

# *myridas*<sup>TM</sup> *User Guide*

Version 7.8 for Great Plains 7.5

Extended Pricing Enhancements



Trinity Computer Services Limited

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## 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



*Cards >> Myridas Setup >> About Myridas*

Use the About Myridas window to check your license 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*

License Information

Company Name

Max Users

Key 1  Key 2

Key 3  Key 4

Key 5

Installation Details

Company ID

Installer Version  Dictionary Build

Module	Registered	Installed
Additional Charges	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Call Scheduling	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Catalogue based sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OK

## Extended Pricing Enhancements

The Myridas Extended Pricing module provides additional functionality for Great Plains Extended Pricing.

The key features of the Extended Pricing Enhancement module are:

- The facility to set up and use cost uplift prices
- New promotion information window providing increased information during sales transaction entry
- A new calculation for quantity free promotions
- The facility to include negative adjustments on price sheets
- Visible discounts to view discount details for sales transactions
- Aggregate pricing based on multiple item purchases
- Inventory prices can be set on a site specific basis

The Myridas Extended Pricing Enhancements module is fully integrated with Great Plains 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

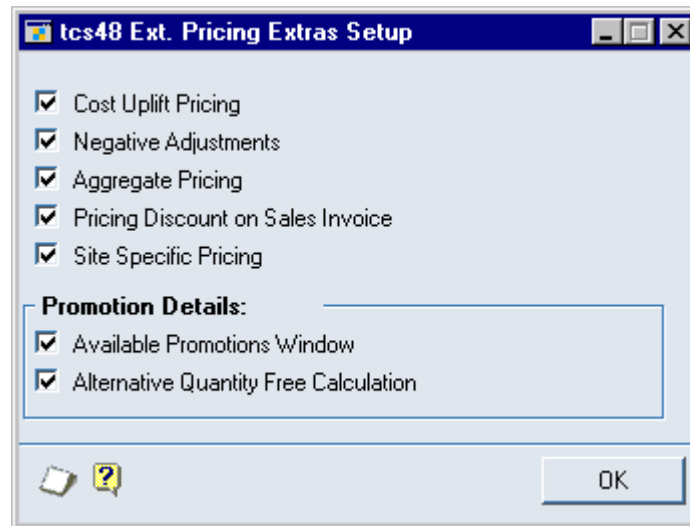


*Cards >> Myridas Setup >> Ex. Prc. Enhancements>> Ex. Prc. Enh. Setup*

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. Seven 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 <a href="#">Cost Uplift Pricing</a> .
Negative Adjustments	Enables you to enter negative values for value off and percentage off adjustments against price sheet items. See <a href="#">Negative Adjustments in Price Sheets</a> .
Aggregate Pricing	Enables accumulated quantities in sales transactions to be accumulated against multiple items rather than based solely on individual item accumulations. See <a href="#">Aggregate Pricing</a> .
Pricing Discount on Sales Invoices	Enables Visible Discounts functionality. Invoices can be modified to display the discount given on a transaction where the debtors has been set up for visible discounts in the <a href="#">Extended Pricing Enhancements Debtor/Prospect Maintenance window</a> . See <a href="#">Visible Discounts</a> .

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 <a href="#">Site Specific Pricing</a> 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 <a href="#">Myridas Promotions</a> .
Alternate Quantity Free Calculation	Quantity free calculations will follow the Myridas calculation for working out free quantities rather than the Great Plains calculation. See <a href="#">Myridas Promotions</a> .

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

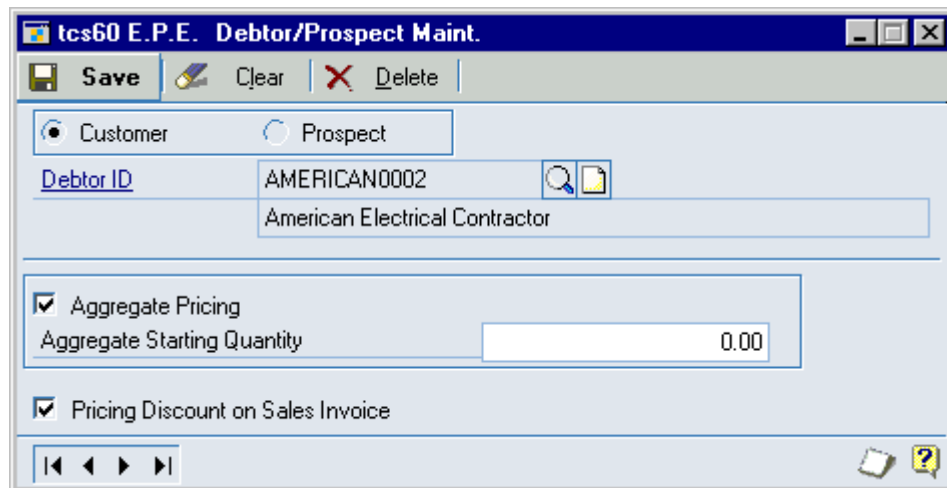


*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ex. Prc. Enh. Debt Maint*

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 Extras 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

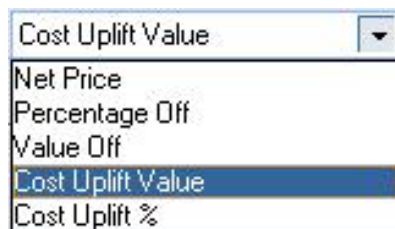
Cost uplift pricing is when a selling price for sales transactions is calculated by adding a value or percentage to the unit cost price. New, mainly underlying, functionality allows you to create cost uplift prices using the Great Plains Extended Pricing windows.

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 Great Plains 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 Great Plains 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 Great Plains 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 Great Plains.

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.

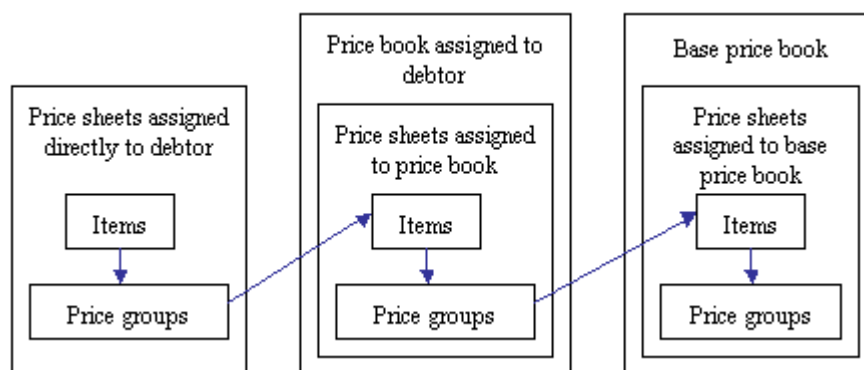
## 4. How Cost Uplift Prices are Calculated

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 Great Plains Extended Pricing and Extended Pricing Error Reports.

## Promotions

### 5. Myridas Promotions

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 Great Plains 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

Great Plains 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	5
10 to 99	15
100 to 999999999	25

If a purchase quantity of 50 were entered into a transaction then standard Great Plains would calculate a quantity of 750 free items (purchase quantity (50) x quantity free (15)).

With the Myridas alternate free quantity calculation, if a purchase quantity of 50 were entered into a transaction the free quantity calculated would be 75 (purchase quantity (50) / quantity from (10) x quantity free (15)).

## 6. Available Promotions Information window



*Transactions >> Sales >> Sales Trn. 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
Scheme Code	Start Date	End Date	Value
Free Item			U of M
Each	1	1	Quantity Free
PROMSH1	01/01/03	31/12/03	1
24X IDE			Each
Each	2	999,999,999,999	Quantity Free
PROMSH1	01/01/03	31/12/03	2
24X IDE			Each

OK

### 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 Great Plains 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 and percentage 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 Great Plains, 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 breaks in sales transactions to be accumulated against multiple items rather than based solely on individual item accumulations. Items are assigned to price books and sheets as with standard Great Plains Extended Pricing, and also assigned to an aggregate price group with each group containing one or multiple items. Quantity breaks can be set against aggregate pricing groups from the [Aggregate Pricing Group Maintenance window](#), with each quantity break having an aggregate price book assigned to it. See [How Aggregate Prices are Calculated](#) for further details.

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

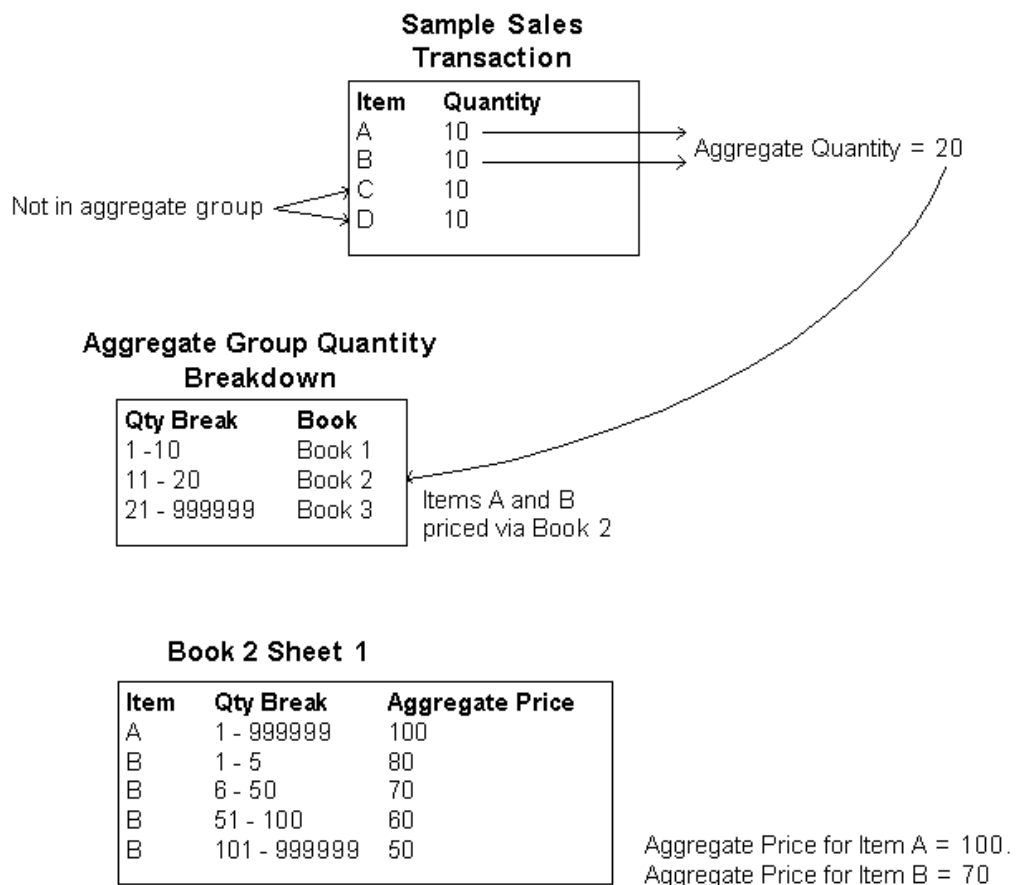
When a transaction is entered for a debtor set up for aggregate pricing, and you select the rework aggregate prices option during sales transaction entry, aggregate pricing functionality will use the following rules to establish aggregate prices for the items on the transaction.

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. 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.
3. 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.

4. 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.
5. 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 then the system will use this to establish aggregate prices from the aggregate price books.
6. 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 diagram below for further explanation of how aggregate prices are calculated.



## 10. Aggregate Pricing Group Maintenance window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Group Maint*

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

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

*Deleting  
group IDs*

Click Delete to delete group codes.

## 11. Aggregate Pricing Group Breaks window



*Cards >> Myridas Cards >> Ext. Prc. Enhancements >> Agg. Group. Maint >> Quantity Breaks button*

Use the Aggregate Pricing Group Breaks window to:

- Set up quantity breaks for aggregate pricing

*The  
Aggregate  
Pricing  
Group  
Breaks  
window*

From Qty	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
0.00		

### 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. Enter the quantity breaks that you want to set for the aggregate price group 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.
3. Click OK to return to the [Aggregate Pricing Group Maintenance window](#).

## 12. Aggregate Pricing Group Allocation window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Group Alloc*

Use the Aggregate Pricing Group Allocation window to:

- Allocated 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 Cards >> Ex. Prc. Enhancements >> Agg.Price Group Alloc >> 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
Group Code	Group Code Description	Class ID
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.

3. 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.
4. For the **Select Items** whose **Group Code** is set to option select one of the options:

<b>Unassigned</b>	Only items not currently assigned to a group code will be included in the range.
<b>Any</b>	All items will be included in the range.
<b>Specified</b>	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.

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

## 14. Aggregate Pricing Unit Item Maintenance window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Item Maint.*

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 Extras 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.

4. 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



*Cards >> Myridas Setup >> Ex. Prc. Enhancements >> Agg.Price U of M Maint*

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 Extras 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:**

1. Enter a unit of measure schedule ID or select one using the lookup.
2. 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.

3. 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.

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

*Deleting aggregate  
pricing units*

## 16. Sales Transaction Entry with Aggregate Pricing



*The Great  
Plains Sales  
Transaction  
Entry  
window*

*Transactions >> Sales >> Sales Trn Entry*

The screenshot shows the 'Sales Transaction Entry' window. The top section contains header information: Order Type (STDDRD), Date (03/09/03), Document No. (ORDST2233), Debtor ID (AMERICAN0002), Debtor Name (American Electrical Contractor), Ship to Address (WAREHOUSE, 849 89 Ave E), and Currency (Z-US\$). Below this is a table of 'Line Items by Order Entered' with columns for Item Number, U of M, Quantity Ordered, Unit Price, and Extended Price. The items listed are 24X IDE (16 units, \$42.50 each, \$680.00 total), 32X IDE (12 units, \$55.00 each, \$660.00 total), and 40X IDE (20 units, \$65.00 each, \$1,300.00 total). A summary table at the bottom right shows Subtotal (\$2,640.00), Trade Discount (\$0.00), Freight (\$0.00), Miscellaneous (\$0.00), Tax (\$0.00), and Total (\$2,640.00). The bottom left shows payment information: Amount Received (\$0.00), Terms Discount Taken (\$0.00), and On Account (\$2,640.00).

Item Number	U of M	Quantity Ordered	Unit Price	Extended Price
24X IDE	Each	16	\$42.50	\$680.00
32X IDE	Each	12	\$55.00	\$660.00
40X IDE	Each	20	\$65.00	\$1,300.00
		0.00	\$0.00	\$0.00

Amount Received	\$0.00	Subtotal	\$2,640.00
Terms Discount Taken	\$0.00	Trade Discount	\$0.00
On Account	\$2,640.00	Freight	\$0.00
		Miscellaneous	\$0.00
		Tax	\$0.00
		Total	\$2,640.00

Standard Great Plains 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 Extras 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 Extras 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.

## 17. Aggregate Pricing Rework window



*Transactions >> Sales >> Sales Trn Entry >> Extras >> 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?
24% IDE	\$42.50	\$30.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
32% IDE	\$55.00	\$40.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
40% IDE	\$65.00	\$45.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### 17.1 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.

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. All items can be selected or deselected for update by clicking the Update? checkboxes, or by clicking the Mark All/Unmark All buttons.

- 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.

## 18. Aggregate Pricing Tracker window



*Transactions >> Sales >> Sales Trn Entry >> Extras >> Aggregate Pricing Information*

Use the Aggregate Pricing Tracker window to:

- View aggregate pricing quantity details during sales transaction entry

*The  
Aggregate  
Pricing  
Tracker  
window*

Document Type	Order	Debtor ID	AMERICAN0002
Document Number	ORDST2240	Debtor Aggregate Starting Quantity	0.00

Group Code	Group Description	Price Book Achieved	Group Qty Ordered	Qty to Next Break
CD ROMS	Aggregate pricing group for CD	CD ROMS BK1	15.00	5.00

Item Number	Item Description	Qty Ordered	U of M
40x IDE	40x CD-ROM	14	Each

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).

## 18.1 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 dependant upon where the window was opened from.

<b>Opened from Sales Transaction Entry</b>	
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
<b>Opened from Item Catalogue and Search</b>	
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.

## 19. Aggregate Pricing Group Detail View window



*Transactions >> Sales >> Sales Trn Entry >> Extras >> Aggregate Pricing Information >> Group Code zoom 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	aggregate price sheet
10.00	CD ROMS BK1	aggregate sheet 2
20.00	CD ROMS BK2	aggregate sheet 3

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

### 19.1 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.

## 20. Aggregate Pricing Price Trace window



*Enquiries >> Myridas Enquiries >> Ex. Prc. Enhancements >> Agg. 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 Extras option from the Price Trace Enquiry window.

### 20.1 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 Great Plains 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 Great Plains reporting functions.

## 21. Site Price Type Maintenance window



*Cards >> Myridas Cards >> Ex.Prc.Enhancements >> Site Price Type Maint.*

Use the Site Price Type Maintenance window to:

- Set up site price types

*The Site Price Type Maintenance window*

### 21.1 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.

## 22. Assign Site Price Type To Site ID window



*Cards >> Inventory >> Site >> Extras >> Ass. Site Price to Site*

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*

### 22.1 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.

## 23. Assign Site IDs To Site Price Types window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Sites to Type*

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](#).

### 23.1 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.

- 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.

## 24. Assign Site IDs To Site Price Types - By Range window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Sites to Type >> 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 a software window titled "tcs78 Assign Site IDs To Site Price Types - By Range". The window contains the following elements:

- Site Price Type:** A dropdown menu is set to "RETAIL". Below it, the text "Retail Price Type" is displayed.
- Site ID Selection:** There are radio buttons for "All" and "From: To:". The "From:" field is "WC1" and the "To:" field is "WC3".
- Select Site ID's whose Site Price Type is set to:** There are radio buttons for "Unassigned", "Any", and "Specified:". The "Unassigned" option is selected.
- Table:** A table with two columns: "Site ID" and "Site Price Type". The rows are:
 

Site ID	Site Price Type
WC1	
WC2	
WC3	
- Buttons:** At the bottom of the window, there are three buttons: "Transfer", "OK", and "Preview".

## 24.1 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:

<b>Unassigned</b>	Only sites not currently assigned to a site price type will be included in the range.
<b>Any</b>	All sites will be included in the range.
<b>Specified</b>	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.

## 25. Assign Site Price Type To Price Sheet ID window



*Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Type to Sheet*

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*

### 25.1 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*



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.

## 27. Assign Price Sheets To Site Price Types - By Range window

*Cards >> Myridas Cards >> Ex.Prc.Enhancements >> Ass. Sheets to Type >> 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*

Price Sheet ID	Site Price Type
BEVERAGES	
DRINKS	

## 27.1 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:

<b>Unassigned</b>	Only price sheets not currently assigned to a site price type will be included in the range.
<b>Any</b>	All price sheets will be included in the range.
<b>Specified</b>	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.

## 28. Price Trace Enquiry - Site ID window

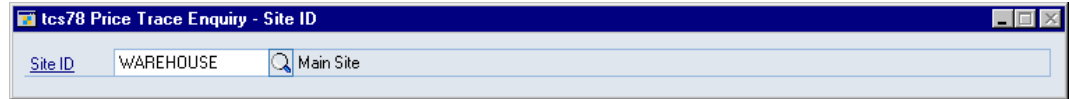


*Enquiry >> Inventory >> Extended Pricing >> Price Trace*

Use the Price Trace Enquiry - Site ID window to:

- Trace a site specific price

*The Price  
Trace Enquiry  
- Site ID  
window*



### 28.1 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 Great Plains 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.

## Appendix A

### Access to Myridas Windows

#### Extended Pricing Enhancements

Window Name	 Menu Access	 Other Access
Aggregate Pricing Group Allocation	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Group Alloc	
Aggregate Pricing Group Allocation Range		Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Group Alloc >> Ranges button
Aggregate Pricing Group Breaks		Cards >> Myridas Cards >> Ext. Prc. Enhancements >> Agg. Group. Maint >> Quantity Breaks button
Aggregate Pricing Group Detail View		Aggregate Pricing Tracker window >> Group Code zoom button
Aggregate Pricing Group Maintenance	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Agg.Price Group Maint	
Aggregate Pricing Price Trace	Enquiries >> Myridas Enquiries >> Ex. Prc. Enhancements >> Agg. Price Trace	Enquiry >> Inventory >> Extended Pricing >> Price Trace >> Extras >> Aggregate Pricing
Aggregate Pricing Rework		Transactions >> Sales >> Sales Trn Entry >> Extras >> Rework Aggregate Prices
Aggregate Pricing Tracker		Transactions >> Sales >> Sales Trn Entry >> Extras >> 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 Cards >> Ex. Prc. Enhancements >> Agg.Price Item Maint.	Cards >> Inventory >> Items >> Extras >> Aggregate Pricing
Aggregate Pricing Unit Of Measure Maintenance	Cards >> Myridas Setup >> Ex. Prc. Enhancements >> Agg.Price U of M Maint	Setup >> Inventory >> U of M Schedule >> Extras >> Aggregate Pricing
Assign Price Sheets To Site Price Types	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Sheets to Type	
Assign Site IDs To Site Price Types	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Sites to Type	
Assign Site IDs To Site Price Types - By Range		Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Sites to Type >> Ranges button
Assign Site Price Type To Price Sheet ID	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Type to Sheet	
Assign Site Price Type To Price Sheet ID - By Range		Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ass. Type to Sheet >> Ranges button
Assign Site Price Type To Site ID		Cards >> Inventory >> Site >> Extras >> Ass. Site Price to Site
Available Promotions Information		Transactions >> Sales >> Sales Trn. Entry >> Enter an item on a current

		promotion sheet
Extended Pricing Enhancements Debtor/Prospect Maintenance	Cards >> Myridas Cards >> Ex. Prc. Enhancements >> Ex. Prc. Enh. Debt Maint	Cards >> Sales >> Debtor/Prospects >> Extras >> Ex. Prc. Enhancements
Extended Pricing Extras Setup	Cards >> Myridas Setup >> Ex. Prc. Enhancements >> Ex. Prc. Enh. Setup	
Price Trace Enquiry - Site ID		Enquiry >> Inventory >> Extended Pricing >> Price Trace
Site Price Type Maintenance	Cards >> Myridas Cards >> Ex.Prc.Enhancements >> Site Price Type Maint.	

## Appendix B

### Amended Great Plains Windows

Multiple Great Plains windows have been amended to provide increased functionality.

<b>Window Name</b>	<b>Amended Functionality</b>
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"> <li>• The base adjusted price on will be set to base book</li> <li>• Sheet price will be drawn from the BASECOSTBOOK</li> <li>• Adjusted price will be calculated on entry of values</li> </ul> <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.

<b>Window Name</b>	<b>Module</b>	<b>Amended Functionality</b>
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
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

The Extended Pricing Enhancements module can be used in conjunction with Great Plains 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.

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