

*myridas*TM *User Guide*

Version 10.0 for Microsoft Dynamics™ GP 10.0

Extended Pricing Enhancements

Trinity Computer Services Limited

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Contents

CONTENTS	2
USING THIS GUIDE	5
ABOUT MYRIDAS	6
EXTENDED PRICING ENHANCEMENTS	7
1. EXTENDED PRICING EXTRAS SETUP WINDOW	8
1.1 <i>Setting Defaults for Extended Pricing Enhancements</i>	8
2. EXTENDED PRICING ENHANCEMENTS DEBTOR/PROSPECT MAINTENANCE WINDOW	11
2.1 <i>Setting Up Debtors for Extended Pricing Enhancements Functionality</i>	11
COST UPLIFT PRICING	13
3. SETTING UP COST UPLIFT PRICES	13
4. HOW COST UPLIFT PRICES ARE CALCULATED	14
PROMOTIONS	15
5. MYRIDAS PROMOTIONS	15
6. AVAILABLE PROMOTIONS INFORMATION WINDOW	16
6.1 <i>Viewing Promotions for Sales Items</i>	16
NEGATIVE ADJUSTMENTS IN PRICE SHEETS	17
7. SETTING UP NEGATIVE ADJUSTMENTS IN PRICE SHEETS	17
VISIBLE DISCOUNTS	18
8. SETTING UP VISIBLE DISCOUNTS	18
AGGREGATE PRICING	19
9. HOW AGGREGATE PRICES ARE CALCULATED	20
10. AGGREGATE PRICING GROUP MAINTENANCE WINDOW	22
10.1 <i>Setting Up Aggregate Pricing Groups</i>	22
11. AGGREGATE PRICING GROUP BREAKS WINDOW	23
11.1 <i>Setting Up Quantity Breaks for Aggregate Pricing</i>	24
12. AGGREGATE PRICING GROUP ALLOCATION WINDOW	25
12.1 <i>Allocating Items to Aggregate Pricing Groups</i>	25
13. AGGREGATE PRICING GROUP ALLOCATION RANGE WINDOW	26
13.1 <i>Assigning Ranges of Items to a Group Code</i>	27
14. AGGREGATE PRICING UNIT ITEM MAINTENANCE WINDOW	28
14.1 <i>Setting Up Individual Items for Aggregate Pricing</i>	28
15. AGGREGATE PRICING UNIT OF MEASURE MAINTENANCE WINDOW	29
15.1 <i>Setting Up Aggregate Pricing Units for Unit of Measure Schedules</i>	29
16. AGGREGATE PRICING DEBTOR/PROSPECT ACTIVATION BY RANGE WINDOW	30
16.1 <i>Activating Aggregate Pricing for a range of debtors or prospects in the Aggregate Pricing – Debtor/Prospect Activation by Range window</i>	30
17. AGGREGATE PRICING GROUP DEALS – ASSIGN DEBTORS WINDOW	31
17.1 <i>Assigning debtors to aggregate deals in the Aggregate Pricing Group Deals – Assign Debtors window</i>	32
18. AGGREGATE PRICING GROUP DEALS – ASSIGN DEBTORS BY RANGE WINDOW	33
18.1 <i>Assigning Ranges of Debtors to an Aggregate Pricing Group Deal</i>	34
19. SALES TRANSACTION ENTRY WITH AGGREGATE PRICING	35
20. AGGREGATE PRICING REWORK WINDOW	36

20.1 <i>Selecting Aggregate Prices in the Aggregate Pricing Rework window</i>	36
21. AGGREGATE PRICING TRACKER WINDOW	37
21.1 <i>Viewing Aggregate Pricing Quantity Details During Sales Transaction Entry</i>	38
22. AGGREGATE PRICING GROUP DETAIL VIEW WINDOW	39
22.1 <i>Viewing Aggregate Group Details During Sales Transaction Entry</i>	39
23. AGGREGATE PRICING PRICE TRACE WINDOW	41
23.1 <i>Tracing an Aggregate Price Calculation</i>	41
SITE SPECIFIC PRICING	43
24. SITE PRICE TYPE MAINTENANCE WINDOW	44
24.1 <i>Setting Up Site Price Types</i>	44
25. ASSIGN SITE PRICE TYPE TO SITE ID WINDOW	45
25.1 <i>Assigning a Site Price Type to a Site ID</i>	45
26. ASSIGN SITE IDS TO SITE PRICE TYPES WINDOW	46
26.1 <i>Assigning a Site Price Type to Multiple Sites</i>	46
27. ASSIGN SITE IDS TO SITE PRICE TYPES - BY RANGE WINDOW	47
27.1 <i>Assigning a Site Price Type to a Range of Sites</i>	48
28. ASSIGN SITE PRICE TYPE TO PRICE SHEET ID WINDOW	49
28.1 <i>Assigning a Site Price Type to a Price Sheet</i>	49
29. ASSIGN PRICE SHEETS TO SITE PRICE TYPES WINDOW	50
29.1 <i>Assigning Multiple Price Sheets to a Site Price Type</i>	50
30. ASSIGN PRICE SHEETS TO SITE PRICE TYPES - BY RANGE WINDOW	51
30.1 <i>Assigning Ranges of Price Sheets to a Site Price Type</i>	52
31. PRICE TRACE ENQUIRY - SITE ID WINDOW	53
31.1 <i>Tracing a Site Specific Price</i>	53
ORDER VALUE DISCOUNTS.....	54
32. HOW ORDER VALUE DISCOUNT IS CALCULATED	54
33. ORDER VALUE DISCOUNT SETUP WINDOW	55
33.1 <i>Setting Up Order Value Discount options</i>	55
34. ORDER VALUE DISCOUNT GROUP MAINTENANCE WINDOW.....	56
34.1 <i>Setting Up Order Value Discount Groups</i>	57
35. ORDER VALUE DISCOUNTS – ASSIGN DEBTORS WINDOW	58
35.1 <i>Assigning Debtors to Order Value Discount Groups</i>	58
36. ORDER VALUE DISCOUNTS – ASSIGN DEBTOR RANGES WINDOW	60
36.1 <i>Assigning Ranges of Debtors to an Order Value Discount Group</i>	60
37. ORDER VALUE DISCOUNT RATES WINDOW	61
37.1 <i>Maintaining Order Value break points and discount percentages</i>	62
38. ORDER VALUE DISCOUNTS – EXCLUDED ITEMS WINDOW	63
38.1 <i>Excluding Items from Order Value Discount</i>	63
39. ORDER VALUE DISCOUNTS – EXCLUDED ITEMS RANGE WINDOW	64
39.1 <i>Excluding Ranges of Items from Order Value Discounts</i>	65
40. SALES TRANSACTION ENTRY WITH ORDER VALUE DISCOUNTS.....	66
41. THE ORDER VALUE DISCOUNTS WINDOW	66
41.1 <i>Viewing Order Value Discount for a sales document in the Order Value Discounts window</i>	67
42. THE ORDER VALUE DISCOUNT DOCUMENT WINDOW	67
42.1 <i>Overriding the Order Value Discount for a document</i>	68
43. THE ORDER VALUE DISCOUNT LINE ITEM WINDOW	68
43.1 <i>Excluding a line item from Order Value Discount</i>	69
AGGREGATE PROMOTIONS.....	70
44. HOW AGGREGATE PROMOTIONS ARE CALCULATED	70
44.1 <i>Total Quantity Promotions</i>	70
44.2 <i>Points Allocation Promotions</i>	71

45. AGGREGATE PROMOTIONS MAINTENANCE WINDOW	72
45.1 <i>Setting Up Aggregate Promotions</i>	72
46. AGGREGATE PROMOTIONS MAINTENANCE – FREE ITEMS WINDOW	74
46.1 <i>Maintaining Aggregate Promotion Break Points</i>	74
47. AGGREGATE PROMOTIONS – ASSIGN DEBTORS WINDOW	76
47.1 <i>Assigning Debtors to Aggregate Promotions</i>	76
48. AGGREGATE PROMOTIONS – ASSIGN DEBTORS BY RANGE WINDOW	77
48.1 <i>Assigning a Range of Debtors to an Aggregate Promotion</i>	78
49. AGGREGATE PROMOTIONS – ASSIGN DEBTOR GROUPS BY RANGE WINDOW	79
49.1 <i>Assigning a Range of Debtor Groups to an Aggregate Promotion</i>	79
50. AGGREGATE PROMOTIONS – ASSIGN ITEMS WINDOW	81
50.1 <i>Assigning Items to Aggregate Promotions</i>	81
51. AGGREGATE PROMOTIONS – ASSIGN ITEMS BY RANGE WINDOW.....	83
51.1 <i>Assigning Ranges of Items to an Aggregate Promotion</i>	83
52. FREE ITEM LIST MAINTENANCE WINDOW	85
52.1 <i>Maintaining Free Item Lists</i>	85
53. FREE ITEM LIST MAINTENANCE – RANGE ALLOCATION.....	87
53.1 <i>Assigning Ranges of Items to a Free Item List</i>	87
54. AGGREGATE PROMOTIONS – DEBTOR GROUP MAINTENANCE WINDOW	89
54.1 <i>Maintaining Aggregate Promotion Debtor Groups</i>	89
55. AGGREGATE PROMOTIONS - DEBTOR GROUP - ASSIGN BY RANGE	90
55.1 <i>Assigning Ranges of Debtors to an Aggregate Promotion Debtor Group</i>	91
56. AGGREGATE PROMOTIONS IN SALES TRANSACTION ENTRY.....	92
57. AGGREGATE PROMOTION TRACKER WINDOW.....	93
57.1 <i>Viewing the status of aggregate promotions</i>	94
57.2 <i>Viewing the available free items for a Points Allocation Promotion</i>	95
58. AGGREGATE PROMOTIONS– SELECT PROMOTIONS WINDOW.....	96
58.1 <i>Adding Free Items to an Order</i>	96
58.2 <i>Selecting Free Items from a List</i>	97
58.3 <i>Selecting Free Items from a List – Points Allocation</i>	98
59. AGGREGATE PROMOTIONS ENQUIRY	98
59.1 <i>Viewing Aggregate Promotions for a debtor or item</i>	99
DEBTOR PRICE REPORT.....	100
60. DEBTOR PRICE LIST PRODUCTION WINDOW.....	100
60.1 <i>Reporting on Debtor Price Lists</i>	101
60.2 <i>Clearing Price Report data</i>	103
APPENDIX A.....	104
ACCESS TO MYRIDAS WINDOWS	104
<i>Extended Pricing Enhancements</i>	104
APPENDIX B.....	110
AMENDED MICROSOFT DYNAMICS™ GP WINDOWS	110
APPENDIX C.....	111
AMENDED MYRIDAS WINDOWS	111
APPENDIX D.....	112
MYRIDAS REPORTS.....	112
<i>Extended Pricing Enhancements Report Functions</i>	112
INDEX.....	114

Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Extended Pricing Enhancements module:

- Extended Pricing Enhancements



The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See [Appendix A](#) for a list of Myridas windows and their location in the software.

A full range of tutorials is also available on our website, <http://www.trinitypartner.com>.

About Myridas

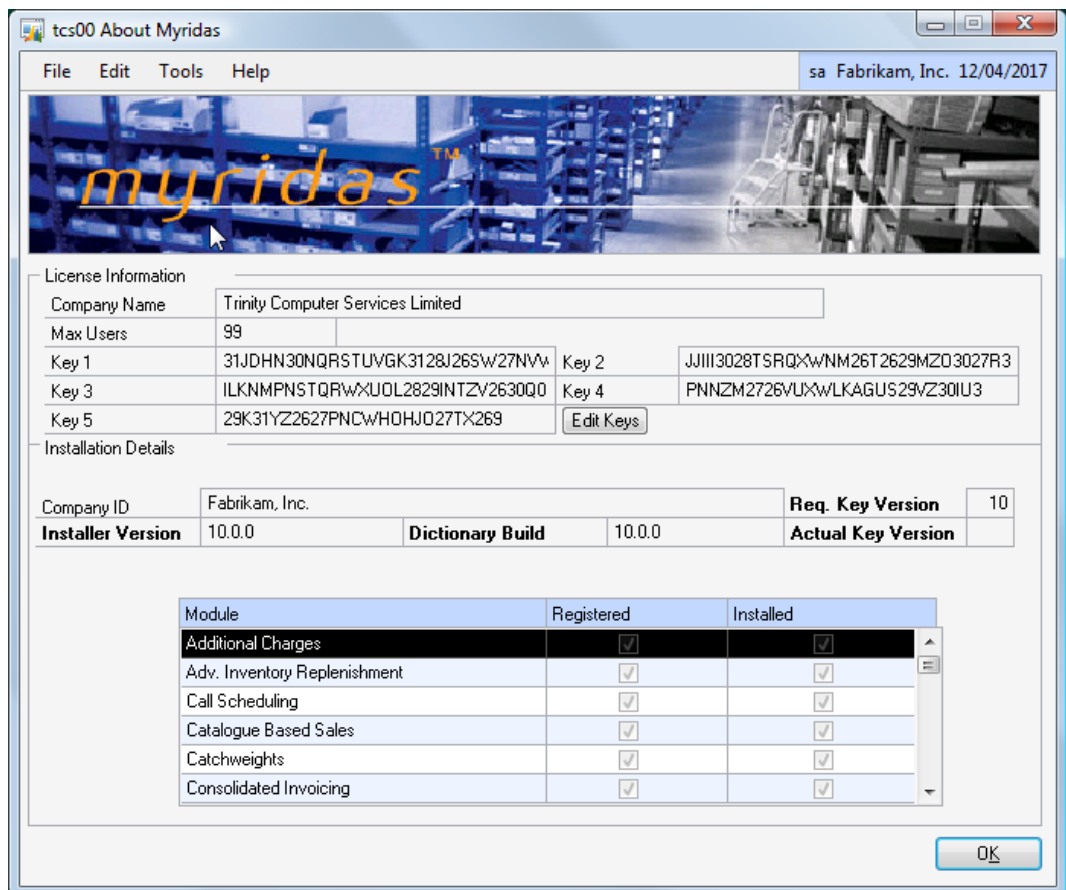


Tools >> Setup >> Myridas >> About Myridas

Help >> About Microsoft Dynamics GP >> Additional >> About Myridas

Use the About Myridas window to check your registration information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Extended Pricing Enhancements

The Myridas Extended Pricing module provides additional functionality for Microsoft Dynamics™ GP Extended Pricing.

The key features of the Extended Pricing Enhancement module are:

- The facility to set up and use cost uplift prices
- Promotion information window displaying promotion details during sales transaction entry
- An alternative calculation for quantity free promotions
- The facility to include negative value adjustments on price sheets
- Visible discounts to view discount details for sales transactions
- Aggregate pricing based on multiple item purchases
- Site specific pricing
- Price list production
- Order value discounts based on total order value
- Aggregate promotions based on total quantity purchased from a list of items

The Myridas Extended Pricing Enhancements module is fully integrated with Microsoft Dynamics™ GP Extended Pricing. Please see [Appendix B](#) for full details of enhancements to specific Extended Pricing windows.

If you are using the Myridas Extended Pricing Integration module then cost uplift prices can be imported from or exported to an excel spreadsheet. See the Extended Pricing Integration User Guide for further details.

Note that if you have site specific pricing switched on then all price sheets in use must be assigned to a site price type.

1. Extended Pricing Extras Setup window

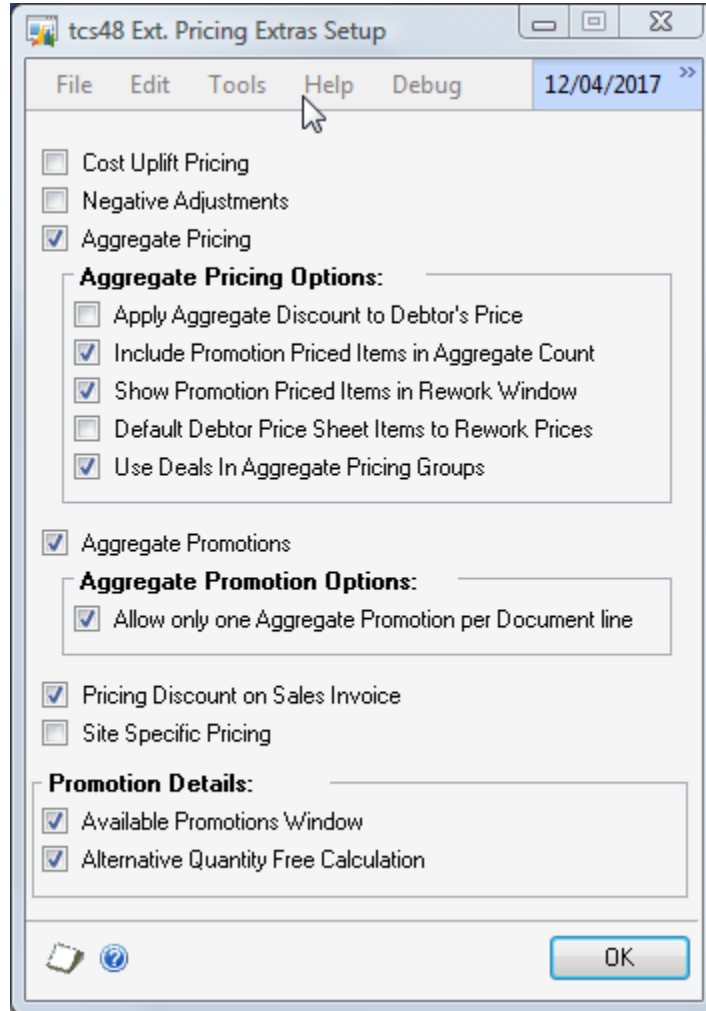


Tools >> Setup >> Myridas >> Extended Pricing Enhancements>> Extended Pricing Enhancements Setup

Use the Extended Pricing Extras Setup window to:

- Set defaults for extended pricing enhancements

The Extended Pricing Extras Setup window



1.1 Setting Defaults for Extended Pricing Enhancements

To set defaults for extended pricing enhancements in the Extended Pricing Extras Setup window:

1. The following settings are available in the window:

Cost Uplift Pricing	Enables you to calculate a selling price by adding a percentage or value to the cost price. See Cost Uplift Pricing .
Negative Adjustments	Enables you to enter negative values for value adjustments against price sheet items. See Negative

	Adjustments in Price Sheets.
Aggregate Pricing	Enables prices to be determined from the total quantity of a range of items on a sales document. See Aggregate Pricing .
Aggregate Pricing Option: Apply Aggregate Discount to Debtor's Price	If this option is set, any value off or percentage off from the aggregate price book will be applied to the debtor's current price rather than to the base price. See Aggregate Pricing .
Aggregate Pricing Option: Include Promotion Priced Items in Aggregate Count	If this option is set, promotion priced items which are part of an aggregate group will be included in the total quantities for Aggregate Pricing . Turn off this option if you don't want promotion priced items to contribute to aggregate pricing totals.
Aggregate Pricing Option: Show Promotion Priced Items in Rework window	If this option is set, promotion priced items will be displayed in the Aggregate Pricing rework window if an aggregate price is available. Turn off this option if you don't want to see promotion priced items in the Aggregate Pricing rework window .
Aggregate Pricing Option: Default Debtor Price Sheet Items to rework prices	If this option is set, items whose price originated from a debtor price sheet will by default be marked to update in the Aggregate Pricing Rework window .
Aggregate Pricing Option: Use Deals In Aggregate Pricing Groups	If this option is selected, multiple sets of quantity breaks and aggregate price books can be maintained against a single aggregate group in the Aggregate Pricing Group Breaks window . Different customers can then be offered different prices for the same aggregate pricing group.
Aggregate Promotions	Enables free item promotions to be given according to the total quantity of a range of items on a sales document. See Aggregate Promotions .
Allow only one Aggregate Promotion per Document line	If this option is set, a sales document line cannot contribute towards more than one aggregate promotion. When a document line is entered, if the item could contribute to multiple promotions, the user will be prompted to select one. See Aggregate Promotions .
Pricing Discount on Sales Invoices	Enables Visible Discounts functionality. Invoices can be modified to display the discount given on a transaction where the debtor has been set up for visible discounts in the Extended Pricing Enhancements Debtor/Prospect Maintenance window .

	See Visible Discounts .
Site Specific Pricing	Enables Site Specific Pricing functionality with which multiple prices can be set up for items on a site by site basis. See Site Specific Pricing for further details.
Available Promotions Window	If any promotions exist for an item that is selected for a sales transaction then the Available Promotions Info window will be displayed. See Myridas Promotions . Note that this option applies only to single item promotions from promotion price sheets, not to aggregate promotions .
Alternate Quantity Free Calculation	Quantity free calculations will follow the Myridas calculation for working out free quantities rather than the standard calculation. See Myridas Promotions . Note that this option applies only to single item promotions from promotion price sheets, not to aggregate promotions .

Click to select the required options.

2. Click OK to close the window.

Note that if you selected the Cost Uplift Pricing option then the base cost book - called BASECOSTBOOK - will be created automatically.

2. Extended Pricing Enhancements Debtor/Prospect Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Debtor/Prospect Maintenance

Use the Extended Pricing Enhancements Debtor/Prospect Maintenance window to:

- Set up debtors for Extended Pricing Enhancements functionality

The Extended Pricing Enhancements Debtor/Prospect Maintenance window

Note that this window is also available as an Additional option from the Debtor Maintenance and Sales Prospect Maintenance windows.

2.1 Setting Up Debtors for Extended Pricing Enhancements Functionality

To set up debtors for aggregate pricing and/or visible discounts in the Extended Pricing Enhancements Debtor/Prospect Maintenance window:

1. Click to select Customer or Prospect to set up for extended pricing enhancements functionality.
2. Enter a debtor/prospect ID or select one using the lookup.
3. Click the Aggregate Pricing check box to set the selected debtor/prospect for [aggregate pricing](#) functionality.
4. Enter an Aggregate Starting Quantity if required. If you enter an aggregate starting quantity then when sales transactions for this debtor are entered with an aggregate starting quantity greater than the accumulated quantity in the transaction, the aggregate starting quantity will be used to establish the price book that aggregate prices are taken from rather than the actual accumulated transaction quantity.

5. Click the Pricing Discount on Sales Invoice check box to set the selected debtor/prospect for **visible discounts** functionality.
6. Click Save to save your changes and close the window.

Note that you can click Clear at any point to clear entries made in the window.

Click Delete to unassign a debtor/prospect from Extended Pricing Enhancements functionality.

*Unassigning
debtors/prospects from
Extended Pricing
Enhancements
functionality*

Cost Uplift Pricing

3. Setting Up Cost Uplift Prices

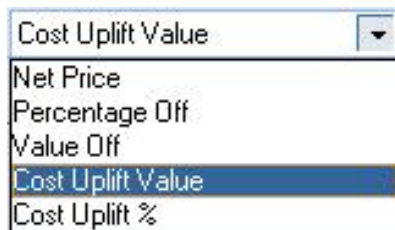
Cost uplift pricing is when a selling price for sales transactions is calculated by adding a value or percentage to the unit cost price. New, mainly underlying, functionality allows you to create cost uplift prices using the Microsoft Dynamics™ GP Extended Pricing windows.

To enable cost uplift pricing functionality you need to select the Cost Uplift Pricing option in the [Extended Pricing Extras Setup window](#). When you select this option for the first time and close the window, a new price book - the BASECOSTBOOK - is created automatically. This price book is used as the basis for cost uplift pricing and follows the same rules as the Microsoft Dynamics™ GP base price book (BASEBOOK).

Prices are not automatically added to the base cost book. To utilise cost uplift pricing you should set up one or more base price sheets and assign them to the base cost book. Add items to price sheets in the Microsoft Dynamics™ GP Price Sheet Maintenance window. You must select the Net Price Only option in this window - only net price sheets can be assigned to the base cost book.

When net prices for the required items have been assigned to the base cost book you should set up one or more cost uplift price sheets for the items. The Microsoft Dynamics™ GP Price Sheet Detail Maintenance window has been amended to include two new price type options, cost uplift value and cost uplift percentage.

Cost uplift options



Select one of the cost uplift options when creating a cost uplift price sheet. By default the base cost price book (BASECOSTBOOK) will be selected as the Base Adjusted Price on option. In the Cost Uplift Value field in the scrolling window enter the value or percentage that you want the cost price to be uplifted by in sales transactions. The adjusted price (sheet price + cost uplift value/percentage) will be displayed automatically. All other functionality within the window remains the same as with standard Microsoft Dynamics™ GP.

When a cost uplift sheet has been set up it should be assigned to a suitable debtor or price book. A cost uplift sheet cannot be assigned to the base cost book, as it does not contain net only prices.

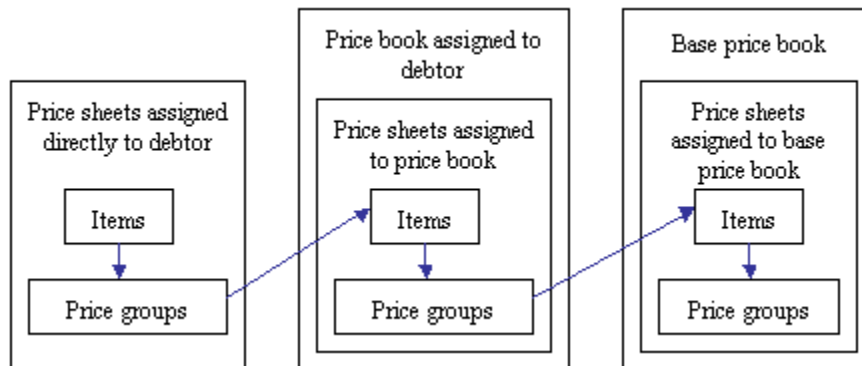
4. How Cost Uplift Prices are Calculated

The system searches for cost uplift pricing information in the same way it searches for other price type information but only to book level.

Once a cost uplift price type is found, the cost uplift percentage or value uplift is applied to the base cost book. If the price is found at sheet level it still goes straight to the base cost book to calculate the price and does not apply any other level price calculations. If no price is found on the base cost book then an error is given.

If a cost uplift price is found then the adjusted price will be brought into the sales transaction. The system will be searched for any applicable promotion sheets. If a promotion sheet is found then the cost uplift adjusted price will be amended to take account of any promotional pricing.

Refer to the illustration for more information.



Note that cost uplift prices are calculated and reported on as standard in the Microsoft Dynamics™ GP Extended Pricing and Extended Pricing Error Reports.

Promotions

5. Myridas Promotions

This section described Myridas functionality for single item promotions. See [Aggregate Promotions](#) for details of how to set up promotions based on the total quantity of a range of items.

To enable Myridas promotions functionality you need to select the Promotion Details options in the [Extended Pricing Extras Setup window](#).

Available Promotions Window option

Selecting this option will provide additional functionality when entering sales transactions.

With standard Microsoft Dynamics™ GP the Promotion Alert window is displayed only after the quantity of an item required to meet a promotion has been entered into the transaction. If the quantity entered is less than that required to meet the promotion then the user will not know that by increasing the order a promotion would have been available.

With the Available Promotions Window option enabled, when an item on a promotional price sheet is selected in a sales transaction the [Available Promotions Information window](#) will be displayed. This provides the user with full details of promotions that the item is eligible for.

Alternative Quantity Free Calculation

Microsoft Dynamics™ GP quantity free promotions allow you to create giveaway promotions. For example, you can create promotions that give away different quantities of free items depending on the quantity of an item purchased by the customer.

Myridas functionality provides an alternate calculation for working out the quantity of free items that should be given. For example, you could set up a promotional price sheet like this:

Purchase Quantity	Quantity of free items
0 to 1	0
2 to 9	1
10 to 99	8
100 to 999999999	100

If a purchase quantity of 50 were entered into a transaction then standard Microsoft Dynamics™ GP would calculate a quantity of 400 free items (purchase quantity (50) x quantity free (8)).

With the Myridas alternate free quantity calculation, if a purchase quantity of 50 were entered into a transaction the free quantity calculated would be 40 (purchase quantity (50) / quantity from (10) x quantity free (8)).

6. Available Promotions Information window



Transactions >> Sales >> Sales Transaction Entry >> Enter an item on a current promotion sheet

Use the Available Promotions Information window to:

- View promotions for sales items

The Available Promotions Information window

U of M	From Qty	To Qty	Promotion Type
Each	1	999,999,999,999	Percent of List
SPRING PROMO	01/03/2007	31/05/2007	90.00%

6.1 Viewing Promotions for Sales Items

To view promotions for sales items in the Available Promotions Information window:

1. The window will open automatically when you enter an item into a sales transaction that is on a current promotional price sheet.
2. When you have viewed available promotion details click OK to close the window.

Negative Adjustments in Price Sheets

7. Setting Up Negative Adjustments in Price Sheets

With standard Microsoft Dynamics™ GP you cannot enter negative values against price sheet items. With Myridas Extended Pricing Enhancements functionality negative values can be entered against price sheet items for value off adjustments.

To enable this functionality select the Negative Adjustments option in the [Extended Pricing Extras Setup window](#). To enter negative values in price sheets type a - symbol before the quantity to be entered.

Note that negative values are displayed in brackets.

Visible Discounts

8. Setting Up Visible Discounts

With standard Microsoft Dynamics™ GP, printed invoices display the selling price for each line item. Details of any discounts incorporated into the selling price are not explicitly visible.

With Myridas Extended Pricing Enhancements functionality you can use a new report function to display the discount applied to a transaction line on printed sales documents or reports. See [Appendix D Myridas Reports](#) for details on how to implement this functionality in documents and reports.

The actual discount that will be displayed on a modified report is the difference between the price on the BASEBOOK or Price Book/Sheet assigned to a debtor and the actual selling price used in a transaction.

Aggregate Pricing

Aggregate Pricing functionality enables quantity break pricing to be used in sales transactions to calculate prices for groups of items rather than individual item items. Items are assigned to price books and sheets as with standard Microsoft Dynamics™ GP Extended Pricing, and also assigned to an aggregate price group with each group containing one or more items. Quantity breaks can be set against aggregate pricing groups using the [Aggregate Pricing Group Maintenance window](#), with each quantity break having an aggregate price book assigned to it. If the Use Deals In Aggregate Pricing Groups option is selected in the [Extended Pricing Extras Setup window](#), multiple sets of quantity breaks and price books can be maintained against a single aggregate price group. Different customers can then receive different prices for the same aggregate group.

A setting on the Aggregate Pricing Group determines whether the price break achieved is determined from the total quantity ordered of the items in the group, or from the number of different items ordered.

See [How Aggregate Prices are Calculated](#) for further details.

For total quantity ordered type aggregate groups, aggregate quantities are based on aggregate pricing units and are always accumulated in a single unit i.e. the Aggregate Pricing Unit. These can be set against a unit of measure schedule in the [Aggregate Pricing Unit Of Measure Maintenance window](#) or against individual items in the [Aggregate Pricing Unit Item Maintenance window](#). When aggregate prices are calculated the quantity on a sales transaction will be converted to a quantity in the aggregate pricing unit. Where an item is entered into a transaction in a unit other than the aggregate pricing unit then aggregate pricing functionality will use an equivalence conversion to establish the quantity of the item that is on the transaction in the aggregate pricing unit. This equivalence will be used in establishing an aggregate price.

Debtors and prospects are set up for aggregate pricing functionality using the [Extended Pricing Enhancements Debtor/Prospect Maintenance window](#).

Note that aggregate pricing functionality is not applicable to return transactions or printed invoices.

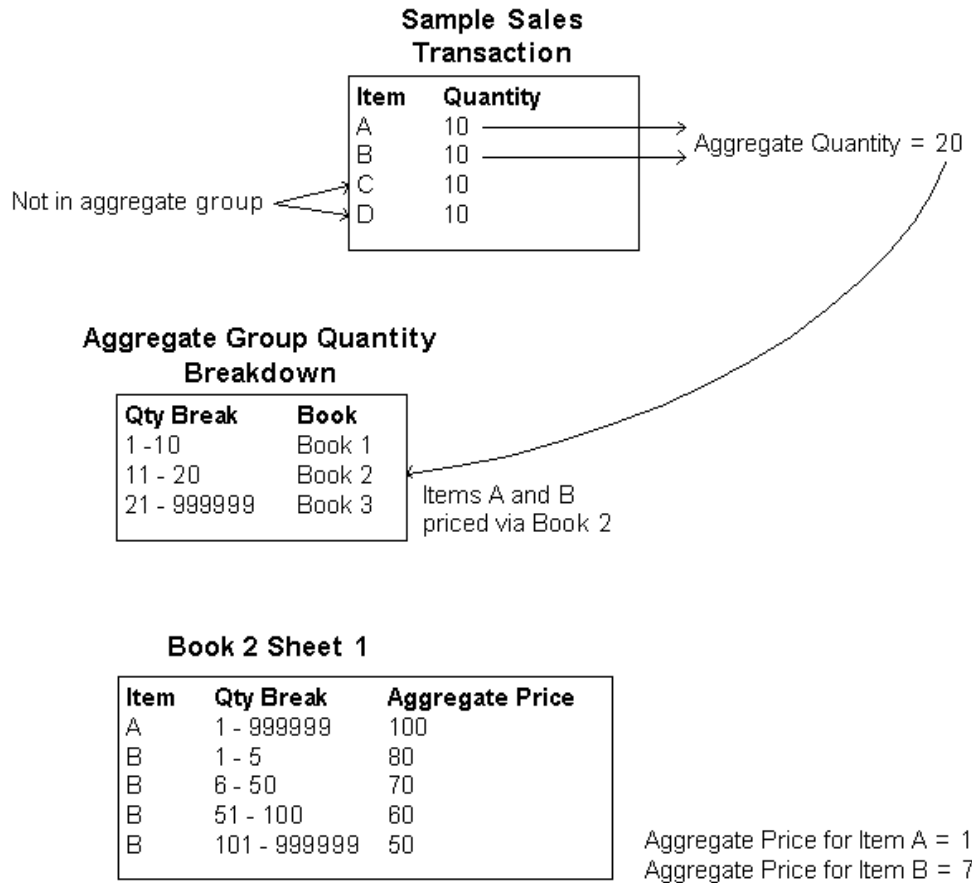
9. How Aggregate Prices are Calculated

When a transaction is entered for a debtor set up for aggregate pricing, and you select the rework aggregate prices option during sales transaction entry, aggregate pricing functionality will use the following rules to establish aggregate prices for the items on the transaction.

The following description is for Aggregate Pricing Groups of type Quantity Break Represents Total Quantity. For Quantity Break Represents Item Count type, the calculation is similar, but the total is a count of the items on the transaction, not the total quantity. Aggregate starting quantities do not apply to Quantity Break Represents Item Count type aggregate pricing.

1. If a transaction line is a free quantity promotion line or the item is not in an aggregate group then the line will be excluded from aggregate pricing calculations.
2. Promotion priced items will be excluded from the aggregate pricing quantity unless the option Include Promotion Priced Items in Aggregate Count is set in the [Extended Pricing Extras Setup](#) window.
3. An aggregate pricing unit will be searched for, first against the transaction items, then against the transaction items unit of measure schedules. If no aggregate pricing units are found then the lines will be excluded from aggregate pricing calculations.
4. The aggregate pricing quantity for each qualifying item is calculated by taking the transaction quantity, adjusting the quantity to the base unit of measure equivalence (if it is not already in the base unit of measure), then adjusting the quantity again to the equivalence in the aggregate pricing unit.
5. Item line quantities are now accumulated and cross-referenced to group codes to establish whether aggregate pricing is applicable. If item quantities are eligible for aggregate pricing then each line item will be reassessed.
6. If there is an aggregate starting quantity for the debtor that is greater than the accumulated quantity then this will be used to establish aggregate prices. If the accumulated quantity is greater, the system will use this to establish aggregate prices from the aggregate price books.
7. The system will establish which price book the accumulated quantity achieves in the aggregate price group. It will then look to price sheets assigned to the selected price group and take the appropriate prices, calculating the aggregate price for each item separately. Aggregate prices will then be displayed in the [Aggregate Pricing Rework](#) window.

See the following diagram for further explanation of how aggregate prices are calculated.



If the Apply Aggregate Discount to Debtor's Price option is not selected in the [Extended Pricing Extras Setup window](#), the Aggregate book prices will apply as they would if the book were assigned to the debtor. So any values off or percentages are applied to the Base book price.

If the Apply Aggregate Discount to Debtor's Price option is selected in the [Extended Pricing Extras Setup window](#), any values off or percentages are applied to the debtor's current price.

10. Aggregate Pricing Group Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance

Use the Aggregate Pricing Group Maintenance window to:

- Set up aggregate pricing groups

*The
Aggregate
Pricing
Group
Maintenance
window*

10.1 Setting Up Aggregate Pricing Groups

To set up aggregate pricing groups using the Aggregate Pricing Group Maintenance window:

1. Enter a Group Code or select one using the lookup.
2. If you are entering a new group code, enter a description.

Click the Assign button to display the [Aggregate Pricing Group Allocation window](#) where you can assign items to a group code. Click the Deals/Quantity Breaks button to display the [Aggregate Pricing Group Breaks window](#) where you set up price books against quantity breaks for the group code.

3. Select an Aggregate Price Type from the drop down list:
Quantity Breaks Represent Total Quantity if the price break achieved is determined from the total quantity ordered of the items in the group,
or
Quantity Breaks Represent Item Count if the price break achieved is determined from the number of different items ordered.
4. If you have chosen to Use Deals In Aggregate Pricing Groups in the [Extended Pricing Extras Setup window](#), you have the option to specify a Default Deal. This will be used for any customer not linked to a specific deal. If a default deal is not specified, any customer not assigned to a specific deal will not receive aggregate prices for this group. Note that you cannot specify a default

deal until you have used the [Aggregate Pricing Group Breaks window](#) to set up price books against quantity breaks for the group code.

If you have not chosen to Use Deals In Aggregate Pricing Groups, the Default Deal field will be set automatically to “DEFAULT DEAL” and cannot be changed.

5. Click Save to save changes and close the window.

Deleting groups

Click Delete to delete group codes.

11. Aggregate Pricing Group Breaks window

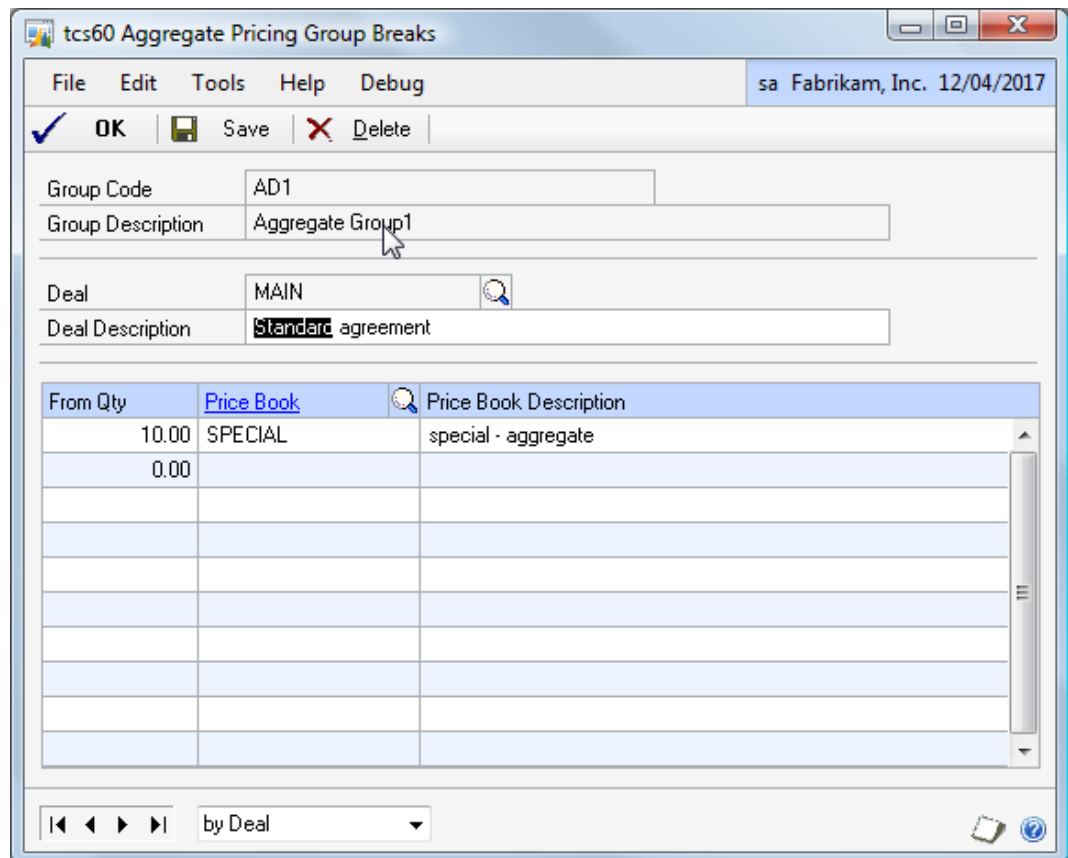


Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance >> Deals / Quantity Breaks button

Use the Aggregate Pricing Group Breaks window to:

- Set up quantity breaks for aggregate pricing

The Aggregate Pricing Group Breaks window



11.1 Setting Up Quantity Breaks for Aggregate Pricing

To set up quantity breaks for aggregate pricing in the Aggregate Pricing Group Breaks window:

1. The currently selected group code will be displayed.
2. If you are using Aggregate Price deals, enter a Price Deal code and description. If you are not using Aggregate Price Deals, the Deal code will be set automatically to “DEFAULT DEAL” and cannot be changed.
3. Enter the quantity breaks for the aggregate price group and deal, and enter the price books that quantity break prices will be based on or select them using the lookup. See [How Aggregate Prices are Calculated](#) for further details.
4. Click OK to return to the [Aggregate Pricing Group Maintenance window](#).

12. Aggregate Pricing Group Allocation window



Cards >> Myridas >> Extended Pricing. Enhancements >> Aggregate Pricing Group Allocation

Use the Aggregate Pricing Group Allocation window to:

- Allocate items to aggregate price groups

*The
Aggregate
Pricing
Group
Allocation
window*

Item Number	Description
Generic Description	Class Code
24X IDE	24x CD-ROM
32X IDE	32x CD-ROM
40X IDE	40x CD-ROM

Note that this window can also be displayed by clicking the Assign button in the [Aggregate Pricing Group Maintenance window](#).

Also note that an item number may only be assigned to one group code at a time.

12.1 Allocating Items to Aggregate Pricing Groups

Allocating items to aggregate pricing groups in the Aggregate Pricing Group Allocation window:

1. Enter a group code or select one using the lookup.

Note that if you opened this window from the [Aggregate Pricing Group Maintenance window](#) then the group code selected in that window will be displayed.

2. Enter an item number to assign to the group code or select one using the lookup. Repeat until all required items have been added to the group.

Alternatively click the Ranges button to display the [Aggregate Pricing Group Allocation Range window](#) where you can assign ranges of items to the group code.

Note that the selected items must be on price books assigned to the aggregate group for aggregate prices to be calculated.

3. Click Save to save changes and close the window.

Unassigning items from group codes

Click Delete to unassign all displayed items from the group code.

13. Aggregate Pricing Group Allocation Range window



Cards >> Myridas >> Extended Pricing, Enhancements >> Aggregate Pricing Group Allocation >> Ranges button

Use the Aggregate Pricing Group Allocation Range window to:

- Assign ranges of items to a group code

The Aggregate Pricing Group Allocation Range window

Item Number	Item Description	Generic Desc
24X IDE	24x CD-ROM	CD ROM
32X IDE	32x CD-ROM	CD ROM
40X IDE	40x CD-ROM	CD ROM

13.1 Assigning Ranges of Items to a Group Code

To assign ranges of items to a group code in the Aggregate Pricing Group Allocation Range window:

The window will open with the currently selected group code displayed.

1. Click All to assign all records or From to assign a selection of records for item number, generic description and class ID. If you select From, enter To and From values to specify a range, or use the lookups.
2. For the Select Items whose Group Code is set to option select one of the options:

Unassigned	Only items not currently assigned to a group code will be included in the range.
Any	All items will be included in the range.
Specified	If you select specified, enter a group code or select one using the lookup. Only items assigned to this group code will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of items to the current group code.
5. Click OK to close the window.

14. Aggregate Pricing Unit Item Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Unit Item Maintenance

Use the Aggregate Pricing Unit Item Maintenance window to:

- Assign individual items to a group code
- Set an aggregate pricing unit for individual items

*The
Aggregate
Pricing Unit
Item
Maintenance
window*

Note that this window is also available as an Additional option from the Item Maintenance window.

14.1 Setting Up Individual Items for Aggregate Pricing

To set up individual items for aggregate pricing in the Aggregate Pricing Unit Item Maintenance window:

1. Enter an item number or select one using the lookup.
2. Enter a group code or select one using the lookup.

If the selected item number is already assigned to a group code the group code will be displayed. This can be amended as required.

Note that the selected item must be on price books assigned to the aggregate group for aggregate prices to be calculated.

3. Select an aggregate pricing unit from the drop-down menu. This is the unit of measure the aggregate pricing will be based on.

Note that you do not need to select an aggregate pricing unit in this window. An aggregate pricing unit can be set for all items sharing a unit of measure schedule in the [Aggregate Pricing Unit Of Measure Maintenance window](#). Aggregate pricing units assigned to a specific item in this window will be used rather than any assigned to the unit of measure schedule as a whole.

- Click Save to save any changes made and close the window.

Note that you can click Clear at any point to clear any entries made in the window.

*Deleting item
aggregate pricing
settings*

Click Delete to delete item aggregate pricing settings.

15. Aggregate Pricing Unit Of Measure Maintenance window



Tools >> Setup >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Unit of Measure Maintenance

Use the Aggregate Pricing Unit Of Measure Maintenance window to:

- Set up aggregate pricing units for unit of measure schedules

*The
Aggregate
Pricing Unit
of Measure
Maintenance
window*

Note that this window is also available as an Additional option from the Unit of Measure Schedule Setup window.

15.1 Setting Up Aggregate Pricing Units for Unit of Measure Schedules

To set up aggregate pricing units for unit of measure schedules in the Aggregate Pricing Unit Of Measure Maintenance window:

- Enter a unit of measure schedule ID or select one using the lookup.
- Select an aggregate pricing unit from the drop-down menu.

Note that if you have set up aggregate pricing units for individual items in the [Aggregate Pricing Unit Item Maintenance window](#) then these will be used rather than units selected in this window when aggregate prices are calculated.

- Click Save to save any changes and close the window.

Note that you can click Clear at any point to clear entries made in the window.

*Deleting aggregate
pricing units*

Click Delete to delete an aggregate pricing unit set up for displayed unit of measure schedule.

16. Aggregate Pricing Debtor/Prospect Activation by Range window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing - Debtor/Prospect Activation by Range

Use the Extended Pricing Enhancements Debtor/Prospect Activation by Range window to:

- Set a range of debtors to use Aggregate Pricing

The Aggregate Pricing Debtor/Prospect Activation by Range window

Preview: Aggregate Pricing will be activated for the following Debtor ID's

Debtor ID	Name	Class ID	Activate

16.1 Activating Aggregate Pricing for a range of debtors or prospects in the Aggregate Pricing – Debtor/Prospect Activation by Range window

To set a range of debtors to use Aggregate Pricing in the Aggregate Pricing - Debtor/Prospect Activation by Range window:

1. Select whether to process Debtors or Prospects.
2. Click All to assign all debtors or prospects, or From to assign a range of debtors. If you select From, enter From and To values to specify a range, or use the lookups.

3. Click All to select all Class Ids, or From to select a range of Class Ids. If you select From, enter From and To values to specify a range, or use the lookups.
4. Click Preview to view your selection in the scrolling window.
5. Use the Activate check box in the scrolling window to select or remove individual Debtors or Prospects from the list to be processed.
6. Click Process to activate aggregate pricing for the selected range of Debtors or Prospects.

17. Aggregate Pricing Group Deals – Assign Debtors window

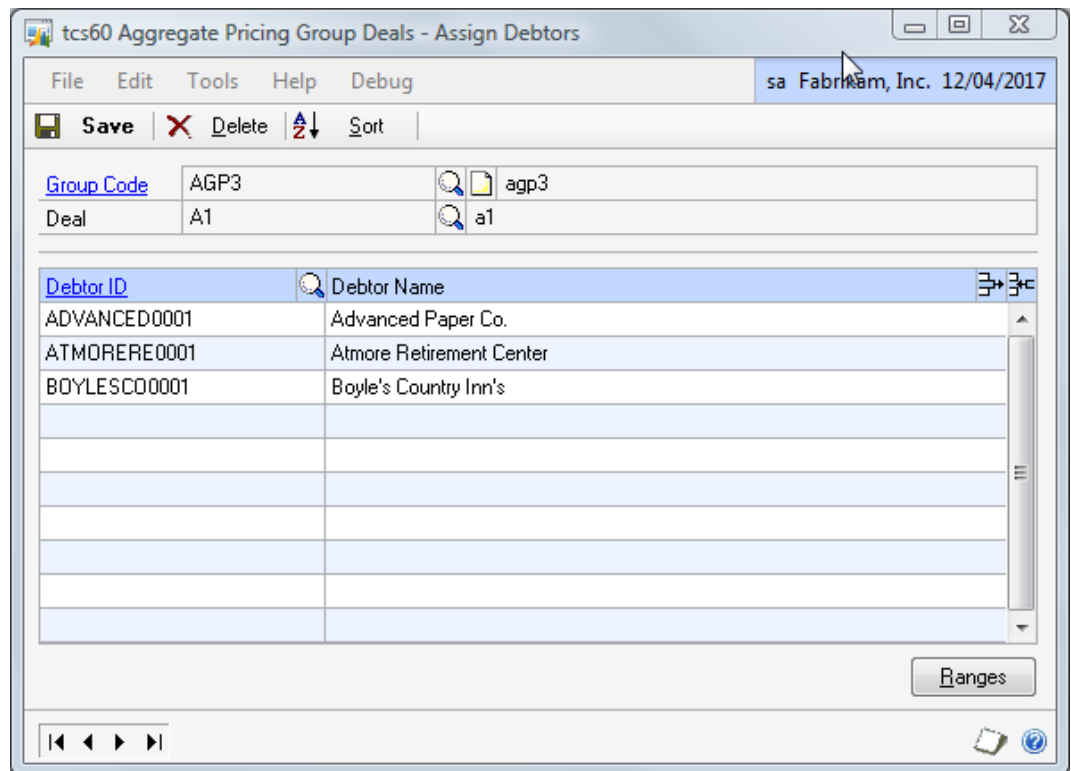


Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals - Assign Debtors

Use the Aggregate Pricing Group Deals - Assign Debtors window to:

- Assign debtors to aggregate deals. Note that this option is available only if you have set the Use Deals In Aggregate Pricing Groups option on the [Extended Pricing Extras Setup window](#)

The Aggregate Pricing Group Deals – Assign Debtors window



17.1 Assigning debtors to aggregate deals in the Aggregate Pricing Group Deals – Assign Debtors window

To assign debtors to aggregate deals in the Aggregate Pricing Group Deals - Assign Debtors window:

1. Enter an Aggregate Group code or select one using the lookup.
2. Enter an Aggregate Deal code or select one using the lookup.
3. Enter a debtor id to assign to the Aggregate group and deal or select one using the lookup. Repeat until all required debtors have been added to the group.

Alternatively click the Ranges button to display the [Aggregate Pricing Group Deals – Assign Debtors by Range window](#) where you can assign ranges of debtors to the aggregate deal.

4. Click Save to save changes and close the window.

Click Delete to remove all debtors from the selected aggregate group and deal.

*Unassigning
debtors from
aggregate deals*

18. Aggregate Pricing Group Deals – Assign Debtors by Range window

Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors >> Ranges button

Use the Aggregate Pricing Group Deals – Assign Debtors by Range window to:

- Assign ranges of debtors to an aggregate pricing group deal

*The
Aggregate
Pricing
Group Deals
Assign
Debtors by
Range
window*

File Edit Tools Help Debug sa Fabrikam, Inc. 12/04/2017

Group Code	AGP3	agp3
Deal	A1	a1

Debtor ID All From: To:

Sales Person ID All From: To:

Debtor Class ID All From: USA-ILMO-T1 To: USA-ILMO-T1

Select Debtor whose Group Code/Deal is set to:

Unassigned
 Any
 Specified: Group Code Deal

Debtor ID	Salesperson ID	Class ID
AARONFIT0001	PAUL W.	USA-ILMO-T1
AMERICAN0001	PAUL W.	USA-ILMO-T1
CELLULAR0001	PAUL W.	USA-ILMO-T1
CENTRALC0001	PAUL W.	USA-ILMO-T1
CENTRALI0001	PAUL W.	USA-ILMO-T1
COHOWINE0001	PAUL W.	USA-ILMO-T1
CRAWFORD0001	PAUL W.	USA-ILMO-T1
DIALDIRE0001	PAUL W.	USA-ILMO-T1

Preview Assign OK

18.1 Assigning Ranges of Debtors to an Aggregate Pricing Group Deal

To assign ranges of debtors to an aggregate pricing group deal in the Aggregate Group Deals – Assign Debtors by Range window:

The window will open with the currently selected aggregate group code and deal displayed.

1. Click All to assign all records or From to assign a selection of records for debtor id, sales person id and debtor class id. If you select From, enter To and From values to specify a range, or use the lookups.
2. Select one of the following:
Select Debtor whose Group Code/Deal is set to:

Unassigned	Only debtors not currently assigned to a deal for the selected group code will be included in the range.
Any	All debtors will be included in the range.
Specified	If you select specified, enter a group code and deal or select one using the lookup. Only those debtors that have been assigned to this group code and deal will then be included in the range. If you specify another deal for the same aggregate group, the selected debtor ids will be removed from the original deal when the Assign button is clicked. Links to deals for other aggregate groups will not be affected.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Assign button to assign the selected range of debtors to the current group code.
5. Click OK to close the window.

19. Sales Transaction Entry with Aggregate Pricing



Transactions >> Sales >> Sales Transaction Entry

*The Sales
Transaction
Entry
window*

Item Number	D	U of M	Qty Ordered	Unit Price	Extended Price
24X IDE	<input type="checkbox"/>	Each	16	\$40.00	\$640.00
32X IDE	<input type="checkbox"/>	Each	12	\$55.00	\$660.00
40X IDE	<input type="checkbox"/>	Each	20	\$65.00	\$1,300.00
	<input type="checkbox"/>		0	\$0.00	\$0.00

Subtotal	\$2,600.00
Trade Discount	\$0.00
Freight	\$0.00
Miscellaneous	\$0.00
Tax	\$0.00
Total	\$2,600.00

Standard Microsoft Dynamics™ GP sales transaction entry functionality has been extended to incorporate aggregate pricing functionality. When you enter items set up for aggregate pricing against a debtor set up for aggregate pricing, you can select the Additional Rework Aggregate Prices option to display the [Aggregate Pricing Rework window](#) where aggregated prices will be displayed and available for selection. If this option is selected where ordered items do not qualify for aggregate discounts or the debtor has not been set up for aggregate pricing then the window will not be displayed. See [How Aggregate Prices are Calculated](#) for further details.

If you select to Save, Post, Transfer or Print the document then where aggregate prices are applicable a dialogue box will ask you if you want to rework aggregate prices. Click Yes to display the Aggregate Pricing Rework window.

Note that aggregate prices cannot be calculated against returns transactions, printed invoices or inter-site transfers (see the Myridas Inter-Site Transfers User Guide for further details).

Also note that items given on a free quantity promotion will not be included in aggregate pricing calculations.

Select the Aggregate Pricing Information Additional option to display the [Aggregate Pricing Tracker window](#) where you can view aggregate pricing information for the current transaction.

The Item Catalogue and Search window will denote items in an aggregate group with an A symbol. See Myridas Catalogue Based Sales for further details.

20. Aggregate Pricing Rework window



Transactions >> Sales >> Sales Transaction Entry >> Additional >> Rework Aggregate Prices

Use the Aggregate Pricing Rework window to:

- View and select aggregate prices

*The
Aggregate
Pricing
Rework
window*

Item Number	Original Unit Price	New Unit Price	Promotion	Sheet	User	Reserved	Update?
24X IDE	\$40.00	\$30.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
32X IDE	\$55.00	\$40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
40X IDE	\$65.00	\$45.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

20.1 Selecting Aggregate Prices in the Aggregate Pricing Rework window

To view and select aggregate prices in the Aggregate Pricing Rework window:

1. All items applicable for aggregate pricing rework on the displayed order will be displayed in the scrolling window with the original unit price and the new unit price available through aggregate pricing rework.

Items whose original unit price is derived from a promotion will be shown in the window if the Show Promotion Priced Items in Rework window option is set in the [Extended Pricing Extras Setup](#) window.

If the original unit price is derived from a promotion, a price sheet directly assigned to the debtor, a reserved stock (see the Myridas Reserved Stock User Guide for further details) or has been entered by the user in the sales transaction entry window then the relevant checkbox will be marked.

2. By default all displayed items without a Source of Original Price checkbox marked will be selected for update. In addition, items whose Source of Original Price is set to Sheet will be selected for update if the Default Debtor Price Sheet Items to rework prices option is set in the [Extended Pricing Extras Setup](#) window. All items can be selected or deselected for update by clicking the Update? checkboxes, or by clicking the Mark All/Unmark All buttons.
3. When the required items are selected click Process. The window will close and the displayed new unit prices will replace the original unit prices in the sales transaction.

Note that you can click Cancel at any point to close the window.

21. Aggregate Pricing Tracker window



Transactions >> Sales >> Sales Transaction Entry >> Additional >> Aggregate Pricing Information

Use the Aggregate Pricing Tracker window to:

- View aggregate pricing quantity details during sales transaction entry

The Aggregate Pricing Tracker window

Group Code	Group Description	Price Book Achieved	Group Qty Ordered	Qty to Next Break
CD ROMS	Aggregate Pricing Group for CD Roms		16.00	0.00

Item Number	Item Description	Qty Ordered	U of M
24x IDE	24x CD-ROM	15	Case
32x IDE	32x CD-ROM	1	Case

Note that this window is also available from the Item Catalogue and Search window (see the Myridas Catalogue Based Sales User Guide for further details).

21.1 Viewing Aggregate Pricing Quantity Details During Sales Transaction Entry

To view aggregate pricing quantity details during sales transaction entry with the Aggregate Pricing Tracker window:

1. The window will open displaying the current sales document and debtor ID. Details displaying in the scrolling windows will be dependent upon where the window was opened from.

Opened from Sales Transaction Entry	
Upper scrolling window	Displays all aggregate groups active within the current sales document
Lower scrolling window	Displays all items in the selected group (upper scrolling window) that are in the current sales document
Opened from Item Catalogue and Search	
Upper scrolling window	Displays only the aggregate group containing the currently selected item
Lower scrolling window	Displays only the selected item (all items in the group on the current sales document can be displayed by clicking the View all Sales Document Items in Group check box)

Note that the scrolling window heading will also vary dependant on where you opened the window from.

The upper scrolling window displays how many items from the group have been ordered, and how many further items need to be ordered to achieve the next aggregate quantity break.

To view further details on a displayed group select the group then click the Group Code zoom button to display the [Aggregate Pricing Group Detail View window](#).

To establish how an aggregate price was achieved select an item and click the Item Number zoom button and select Price Trace to display the [Aggregate Pricing Price Trace window](#) and Price Trace window. The price trace will be run automatically.

2. When you have viewed required information click OK to close the window.

22. Aggregate Pricing Group Detail View window



Transactions >> Sales >> Sales Transaction Entry >> Additional >> Aggregate Pricing Information >> Group Code link button

Use the Aggregate Pricing Group Detail View window to:

- View aggregate group details during sales transaction entry

*The
Aggregate
Pricing
Group
Detail View
window*

Qty From	Price Book	Price Book Description
1.00	CD ROMS BASEBK	cd roms aggregate base book
10.00	CD ROMS BK1	cd roms aggregate book 1
20.00	CD ROMS BK2	cd roms aggregate book 2

Item Number	Description
24X IDE	24x CD-ROM
32X IDE	32x CD-ROM
40X IDE	40x CD-ROM

22.1 Viewing Aggregate Group Details During Sales Transaction Entry

To view aggregate group details during sales transaction entry using the Aggregate Pricing Group Detail View window:

1. The window will open with the selected aggregate pricing group displayed. The upper scrolling window will display quantity break details. The lower scrolling window will display all items in the aggregate group.

To establish how an aggregate price was achieved select an item and click the Item Number zoom button and select Aggregate Price Trace to display the

[Aggregate Pricing Price Trace window](#) and Price Trace window. The price trace will be run automatically.

2. Click OK to close the window.

23. Aggregate Pricing Price Trace window



Enquiries >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Price Trace

Use the Aggregate Pricing Price Trace window to:

- View information about how an aggregate price is calculated for a customer or prospect

*The
Aggregate
Pricing
Price Trace
window*

Note that this window is also available as an Additional option from the Price Trace Enquiry window.

23.1 Tracing an Aggregate Price Calculation

Use the Aggregate Pricing Price Trace window to find out how an item's aggregate price is calculated for a debtor. You can use this window to view the total price, the steps taken to calculate the price, and the price book used to calculate the price.

To trace an aggregate price calculation in the Aggregate Pricing Price Trace window:

1. Select Customer or Prospect, and enter a debtor ID or prospect ID, or select one using the lookup.

If an aggregate starting quantity has been set for the selected debtor/prospect then this will be displayed in the Aggregate Starting Quantity field.

2. Enter a currency ID or select one using the lookup.
3. Enter an item number or select one using the lookup.
4. Select a unit of measure from the drop-down menu.
5. Enter a date for the price enquiry.

Note that the current date will be selected by default.

6. Enter a quantity if required. The quantity is used if quantity break pricing is set up for the selected item. The price per item will be calculated.
7. Enter an Accumulated Quantity in Aggregate Unit. This is the aggregate quantity of items in the aggregate group, represented in the aggregate unit. This quantity will be used to find the aggregate quantity break.
8. Click Trace.

The price book that the aggregate price is taken from will be displayed in the Price Book Achieved field.

The Microsoft Dynamics™ GP Price Trace Enquiry window will be displayed showing standard details including the price for the item based on details entered and the price sheet the price is taken from. Click OK to close the Price Trace Enquiry window.

9. Click OK to close the Aggregate Pricing Price Trace window.

Note that you can click Clear at any point to clear any entries made in the window.

Site Specific Pricing

Site specific pricing functionality enables you to define item prices by their location. You may have items that are sold at different prices dependent upon their site. Site specific pricing is enabled by site price types. Site price types act as a link between sites and price sheets. Both sites and price sheets can be assigned to a site price type. Set up a site price type using the [Site Price Type Maintenance window](#).

When you enter a sales transaction against a site that has been assigned to a site price type, the system will check each item on the transaction to see whether it appears on a price sheet assigned to the site price type. Where items appear on a price sheet assigned to the site price type then that price sheet price will be used in the transaction.

See [Appendix C](#) for details of Myridas windows that incorporate site specific pricing functionality.

Note that if you have site specific pricing switched on then all price sheets in use must be assigned to a site price type.

Also note that site pricing functionality will not be incorporated into Microsoft Dynamics™ GP reporting functions.

24. Site Price Type Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Site Price Type Maintenance

Use the Site Price Type Maintenance window to:

- Set up site price types

The Site Price Type Maintenance window

24.1 Setting Up Site Price Types

To set up site price types using the Site Price Type Maintenance window:

1. Enter a site price type or select one using the lookup.
2. Enter a description for the site price type.

Note that you can click the Go To button to display the [Assign Site IDs to Site Price Types window](#) or the [Assign Price Sheets to Site Price Types window](#).

3. Click Save to save any changes made in the window.

Deleting site price types

Click Delete to delete the displayed site price type. You cannot delete a site price type that is currently assigned to a price sheet or site ID.

25. Assign Site Price Type To Site ID window



Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID

Use the Assign Site Price Type To Site ID window:

- Assign a site price type to a site ID

The Assign Site Price Type To Site ID window

This window is also available as an Additional option from the Site Maintenance window.

25.1 Assigning a Site Price Type to a Site ID

To assign a site price type to a site ID using the Assign Site Price Type To Site ID window:

1. The currently selected site ID will be displayed by default. Click the lookup to select an alternate site ID.
2. Enter a site price type to assign to the site ID or select one using the lookup.

Note that a site can only be assigned to one site price type.

3. Click Save to save any changes made in the window.

Unassigning site price types

Click delete to unassign a site price type from a site ID.

26. Assign Site IDs To Site Price Types window



Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site ID's To Site Price Types

Use the Assign Site IDs To Site Price Type window to:

- Assign a site price type to multiple sites

The Assign Site IDs To Site Price Types window

Site ID	Description
WAREHOUSE	Main Site
WC1	Work Center 1
WC2	Work Center 2
WC3	Work Center 3

Note that this window can also be displayed from the [Site Price Type Maintenance window](#).

26.1 Assigning a Site Price Type to Multiple Sites

To assign a site price to multiple sites using the Assign Site IDs To Site Price Types window:

1. Enter a site price type or select one using the lookup.
2. Enter a site ID to assign to the site price type or select one using the lookup. You can assign as many site IDs to the site price type as required.

Alternatively click the Ranges button to display the [Assign Site IDs To Site Price Type - By Range window](#) where you can assign a range of site IDs to a site price type.

3. Click Save to save any changes made in the window.

*Unassigning
site IDs*

Click Delete to unassign all displayed site IDs from the selected site price type.

27. Assign Site IDs To Site Price Types - By Range window



Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site ID's To Site Price Types >> Ranges button

Use the Assign Site IDs To Site Price Type - By Range window to:

- Assign a site price type to a range of sites

The screenshot shows the 'tcs78 Assign Site IDs To Site Price Types - By Range' window. The 'Site Price Type' is set to 'RETAIL'. The 'Site ID' range is defined from 'WC1' to 'WC3'. The 'Unassigned' radio button is selected under 'Select Site ID's whose Site Price Type is set to:'. The table below shows the following data:

Site ID	Site Price Type
WC1	
WC2	
WC3	

27.1 Assigning a Site Price Type to a Range of Sites

To assign a site price type to a range of items in the Assign Site IDs To Site Price Type - By Range window:

1. All site IDs will be selected by default. Accept this selection or click From and enter from and to values or use the lookups to specify a range.
2. For the Select Site IDs whose Site Price Type is set to option select one of the options:

Unassigned	Only sites not currently assigned to a site price type will be included in the range.
Any	All sites will be included in the range.
Specified	If you select specified, enter a site price type or select one using the lookup. Only sites assigned to this site price type will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of sites to the current site price type.
5. Click OK to close the window.

28. Assign Site Price Type To Price Sheet ID window



Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID

Use the Assign Site Price Type To Price Sheet ID window:

- Assign a site price type to a price sheet

The Assign Site Price Type To Price Sheet ID window

28.1 Assigning a Site Price Type to a Price Sheet

To assign a site price type to a price sheet using the Assign Site Price Type To Price Sheet ID window:

1. Enter a price sheet ID or select one using the lookup.
2. Enter a site price type to assign to the price sheet or select one using the lookup.

Note that a price sheet may only be allocated to one site price type at a time.

3. Click Save to save any changes made in the window.

Click Delete to unassign the site price type from the price sheet.

Unassigning site price types

29. Assign Price Sheets To Site Price Types window



Cards >> Myridas Cards >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types

Use the Assign Price Sheets To Site Price Types window to:

- Assign multiple price sheets to a site price

Price Sheet ID	Description
RETAIL	retail
AGGSHEET	aggregate price sheet
AGGSHEET2	aggregate sheet 2
AGGSHEET3	aggregate sheet 3
BASE	Base Price Sheet

Note that this window can also be displayed from the [Site Price Type Maintenance window](#).

29.1 Assigning Multiple Price Sheets to a Site Price Type

To assign multiple price sheets to a price type using the Assign Price Sheets To Site Price Types window:

1. Enter a site price type or select one using the lookup.

If you opened this window from the [Site Price Type Maintenance window](#) then the site price type will be displayed by default.

2. Enter a price sheet ID to assign to the site price type or select one using the lookup. You can assign as many price sheets to the site price type as required. A price sheet may only be assigned to one site price type at a time.

Note that you can click the Ranges button to display the [Assign Price Sheets To Site Price Types - By Range window](#) where you can assign a range of price sheets to a site price type.

3. Click Save to save any changes made in the window.

Unassigning price sheets

Click Delete to unassign all price sheets from the displayed site price type.

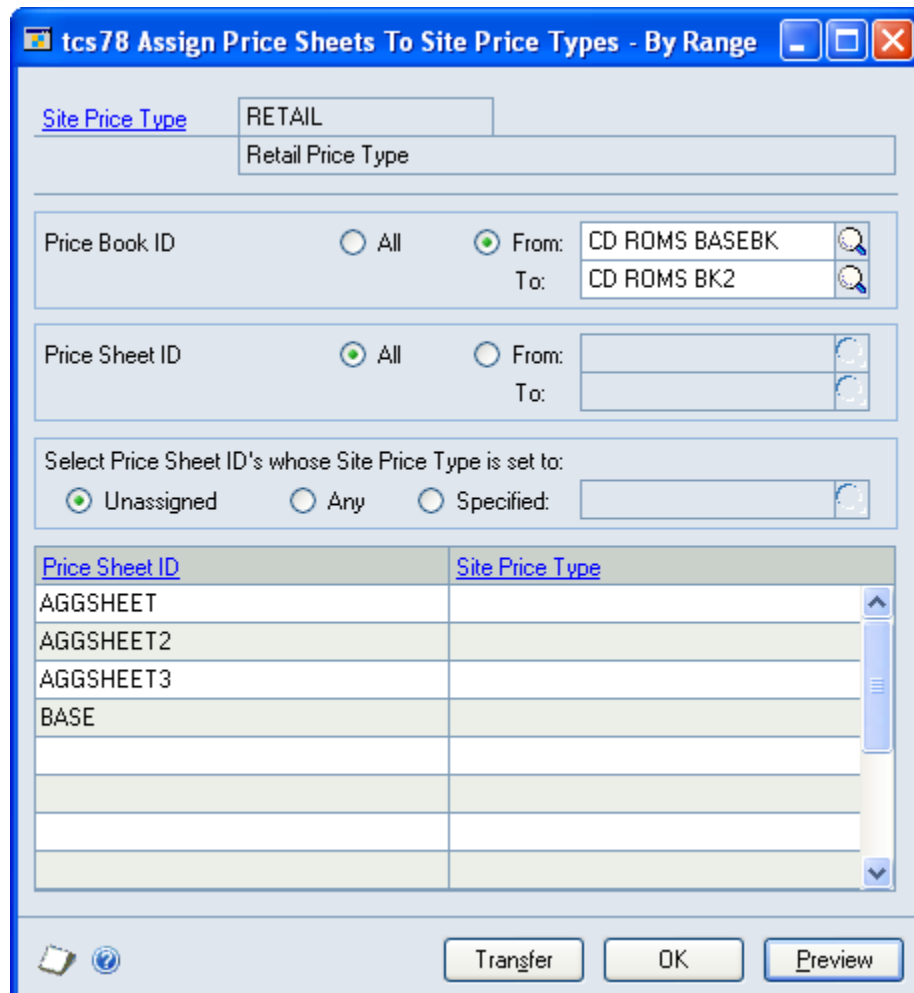
30. Assign Price Sheets To Site Price Types - By Range window

Cards >> Myridas Cards >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types >> Ranges button

Use the Assign Price Sheets To Site Price Types - By Range window to:

- Assign ranges of price sheets to a site price type

The Assign Price Sheets To Site Price Types - By Range window



30.1 Assigning Ranges of Price Sheets to a Site Price Type

To assign ranges of price sheets to a site price type in the Assign Price Sheets To Price Types - By Range window:

1. All price book IDs will be selected by default. Accept this selection or click From and enter from and to values or use the lookups to specify a range.
2. All price sheet IDs will be selected by default. Accept this selection or click From and enter from and to values or use the lookups to specify a range.
3. For the Select Price Sheet IDs whose Site Price Type is set to option select one of the options:

Unassigned	Only price sheets not currently assigned to a site price type will be included in the range.
Any	All price sheets will be included in the range.
Specified	If you select specified, enter a site price type or select one using the lookup. Only price sheets assigned to this site price type will be included in the range.

4. Click the Preview button to preview your selection in the scrolling window.
5. Click the Transfer button to assign the selected range of price sheets to the current site price type.
6. Click OK to close the window.

31. Price Trace Enquiry - Site ID window

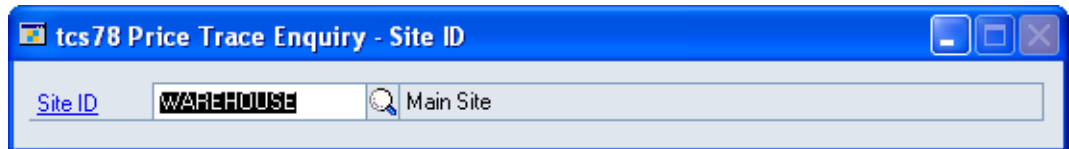


Enquiry >> Inventory >> Extended Pricing >> Price Trace

Use the Price Trace Enquiry - Site ID window to:

- Trace a site specific price

*The Price
Trace Enquiry
- Site ID
window*



31.1 Tracing a Site Specific Price

To trace a site specific price using the Price Trace Enquiry - Site ID window:

1. The Price Trace Enquiry - Site ID window will be displayed by default when you open the Microsoft Dynamics™ GP Price Trace window if you have Site Specific Pricing switched on in the [Extended Pricing Extras Setup window](#).

If you have site specific pricing switched on then you are required to enter a site ID prior to performing a price trace.

2. Enter a site ID or select one using the lookup.

Order Value Discounts

The Order Value Discount feature allows Trade Discount in Sales Transaction Entry to be automatically calculated as a percentage of the document total.

Customers are assigned to Order Value Discount groups, and each group can have its own set of value bands and discount percentages.

See the [Order Value Discount Group maintenance window](#) for details of how to set up Order Value Discount groups, the [Order Value Discounts – Assign Debtors window](#) for details of how to assign customers to Order Value Discount Groups, and the [Order Value Discount Rates window](#) for details of how to set up order value bands and discount percentages.

Items can be excluded from the Order Value Discount calculation by adding them to a list of excluded items. See [the Order Value Discounts – Excluded Items window](#). The percentage discount will not be applied to items which are excluded from Order Value Discount. A setup option determines whether the value of excluded items is included in the order value total used to set the discount band.

From within Sales Transaction Entry, individual item lines and individual documents can be omitted from Order Value Discount, if the appropriate options are enabled in [the Order Value Discount Setup window](#). A further setup option determines whether the calculated discount percentage can be manually overridden.

32. How Order Value Discount is calculated

Order Value Discount is calculated as a percentage of the document subtotal in Sales Transaction Entry. The calculated discount is placed in the Trade Discount field. If Order Value Discount applies to a sales document, the Trade Discount field cannot be edited.

If a Trade Discount percentage is set against the debtor in the Dynamics GP Debtor maintenance window, this takes precedence and Order Value Discount will not be applied to documents for this debtor.

Order Value Discount will be applied when entering a sales document for a debtor who is assigned to an Order Value Discount Group for the originating currency of the document.

As lines are entered, the document subtotal is checked against the break points set up for the Order Value Discount group. If any items on the document are excluded from Order Value Discount, the value used to check against the break points will be reduced by the value of the excluded items, unless the Excluded Items in Total Order Value option is enabled in the [Order Value Discounts Setup window](#). When a break point is achieved, the discount is calculated by applying the percentage to the order value, after the deduction of any items which are excluded from Order Value Discount.

Once the document has been transferred, e.g. an order has been transferred to a fulfilment order or invoice, the percentage achieved is fixed and further changes to the document will not affect the percentage discount achieved.

33. Order Value Discount Setup window

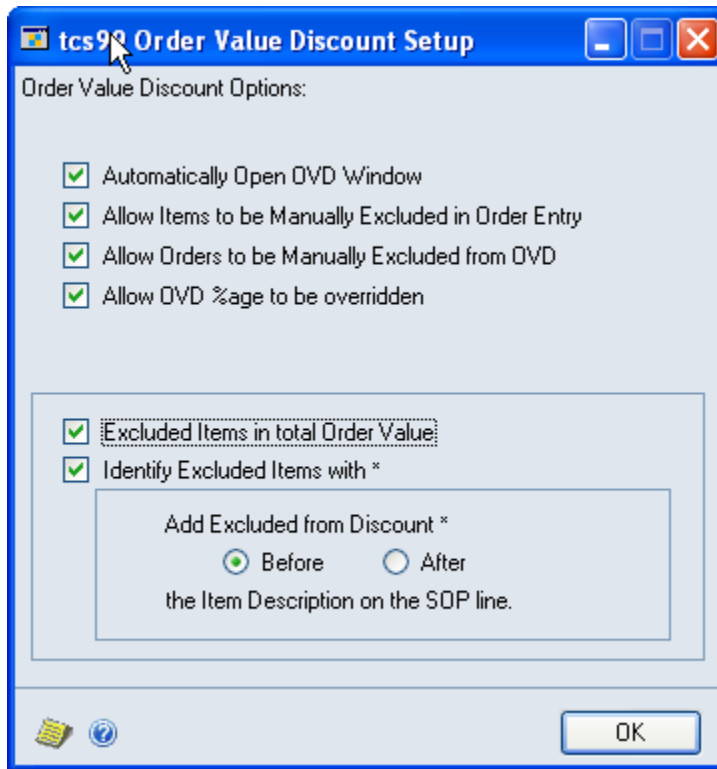


Tools >> Setup >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Setup

Use the Order Value Discount Setup window to:

- Set up Order Value Discount options

The Order Value Discount Setup window



33.1 Setting Up Order Value Discount options

To set up Order Value Discount options using the Order Value Discount Setup window:

Six options are available within this window:

Automatically Open OVD window	Select this option if you would like the Order Value Discounts information window to open automatically in Sales Transaction Entry. If this option is not selected, the Order Value Discounts information window can be opened from Sales Transaction entry by selecting Additional >> Order Value Discounts.
Allow Items to be	This option allows individual line items to be selected

Manually Excluded in Order Entry	for exclusion from the Order value discount calculation during entry of a sales document in Sales Transaction Entry.
Allow Orders to be Manually Excluded from OVD	This option allows the calculation of Order Value Discount to be switched off for individual documents.
Allow OVD %age to be overridden	This option allows the Order Value Discount percentage to be manually changed for a document.
Excluded Items in total Order Value	<p>If this option is selected, items which are excluded from the Order Value Discount calculation will be included in the total order value used to determine the value break point and the discount applicable. If the option is not selected, excluded items will not be included in the total order value.</p> <p>The value of excluded items will never be included in the value to which the discount percentage is applied, regardless of the setting of this option.</p>
Identify excluded items with *	If this option is selected, items excluded from order value discount will have an * added to the item description on the sales document. There is an additional selection to add the * before or after the standard item description.

34. Order Value Discount Group Maintenance window

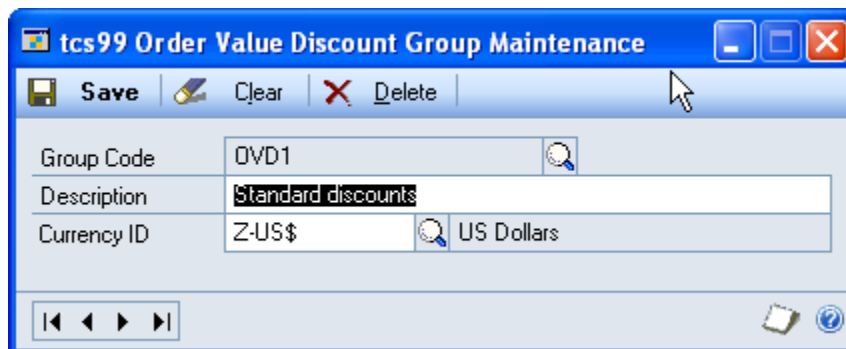


Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Groups

Use the Order Value Discount Group Maintenance window to:

- Set up Order Value Discount Groups

The Order Value Discount Group Maintenance window



34.1 Setting Up Order Value Discount Groups

To set up order value discount groups using the Order Value Discount Group Maintenance window:

1. Enter a Group Code or select one using the lookup.
2. Enter a description.
3. Enter a Currency ID or select one using the lookup.
4. Click Save to save changes.
5. Note that you can click Clear at any point to clear any entries made in the window.

*Deleting
Order Value
Discount
Groups*

Click Delete to delete an Order Value Discount Group.

35. Order Value Discounts – Assign Debtors window



Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Assign

Use the Order Value Discounts – Assign Debtors window to:

- Assign debtors to an Order Value Discount Group

The Order Value Discount Assign Debtors window

Line Type	Debtor Class/ID
Description	
Debtor ID	COMMUNIC0002
Debtor ID	AARONFIT0001
Debtor ID	ADAMPARK0001
Debtor ID	ALTONMAN0001
Debtor ID	AMERICAN0001
Debtor ID	AMERICAN0002
Debtor ID	ASTORSUI0001
Debtor ID	

35.1 Assigning Debtors to Order Value Discount Groups

To assign debtors to an Order Value Discount Group using the Order Value Discounts Assign Debtors window:

1. Enter a Group Code or select one using the lookup. The group description and currency id will be displayed.
2. In the scrolling window, choose a line type of debtor id or debtor class from the drop down list.
3. Enter a debtor id or class id or select one using the lookup.

Repeat steps 2 and 3 until all required debtors and debtor classes have been added to the Order Value Discount group.

Alternatively click the Ranges button to display the [Order Value Discounts – Assign Debtor Ranges window](#) where you can assign ranges of debtors and classes to the group code.

4. Click Save to save changes.

*Unassigning
debtors from group
codes*

Click Delete to unassign all debtors from the group code.

36. Order Value Discounts – Assign Debtor Ranges window



Cards >> Myridas >> Extended Pricing, Enhancements >> Order Value Discount Assign >> Ranges button

Use the Order Value Discounts Assign Debtor Ranges window to:

- Assign ranges of debtors to an Order Value Discount Group

The Order Value Discount Assign Debtor Ranges window

Debtor ID	Class ID
BAKERSEM0001	USA-INMI-T2
BERRYMED0001	USA-MNWI-T4
BLUEYOND0001	USA-IKSNE-T3
BOYLESCO0001	AUSTRALIA-T8
BREAKTHR0001	CAN-PQMT-T5

36.1 Assigning Ranges of Debtors to an Order Value Discount Group

To assign ranges of debtors to a group in the Order Value Discount Assign Debtor Ranges window:

The window will open with the currently selected Order Value Discount Group displayed.

1. Click All to assign all records or From to assign a selection of records for debtor ID and class ID. If you select From, enter To and From values to specify a range, or use the lookups.
2. For the Select Debtors whose Group Code is set to option select one of the following:

Unassigned	Only debtors not currently assigned to an Order Value Discount group will be included in the range.
Any	All debtors will be included in the range.
Specified	If you select specified, enter an Order Value Discount group code or select one using the lookup. Only debtors assigned to this group will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of debtors to the selected group code.
5. Click OK to close the window.

37. Order Value Discount Rates window



Cards >> Myridas >> Extended Pricing. Enhancements >> Order Value Discount Rates

Use the Order Value Discount Rates window to:

- Maintain order value break points and discount percentages for an Order Value Discount group

The Order Value Discount Rates window



37.1 Maintaining Order Value break points and discount percentages

To maintain order value breakpoints and discount percentages in the Order Value Discount Rates window:

1. Enter an Order Value Discount group code or select one using the lookup.
2. In the scrolling window, enter order value ranges and the applicable discounts. For example to give a discount of 5% on orders over £500, enter:

Amount from	Amount to	Trade discount %
0.01	499.99	0.00%
500.00	9999999999999999.99	5.00%

3. Click Save to save changes.

Deleting order value break points

Click Delete to remove all quantity breaks and discounts from the Order Value Discount group.

3. Click Save to save changes.
4. Click Delete to clear the list of excluded items.

Removing the list of excluded items

39. Order Value Discounts – Excluded Items Range window



Cards >> Myridas >> Extended Pricing. Enhancements >> Order Value Discount Excluded Items >> Ranges button

Use the Order Value Discounts Excluded Items Range window to:

- Exclude ranges of items from Order Value Discounts

The Order Value Discounts Excluded Items Range window

Item Number	Class ID	Generic Desc
FAXX-FG3-0001	FINGOODS	FG
HDWR-FGC-0001	FINGOODS	FG
PHAN-FAX-0001	FINGOODS	FG
PHON-FGD-0001	FINGOODS	FG
PHON-FGS-0002	FINGOODS	FG
PSYS-FG1-0001	FINGOODS	FG
VMSY-FG2-0001	FINGOODS	FG

39.1 Excluding Ranges of Items from Order Value Discounts

To exclude ranges of items from Order Value Discounts in the Order Value Discounts Excluded Items Range window:

1. Click All to exclude all items or From to exclude a selection of items by item number, generic description and class id. If you select From, enter To and From values to specify a range, or use the lookups.
2. Click the Preview button to preview your selection in the scrolling window.
3. Click the Transfer button to add the selected items to the list of excluded items.
4. Click OK to close the window.

40. Sales Transaction Entry with Order Value Discounts

As a document is entered in Sales Transaction Entry, Order Value Discount will be calculated as described in [How Order Value Discount is calculated](#).

You can view the discount achieved so far in the [Order Value Discounts window](#).

If you have enabled the Allow Orders to be Manually Excluded from OVD or Allow OVD %age to be overridden option in the [Order Value Discount Setup window](#), you can perform these functions through the [Order Value Discount Document window](#).

If you have enabled the Allow Items to be Manually Excluded in Order Entry option in the [Order Value Discount Setup window](#), you can omit individual lines from Order Value Discount through the [Order Value Discount – Line Item window](#).

41. The Order Value Discounts window

Sales Transaction Entry >> Additional >> Order Value Discount

The window will be opened automatically if you have enabled the Automatically Open OVD window option in the [Order Value Discount Setup window](#)

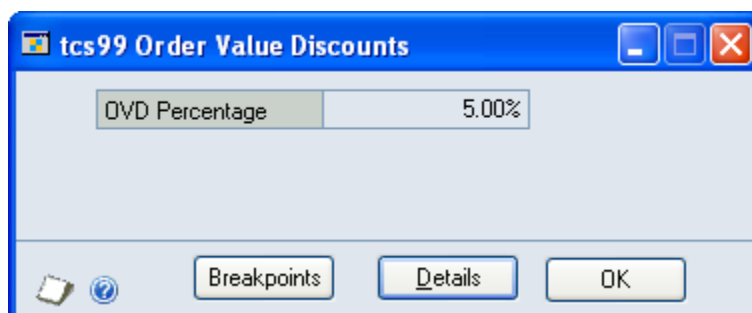
Use the Order Value Discounts window to:

- View the OVD percentage achieved.

The Order Value Discounts window – new documents

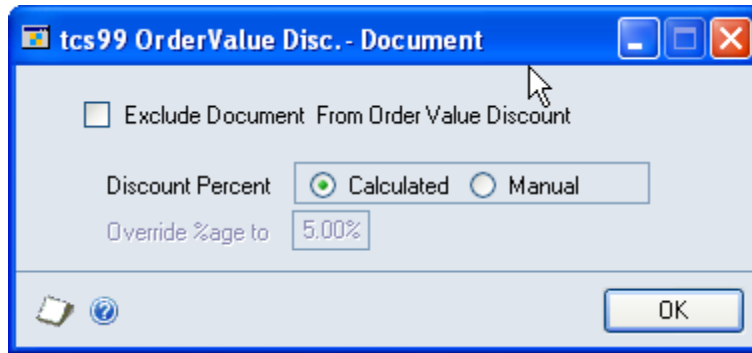


The Order Value Discounts window – after transfer



- Override the discount percentage

The Order Value Discount - Document window



42.1 Overriding the Order Value Discount for a document

To exclude a document from OVD or override the discount percentage using the Order Value Discount - Document window:

1. Click Exclude Document from Order Value Discount if you do not want OVD to apply to the current sales document. The trade discount field will be re-enabled. The existing calculated Order Value Discount value will remain in the trade discount field, to be manually edited as required.
2. By default, the Discount Percent will be set to Calculated. Click Manual to override the discount percentage, and enter the required value against Override % to.

Note that once you have selected Manual, the discount percentage will not be changed automatically as a result of any further changes in order value.

3. Click OK to apply your changes and close the window.

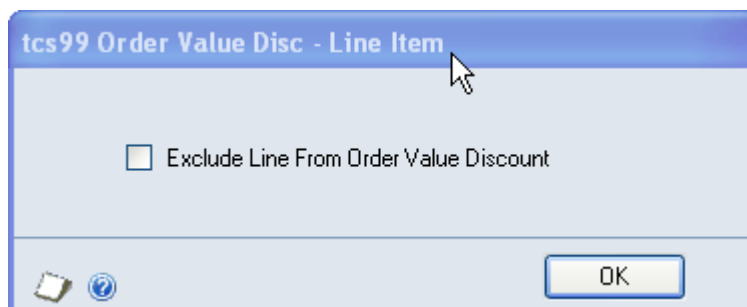
43. The Order Value Discount Line Item window

Sales Transaction Entry >> Additional >> Order Value Disc Line Item

Use the Order Value Discount Line Item window to:

- Exclude a line item from Order Value Discount

The Order Value Discount Line Item window



43.1 Excluding a line item from Order Value Discount

To exclude a line item from OVD using the Order Value Discount Line Item window:

1. Click Exclude Line from Order Value Discount if you do not want OVD to apply to the current document line.
2. Click OK to apply your changes and close the window.

Aggregate Promotions

An order qualifies for an aggregate promotion if the total quantity of a range of items on the order reaches a specified level, or if the order includes a minimum quantity of every item from a list.

Multiple quantity breaks can be set against a promotion, with different free items offered as the different break points are achieved.

Four types of Aggregate Promotion can be set up:

- Total Quantity promotions – when the total quantity ordered from a list of items reaches a break point, the order qualifies for a free item
- Every item in list – to qualify for the free item, one or more of every item in a list must be ordered
- Variable Quantity list – to qualify for the free item, a specified quantity of every item in a list must be ordered
- Points Allocation – these are similar to Total Quantity promotions, but the total order quantity is used as a number of points. The order qualifies for one or more free items from a list, depending on the number of points achieved.

See the [Aggregate Promotions Maintenance window](#) for details of how to set up an Aggregate Promotion, and see [Aggregate Promotions Maintenance – Free Items window](#), for details of how to set up break points and free items. For details of how to set up the list of items contributing to the promotion, see the [Aggregate Promotions– Assign Items window](#).

An aggregate promotion can be made available to a range of debtors – see [Aggregate Promotions – Assign Debtors window](#).

44. How Aggregate Promotions are Calculated

44.1 Total Quantity Promotions

To determine whether an order qualifies for a total quantity promotion, the total quantity ordered of the items assigned to the promotion is checked against the promotion break points.

For example:

From Quantity	Free Item Number or List		U of M	Quantity Free	Maximum Quantity Free
10	Item Number	D/12345	Each	1	0

100	List	PRLIST	N/A	2	2
-----	------	--------	-----	---	---

In the above promotion, if the total order quantity is less than 10, the order does not qualify for the promotion.

If the total order quantity is 10 or above, but less than 100, a free item D/12345 is available for every 10 ordered.

If the total order quantity is 100 or above, 2 free items from the item list PRLIST are available. As the Maximum Quantity Free is set to 2, the order does not qualify for more free items at this break point, regardless of increases in the order volume.

An option against each promotion on the [Aggregate Promotions Maintenance window](#) determines whether free items will be offered from multiple quantity breaks. If Allow Free Items from Multiple Quantity Breaks is not enabled, once a higher quantity break is achieved, lower quantity breaks become inactive. So in the example above, an order of 110 would receive only the 2 free items from the higher break point. If Allow Free Items from Multiple Quantity Breaks is enabled, the total quantity will be assessed against both quantity breaks. So in the example above an order of 110 would receive the 2 free items from the higher break point, and 1 free item from the lower break point.

44.2 Points Allocation Promotions

As for Total Quantity Promotions, the total order quantity of the items assigned to the promotion is checked against the promotion break points. However, the order total quantity can then be used as a points value to assign to free items from any of the achieved breakpoints.

For example:

From Quantity	Free Item Number or List		U of M	Quantity Free	Maximum Quantity Free
10	Item Number	D/12345	Each	1	n/a
20	List	PRLIST	N/A	1	n/a
30	Item Number	X12	Each	1	n/a
50	List	P2LIST	N/A	1	n/a

In the above promotion, if the total order quantity is less than 10, the order does not qualify for the promotion.

If the total order quantity is 10 or more, but less than 20, a free item D/12345 is available.

If the total order quantity is, for example, 35, any combination of items from the breakpoints at 10, 20 and 30 can be selected so long as the total “points” used does not exceed 35. The customer could choose to take three of item D/12345; or one of item D/12345 and one item from the list PRLIST; or one of item X12.

If the total order quantity exceeds 50, items from any of the breakpoints can be chosen until all the points have been allocated.

45. Aggregate Promotions Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance

Use the Aggregate Promotions Maintenance window to:

- Set up Aggregate Promotions

*The
Aggregate
Promotions
Maintenance
window*

45.1 Setting Up Aggregate Promotions

To set up Aggregate Promotions using the Aggregate Promotions Maintenance window:

1. Enter a Promotion ID or select one using the lookup.
2. Enter a description.
3. Enter the Date Range during which the promotion will be available.
4. Select an Aggregate Type from the drop down. There are four options:

Total Quantity	When a sales order is entered, the total quantity of the contributing items is accumulated. This quantity is then checked against quantity break points to determine whether the order qualifies for the promotion.
----------------	---

Every Item in List	In order to qualify for this type of promotion, a minimum quantity of every item in a list must be ordered.
Variable Quantity List	In order to qualify for the free item, a specified quantity of every item in a list must be ordered
Points Allocation	Similar to Total Quantity promotions, but the total order quantity is used as a points value. The order qualifies for one or more free items from a list, depending on the number of points achieved.

5. Select Allow Free Items from multiple Quantity Breaks to allow multiple quantity breaks to be active. See [How Aggregate Promotions are calculated](#) for more details. Note this option is only available for Total Quantity type promotions.
6. Select Supplier Funded to indicate that this promotion is funded by a supplier. This is for information only, and does not affect the Aggregate Promotion calculation.
7. Note that you can click Clear at any point to clear any entries made in the window.

*Deleting
Aggregate
Promotions*

Click Delete to delete an Aggregate Promotion.

46. Aggregate Promotions Maintenance – Free Items window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance >> Free Item(s) button

Use the Aggregate Promotions Maintenance – Free Items window to:

- Maintain the quantity break points and free items for an Aggregate Promotion

The Aggregate Promotions Maintenance – Free Items window: Total Quantity version

From Quantity	Free Item Number or Item List	U Of M	Quantity Free	Max Quantity Free
10.00	Item Number D/12345	Each	1	0
100.00	Item List PROMOTION LIST	N/A	2.00	2.00
			0.00	0.00

The Aggregate Promotions Maintenance – Free Items window: Items in List version

Promotion ID: AGP2 list of items

Quantity Required Per Item: 1.00

Free Item Number or Item List: Item Number

Item Number: A/123/457

Unit Of Measure: Each

Quantity Free: 1

Maximum Quantity Free: 5

46.1 Maintaining Aggregate Promotion Break Points

To maintain break points and free items using the Aggregate Promotion Maintenance – Free Items window for Total Quantity and Points Allocation Promotions:

The window will open with the currently selected Promotion ID displayed.

1. In the scrolling window, enter the quantity which must be ordered to qualify for the aggregate promotion.

2. From the drop down list select Free Item Number or Item List. You should select Item List if a choice of free items will be offered.
3. If you selected Free Item Number, enter the item number and unit of measure that will be given free on orders qualifying for the promotion. If you selected Item List, enter a Free Item List ID. See [Free Item List Maintenance](#) for details of how to set up lists of free items.
4. Enter the quantity to be given free when the From Quantity is ordered. Note that for Points Allocation promotions this quantity is set to 1 and cannot be changed.
5. Enter the maximum quantity to be given free. If zero is entered, there is no limit to the number of free items that will be given. Note that this field is not available for Points Allocation promotions.
6. If there are multiple quantity breaks with different free items at different break points, repeat steps 1 to 5 to enter further break points.

To maintain break points and free items using the Aggregate Promotion Maintenance – Free Items window for Every Item in List Promotions and Variable Quantity List Promotions:

The window will open with the currently selected Promotion ID displayed.

1. For Every Item in List type promotions, enter the quantity to be ordered from every item in the list in order to qualify for the promotion. This field is not available for Variable Quantity List type promotions.
2. From the drop down list select Free Item Number or Item List. You should select Item List if a choice of free items will be offered.
3. If you selected Free Item Number, enter the item number and unit of measure that will be given free on orders qualifying for the promotion. If you selected Item List, enter a Free Item List ID. See [Free Item List Maintenance](#) for details of how to set up lists of free items.
4. Enter the quantity to be given free when the From Quantity is ordered.
5. Enter the maximum quantity to be given free. If zero is entered, there is no limit to the number of free items that will be given.
6. Click OK to save your entries and close the window.

47. Aggregate Promotions – Assign Debtors window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Debtors

This window is also available from Go To >> Assign Debtors on the [Aggregate Promotions Maintenance window](#).

Use the Aggregate Promotions – Assign Debtors window to:

- Assign Debtors to an Aggregate Promotion

*The
Aggregate
Promotions
– Assign
Debtors
window*

Record Type	Debtor/Group ID	Debtor Name/Group Description
Debtor ID	ADAMPARK0001	Adam Park Resort
Debtor ID	ADVANCED0001	Advanced Paper Co.
Group ID	AG2	aggregate customer group 2
Debtor ID		

47.1 Assigning Debtors to Aggregate Promotions

To assign Debtors to an Aggregate Promotion in the Aggregate Promotions – Assign Debtors window:

1. Enter a Promotion ID or select one using the lookup. The promotion description will be displayed.
2. In the scrolling window select a Record Type of Debtor ID or Group ID.
3. Enter a debtor ID or group ID, or select one from the lookup.
4. Repeat steps 2 and 3 until all required debtors and groups have been added to the Promotion.

Alternatively click the Ranges button. You can then choose to display the [Aggregate Promotions – Assign Debtors by Range](#) window where you can assign ranges of debtors to the promotion; or the [Aggregate Promotions – Assign Debtor Groups by Range](#) window where you can assign ranges of groups to the promotion.

5. Click Save to save changes.

Unassigning debtors from a promotion

Click Delete to unassign all debtors from the promotion.

48. Aggregate Promotions – Assign Debtors by Range window

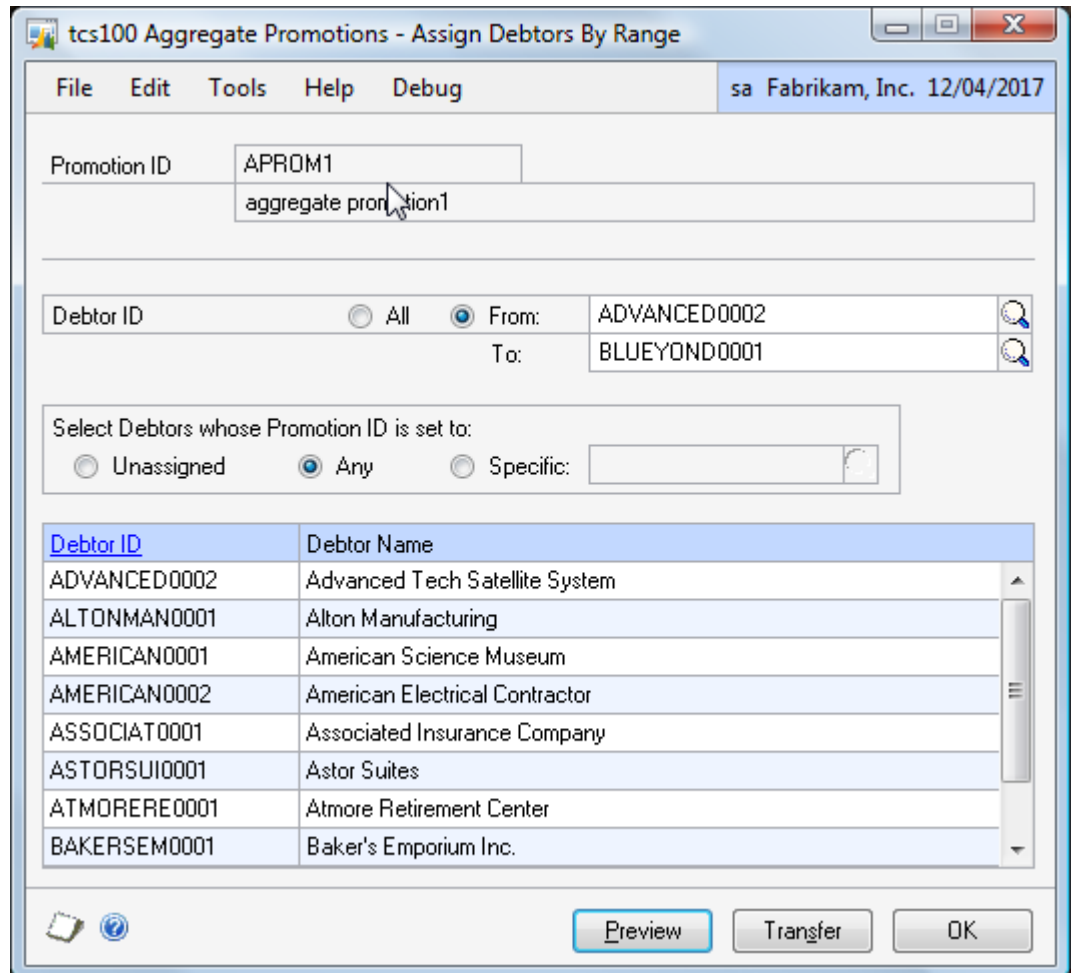


Cards >> Myridas >> Extended Pricing. Enhancements >> Aggregate Promotions – Assign Debtors>> Ranges button>>Assign Debtors option

Use the Aggregate Promotions – Assign Debtors by Range window to:

- Assign ranges of debtors to an Aggregate Promotion

The Aggregate Promotions – Assign Debtors by Range window



48.1 Assigning a Range of Debtors to an Aggregate Promotion

To assign a range of debtors to an Aggregate Promotion in the Aggregate Promotions - Assign Debtors by Range window:

The window will open with the currently selected Promotion ID displayed.

1. Click All to assign all records or From to assign a range of debtors. If you select From, enter To and From values to specify a range, or use the lookups.
2. For the Select Debtors whose Promotion ID is set to option select one of the following:

Unassigned	Only debtors not currently assigned to any Aggregate Promotion will be included in the range.
Any	All debtors will be included in the range.
Specified	If you select specified, enter an Aggregate Promotion ID or select one using the lookup. Only debtors assigned to this promotion will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of debtors to the selected promotion ID. Note that this will not affect any existing promotion assignments of the selected debtors, as a debtor may be assigned to multiple promotions at the same time.

Click OK to close the window.

49. Aggregate Promotions – Assign Debtor Groups by Range window



Cards >> Myridas >> Extended Pricing, Enhancements >> Aggregate Promotions – Assign Debtors>> Ranges button>>Assign Debtor Groups option

Use the Aggregate Promotions – Assign Debtors by Range window to:

- Assign ranges of debtor groups to an Aggregate Promotion

*The
Aggregate
Promotions
– Assign
Debtor
Groups by
Range
window*

Debtor Group ID	Description
AG1	Aggregate customer group 1
AG2	aggregate customer group 2

49.1 Assigning a Range of Debtor Groups to an Aggregate Promotion

To assign a range of debtor groups to an Aggregate Promotion in the Aggregate Promotions - Assign Debtor Groups by Range window:

The window will open with the currently selected Promotion ID displayed.

1. Click All to assign all records or From to assign a range of debtor groups. If you select From, enter To and From values to specify a range, or use the lookups.

- For the Select Debtor Groups whose Promotion ID is set to option select one of the following:

Unassigned	Only debtor groups not currently assigned to any Aggregate Promotion will be included in the range.
Any	All debtor groups will be included in the range.
Specific	If you select specific, enter an Aggregate Promotion ID or select one using the lookup. Only debtor groups assigned to this promotion will be included in the range.

- Click the Preview button to preview your selection in the scrolling window.
- Click the Transfer button to assign the selected range of debtor groups to the selected promotion ID. Note that this will not affect any existing promotion assignments of the selected debtor groups, as a debtor group may be assigned to multiple promotions at the same time.

Click OK to close the window.

50. Aggregate Promotions – Assign Items window



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Items

This window is also available from Go To >> Assign Items on the [Aggregate Promotions Maintenance window](#).

Use the Aggregate Promotions – Assign Items window to:

- Assign Items to an Aggregate Promotion

*The
Aggregate
Promotions
– Assign
Items
window*

Item Number	U Of M	Quantity
A/123/456	Case	N/A
A/123/457	Case	N/A

50.1 Assigning Items to Aggregate Promotions

To assign Items to an Aggregate Promotion in the Aggregate Promotions – Assign Items window.

1. Enter a Promotion ID or select one using the lookup. The promotion description will be displayed.
2. In the scrolling window enter an item number or select one from the lookup.
3. Enter a Unit of Measure or select one using the lookup. Order quantities for this item will be converted to this unit of measure when totalling the quantity ordered for this Aggregate Promotion.

When the item number is entered the Unit of Measure will be set to a default

value, using the following hierarchy:

- the Aggregate Pricing Unit for the item from the [Aggregate Pricing Unit Item Maintenance window](#)
- the Aggregate Pricing Unit for the item's Unit of Measure Schedule from the [Aggregate Pricing Unit of Measure Maintenance window](#)
- the default selling unit for the item
- the base unit of measure for the item

4. For Variable Quantity List type promotions, enter the quantity required for this item.
5. Repeat steps 2, 3 and 4 until all required items have been added to the Promotion.

Alternatively click the Ranges button to display the [Aggregate Promotions – Assign Items by Range window](#) where you can assign ranges of items to the promotion.

6. Click Save to save changes.

*Unassigning items
from a promotion*

Click Delete to unassign all items from the promotion.

51. Aggregate Promotions – Assign Items by Range window



Cards >> Myridas >> Extended Pricing. Enhancements >> Aggregate Promotions – Assign Items>> Ranges button

Use the Aggregate Promotions – Assign Items by Range window to:

- Assign ranges of items to an Aggregate Promotion

*The
Aggregate
Promotions
– Assign
Items by
Range
window*

Item Number	Generic Desc	Class ID	U Of M
A/123/456			Each
A/123/457			Each

51.1 Assigning Ranges of Items to an Aggregate Promotion

To assign ranges of items to an Aggregate Promotion in the Aggregate Promotions - Assign Items by Range window:

The window will open with the currently selected Promotion ID displayed.

1. Click **All** to assign all records or **From** to assign a range of items, generic descriptions or class ids. If you select **From**, enter **To** and **From** values to specify a range, or use the lookups.
2. For the **Select Items** whose **Promotion ID** is set to option select one of the following:

Unassigned	Only items not currently assigned to any Aggregate Promotion will be included in the range.
Any	All items will be included in the range.
Specified	If you select specified, enter an Aggregate Promotion ID or select one using the lookup. Only items assigned to this promotion will be included in the range.

3. Click the **Preview** button to preview your selection in the scrolling window.
4. Click the **Transfer** button to assign the selected range of items to the selected promotion ID. Note that this will not affect any existing promotion assignments of the selected items, as an item may be assigned to multiple promotions at the same time.
5. Click **OK** to close the window.

52. Free Item List Maintenance window



Cards >> Myridas >> Extended Pricing Enhancements >> Free Item List Maintenance

Use the Free Item List Maintenance window to:

- Maintain lists of items available to qualifying aggregate promotions

The Free Item List Maintenance window

Item Number	U Of M	Number Of Units
F/14567	Each	1
F/14789	Each	1
F/15678	Each	1
F/32456	Each	1
		0.00

52.1 Maintaining Free Item Lists

To maintain Free Item Lists in the Free Item List Maintenance window:

1. Enter a Free Item List ID or select one using the lookup.
2. Enter a description for the free item list.
3. In the scrolling window enter an item number or select one from the lookup.
4. Enter a Unit of Measure or select one using the lookup. This is the unit of measure that will be used when creating a free item promotion line for this item.
5. Enter a number of units. This is the number of units of this item which will be supplied free when a quantity of one of this item is selected in the [Aggregate](#)

Promotions – Select Promotions window.

For example, if LIST A is set up as:

Product A	Each	5
Product B	Each	1

If you qualify for 2 items from LIST A, you could select 10 of Product A; or 2 of Product B; or 5 of Product A and 1 of Product B.

- Repeat steps 3 to 5 until all required items have been added to the Free Item List.

Alternatively click the Ranges button to display the [Free Item List Maintenance – Range Allocation](#) window where you can assign ranges of items to the Free item list.

- Click Save to save changes.

Deleting free item lists

Click Delete to delete the list of free items.

53. Free Item List Maintenance – Range Allocation



Cards >> Myridas >> Extended Pricing Enhancements >> Free Item List Maintenance >> Ranges Button

Use the Free Item List Maintenance Range Allocation window to:

- Assign ranges of items to a list of free items

The Free Item List Maintenance – Range Allocation window

Free Item List ID: L1
Free Promotion Illist:

Item Number: All From: F To: F/Z

Generic Description: All From: To:

Class ID: All From: To:

Select Items whose Free Item List ID is set to:
 Unassigned Any Specific:

Default Number Of Units: 1.00

Item Number	Generic Desc	Class ID	U Of M
F.12456	128 GENERC	ATT CORD	Case
F/17563	128 GENERC	ATT CORD	Case
F/17892	128 GENERC	ATT CORD	Case

Buttons: Preview, Transfer, OK

53.1 Assigning Ranges of Items to a Free Item List

To assign ranges of items to a Free Item List in the Free Item List Maintenance – Range Allocation window:

The window will open with the currently selected Free Item List ID displayed.

1. Click All to assign all records or From to assign a range of items, generic descriptions or class ids. If you select From, enter To and From values to specify a range, or use the lookups.
2. For the Select Items whose Free Item List ID is set to option select one of the following:

Unassigned	Only items not currently assigned to any Free Item List will be included in the range.
Any	All items will be included in the range.
Specified	If you select specified, enter a Free Item List ID or select one using the lookup. Only items assigned to this Free Item List ID will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of items to the selected Free Item List ID. Note that this will not affect any existing Free Item List assignments of the selected items, as an item may be assigned to multiple lists.
5. Click OK to close the window.

54. Aggregate Promotions – Debtor Group Maintenance window

Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions - Debtor Group Maintenance

Use the Aggregate Promotions Debtor Group Maintenance window to:

- Maintain aggregate promotion debtor groups. Creating an aggregate promotion debtor group provides a way of easily assigning multiple debtors to an Aggregate Promotion

*The
Aggregate
Promotion
Debtor Group
Maintenance
window*

Debtor ID	Name
BAKERSEM0001	Baker's Emporium Inc.
BERRYMED0001	Berry Medical Center
ADAMPARK0001	Adam Park Resort

54.1 Maintaining Aggregate Promotion Debtor Groups

To maintain debtor groups in the Aggregate Promotions – Debtor Groups window:

1. Enter a Group ID or select one using the lookup.
2. Enter a Description for the Debtor Group.
3. In the scrolling window, enter the list of Debtor Ids in the group.
4. Alternatively click the Ranges button to display the [Aggregate Promotions – Debtor Group – Assign by Range window](#) where you can assign ranges of debtors to the group.
5. Click Save to save your changes.

Deleting debtor groups

Click Delete to delete an aggregate promotion debtor group.

55. Aggregate Promotions - Debtor Group - Assign by Range



Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions - Debtor Group Maintenance >> Ranges Button

Use the Aggregate Promotions - Debtor Group - Assign by Range window to:

- Assign a range of debtors to an aggregate promotion debtor group

The Aggregate Promotions - Debtor Group - Assign by Range window

File Edit Tools Help Debug sa Fabrikam, Inc. 12/04/2017

Group ID AG2 aggregate customer group 2

Debtor ID All From: CELLULAR0001 To: CENTRALI0001

Class ID All From: To:

Select Debtors whose Group ID is set to:
 Unassigned Any Assigned To:

Debtor ID	Class ID
Debtor Name	
CELLULAR0001	USA-ILMO-T1
CENTERSU0001	USA-MNWI-T4
CENTRALC0001	USA-ILMO-T1
CENTRALD0001	USA-MNWI-T4
CENTRALI0001	USA-ILMO-T1

Preview Transfer OK

55.1 Assigning Ranges of Debtors to an Aggregate Promotion Debtor Group

To assign ranges of debtors to an Aggregate Promotion Debtor Group in the Aggregate Promotions – Debtor Group – Assign by Range window:

The window will open with the currently selected Group ID displayed.

1. Click All to assign all records or From to assign a range of debtors or class ids. If you select From, enter To and From values to specify a range, or use the lookups.
2. For the Select Debtors whose Group ID is set to option, select one of the following:

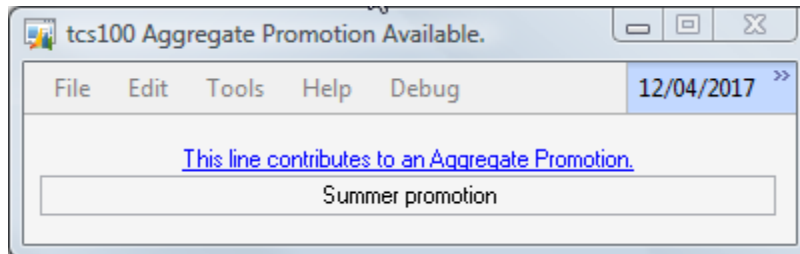
Unassigned	Only debtors not currently assigned to any Group ID will be included in the range.
Any	All debtors will be included in the range.
Assigned To	If you select Assigned to, enter a Group ID or select one using the lookup. Only debtors assigned to this Group ID will be included in the range.

3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Transfer button to assign the selected range of debtors to the selected Group ID. Note that this will not affect any existing Group assignments of the selected debtors, as a debtor may be assigned to multiple groups.
5. Click OK to close the window.

56. Aggregate Promotions in Sales Transaction Entry

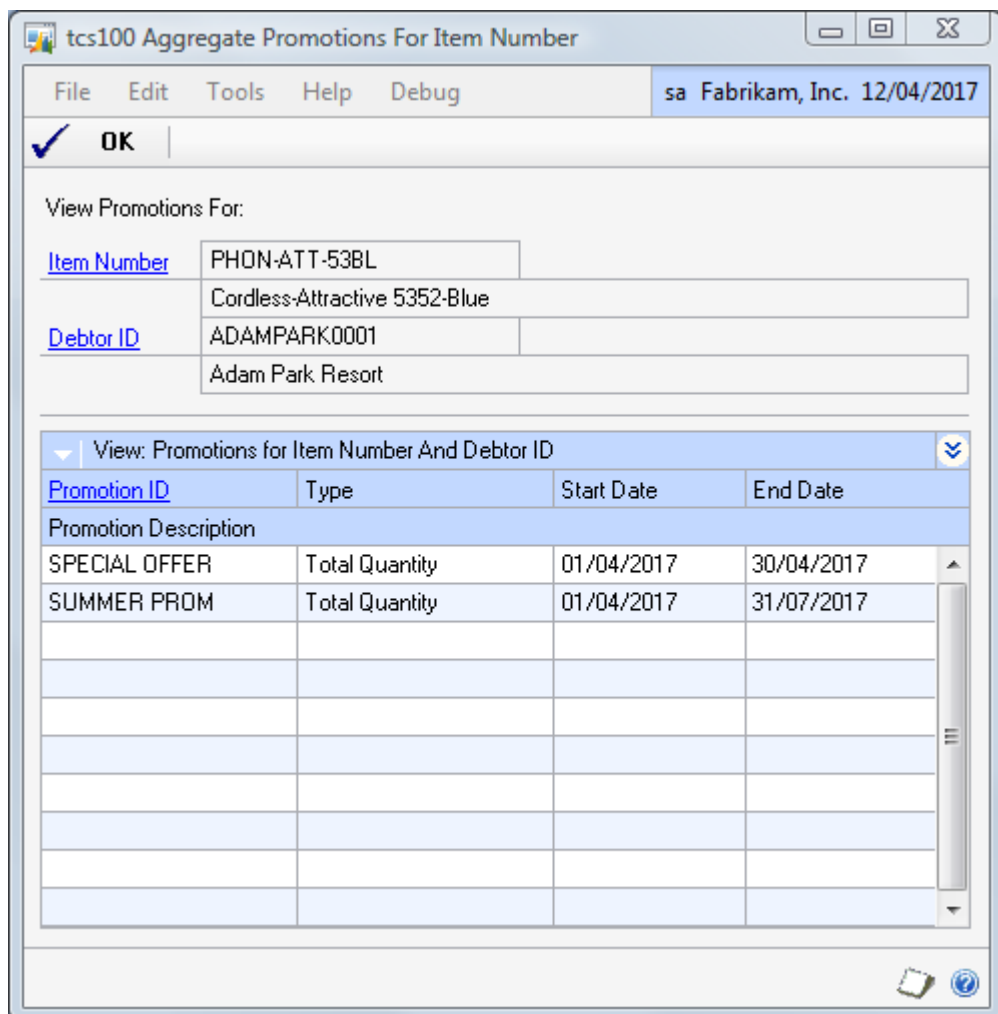
As items are entered onto an order, the Aggregate Promotion Available window informs the user if the item contributes to one or more aggregate promotions. If the item contributes to one promotion, the promotion name will be displayed; if the item contributes to multiple promotions the text “*** Multiple Promotions Found ***” will appear.

The Aggregate Promotion Available window



From this window, a zoom facility provides a list of the relevant Aggregate Promotions in the Aggregate Promotions for Item Number window.

The Aggregate Promotions for Item Number window



During entry of an order, the progress of aggregate promotion quantities against breakpoints can be viewed in the [Aggregate Promotion Tracker window](#).

When the order is complete, the aggregate promotion free item lines can be reviewed and added using the [Aggregate Promotions – Select Promotions window](#). When the order is saved, the user will be reminded to add the free item lines if they have not already done so. Free item lines can be added only once; further free items cannot be added to an order which already has free promotion lines added.

Aggregate Promotions may be added to quotes and to orders. They can also be added to fulfillment orders and invoices if these are entered directly, i.e. if they have not been created by a transfer from another document.

If an item is part of more than aggregate promotion it will contribute to all of them unless the option to Allow only one Aggregate Promotion per Document line option has been selected in the [Extended Pricing Extras Setup window](#). If this option has been selected, if an item is part of multiple aggregate promotions, the user will be offered a choice of promotions when the item is entered on a document line. Selecting the required Promotion in the Assign Aggregate Promotion to Document Line window, will link the item to one promotion.

tcs100 Assign Aggregate Promotion To Document Line

This Item contributes to several Aggregate Promotions. Please select one to contribute to before proceeding:

Promotion ID	Type	Start Date	End Date	
Promotion Description				
SPECIAL OFFER	Total Quantity	01/04/2017	30/04/2017	▲
SUMMER PROM	Total Quantity	01/04/2017	31/07/2017	

57. Aggregate Promotion Tracker window

Sales Transaction Entry >> Additional >> Aggregate Promotion Information

Use the Aggregate Promotion Tracker window to:

- View the status of aggregate promotion quantities

*The
Aggregate
Promotion
Tracker
window*

Promotion ID	Type	Free Item Number or List	Quantity Ordered	Qty Break Achieved	Next Qty Break	Qty Free Achieved
			1.00	0.00	10.00	0
			0.00	0.00	1.00	0
			N/A	N/A	N/A	0

Item Number	U Of M	Quantity Required	Quantity Ordered	Item Description
A/123/456	Case	N/A	1	a/123/456
A/123/457	Case	N/A	0	A/123/457

57.1 Viewing the status of aggregate promotions

To view the status of aggregate promotions in the Aggregate Promotion Tracker window:

1. The upper scrolling window shows the Aggregate Promotions available to the debtor for whom the current order is being placed.

For total quantity type promotions, the total quantity ordered of the items on the promotion is displayed. If a break point has been reached, the break point quantity and the free quantity achieved are displayed. If applicable, the next break point is also shown. Zoom facilities allow more details of the aggregate promotion to be viewed.

For Every Item in List type promotions, the quantity ordered field shows the lowest quantity ordered of any item in the list. So, for example, if there are six items on the promotion list but only five have been ordered so far, quantity ordered will be displayed as 0. If a quantity of 1 has been ordered of all six items, the quantity ordered will be displayed as 1.

For points allocation promotions, the total quantity ordered and break points are shown as they are for total quantity type promotions. In the Qty Free achieved column, the total points achieved is shown. This is highlighted by a letter P next to the points value.

For Variable Quantity List type promotions, the quantity ordered field is not available in the upper scrolling window.

A letter Q next to the promotion id indicates that this document has qualified for the promotion.

For Every Item in List and Variable Quantity List type promotions, a letter P next to the promotion id indicates that some of the items have been ordered.

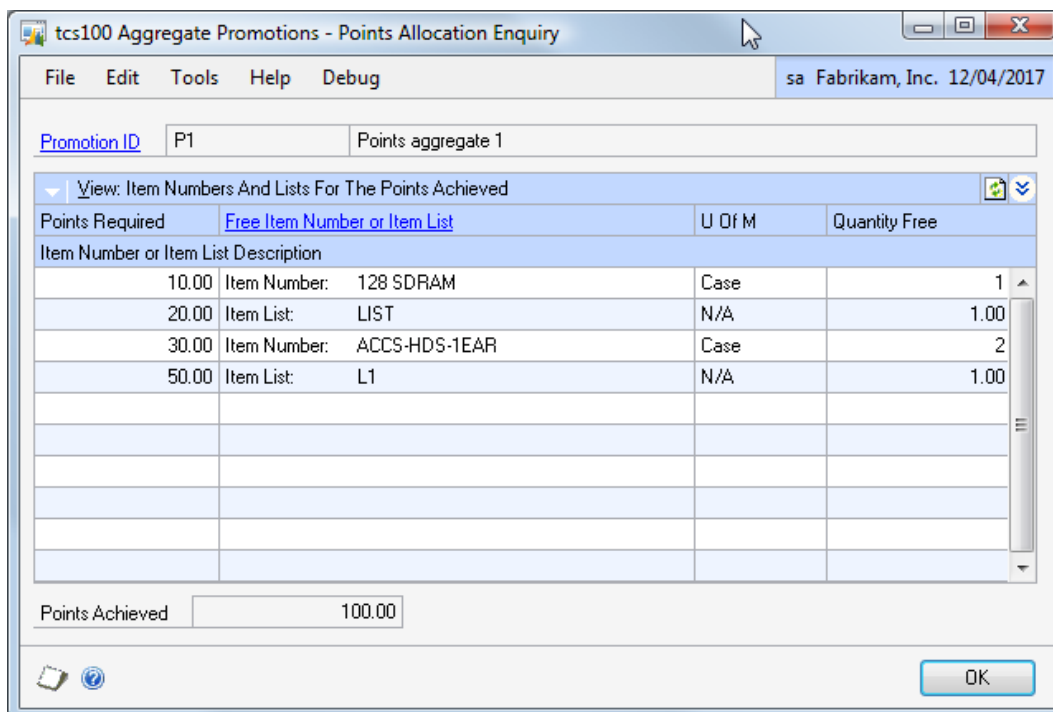
The lower scrolling window shows the items assigned to the promotion and the quantities ordered so far. Items can be added to the order by selecting them from the lower scrolling window.

2. Press OK to close the window.

57.2 Viewing the available free items for a Points Allocation Promotion

For a Points Allocation Promotion, when you click on the Free Item Number or List link from the Aggregate Promotion Tracker window, the Aggregate Promotions – Points Allocation Enquiry window will open.

This shows the free items and item lists available for this promotion and the points required for each.



58. Aggregate Promotions– Select Promotions window

Sales Transaction Entry >> Additional >> Aggregate Promotion Selection

Use the Aggregate Promotions – Select Promotions window to:

- Review free items and add them to the order

The window may be used at any time during the entry of an order to review the free items and to select from free item lists where appropriate. When the order is saved, if it qualifies for any aggregate promotions the user will be prompted to open this window so that the free items can be added to the order.

*The
Aggregate
Promotions
– Select
Promotions
window*

Free Item Number or List	Quantity Ordered	Break Achieved	Next Qty Break	Qty Free Achieved	Qty Taken	Include?
Item Number: 128 SDRAM	11.00	10.00	0.00	1	1	<input checked="" type="checkbox"/>
128 meg SDRAM	SPECIAL OFFER	Total Quantity	April special offer			
Item Number: 128 SDRAM	11.00	10.00	0.00	1	1	<input checked="" type="checkbox"/>
128 meg SDRAM	SUMMER PROM	Total Quantity	Summer promotion			

Item Number	U Of M	Quantity Required	Quantity Ordered	Item Description
PHON-ATT-5354	Case	N/A	10	Cordless-Attractive 5354
PHON-ATT-53BL	Case	N/A	1	Cordless-Attractive 5352-Blue

58.1 Adding Free Items to an Order

To add free items to an order in the Aggregate Promotion – Select Promotions window:

1. The upper scrolling window shows the Aggregate Promotions for which the current order has qualified. For all promotion types except Points Allocation type, the Qty Free Achieved field shows the quantity of the free item that this order has qualified for, and the Qty Taken field shows the quantity of the free item which will be added to the order. For Points Allocation type promotions, the Points Achieved and Points Allocated are shown in these two columns. This is highlighted with a letter P.
2. If the resulting free item is a single item, Qty Taken will have a default value equal to Qty Free Achieved.

3. If the resulting free item has to be selected from a Free Item List, or if the promotion is a Points Allocation type, Qty Taken will have a default value of 0. Use the Qty Taken expansion button to choose the items to be added as free items. The expansion button will the [Aggregate Promotions – Select Promotions – Free Items window](#) or the [Aggregate Promotions – Select Promotions – Points Allocation window](#), depending on the promotion type.
4. Unless an error is detected, the Include check box will be ticked automatically for any line which has a value in Qty Taken. You can omit free lines by removing the tick from the Include checkbox.
5. Click Save to save your free item selections and continue with entry of the sales order., or click Add Free Items to add the lines to the order. The Add Free Items button is only available when the Aggregate Promotions – Select Promotions window is opened on Saving the sales document.
6. As the free items are added, if the system encounters any errors or questions that cannot be answered automatically, the addition of lines will stop and the Sales Item Detail Entry window will open. After replying to the question or dealing with the error you should press save, at which point the addition of any further free lines will continue.

Note that you can click cancel to exit from the Aggregate Promotions – Select Promotions window without adding the free item lines.

58.2 Selecting Free Items from a List

To select free items from a list in the Aggregate Promotions – Select Promotions – Free Items window:

1. In the Aggregate Promotions – Select Promotions window, click the Qty Taken Expansion button to open the free item selection window.

Item Number	U Of M	QTY Available	Number Of Units	QTY Taken	Total Free Qty
256 SDRAM	Case	1,588	1	0	0
256 meg SDRAM	Each	10	1	0	0
F/14567	Each	10	5	0	0
F/14789	Each	0	1	0	0
F/15678	Each	0	1	0	0
F/32456	Each	0	1	0	0

Qty Free Achieved: 10.00 Quantity Selected: 0.00 Clear All Quantities OK

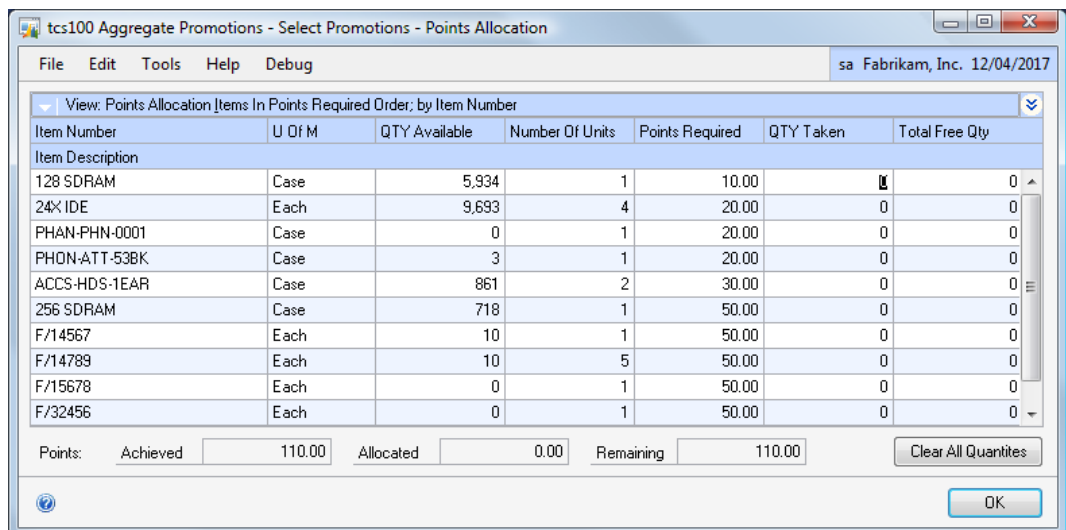
2. From the list in the scrolling window, choose the item number to be taken as the free item, and enter the quantity to be given free in the QTY Taken field.

3. The Total Free Quantity of the item is calculated as Qty Taken * Number of Units.
4. Multiple items may be selected, until the total quantity selected equals the quantity free achieved.
5. Press OK to return to the Aggregate Promotions – Select Promotions window.

58.3 Selecting Free Items from a List – Points Allocation

To select free items from a list in the Aggregate Promotions – Select Promotions – Points Allocation window:

1. In the Aggregate Promotions – Select Promotions window, click the Qty Taken Expansion button to open the free item selection window.



2. From the list in the scrolling window, choose the item number to be taken as the free item, and enter the quantity to be given free in the QTY Taken field.
3. The Total Free Quantity of the item is calculated as Qty Taken * Number of Units.
4. Multiple items may be selected, until the points allocated equals the points achieved.
5. Press OK to return to the Aggregate Promotions – Select Promotions window.

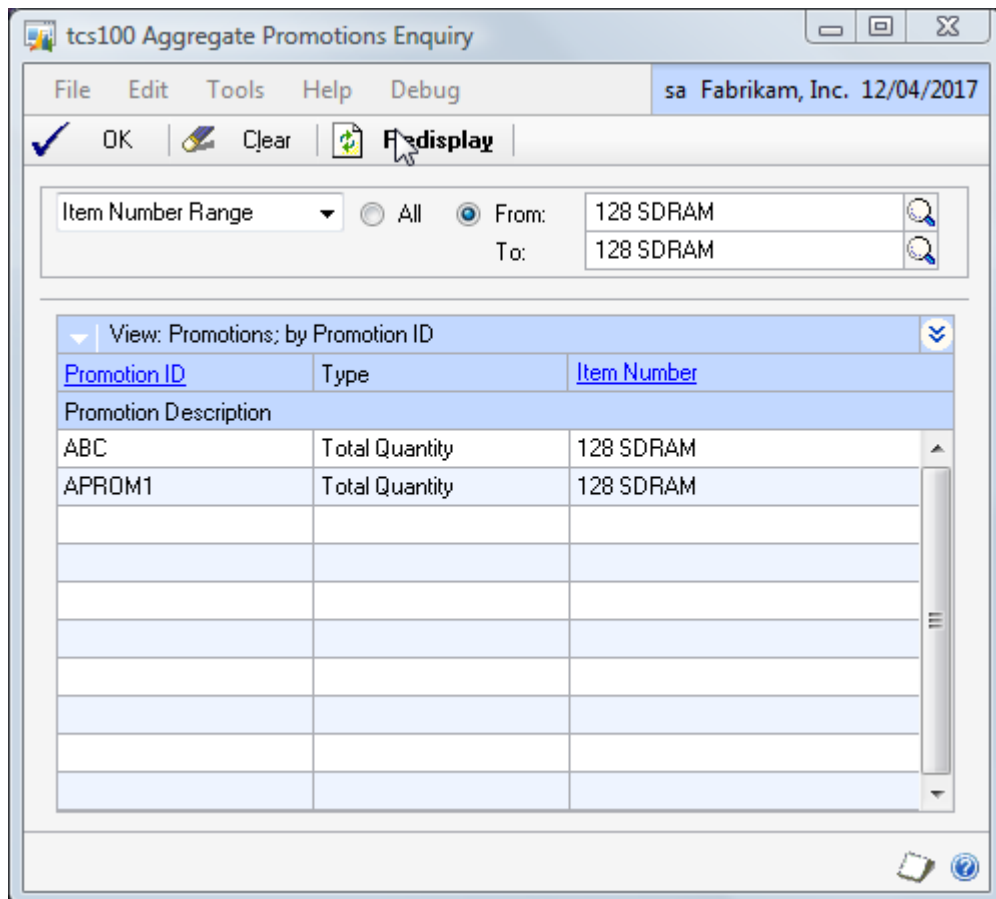
59. Aggregate Promotions Enquiry

Enquiry >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Enquiry

Use the Aggregate Promotions Enquiry window to:

- View the Aggregate Promotions available to a debtor or range of debtors
- View the Aggregate Promotions associated with an item or range of items

*The
Aggregate
Promotions
Enquiry
window*



59.1 Viewing Aggregate Promotions for a debtor or item

To view aggregate promotions for a debtor or item in the Aggregate Promotions Enquiry window:

1. From the dropdown list select to view promotions for an Item Number range, Debtor ID range or Debtor Group ID range.
2. Click All to view all records, or From to view promotions for a range of items or debtors.
3. Click Redisplay to view the aggregate promotions for the selected range of Item Numbers, Debtor Ids or Debtor Group Ids.
4. Click Clear to clear your entries and select a new range, or OK to close the window.

Debtor Price Report

With the Debtor Price List Production window you can produce reports of customer price lists. The reports can be printed in text or graphical format and based on a wide variety of parameters. Prices produced on the reports are held in a SQL table - tcsSOPTB00096_DP_DTL. The table can be used by SmartList Builder or Crystal Reports or used to export prices to Excel in conjunction with a suitable data tool.

60. Debtor Price List Production window



Reports >> Myridas >> Extended Pricing Enhancements >> Customer Price Reports

Use the Debtor Price List Production window to:

- Report on debtor prices

The Debtor Price List Production window

60.1 Reporting on Debtor Price Lists

To report on debtor price lists using the Debtor Price List Production window:

1. Select whether to produce price lists for Debtors or Prospects.
2. Select an Account Preference:

National Account	This option will enable you to print prices for debtors held under a national account. Enter a national account or select one using the lookup. All debtors will be selected by default. Accept this selection or click From and enter from and to range values or select them using the lookups.
Individual Debtor/Prospect	This option will enable you to print prices for a specific debtor or prospect. Enter a debtor or prospect ID or select one using the lookup. If you select this option then you can also select the Use Template as basis for list option. This will base reported prices on items on a selected template (see Myridas Customer Templates). You should select a ship to address and template ID. Note that the Use Template option is not available if producing price lists for prospects.
Account Range	This option will enable you to print prices for a range of debtors or prospects. All debtors/prospects will be selected by default. Accept this selection or click From and enter from and to range values or select them using the lookups.

3. All Item Class IDs will be selected by default. Accept this selection or click From and enter from and to range values or select them using the lookups.
4. All Item Numbers will be selected by default. Accept this selection or click From and enter from and to range values or select them using the lookups.
5. The current user date will be selected by default as the As at date. Amend this selection as required.

Note that the system will only hold price reports for 3 different dates per debtor or prospect. If you attempt to print a report for a fourth date then the Price List Purge window will be displayed.

Select one or more dates to remove and click Purge or click Cancel to return to the Debtor Price List Production window where you can amend you selection.

*The Price List
Purge window*

Debtor ID	Report Date 1	Report Date 2	Report Date 3
Name			
ADAMPARK0001	12/04/07 <input type="checkbox"/>	15/04/07 <input type="checkbox"/>	17/04/07 <input type="checkbox"/>

6. If you are working in a multi-currency system then the default functional currency will be displayed. Enter a new currency ID or select one using the lookup as required.
7. From the U Of M drop-down menu select to print prices for the Default Selling U Of M only or for All units of measure.
8. From the Get Prices From drop-down menu select to get price from Price Sheets and Books or Price Sheets Only. If you choose Price Sheets and Books, an additional Include Base option is given. Select this to include items where the debtor's price is taken from the Base book.
9. If you are working with [Site Specific Pricing](#) you need to enter a site ID or select one using the lookup.
10. If you want to include [promotional prices](#) in the debtor price report then click the Include Promotions checkbox.
11. By default the price report will be produced in text format. Click the Graphical Cut-down Version checkbox if you want produce the report in graphical format. Note that graphical reports will display only one price for an item.

If you have selected to include promotional prices and are printing a graphical report then by default available promotional prices will be displayed on the report. If you select the Use Best Price only option then the best price will be displayed, even if this is not the promotional price.
12. Click Print then from the Report Destination dialogue box select where the Debtor Prices Report should be printed to.
13. Click OK to close the window.

Note that you can click Clear at any point to clear any entries made in the window.



60.2 Clearing Price Report data

Price list reporting data generated by the Debtor Price List Production window is stored in table tcsSOPTB00096_DP_DTL to allow it to be used by external reporting tools. To clear the contents of this table select Options->Clear Tables.

Appendix A

Access to Myridas Windows

Extended Pricing Enhancements

Window Name	 Menu Access	 Other Access
Aggregate Pricing – Debtor/Prospect Activation by Range	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Debtor Prospect Activation by Range	
Aggregate Pricing Group Allocation	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Allocation	
Aggregate Pricing Group Allocation Range		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Allocation >> Ranges button
Aggregate Pricing Group Breaks		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance >> Quantity Breaks button
Aggregate Pricing Group Deals – Assign Debtors	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors	
Aggregate Pricing Group Deals – Assign Debtors by Range		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors >> Ranges button
Aggregate Pricing Group		Aggregate Pricing

Detail View		Tracker window >> Group Code link button
Aggregate Pricing Group Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance	
Aggregate Pricing Price Trace	Enquiries >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Price Trace	Enquiry >> Inventory >> Extended Pricing >> Price Trace >> Additional >> Aggregate Pricing
Aggregate Pricing Rework		Transactions >> Sales >> Sales Transaction Entry >> Additional >> Rework Aggregate Prices
Aggregate Pricing Tracker		Transactions >> Sales >> Sales Transaction Entry >> Additional >> Aggregate Pricing Information Item Catalogue and Search window >> Select an item and click the Aggregate Pricing Information window
Aggregate Pricing Unit Item Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Unit Item Maintenance	Cards >> Inventory >> Items >> Additional >> Aggregate Pricing
Aggregate Pricing Unit Of Measure Maintenance	Tools >> Setup >> Myridas >> Extended Pricing Enhancements >> Aggregate Pricing Unit Of Measure Maintenance	Setup >> Inventory >> U of M Schedule >> Additional >> Aggregate Pricing
Aggregate Promotions Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance	

Aggregate Promotions Maintenance – Free Items		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance >> Free Item(s) Button
Aggregate Promotions – Assign Debtors	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Debtors	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance >> Go To >>Assign Debtors
Aggregate Promotions – Assign Debtors by Range		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Debtors >> Ranges Button
Aggregate Promotions – Assign Items	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Items	Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance >> Go To >>Assign Items
Aggregate Promotions – Assign Items by Range		Cards >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Items >> Ranges Button
Aggregate Promotions – Points Allocation Enquiry		Aggregate Promotion Tracker >> Free Item Number or List link Aggregate Promotion Selection >> Free Item Number or List Link
Free Item List Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Free Item List Maintenance	
Free Item List Maintenance – Range		Cards >> Myridas >> Extended Pricing

Allocation		Enhancements >> Free Item List Maintenance >> Ranges Button
Aggregate Promotions Available		Sales Transaction Entry >> Enter an Item on an aggregate promotion
Aggregate Promotions for Item Number		Aggregate Promotions Available >> Zoom
Aggregate Promotion Tracker		Sales Transaction Entry >> Additional >> Aggregate Promotion Information
Aggregate Promotion – Select Promotions		Sales Transaction Entry >> Additional >> Aggregate Promotion Selection
Aggregate Promotion – Select Promotions – Free Items		Sales Transaction Entry >> Additional >> Aggregate Promotion Selection >> Qty Taken Expansion button
Aggregate Promotion – Select Promotions – Points Allocation		Sales Transaction Entry >> Additional >> Aggregate Promotion Selection >> Qty Taken Expansion button
Aggregate Promotions Enquiry	Enquiry >> Myridas >> Extended Pricing Enhancements >> Aggregate Promotions Enquiry	
Assign Price Sheets To Site Price Types	Cards >> Myridas >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types	
Assign Site IDs To Site Price Types	Cards >> Cards >> Extended Pricing Enhancements >> Assign Site IDs To Site Price Types	

Assign Site IDs To Site Price Types - By Range		Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site IDs To Site Price Types >> Ranges button
Assign Site Price Type To Price Sheet ID - By Range		Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID >> Ranges button
Assign Site Price Type To Site ID	Cards >> Myridas >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID	Cards >> Inventory >> Site >> Additional >> Site Price Type
Available Promotions Information		Transactions >> Sales >> Sales Transaction Entry >> Enter an item on a current promotion sheet
Debtor Price List Production	Reports >> Myridas >> Extended Pricing Enhancements >> Customer Price Reports	
Extended Pricing Enhancements Debtor/Prospect Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Debtor/Prospect Maintenance	Cards >> Sales >> Debtor >> Additional >> Extended Pricing Enhancements
Extended Pricing Extras Setup	Tools >> Setup >> Myridas >> Extended Pricing Enhancements >> Extended Pricing Enhancements Setup	
Order Value Discounts		Sales Transaction Entry >> Additional >> Order Value Discount
Order Value Discount Document		Sales Transaction Entry >> Additional >> Order Value Disc - Document
Order Value Discount		Sales Transaction Entry

Line Item		>> Additional >> Order Value Disc – Line Item
Order Value Discounts – Assign Debtors	Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Assign	
Order Value Discounts – Assign Debtor Ranges		Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Assign >> Ranges button
Order Value Discount - Excluded Items	Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Excluded Items	
Order Value Discount Excluded Items Range		Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Excluded Items >> Ranges button
Order Value Discount Groups	Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Groups	
Order Value Discount Rates	Cards >> Myridas >> Extended Pricing Enhancements >> Order Value Discount Rates	
Order Value Discount Setup	Tools >> Setup >> Myridas >>.Extended Pricing Enhancements >> Order Value Discount Setup	
Price Trace Enquiry - Site ID		Enquiry >> Inventory >> Extended Pricing >> Price Trace
Site Price Type Maintenance	Cards >> Myridas >> Extended Pricing Enhancements >> Site Price Type Maintenance	

Appendix B

Amended Microsoft Dynamics™ GP Windows

Multiple Microsoft Dynamics™ GP windows have been amended to provide increased functionality.

Window Name	Amended Functionality
Price Book Maintenance	BASECOSTBOOK cannot be deleted or assigned non-net only price sheets
Price Sheet Maintenance	A price sheet on the BASECOSTBOOK cannot be amended to non-net only
Price Sheet Assignment	Only net price only sheets can be added to the BASECOSTBOOK
Price Sheet Assignment Ranges	Only net price only sheets can be added to the BASECOSTBOOK
Price Sheet Detail Maintenance	<p>Option to select cost uplift value or cost uplift %</p> <p>If cost uplifts options are selected:</p> <ul style="list-style-type: none"> • The base adjusted price on will be set to base book • Sheet price will be drawn from the BASECOSTBOOK • Adjusted price will be calculated on entry of values <p>Option to enter value off and percentage off negative quantities</p>
Price Sheet Enquiry	Includes enquiries on cost uplift sheets
Item Price Sheet Enquiry	Includes enquiries on cost uplift sheets
Price Trace Enquiry	Includes enquiries on cost uplift sheets and aggregate pricing price sheets
Promotion Price Sheet Enquiry	Includes enquiries on cost uplift sheets
Debtor Pricing Maintenance	Debtors cannot be assigned the BASECOSTBOOK
Prospect Pricing Maintenance	Prospects cannot be assigned the BASECOSTBOOK

Appendix C

Amended Myridas Windows

Multiple Myridas windows have been amended to provide increased functionality.

Window Name	Module	Amended Functionality
Aggregate Pricing Group Detail View	Extended Pricing Enhancements	Where applicable displays site specific prices
Aggregate Pricing Price Trace	Extended Pricing Enhancements	Where applicable displays site specific prices
Aggregate Pricing Rework	Extended Pricing Enhancements	Where applicable displays site specific prices
Item Catalogue and Search	Catalogue Based Sales	Where applicable displays site specific prices and aggregate promotion details.
Price Negotiation	Price Negotiation	Where applicable displays site specific prices
Template Select	Template Selling	Where applicable displays site specific prices
True Cost Enquiry	Purchase Retrospective Discounts	Where applicable displays site specific prices

Appendix D

Myridas Reports

Myridas provides reports to increase information visibility.

Report Name	Module	Functionality
Debtor Prices Report	Extended Pricing Enhancements	Prints debtor prices

The Extended Pricing Enhancements module can be used in conjunction with Microsoft Dynamics™ GP Report Writer to provide additional reporting parameters.

Extended Pricing Enhancements Report Functions

Overview

There is one EPE Report Function:

1. `rw_tcsSOPFN00090_GetLineDiscount`

Returns the discount amount for the parameters detailed below.

The function needs the following six parameters passed to it:

- SOP Type
- SOP Number
- Line Item Sequence
- Component Sequence
- Currency ID
- in boolean `tcsPIBO_History`; 1 = History, 0 = Current

Using in a report

To add the EPE Report Function to a report, follow these steps:

1. Open the Report Layout window.
2. On the Toolbox window, select Calculated Fields in the drop-down list.
3. Click the New Button.
4. Choose a name - for example `EPEAppliedDiscount`.
5. Set the Result Type to Variable Currency.

6. Expression Type should be left at Calculated.
7. Select the Functions Tab.
8. Select the User Defined radio button
9. From the Core DDL, select Sales.
10. From the Function DDL, select the relevant Function (rw_tcsSOPFN00070_GetLineDiscount).
11. Click the Add Button.
12. You need to pass parameters to the function. It is assumed the report you are creating contains the 'Sales Transaction Amounts Work' table (SOP_LINE_WORK or SOP_LINE_HIST).
13. Select the Fields tab.
14. Select 'Sales Transaction Amounts Work' from the Resources DDL.
15. In the Field DDL, select 'SOP Type' and press the Add Button.
16. In the Field DDL, select 'SOP Number' and press the Add Button.
17. In the Field DDL, select 'Line Item Sequence' and press the Add Button.
18. In the Field DDL, select 'Component Sequence' and press the Add Button.
19. Select 'Sales Transaction Work' from the Resources DDL.
20. In the Field DDL, select 'Currency ID' and press the Add Button.
21. Now add an integer to define whether the data is historical or current, where 1 = historical and 0 = current.
22. Press OK to save the Calculated Field.
23. You may now drag the Calculated Field on to the report.
24. You can now assign formatting as normal to the field.

Note that you must enable security for modified forms before modifications will take effect.

Index

A

Aggregate Pricing	19
allocating items to groups.....	25
allocating ranges of items to groups	27, 34
calculating aggregate prices.....	20
sales transaction entry.....	35
selecting aggregate prices.....	36
setting up aggregate price groups ...	22
setting up debtors and prospects.....	11
setting up individual items.....	28
setting up quantity breaks	24
tracing prices	41
viewing group details during sales transaction entry	39
viewing quantity details during sales transaction entry	38
Aggregate Pricing Group Allocation Range window	26
Aggregate Pricing Group Allocation window	25
Aggregate Pricing Group Breaks window	23
Aggregate Pricing Group Detail View window	39
Aggregate Pricing Group Maintenance window	22
Aggregate Pricing Groups allocating items.....	25
allocating ranges of items	27, 34
setting up	22
Aggregate Pricing Price Trace window	41
Aggregate Pricing Rework window	36
Aggregate Pricing Tracker window	37
Aggregate Pricing Unit Item Maintenance window.....	28
Aggregate Pricing Unit Of Measure Maintenance window.....	29
Aggregate Pricing Units.....	19
assigning to items	28
setting up for units of measure	29
Aggregate Promotions	70
assigning debtors	76
assigning items	81
calculation.....	70
free item lists	85
free items	74
sales transaction entry.....	92
setup.....	72
Aggregate Starting Quantity	11

Alternate quantity free calculation	15
Assign Price Sheets To Site Price Types - By Range window	51
Assign Price Sheets To Site Price Types window.....	50
Assign Site IDs To Site Price Types - By Range window	47
Assign Site IDs To Site Price Types window.....	46
Assign Site Price Type To Price Sheet ID window	49
Assign Site Price Type To Site ID window.....	45
Available Promotions Information window.....	16
Available promotions window option .	15

B

Base cost book.....	13
---------------------	----

C

Calculating cost uplift prices	14
Cost uplift options	13
Cost uplift prices in sales transactions	14

D

Debtor Price List Production window	100
Debtor Price Report.....	100
printing.....	101

E

Extended Pricing Enhancements	7
setting defaults	8
Extended Pricing Enhancements Debtor/Prospect Maintenance window.....	11
Extended Pricing Extras Setup window	8

N

Negative Adjustments in Price Sheets.	17
---------------------------------------	----

O

Order Value Discounts	54
assign debtors.....	58
calculation	54
excluding items	63
groups.....	56
rates	61
sales transaction entry	66
setup window	55

P	
Price List Purge window	102
Price Sheet Detail Maintenance window	13
Price Sheets	
assigning multiple sheets to a site price type.....	50
assigning ranges of sheets to a site price type.....	52
assigning to a price type	49
entering negative quantities	17
Price Trace	
aggregate prices	41
tracing site specific prices	53
Price Trace Enquiry - Site ID window	53
Promotions	15
viewing in transactions	16
Q	
Quantity Breaks	
aggregate pricing	24
Quantity free	15
S	
Sales Transactions	
aggregate pricing	35
viewing aggregate pricing group details	39
viewing aggregate pricing quantity details.....	38
Setting up cost uplift prices	13
Site Price Type	
assigning multiple price sheets	50
assigning ranges of price sheets	52
assigning to a price sheet	49
assigning to a range of sites	48
assigning to multiple sites	46
Site Price Type Maintenance window	44
Site Price Types	
assigning to a site ID	45
deleting.....	44
setting up.....	44
Site Specific Pricing	43
site price types.....	44
tracing a site specific price.....	53
U	
Units of Measure	
aggregate pricing.....	19
setting aggregate pricing units	29
V	
Viewing promotions for sales items....	16
Visible Discounts	18
modifying reports.....	112
setting up debtors and prospects	11