is mandatory only if the **Price Stage Mandatory** check box is selected for the applicable business document in these sessions:

- **Sales Quotation Parameters (tdsls0100s100)**
- **Sales Order Parameters (tdsls0100s400)**
- **Request for Quotation Parameters (tdpur0100m100)**
- **Purchase Contract Parameters (tdpur0100m300)**
- **Purchase Order Parameters (tdpur0100m400)**
- **Contract Parameters (tpctm0100m000)**

See:

- Price stages in Sales
- Price stages in Procurement
- Landed costs - price stages

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## Chapter 2: Sales

### Price stages in Sales

*Price stages* can be linked to and updated for *sales quotation lines* and *sales order lines* during the sales order process.

Blocking or signaling due to the price stage, is applicable only for sales order lines.

#### Sales quotations

In the Price Stage field of various sales quotation line sessions, you can link a price stage to a sales quotation line. It is mandatory to specify a price stage for a quotation line, if the **Price Stage Mandatory** check box is selected in the **Sales Quotation Parameters (tdsls0100s100)** session.

When processing the quotation to a sales order, the price stage is copied from the quotation line to the sales order line.

#### Sales orders

In the Price Stage field of various sales order line sessions, you can link a price stage to a sales order line. It is mandatory to specify a price stage for an order line, if the **Price Stage Mandatory** check box is selected in the **Sales Order Parameters (tdsls0100s400)** session.

The blocking definition that is linked to the price stage determines the phase at which the order process must be blocked or a signaling message must be displayed. Blocking or signaling can be done during these phases for a sales order line:

- Order entry
- Release to Warehousing
- Confirmation of shipment

Sales order lines that are blocked because of the price stage, are displayed in the **Blocked Sales Order (Lines) (tdsls4520m000)** session. The value of the **Hold Reason** field is retrieved from the *blocking definition* that is linked to the price stage. The blocked lines cannot be released in the **Blocked Sales Order (Lines) (tdsls4520m000)** session. To unblock a line, you must update the price stage. Based on the new price stage, the order process can continue, a new blocking can be created, or only a signal may be displayed.

You can update the price stage for a sales order line only until the order line is processed in the **Process Delivered Sales Orders (tdsls4223m000)** session.

After confirmation of a shipment:



- The price stage can be modified in the **Sales Order Invoice Lines (tdsls4106m100)** session, using the Change Prices and Discounts of Sales Invoice Lines (tdsls4132m000) session.
- The price stage can only be used for information purposes.

**Note:**

- Price stages are not applicable for sales orders with origins **EDI, Intercompany EDI, Retro-Billing, or Consumption**.
- If a sales order is invoiced in installments, which you can specify in the Invoicing by Installments field in the **Sales Orders (tdsls4100m000)** session, the price stage code for all linked sales order lines must be the same.
- If the blocking phase is set to **Release** (to Warehousing), the sales order line can still be released to Warehousing. This can be done only if the **Allow Release to Warehouse** check box is selected for the hold reason and business partner type in the Hold Reason by Business Partner Type (tdsls0193s000) session. The blocking is then applied to the related outbound order line.

**Recalculating prices**

If the item price and **Price Stage** are retrieved from a *price book* for the sales quotation or order line item, the **Price Stage** is defaulted again from the **Price Book Lines (tdpcg0131m000)** session. This value is defaulted when you recalculate prices for the sales quotation line or sales order line in the **Price and Discount Recalculation Parameters (tdpcg0240s000)** session.

## Chapter 3: Procurement

### Price stages in Procurement

*Price stages* can be linked to and updated for these documents in Procurement:

- Requests for quotation (RFQs)  
For *response lines* and negotiation lines
- Purchase contracts  
For *purchase contract price revisions*
- Purchase orders  
For *purchase order lines*

Blocking or signaling due to the price stage, is applicable only for purchase order lines.

#### Requests for quotation (RFQs)

If the **Price Stage Mandatory** check box is selected in the **Request for Quotation Parameters (tdpur0100m100)** session, a price stage must be linked to an RFQ in these sessions:

- RFQ Responses (tdpur1506m000)
- RFQ Negotiations (tdpur1109m000)

When converting the response line to a purchase order, purchase contract, or price book using the **Convert RFQs (tdpur1202m000)** session, the price stage is copied from the response line to the purchase order line, purchase contract price revision, or price book.

#### Purchase contracts

You can specify a price stage for a *contract price revision* in the Price Stage field of the Purchase Contract Prices (tdpur3103m000) session. If a price book is linked to the contract price revision, the price book's price stage is displayed in the **Book Price Stage** field of the **Purchase Contract Prices (tdpur3103m000)** session and the **Price Stage** field is blank and disabled.

If the **Price Stage Mandatory** check box is selected in the **Purchase Contract Parameters (tdpur0100m300)** session, a price stage must be specified in the **Purchase Contract Prices (tdpur3103m000)** session before you can activate the price revision.

**Note:** If the **Change Requests** check box is selected in the **Purchase Contract Parameters (tdpur0100m300)** session, the price stage can be modified after purchase contract activation only by using the *change request* process.

## Purchase orders

In the Price Stage field of various purchase order line sessions, you can link a price stage to a purchase order line. It is mandatory to specify a price stage for an order line if the **Price Stage Mandatory** check box is selected in the **Purchase Order Parameters (tdpur0100m400)** session.

The blocking definition that is linked to the price stage determines the phase at which the order process must be blocked or a signaling message must be displayed. Blocking or signaling can be done during these phases for a purchase order line:

- Order entry
- Release to Warehousing
- Receipt confirmation

Purchase order lines that are blocked because of the price stage, are displayed in the **Purchase Order (Line) Blockings (tdpur4120m000)** session. The value of the **Hold Reason** field is retrieved from the *blocking definition* that is linked to the price stage. The blocked lines cannot be released in the **Purchase Order (Line) Blockings (tdpur4120m000)** session. To unblock a line, you must update the price stage. Based on the new price stage, the order process can continue, a new blocking can be created, or only a signal may be displayed.

You can update the price stage for a purchase order line only until the order line is processed in the **Process Delivered Purchase Orders (tdpur4223m000)** session.

After confirmation of a receipt:

- The price stage can be modified in the **Purchase Payable Receipts (tdpur4130m000)** session, using the Change Price and Discounts of Purchase Payable Receipts (tdpur4132m000) session.
- The price stage can only be used for information purposes.

### Note:

- Price stages are not applicable for purchase orders with origins **Warehousing Receipt** or **Purchase Payment**.
- If the Always Use Contract Price and Discount check box is selected in the **Purchase Contract Parameters (tdpur0100m300)** session, you cannot update the price stage for a purchase order line if a contract is linked to the order line and the price stage differs from the contract's price stage. You must first unlink the contract to update the price stage for the order line.
- If *landed cost* lines are linked to a purchase order line, a price stage can or must also be specified for these lines. See Landed costs - price stages.
- If the **Change Requests** check box is selected in the **Purchase Order Parameters (tdpur0100m400)** session, the price stage can be modified after purchase order approval or printing only by using the *change request* process.

## Recalculating prices

If the item price and **Price Stage** are retrieved from a *price book* for the response line, contract price revision, or order line item, the **Price Stage** is defaulted again from the **Price Book Lines (tdpcg0131m000)** session. This value is defaulted when you recalculate prices for the response line, contract price revision, or purchase order line in the **Price and Discount Recalculation Parameters (tdpcg0240s000)** session.

## Chapter 4: Landed Costs

### Landed costs - price stages

*Price stages* can be specified for the landed cost lines that are linked to a purchase order line. If the **Price Stage Mandatory** check box is selected in the **Purchase Order Parameters (tdpur0100m400)** session, the price stage is mandatory for these landed cost lines.

In the Price Stage field of the Landed Costs Revisions (tclct1120m000) session, you can specify a price stage for a landed cost revision. When a landed cost line is created for a purchase order line, the price stage is defaulted from the relevant landed cost revision to the **Landed Cost Lines (tclct2100m000)** session. You can manually link a price stage to a landed cost line in the **Landed Cost Lines (tclct2100m000)** session, if a default price stage is not specified in the **Landed Costs Revisions (tclct1120m000)** session.

The **Price Stage** that is specified for a landed cost line, cannot be modified after the landed cost line is matched and approved in Accounts Payable. Also, you cannot update a landed cost line if a receipt or advance shipment notice is linked to the purchase order line.

**Note:** If the **Change Requests** check box is selected in the **Purchase Order Parameters (tdpur0100m400)** session, the price stage can be modified only by using the *change request* process.

If a *blocking definition* is specified for the **Price Stage** that is linked to the landed cost line, the purchase order line is blocked based on the phase for which the blocking is specified. If multiple landed cost lines exist for the purchase order line and different price stages and blocking phases are specified, the most restrictive blocking phase is considered and blocking is applied accordingly.

#### Example

- The blocking phase for the price stage of the purchase order line is set to **Release**.
- The blocking phase for the price stage of the linked landed cost line is set to **Order Entry**.

Consequently, the purchase order line is blocked at order entry.

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