



Infor LN Sales User Guide for Sales Quotations

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About this Guide

This document provides an introduction to sales quotations and explains the sales quotation procedure and functions.

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 sales quotations. Use the current editions of these related references to research information that is not covered in this guide:

- *User Guide for Sales Master Data*
- *User Guide for Product Catalogs*
- *User Guide for Margin Control*
- *User Guide for Sales Orders*
- *User Guide for Project Pegging*
- *User Guide for Pricing*
- *User Guide for Material Pricing*
- *User Guide for Price Stages*

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Chapter 1: Introduction

Sales quotations

Sales quotations are used to supply a sold-to business partner with the required details to make a purchasing decision.

You can create a *sales quotation* in response to a *request for quotation (RFQ)* from a business partner, or as a sales tool to initiate the sales process with potential business partners. A quotation includes the dates, terms, items, or item descriptions to be sold, and a *success percentage*, which reflects the level of certainty that the quotation will be accepted. Sales quotations are included in the planning modules based on their success percentages. Quotations with a high success percentage are considered as sold.

You can print and send quotations to business partners. You can specify the results of the returned quotations in Sales. If the quotation is not accepted, you can specify the reason for failure and the competitor who won the quote. If the business partner accepts the quotation, you can transfer the quotation to a sales order and specify the reason for success.

Sales quotation master data

Before you can use the sales quotation procedure, you must specify these parameters and master data:

- 1 Select the Quotations check box in the **Sales Parameters (tdsls0100s000)** session.
- 2 Specify the sales quotation parameters in the Sales Quotation Parameters (tdsls0100s100) session.
- 3 Use the Competitors (tdsls1106m000) session to define and track *competitors* through the sales quotation procedure. If a quotation line is not successful, you can indicate the competitor who won the order.
- 4 To improve quotation success percentages, it is essential to record the reasons for acceptance or rejection of quotations. The reasons for success or failure, as specified in the Reasons (tcmcs0105m000) session, enable you to understand the strengths and weaknesses of quotations. For each quotation line, you can indicate the reason for success or failure.

Sales quotation procedure

The sales quotation procedure includes steps such as creating, printing, specifying quotation results, processing, and submitting sales quotations.

For more information, refer to Sales quotation procedure.

Sales quotation additional processes

A number of processes do not always occur in the sales quotation procedure, but can be applicable in specific situations.

For more information, refer to Sales quotations - additional processes.

Chapter 2: Procedure

Sales quotation procedure

To create and process sales quotations:

1 Sales Quotation (tdsls1600m000)

Specify a sales quotation header and lines in the Sales Quotation (tdsls1600m000) session. In this session, you can specify the most important information for a sales quotation and to process the quotation.

2 Approve Sales Quotations (tdsls1211m000)

If the Approval Required check box is selected in the **Sales Quotation Parameters (tdsls0100s100)** session, sales quotation approval is mandatory in the sales quotation procedure.

3 Print Sales Quotations (tdsls1401m000)

Print the sales quotation in the Print Sales Quotations (tdsls1401m000) session and send it to the business partner for review. This document includes the price and conditions for delivering the required goods. Additional copies can be printed for filing.

If the **Approval Required** check box is selected in the **Sales Quotation Parameters (tdsls0100s100)** session, the sales quotation must be approved before it can be formally printed, that is the status is set to **Printed**.

4 Sales Quotation Results (tdsls1101s100)

Specify the business partner's response to the quotation in the Sales Quotation Results (tdsls1101s100) session. The business partner can either accept or reject the submitted quotation line. The reason for acceptance or rejection and the competitor who lost or won the quotation line can also be indicated in this session. This information can be important for future quotations.

You can use the Global Update of Sales Quotations (tdsls1205s000) session to specify results for the entire quotation, or for a group of quotations.

5 Process Sales Quotations (tdsls1200m000)

If the business partner accepts a quotation line, you can generate a sales order from the submitted quotation line in the Process Sales Quotations (tdsls1200m000) session.

6 Sales Orders (tdsls4100m000)

Maintain sales orders that are created from a quotation in the Sales Orders (tdsls4100m000) session.

Note: You can also complete the previous steps using the Sales Quotes (tdsls8310m000) session.

Chapter 3: Additional processes

Sales quotations - additional processes

A number of processes do not always occur in the sales quotation procedure, but can be used depending on specific situations.

Checking ATP and CTP

You can carry out an *available-to-promise (ATP)* and *capable-to-promise (CTP)* check for the quotation. This is executed automatically if, in the **Planning Parameters (cprpd0100m000)** session, the **CTP Check for Sales** check box is selected and one of the **Inventory Check during Quotation Line Entry**, **Inventory Check during Confirmation**, or **Inventory Check during Processing** parameters are set to **Yes** or **Time-Phased** in the **Sales Quotation Parameters (tdsls0100s100)** session. If the free available inventory (ATP) and additional critical components and capacities (CTP) are insufficient to fulfill the quotation line, you can, for instance, handle the shortage by means of a delivery schedule, which you can set up in the **ATP Handling (cprrp4800m000)** session. If you want to use the delivery schedule, you must manually update the schedule line.

You can start the **ATP Handling (cprrp4800m000)** session as follows:

- Manually, if you want to carry out offline ATP/CTP checks.
- Automatically, if it is defined as an automatic inventory shortage handling option for the order type.
- Manually, from the Inventory Shortage Menu (tdsls4830s000) that is displayed during quotation line entry, confirmation, or processing.

Configuring product variants

You can configure a *product variant* for a *generic item* from the quotation line.

Copying BOM components to a sales quotation

You can use the **Copy BOM Components to Sales Quotation (tdsls1812s000)** session to copy *bill of material* components to a sales quotation. You must enter a manufactured item and the number of BOM levels to copy to the quotation. A sales quotation line is added for each position in the bill of material that does not contain another level of components.

Creating sales quotations from a catalog

You can create a new sales quotation based on a *catalog*.

Deleting sales quotations

You can delete (processed) sales quotations in the **Archive/Delete Sales Quotations (tdsls1210m000)** session.

Offering an alternative

You can offer a sold-to business partner more than one choice for a particular quotation. If you click **Create Alternative** on the *appropriate* menu of the **Sales Quotation Lines (tdsls1501m000)** session, you can create an alternative line. This line has the same position number as the primary quotation line, but the sequence number is increased by one.

Linking price stages

You can specify and update *price stages* for sales quotation lines. When processing a quotation to a sales order, the price stage is copied from the quotation line to the sales order line. Sales order lines can be blocked because of the price stage.

Pegging project costs for a quotation line

If project pegging is mandatory for the item on the sales quotation line, a *peg* must be specified in the **Sales Quotation Lines (tdsls1501m000)** session.

Printing and reviewing sales quotations

You can print and review sales quotations in the **Preview Sales Quotation (tdsls1401m200)**, **Print Sales Quotations (tdsls1419m000)**, and **Print Sales Quotation Lines (tdsls1420m000)** sessions.

Retrieving material prices

If the **Material Pricing in Sales** check box is selected in the Material Price Parameters (tcmpr0100m000) session and the material pricing master data is specified, LN can retrieve material price information and calculate *material prices* for a sales quotation line.

Specifying after-sales services

You can specify the after-sales services that will apply to a sold item after delivery. When processing a quotation to a sales order, the after-sales service data is copied from the sales quotation to the sales order.

Product variants in Sales

In Sales, you can generate *product variants for configurable items*, which are items that have the Configurable check box selected in the **Items (tcibd0501m000)** session.

In the **Items (tcibd0501m000)** session, **Manufactured**, **Purchased**, or **Product** items with the Default Supply Source set to **Assembly** and **Generic** items, are always configurable.

Note:

For items with the *default supply source* set to **Assembly** in the **Items (tcibd0501m000)** session, the following are applicable:

- If the **Sell Multiples of Same Configuration** check box is cleared in the **Assembly Planning Parameters (tiapl0500m000)** session, the order quantity is limited to one on a sales order line. Only if the **Sell Multiples of Same Configuration** check box is selected in the **Assembly Planning Parameters (tiapl0500m000)** session, you can enter an item with an order quantity greater than one and sell multiples of the same assembly product variant, which results in several assembly orders linked to one sales order line. To identify the product variant, the various assembly orders and the sales order line have the same *specification*. These items are also called *assembly items*. For more information, refer to *Selling multiples of product variants for assembly and Assembly items*.
- The **Configurator** check box in the **Assembly Planning Parameters (tiapl0500m000)** session determines whether you must configure the item in Product Configuration or whether LN automatically generates a product variant for the item in the **Product Variants - Inventory (Assembly) (tiapl3600m000)** session.

Linking product variants

If the item is a configurable item, you can choose to immediately configure the item at line entry in the **Sales Order Lines (tdsls4101m000)** and **Sales Quotation Lines (tdsls1501m000)** sessions. If you want to configure the product variant after the sales line is saved, on the *appropriate menu*, click **Configurator** to configure the product variant from the Product Configurator (tipcf5120m000) session.

You can also choose to link an existing product variant in the **Product Variant** field of the **Sales Order Lines (tdsls4101m000)** and **Sales Quotation Lines (tdsls1501m000)** sessions.

Product variants can be configured or selected here:

Default Supply Source	Item on sales order/quotation	Configure by PCF parameter	Configure product variant	Select product variant from session:
Job Shop	Generic	Not applicable	Product Configurator (tipcf5120m000)	Product Variants (tipcf5501m000)
Assembly	Generic	Selected	Product Configurator (tipcf5120m000)	Product Variants - Inventory (Assembly) (tiapl3600m000)
Assembly	Generic	Cleared	Not applicable	Product Variants - Inventory (Assembly) (tiapl3600m000)
Assembly	Manufactured/Purchased/Product	Selected	Product Configurator (tipcf5120m000)	Product Variants - Inventory (Assembly) (tiapl3600m000)
Assembly	Manufactured/Purchased/Product	Cleared	Not applicable	Product Variants - Inventory (Assembly) (tiapl3600m000)

Note: If LN is integrated with the Product Configuration Management configurator, the product variant is configured in *CPQ Configurator* and not in the **Product Configurator (tipcf5120m000)** session. For more information, refer to *CPQ Configurator set up*.

Reusing product variants

On different sales order/quotation lines of the same sales order or quotation, a specific product variant can be used multiple times.

This functionality can only be used if the following settings are applicable:

- The Identifying Item Code check box is selected in the **Product Configuration Parameters (tipcf0100m000)** session.
- The Equate Project (PCS) with Sales Order check box is selected when generating a project structure for the configured item in the **Generate (Project PCS) Structure for Sales Orders (tdsls4244m000)** session.
- The Allow reuse of Configurations check box is selected in the **Product Configuration Parameters (tipcf0100m000)** session.

Example

Generic item	Feature	Options
100: Chair X	Color	1: Red
		2: Blue
	Height	1: A
		2: B

Sales order/quotation after the configuration is saved:

Order	Position	Item	Description	Variant	Options chosen
123	5	Text	Classroom 1a	-	-
	10	100	Chair X	10	Color Red, Height A
	15	100	Chair X	11	Color Red, Height B
	20	Text	Classroom 1b	-	-
	25	100	Chair X	10	Color Red, Height A
	30	100	Chair X	11	Color Red, Height B

Sales order/quotation after the project structure is generated in the **Generate (Project PCS) Structure for Sales Orders (tdsls4244m000)** session:

Order	Position	Item	Description	Variant	Options chosen
	5	Text	Classroom 1a	-	-

Order	Position	Item	Description	Variant	Options chosen
123	10	100-1-A	Chair X, Color Red, Height A	10	Color Red, Height A
	15	100-1-B	Chair X, Color Red, Height B	11	Color Red, Height B
	20	Text	Classroom 1b	-	-
	25	100-1-A	Chair X, Color Red, Height A	10	Color Red, Height A
	30	100-1-B	Chair X, Color Red, Height B	11	Color Red, Height B

Checks applied in the example

- After configuration of order line 15, the same item is found on line 10. The new item code of position 10 (123/100-1-A) and the item code of line 15 (123/100-1-B) are different. Therefore, order line 15 is accepted.
- After configuration of order line 25, the same item with the same options is found on line 10. The new item code of position 10 and the item code of line 25 are the same: 123/100-1-A. Order line 25 can only be accepted if the **Allow reuse of Configurations** check box is selected.

The item code of position 10 and 25 are the same. In the **Items (tcibd0501m000)** session, the **Product Variant** for item 123/100-1-A is 10.

Note: The **Generic Item - Settings for Data Generation (tipcf3101m000)** session affects the expected result:

- In the example, the settings from this session are used: the selected options are part of the generated item code. If you select another option, a different customized item code is generated.
- If the settings for data generation are not specified in the **Generic Item - Settings for Data Generation (tipcf3101m000)** session, the customized item code is based on order number – item code, that is 123-100. In this case, position 15 would have resulted in an error message: the customized item code is the same as position 10 but the options are different.

Updating sales order lines and sales quotation lines

When you insert an existing product variant on the sales order/quotation line, these fields are updated on the sales order/quotation line:

Effectivity Unit	For items with the Default Supply Source set to Assembly and an effectivity unit linked to the product variant in Assembly Planning.
Warehouse	For Manufactured , Purchased , or Product items with the Default Supply Source set to Assembly .
Work Center	For Generic items with the Default Supply Source set to Assembly .
Price	-
Serial Number	Is updated when the linked <i>assembly order</i> is sequenced. The sales order cannot be released to Warehousing without this number.

Standard Cost	Is updated after you do one of the following: <ul style="list-style-type: none"> Click Calculate Standard Costs in the Product Variants (Assembly) (tiapl3500m000) session. Freeze the assembly order.
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Note: For **Manufactured**, **Purchased**, or **Product** items with the **Default Supply Source** set to **Assembly** and the **Sell Multiples of Same Configuration** check box selected in the **Assembly Planning Parameters (tiapl0500m000)** session, multiple assembly orders can be linked to one sales order line, which means the sales order line cannot be updated with a serial number. Therefore, Warehousing enters serial numbers in a *lot and serial set*, which you can view by clicking the **Lot and Serial Set** button in the **Sales Order Actual Delivery Lines (tdsls4106m000)** session. Using this set, multiple serials are linked to the delivery line.

Updating product variants

When you change the **Planned Delivery Date** or the **Order Date/ Quotation Date** on the sales order/quotation line, the following fields are updated on the linked product variant:

Changed field on sales order/quotation line	Updated field on product variant	Update restrictions
Planned Delivery Date	Requested Offline Date	None
Planned Delivery Date	Planned Offline Date	<ul style="list-style-type: none"> Product variant status is Open. No assembly orders exist.
Planned Delivery Date	Configuration Date	<ul style="list-style-type: none"> Product variant status is Open. No assembly orders exist. The Configuration Date (PCS) is set to Delivery Date in the Sales Parameters (tdsls0100s000) session. The product variant is not configured by Product Configuration.
Order Date/ Quotation Date	Configuration Date	<ul style="list-style-type: none"> Product variant status is Open. No assembly orders exist. The Configuration Date (PCS) is set to Order Date in the Sales Parameters (tdsls0100s000) session. The product variant is not configured by Product Configuration.

Note: For **Manufactured**, **Purchased**, or **Product** items with the **Default Supply Source** set to **Assembly** and the **Sell Multiples of Same Configuration** check box selected in the **Assembly Planning Parameters (tiapl0500m000)** session, multiple assembly orders can be linked to one sales order line, and therefore multiple planned delivery dates can be applicable for a sales order line. As a result, date changes are not updated to the product variant.

Unlinking product variants

On the sales order/quotation line, you can unlink a product variant.

Unlinking does not remove the product variant, but removes only the reference to the sales order or quotation on the product variant and on the assembly order, if applicable. In the **Product Variants (Assembly) (tiapl3500m000)** and **Product Variants (tipcf5501m000)** sessions, the **Reference Type** remains **Sales Order**, **Sales Quotation**, Or **Standard Variant**.

The unlinked product variant can be reused by another sales order/quotation.

Note:

For items with the **Default Supply Source** set to **Assembly**, the following are applicable:

- In the **Assembly Planning Parameters (tiapl0100s000)** session, the Allow Assembly Orders for unsold Product Variants check box determines when you can unlink product variants.
- If the item is rejected during warehouse inspection, the product variant status changes to **Canceled**. You can then cancel the linked sales order line or remove the product variant from the sales order line. If required, you can link another product variant.

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