

*myridas*TM *User Guide*

Version 8.1 for Great Plains 8.0

Price Negotiation

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 Price Negotiation module:

- Price Negotiation



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>.

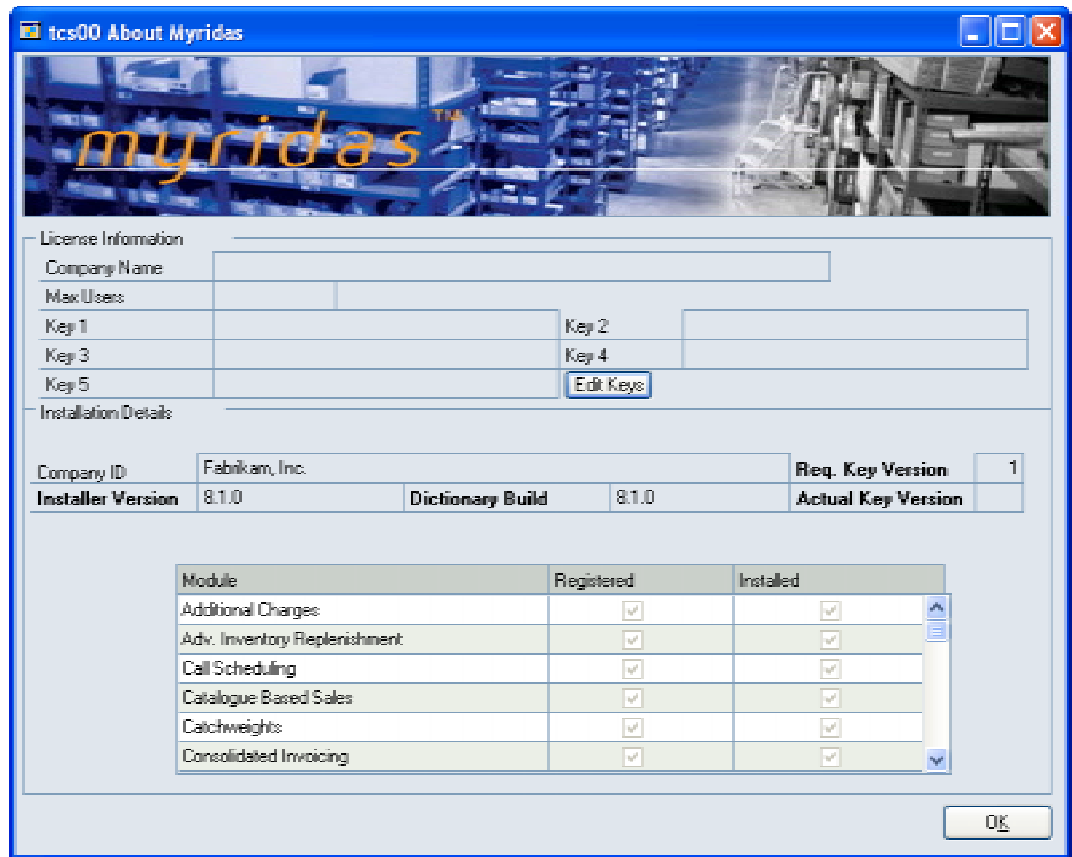
About Myridas



Help >> 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



Price Negotiation

The Myridas Price Negotiation module provides extra functionality when entering sales transactions so that various parameters can be used to negotiate a selling price.

The [Price Negotiation window](#) allows you to base a selling price on a wide range of cost options, amend sales margins to give you the best achievable selling price, and will even convert currencies as required.

The main features of the Price Negotiation module are:

- The facility to negotiate a selling price based on multiple cost parameters
- User-friendly interface makes negotiating a suitable selling price speedy and straightforward
- The facility to negotiate price direct from sales transaction entry or standalone
- Additional lookups to provide further information when negotiating a price

1. Price Negotiation Setup window

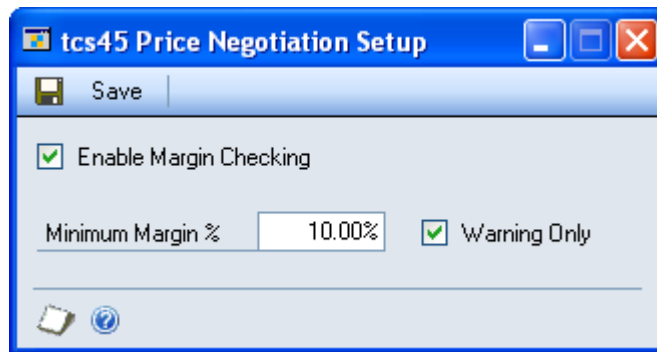


Tools >> Setup >> Myridas >> Price Negotiation >> Minimum Margin Setup

Use the Price Negotiation Setup window to:

- Set up minimum margin restrictions

*The Price
Negotiation
Setup window*



1.1 Setting Up Minimum Margin Restrictions

To set up minimum margin restrictions using the Price Negotiation Setup window:

1. Click the Enable Margin Checking checkbox to enable the setting up of margin restrictions.
2. Enter a minimum margin %. If a selling price is calculated in the [Price Negotiation window](#) with a margin percentage of less than that entered here, then a warning will be displayed.
3. If you do not select the warning only checkbox then when a warning is displayed against a selling price in the Price Negotiation window you will be unable to transfer that price to an order.

2. Price Negotiation window



Enquiry >> Myridas >> Price Negotiation >> Price Negotiator

Use the Price Negotiation window to:

- Build a selling price that can be transferred to sales transactions

*The Price
Negotiation
window*

| Last Invoice | |
|-------------------------|------------|
| Date | 12/04/2007 |
| Quantity | 1 |
| Duty | \$0.00 |
| Unit Cost used as basis | \$55.50 |

| Selling Price | |
|------------------|---------|
| Selling Price | \$55.50 |
| Margin Value | \$0.00 |
| Margin % | 0.00% |
| Minimum Margin % | 10.00% |

Note that the Price Negotiation window is also available as an extras option from the Sales Transaction Entry window and the Sales Item Detail Entry window. You can only transfer the negotiated selling price if you have opened the Price Negotiation window from one of these windows.

2.1 Building and Transferring Selling Prices

To build and transfer selling prices in the Price Negotiation window:

1. Click the Debtor or Prospect option to negotiate prices for a debtor or prospect. If you select prospect then you will be unable to view sales order history (see [step 10](#)).

Note that if you displayed the window through the Sales Transaction Entry window or the Sales Item Detail Entry window then the debtor, currency ID, item number, site and selling u of m will be displayed by default. The creditor ID displayed will be that set as the default primary creditor ID in the Site Item Quantities window.

2. Enter a debtor or select one using the lookup.
3. The currency ID will be displayed by default. If you opened the Price Negotiation window from a transaction then the originating currency for the debtor will be selected by default. If you opened the Price Negotiation window from the palette the functional currency for your system will be selected by default. You can enter or select an alternative currency as required.

Note that all costs are displayed in the system functional currency. Where the originating currency (displayed currency ID) differs from the functional currency the displayed selling price will be converted to the originating currency in the Price in field.

4. Enter an item number or select one using the lookup.
5. Enter a site or select one using the lookup.
6. The selling u of m and creditor (see [above](#)) will be displayed by default. Use the Selling U of M drop-down menu and Creditor lookup to select alternatives as required.
7. Costs will be displayed automatically as follows:

| | |
|--------------------------|---|
| Standard Cost | Set in the Item Maintenance window. |
| Current Cost | Set in the Item Maintenance window. |
| Weighted Average Cost | The average unit cost of all on hand stock of the selected item number. |
| Predicted Wght. Av. Cost | The average cost of all on hand stock and stock on purchase orders of the selected item number. |
| Orig. Invoice Cost | Set in the Item Creditors Maintenance window. |
| Vendor Price | The price set for the displayed creditor using the Myridas Vendor Price Management module. |
| Lot Cost | The cost associated with the lot that stock is booked into. If this option is selected then select a Lot Number using the lookup. |

Click to select which cost you want to base the unit cost on. The Unit Cost used as basis, Margin Value and Margin % fields will be updated automatically to take account of the cost option that you select. See [Appendix B](#) for details of how to set up margin calculations.

You can choose to select an alternate Base Cost On option at any point.

8. Where a landed cost group ID has been assigned to the selected item/site combination in the Item Quantities Maintenance window, this will be displayed by default in the Landed Cost Group ID field. If there is no landed

cost group ID assigned to the item/site, then where one is assigned to the selected creditor this will be displayed.

Click the lookup to select an alternate landed cost group ID.

If a landed cost group ID is displayed, click the Include Landed Cost option to include the landed cost in the price negotiation. The Unit Cost used as basis, Selling Price, Margin Value, Margin % and Price in fields will be updated automatically to take account of the landed cost. Click the Include Landed Cost button again to remove the landed cost from the price negotiation.

Note that if you have selected a Base Cost On option of current cost, weighted average cost or predicted weighted average cost then the option to include landed costs will be disabled. Landed costs are included by default in these costs.

9. The Date, Quantity, Unit Cost used as basis, Selling Price, Margin Value, Margin % and Price in fields are all calculated based on the selections that have been made. The margin value is the selling price less the unit cost used as basis. The margin % represents the margin value. The last invoice details for the selected debtor / currency / item number / site / selling u of m combination will also be displayed.

If the selling price is based on a promotion then it will be denoted with a **P**. If the selling price is based on a quantity break then it will be denoted with a **Q**.

Note that if the margin percentage is less than that set in the [Price Negotiation Setup window](#) then a warning symbol will be displayed.







Click the Selling Price link button to display the Price Trace Enquiry window where you view the source of the displayed selling price. If you did not select the Warning Only checkbox then you will not be able to transfer this price to a sales transaction.

Any of these fields (with the exception of the Price in field) can be amended to produce a new selling price. Where a field is amended, other fields will be automatically updated to take this into account. If cost details are amended then the margin details will be recalculated. If the margin details are amended then the selling price will be recalculated.

The Price in field will display the currently displayed selling price in the selected currency ID.

Note that you can click the Default button at any point to set all fields back to the defaults based on the selections made.

10. You can view further information on the selection that you have made by clicking the following buttons:

| | |
|---|--|
|  Av. To Prom. | Displays the Available to Promise window. Requires access to the Great Plains Available To Promise module. |
|  Goods Recvd. Enq. | Displays the Goods Received Enquiry window. |
|  Sales Order History | Displays the Invoice History Enquiry window (see page 9). |
|  Outst. P. Orders | Displays the Outstanding P.O. Enquiry window (see page 10). |
|  P.Order Hist | Displays the Purchase Order Processing Item Enquiry window. |
|  All Cust History | Displays the Item Invoice History Enquiry window (see page 13). |

11. If you opened the Price Negotiation window from the Sales Transaction Entry window or the Sales Item Detail Entry window, clicking the Transfer button will transfer the price displayed in the Price in field to the current transaction.

Note that you can click Clear at any point to clear any selections made, or Cancel to close the window.

3. Invoice History Enquiry window

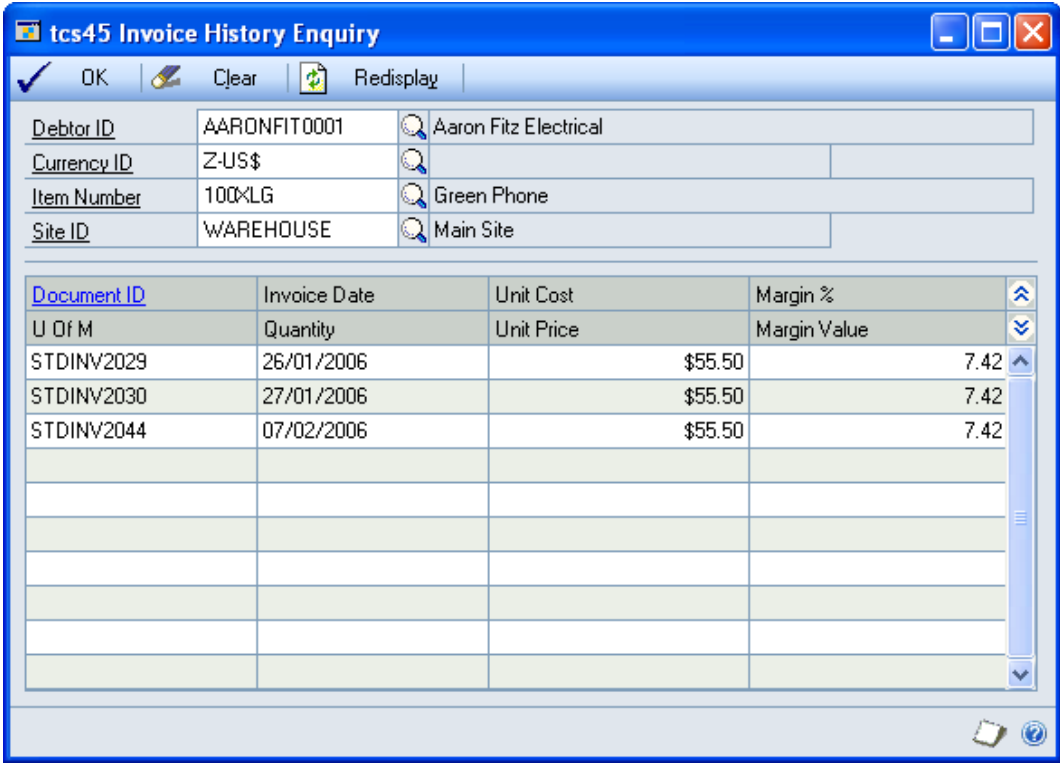


Enquiries >> Myridas >> Price Negotiation >> Invoice History Enquiry

Use the Invoice History Enquiry window to:

- View invoice history with associated costs, selling prices and margins

The Invoice History Enquiry window



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

3.1 Viewing Invoice History

To view invoice history with associated costs, selling prices and margins in the Invoice History Enquiry window:

1. Enter or use the lookups to select a debtor ID, currency ID, item number and site ID.

If you have displayed this window from the Price Negotiation window then these selections will be made automatically.

Note that you if display this window from the palette then the system functional currency ID will be automatically selected. When you enter a debtor ID the currency will default to the debtors originating currency (where relevant). You can select an alternate currency ID as required.

2. All relevant document IDs and associated costs, selling prices and margins will be displayed in the scrolling window.
3. Click OK to close the window.

Note that you can click Clear at any point to clear your selection or Redisplay to update your selection with any changes that have been made.

4. Outstanding P.O. Enquiry window



Enquiries >> Myridas >> Price Negotiation >> Outstanding Purchase Order Enquiry

Use the Outstanding P.O. Enquiry window to:

- View outstanding purchase orders with associated costs

*The
Outstanding
P.O.
Enquiry
window*

| Document ID | Promised Ship Date | Unit Cost | Landed Cost |
|-------------|--------------------|-----------------------|----------------------|
| U Of M | Quantity | Originating Unit Cost | Landed Cost Group ID |
| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |
| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |
| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |
| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |
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| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |
| PO2071 | 12/04/2007 | \$28.46 | \$0.00 |

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

4.1 Viewing Outstanding Purchase Orders

To view outstanding purchase orders with associated costs in the Outstanding P.O. Enquiry window:

1. Enter or use the lookups to select a creditor ID, currency ID, item number and site ID.

If you have displayed this window from the Price Negotiation window then these selections will be made automatically.

Note that if you display this window from the palette then the system functional currency ID will be automatically selected. You can select an alternate currency ID as required.

2. All relevant document IDs and associated costs will be displayed in the scrolling window.
3. Click OK to close the window.

Note that you can click Clear at any point to clear your selection or Redisplay to update your selection with any changes that have been made.

5. Item Invoice History Enquiry window



Enquiries >> Myridas >> Price Negotiation >> Item Invoice History Enquiry

Use the Item Invoice History Enquiry window to:

- View invoice history for items

The Item Invoice History Enquiry window

| Document ID | Invoice Date | Debtor | UOM | Quantity | Unit Cost | Unit Price | Margin Value | % |
|-------------|--------------|--------------|------|----------|-----------|------------|--------------|--------|
| STDINV2263 | 12/04/2007 | AMERICAN002 | Each | 10 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2261 | 12/04/2007 | AARDNFIT0001 | Each | 10 | \$95.50 | \$119.95 | \$64.45 | 53.73% |
| STDINV2216 | 24/03/2007 | AGTOPSUK0001 | Each | 8 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2215 | 23/03/2007 | BLUEYOND0001 | Each | 1 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2108 | 24/03/2006 | AGTOPSUK0001 | Each | 8 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2108 | 23/03/2006 | BLUEYOND0001 | Each | 1 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2062 | 22/02/2006 | METROFDL0001 | Each | 1 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2170 | 22/02/2006 | METROFDL0001 | Each | 1 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2061 | 21/02/2006 | MAGNIFIC0001 | Each | 4 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2169 | 21/02/2006 | MAGNIFIC0001 | Each | 4 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2044 | 07/02/2006 | AARDNFIT0001 | Each | 5 | \$95.50 | \$59.95 | \$4.45 | 7.42% |
| STDINV2043 | 06/02/2006 | VANCOUVE0001 | Each | 2 | \$95.50 | \$59.95 | \$4.45 | 7.42% |

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

5.1 Viewing Invoice History for Items

To view invoice history for items using the Item Invoice History Enquiry window:



1. The item number will be selected by default. Enter or use the lookup to select an alternate item number if required.
2. The site ID will be selected by default. Enter or use the lookup to select an alternate site ID if required.
3. All invoices for the selected item / site will be displayed in the scrolling window.
4. Click OK to close the window.

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

Appendix A

Access to Myridas Windows

Price Negotiation

| Window Name |  Menu Access |  Other Access |
|------------------------------|--|---|
| Invoice History Enquiry | Enquiries >> Myridas >> Price Negotiation >> Invoice History Enquiry | Enquiry >> Myridas >> Price Negotiation >> Price Negotiator >> Sales Order History button |
| Item Invoice History Enquiry | Enquiries >> Myridas >> Price Negotiation >> Item Invoice History Enquiry | Enquiries >> Myridas >> Price Negotiation >> All Cust History button |
| Outstanding P.O. Enquiry | Enquiries >> Myridas >> Price Negotiation >> Outstanding Purchase Order Enquiry | Enquiry >> Myridas >> Price Negotiation >> Price Negotiator >> Outst. P. Orders button |
| Price Negotiation | Enquiry >> Myridas >> Price Negotiation >> Price Negotiator | Sales >> Sales Transaction Entry >>Extras >> Additional >> Price Negotiation |
| Price Negotiation Setup | Tools >> Setup >> Myridas >> Price Negotiation >> Minimum Margin Setup | |

Appendix B

Margin Percentage Setup window

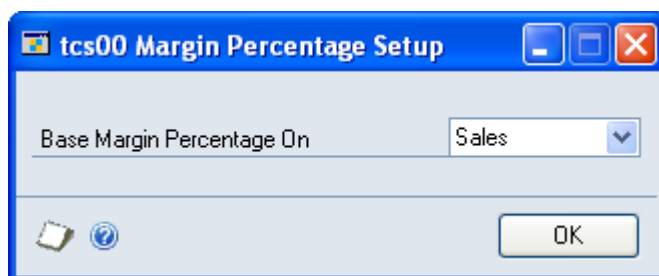


Tools >> Setup >> Myridas >> Margin Percentage Setup

Use the Margin Percentage Setup window:

- Setup document margin calculation details

The Margin Percentage Setup window



The settings made in this window will define how document margins displayed in the [Price Negotiation window](#) are calculated. See below for further details.

Note that the settings made in this window also set how the margin is calculated in the Item Catalogue and Search window (see Myridas Catalogue Based Sales) and the Document Margins window (see Myridas Distribution Enhancements).

Setting Up Document Margin Calculation Details

To setup document margin calculations in the Margin Percentage Setup window:

1. From the Base Margin Percentage On drop-down menu select Costs or Sales.

The margin is the sum of all extended prices minus the sum of all unit cost prices for items on a transaction. The margin percentage is calculated dependant on your selection:

| | |
|--------------|---|
| Sales | Margin / Total sales value for document lines |
| Costs | Margin / Total cost value for document lines |

2. Click OK to save your settings and close the window.

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