

*myridas*TM *User Guide*

Version 8.1 for Great Plains 8.0

Sales Retrospective Discounts

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 Sales Retrospective Discounts module:

- Sales Retrospective Discounts



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>.

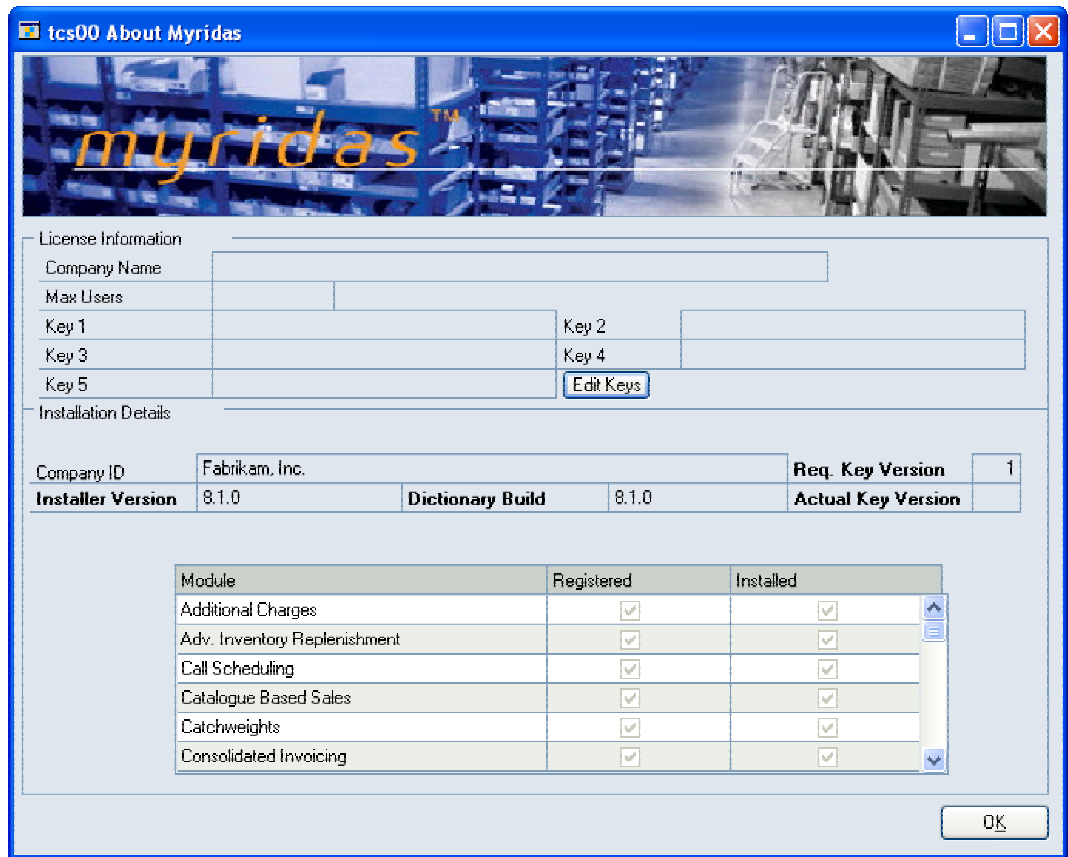
About Myridas



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



Sales Retrospective Discounts

The Myridas Sales Retrospective Discounts module provides you with the functionality to give discounts to debtors retrospectively based on sales made during specific periods. For example, you may want to give discounts on a certain range of items over the summer period. Discounts can be given based on volume of sales or the value of those sales, and be calculated as a value reduction or a percentage off.

Qualifying periods for discounts are held in Schedules, of which an unlimited number may be set up. Schedules can be set up for any length of time and may overlap each other. Discounts accrued during the qualifying periods will be accumulated retrospectively, at a defined time for each debtor or group of debtors (see below).

Discounts can be applied to one or more products, for one or more debtors, based over one or more sites.

The main features of the Sales Retrospective Discounts module are:

- The facility to calculate and accumulate discounts on sales over a qualifying period
- The facility to calculate discounts on quantities or values (selling price) of items sold based on individual items or groups of items
- The option to base discounts on value or percentage of quantity sold
- The facility to set up quantity or value breaks against discounts, providing different discounts dependant upon quantity or value purchased
- Set user defined start and end dates for different discounts
- The facility to apply discounts to individual debtor accounts/addresses, groups of debtors, or all debtors
- Main account groups can be set up so that discounts for multiple debtors can be consolidated and applied to a single debtor
- View accumulated discounts through a range of reports and enquiry windows

Retrospective discounts are calculated on posted invoice and return documents.

Retrospective Discount Schedules

Retrospective Discount Schedules represent a period of time over which discounting is calculated for one or more debtors/debtor addresses. A single schedule can represent a single debtor/address, all debtors, or a specified range.

The same Schedule may be used multiple times, by incrementing the run number. For example, your summer schedule could be run number 1. You could then use the same schedule for your winter schedule, making amendments where necessary, and this would be run number 2.

You can also set your schedules to overlap. For example, you could set up a long-term discount to run for the whole year, with special discounts for certain periods, such as summer or Christmas.

Set up Schedules using the [Retrospective Discount Schedule/Debtor Maintenance window](#) and the [Retrospective Discount Schedule/Plan Maintenance window](#).

Qualifying Periods

A qualifying period is held against a schedule and represents the length of time for which the schedule will run. During the qualifying period all debtors assigned to the schedule will have discounts accumulated by the system for all items assigned to the schedule (via plans).

Note that to accumulate discounts items must have invoices posted between the start and end dates of the qualifying period. Discounts are updated through the [Retrospective Discount Update window](#). When you have processed this window you can view accumulated discounts through the enquiry windows. Discounts should be applied by the user based on the discount reports provided by the module.

Use the [Retrospective Discount Open Next Qualifying Period window](#) to open a new schedule and close the old one.

Retrospective Discount Groups

Retrospective Discount Groups are groups of items that share the same retrospective discount details. An item may only be assigned to one discount group at a time. You can assign multiple items to a Retrospective Discount Group using the [Retrospective Discount Group Allocation window](#). The Group can then be assigned to a Retrospective Discount Plan.

Retrospective Discount Main Account Groups

Retrospective Discount Main Account Groups are made up of multiple debtors and enable you to accumulate discounts from all debtors in the group against a single debtor. One debtor can be set as the main account in the [Retrospective Discount Main Account Group Maintenance window](#). Retrospective discounts can still be calculated individually for debtors in the group but alternatively you can use the [Retrospective Discount Main Account Summary Enquiry window](#) to view accumulated discounts for all debtors in the group applied to the main account debtor.

Debtors must be assigned to the same retrospective discount schedule before they can be assigned to the same main discount group.

Retrospective Discount Plans

Retrospective Discount Plans are a list of discounts for individual items or discount groups. The Plan contains a date range for which the discount period will apply, and the facility to set the discounts to accumulate by quantity or value. Quantity or value breaks may be set up to apply differing levels of discount dependent on the quantity or value bought. Items and groups are assigned to the Plan in the [Retrospective Discount Plan Maintenance window](#).

Retrospective Discount Units

Retrospective Discount Units are the unit of measure that quantity totals are accumulated in. Discount Units can be held against Unit of Measure schedules or against individual items. You can select a currently existing unit of measure as your Discount Unit or create a new one to be used specifically for discounts.

Note that you only need to set up Discount Units where your retrospective discounts are calculated on accumulated **quantities** as opposed to values.

Uplift Selling Price options

Uplift selling price options provide functionality for managing prices and sales margins when dealing, for example, with large contracting companies. Using options in the [Retrospective Discount Debtor Details Maintenance window](#) you can increase selling prices on sales transactions to include relevant settlement and retrospective discounts. These will be calculated and incorporated into a selling price on a sales transactions.

To use this functionality you must be operating with Great Plains Extended Pricing. Discounts must be set up to accumulate by percentage, and if quantity breaks are used the lowest price break will be used in calculations.

Setup

1. Retrospective Discount Setup window



Tools >> Setup >> Myridas >> Sales Retrospective Discounts >> Setup

Use the Retrospective Discount Setup window to:

- Set up and maintain system details for retrospective discounts

*The
Retrospective
Discount Setup
window*



1.1 Setting Up Retrospective Discounts

To set up and maintain retrospective discount settings in the Retrospective Discount Setup window:

1. There is only one editable field in this window. Click to select whether retrospective discounts will be calculated on Accumulated Quantities, Accumulated Values or Both.

Accumulated Quantities	Discounts can only be calculated on quantities sold. You will need to set up Retrospective Discount Units against relevant Unit of Measure Schedules or individual items.
Accumulated Values	Discounts can only be calculated on values sold (selling price).
Both	Discounts can be calculated on quantities or values. Where you calculate discounts on quantities you will need to set up Retrospective Discount Units against relevant Unit of Measure Schedules or individual items.

2. The Date Update Last Run will display the date on which discounts were last updated in the Retrospective Discount Update window.

This field is locked and cannot be edited. It will be updated automatically when an update is run in the Retrospective Discount Update window.

Note that this date will be set to 00/00/00 the first time you display the Retrospective Discount Setup window.

3. The Last DEX_ROW_ID Updated is the system record of the last record that has been updated through the Sales Retrospective Discounts module. The next update run will begin at the subsequent Dex Row ID.

This field is locked and cannot be edited. It will be updated automatically when an update is run in the [Retrospective Discount Update window](#).

4. Click OK to save the settings that you have selected.

Amending Settings

Note that settings in the window can be amended. However, changing settings could result in data being removed from your system, such as Discount Plan settings and accumulated discount totals.

2. Prepare Debtor Range For Retrospective Discounts window



Tools >> Setup >> Myridas >> Sales Retrospective Discounts >> Prepare Debtor Range

Use the Prepare Debtor Range For Retrospective Discounts window to:

- Set up a range of Debtor IDs for Retrospective Discounts

The Prepare Debtor Range for Retrospective Discounts window

Debtor ID	Debtor Name
AARONFIT0001	Aaron Fitz Electrical
ADAMPARK0001	Adam Park Resort
ADVANCED0001	Advanced Paper Co.
ADVANCED0002	Advanced Tech Satellite System
ALTONMAN0001	Alton Manufacturing
AMERICAN0001	American Science Museum
AMERICAN0002	American Electrical Contractor
ASSOCIAT0001	Associated Insurance Company
ASTORSUI0001	Astor Suites
ATMORERE0001	Atmore Retirement Center
BAKERSEM0001	Baker's Emporium Inc.

A debtor cannot be assigned to a retrospective discount schedule until it has been assigned to retrospective discounts.

Note that debtors can be prepared for retrospective discounts individually in the [Retrospective Discount Debtor Details Maintenance window](#).

2.1 Setting up a Range of Debtor IDs for Retrospective Discounts

To set up a range of Debtor IDs for retrospective discounts in the Prepare Debtor Range For Retrospective Discounts window:

1. Click to select All Debtors or select From and enter From and To values or use the lookups to select a range of Debtors.
2. Under Set For Retrospective At, click to select Debtor Level or Address Level.

Note that if you select Address level, then subsequent to processing you will need to select Addresses individually using the [Retrospective Discount Address Details Maintenance window](#).

3. Click the Preview button to display your selected range in the scrolling window.
4. Click Process to set up your selected range for retrospective discounts.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Also note that you can click Cancel at any point prior to clicking the Process button to close the Prepare Debtor Range For Retrospective Discounts window.

Cards

3. Retrospective Discount Schedule/Debtor Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Sched/Debt Maint.

Use the Retrospective Discount Schedule/Debtor Maintenance window to:

- Set up retrospective discount schedules
- Assign debtors to a retrospective discount schedule

The Retrospective Discount Schedule/Debtor Maintenance window

Debtor ID	Address
AARONFIT0001	
ADAMPARK0001	
ADVANCED0001	
ADVANCED0002	
ALTONMAN0001	
AMERICAN0001	
AMERICAN0002	

Note that Schedules can also be set up and maintained using the [Retrospective Discount Schedule/Plan Maintenance window](#).

3.1 Setting Up Retrospective Discount Schedules

To set up retrospective discount schedules in the Retrospective Discount Schedule/Debtor Maintenance window:

1. Enter an R.D. Schedule ID or select one using the lookup.

If you are creating a new R.D. Schedule ID you should also enter a Description for the schedule.

2. Enter a Qualifying Start Date. This is the date from which retrospective discount totals will start being accumulated for all debtors/addresses assigned to this schedule.

Note that the current date will be displayed by default when you are setting up a new R.D. Schedule ID. The date will not be amendable where you are maintaining an existing R.D. Schedule ID.

3. Enter a Qualifying End Date. This is the date that retrospective discount totals will stop being accumulated for all debtors/ship to addresses assigned to this schedule for the current discount qualifying period.

Note that the date will not be amendable where you are maintaining an existing R.D. Schedule ID.

4. Click the Default Schedule to set this R.D. Schedule ID as the default R.D. Schedule ID.

Note that it is recommended that you set a default R.D. Schedule ID when all or most of your retrospective discounting will be based upon this R.D. Schedule ID. Users will automatically be prompted to select the default R.D. Schedule ID when assigning debtors or plans to an R.D. Schedule ID.

5. Select the Apply Settlement Discount before Retrospective Discount option if you want any relevant settlement discounts to be calculated and deducted prior to the retrospective discounts being charged. (Settlement discounts are discounts that may be applied where an account is settled within a specified period, for example, early payment leads to a 5% discount).
6. The Run Number will be selected automatically for you. This displays the current run. Whenever you select a new qualifying period for retrospective discounts (using the [Retrospective Discount Open Next Qualifying Period window](#)) the Run Number will be incremented by 1.
7. Enter Comments as required. These comments are attached to the current retrospective discount qualifying period, i.e.: the current run number for the schedule.
8. Click Save to save the R.D. Schedule ID.

Note that you can assign debtors to an R.D. Schedule ID by using the scrolling window or clicking the Ranges button to display the [Retrospective Discounts Schedule/Debtor Maintenance Range Allocation window](#).

You can click the Assign Plans button to display the [Retrospective Discount Schedule/Plan Maintenance window](#) where you can assign plans to an R.D. Schedule ID.

Deleting a Schedule ID

Click Delete to delete a Schedule ID. Note that if an R.D. Schedule ID is deleted then all accumulated totals on the schedule will also be deleted.

3.2 Assigning Multiple Debtors to an R.D. Schedule ID

To assign multiple debtors to an R.D. Schedule ID in the Retrospective Discount Schedule/Debtor Maintenance window:

1. Enter or select an R.D. Schedule ID as per [3.1](#).
2. Enter a Debtor ID or select one using the lookup.

Note that debtors already assigned to the R.D. Schedule ID will be displayed in the scrolling window.

3. To specify the Debtor Address to be assigned to the R.D. Schedule ID, enter the required Address or select it using the lookup.

Note that if you have selected to apply retrospective discounts at debtor level rather than address level for the selected Debtor ID then you can opt not to select to an Address and leave this field blank. Under these circumstances the Ship To Address for the Debtor ID will be assigned to the R.D. Schedule ID.

If you have selected address level then an Address must be selected.

4. Select as many Debtor ID/Address combinations in the scrolling window as required.

Note that you can click the Ranges button at any point to display the [Retrospective Discounts Schedule/Debtor Maintenance Range Allocation window](#), where you can assign a range of Debtor ID/Address combinations to an R.D. Schedule ID.

5. Click Save.

Deleting Debtor IDs/Addresses from Schedules

To Delete Debtors IDs/Addresses from an R.D. Schedule ID click File, then Delete Row. Note that if you do delete a Debtors ID/Address from an R.D. Schedule ID then all accumulated discounts totals for the deleted Debtor/Address on this schedule will also be deleted.

4. Retrospective Discount Schedule/Debtor Maintenance - Range Allocation window



Cards >> Myridas >> Sales Retrospective Discounts >> Sched/Debt Maint.>> Ranges button

Use the Retrospective Discount Schedule/Debtor Maintenance - Range Allocation window to:

- Assign ranges of Debtor/Address combinations to an R.D. Schedule ID

The Retrospective Discount Schedule/Debtor Maintenance - Range Allocation window

R.D. Schedule ID: SCHEDULE4
retrospective discount schedule 4

Debtor ID: All From: AARONFIT0001 To: ATMOREERE0001

Select Specific Debtor Address

Address: All From: To:

Select Debtor/Addresses whose R.D. Schedule ID is set to:
 Unassigned Any Specified:

Debtor ID	Address	R.D. Schedule ID
AARONFIT0001		
ADAMPARK0001		
ADVANCED0001		
ADVANCED0002		
ALTONMAN0001		
AMERICAN0001		
AMERICAN0002		

Transfer OK Preview

4.1 Assigning Ranges of Debtor/Address Combinations to an R.D. Schedule ID

To assign ranges of Debtor/Address combinations to an R.D. Schedule ID in the Retrospective Discount Schedule/Debtor Maintenance - Range Allocation window:

1. The window will be open with the currently selected R.D. Schedule ID displayed.
2. Click All to select all Debtors or From to select a range of Debtors. If you select From you should enter From and To values or select them using the lookups.
3. You can select to assign a specific address range by clicking the Select Specific Debtor Address option. This option can only be selected if you have selected a single Debtor ID as both the From and To values.

If you select this option you can click All to select all Addresses for the selected Debtor ID, or click From and enter From and To values or select them using the lookup.

4. Under Select Debtor/Addresses whose Schedule ID is set to, select either Unassigned, Any or Specified.

Unassigned	Only Debtors/Addresses not assigned to an R.D. Schedule ID will be available for assigning
Any	Debtors/Addresses assigned to any R.D. Schedule ID (or not assigned to a R.D. Schedule ID) will be available for assigning
Specified	If selecting this option you should enter an R.D. Schedule ID or select one using the lookup. Only Debtors/Addresses assigned to this R.D. Schedule ID will be available for assigning.

5. Click Preview to display your range selection in the scrolling window.
6. Click Transfer to assign your range selection to the selected R.D. Schedule ID.
7. Click OK to close the window and return to the [Retrospective Discount Schedule/Debtor Maintenance window](#).

5. Retrospective Discount Debtor Details Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Debtor Details

Use the Retrospective Discount Debtor Details Maintenance window to:

- Assign individual debtors to Retrospective Discounting

The Retrospective Discount Debtor Details Maintenance window

You can also assign a range of debtors to retrospective discounting in the [Prepare Debtor Range for Retrospective Discount window](#).

Note that the window is also available as an Extras option from the Debtor Maintenance window.

5.1 Assigning Individual Debtors to Retrospective Discounting

To assign individual debtors to Retrospective discounting in the Retrospective Discount Debtor Details Maintenance window:

1. Enter a Debtor ID or select one using the lookup.

Note that if you have selected to display the window from the Debtor Maintenance window, then the currently selected Debtor ID will be displayed.

2. To select this Debtor ID for retrospective discounts click Retrospective Discounts.
3. The R.D. Schedules at Address Level option determines whether the selected Debtor ID will be assigned to discount schedules at Address level only, or at Debtor level only.

Deselect the R.D. Schedules at Address Level option to assign the Debtor ID to retrospective discounting at the Debtor level only.

Click the R.D. Schedules at Address Level option to assign multiple Debtor ID addresses to retrospective discounting. Addresses can be assigned to retrospective discounting using the [Retrospective Discount Address Details Maintenance window](#).

4. The Uplift Selling Price options are useful where you require potential discounts to be added to a selling price during sales transaction entry.

To increase the selling price with a settlement discount select the Uplift Selling Price by Settlement Discount Option. See the Great Plains User Manuals for further details on settlement discounts.

To increase the selling price with a retrospective discount select the Uplift Selling Price by Retrospective Discount Option.

5. If you have not selected the R.D. Schedules at Address Level option then you can enter or select an R.D. Schedule ID or select one using the lookup.

Note that this is not mandatory; an R.D. Schedule ID can be selected at a later date, or using an alternative window, such as the [Retrospective Discount Schedule/Debtor Maintenance window](#).

Also note that if you have set retrospective discounts to address level for the selected Debtor ID, discounts will only be calculated for addresses assigned to R.D. Schedule IDs. No discounts will be accumulated at debtor level.

6. If you want to assign the debtor to a [main account group](#) then enter a main account group or select one using the lookup.

Note that you can only assign a debtor to a main account group where the debtor and the main account group are both assigned to the same R.D. Schedule ID.

7. Click the Main Account check box to set the debtor as the main account in the selected main account group.

8. Click Save.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Deleting retrospective discount debtor details

Click Delete to remove retrospective discount settings from a debtor. Note that deleting a debtor from retrospective discounts will also delete all accumulated discount totals.

6. Retrospective Discount Address Details Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Address Details

Use the Retrospective Discount Address Details Maintenance window to:

- Assign individual Addresses to R.D. Schedule IDs

*The
Retrospective
Discount
Address Details
Maintenance
window*

This window is only functional if you have set retrospective discounts to be applicable to addresses for the selected Debtor ID in the [Retrospective Discount Debtor Details Maintenance window](#).

Note that this window is also available as an Extras option from the Addresses window.

6.1 Assigning Individual Addresses to Retrospective Discount Schedule IDs

To assign individual Addresses to R.D. Schedule IDs in the Retrospective Discount Address Details Maintenance window:

1. Enter a Debtor ID or select one using the lookup.

Note that if you have selected to display the window from the Debtor Maintenance window, then the currently selected Debtor ID will be displayed.

2. Enter an Address ID or select one using the lookup or browse buttons.
3. Enter an R.D. Schedule ID or select one using the lookup.
4. Click Save.

Note that you can choose to clear your selection at any point by clicking the Clear button.

*Deleting
discounting for
debtors*

Click Delete to delete retrospective discount settings for the selected Debtor/Address combination.

7. Retrospective Discount Unit Item Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Item Details

Use the Retrospective Discount Unit Item Maintenance window to:

- Assign single items to discount groups
- Select the Retrospective Discount Unit for an item

*The
Retrospective
Discount
window*

This window is also available as an Extras option from the Item Maintenance window.

Note that you only need to set Retrospective Discount Units where the retrospective discounting on your system is based on accumulated quantities (see the [Retrospective Discount Setup window](#)).

Also note that you can also assign Item Numbers to Group Codes using the [Retrospective Discount Group Allocation window](#).

7.1 Assigning Single Items to Discount Groups

To assign single items to discount groups in the Retrospective Discount Unit Item Maintenance window:

1. Enter an Item Number or select one using the lookup.

Note that if you displayed the window through the Item Maintenance window then the current Item Number will be displayed.

2. If you want to assign the Item Number to a Group Code now, enter the required Group Code or select one using the lookup.

Note that if you have already assigned the Item Number to a Group Code then this Group Code will be displayed.

3. From the drop-down menu select the Discount Unit that you want retrospective discounting for the item to be based on. (See [Retrospective Discount Units](#)).

Note that the selected unit must exist in the Unit of Measure schedule for the item.

4. Click Save.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Click Delete to delete retrospective discount settings from an Item Number.

Deleting retrospective discounting for an item

8. Retrospective Discount Unit of Measure Maintenance window

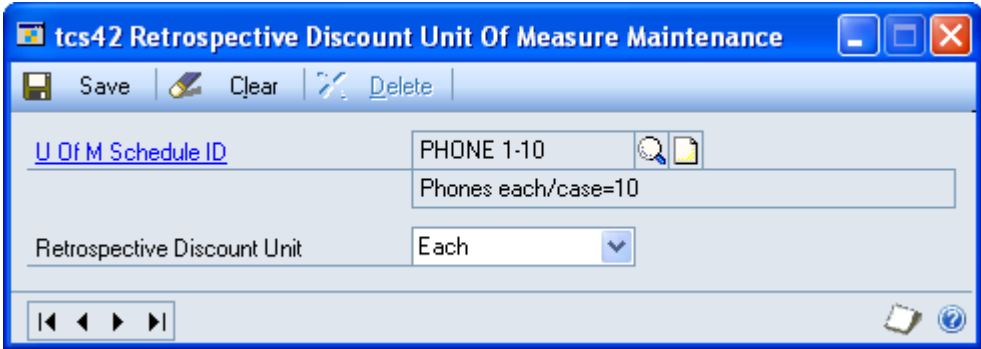


Cards >> Myridas >> Sales Retrospective Discounts >> U of M Details

Use the Retrospective Discount Unit of Measure Maintenance window to:

- Set the retrospective discount unit on a Unit of Measure schedule

The Retrospective Discount Unit of Measure Maintenance window



This window is also available as an Extras option from the Unit of Measure Schedule Setup window.

Note that you only need to set Retrospective Discount Units where the retrospective discounting on your system is based on accumulated quantities (see [Retrospective Discount Units](#)).

8.1 Setting Retrospective Discount Units on a Unit of Measure Schedule

To set retrospective discount units on a Unit of Measure Schedule in the Retrospective Discount Unit of Measure Maintenance window:

1. Enter a Unit of Measure Schedule ID or select one using the lookup.

Note that if you have displayed the window from the Unit of measure Schedule Setup extras option then the Unit of Measure Schedule ID displayed in the Unit of Measure Schedule Setup will be displayed.

2. From the drop-down menu select the unit of measure that you want to be the retrospective discount unit.

Where a Unit of Measure Schedule ID has multiple Units of Measure, you may want to create a new Unit of Measure as a unique Retrospective Discount Unit.

3. Click Save.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Deleting Unit of Measure discount settings

Click Delete to delete retrospective discount settings for a Unit of Measure schedule.

Note that where an R.D. Unit is set against an item, and a different R.D. Unit set against the items Unit of Measure Schedule, discounts calculations will use the R.D. Unit set for the item.

9. Retrospective Discount Group Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Group Maint

Use the Retrospective Discount Group Maintenance window to:

- Set up and maintain retrospective discount groups

*The
Retrospective
Discount Group
Maintenance
window*

9.1 Setting Up and Maintaining Retrospective Discount Groups

To set up and maintain retrospective discount groups in the Retrospective Discount Group Maintenance window:

1. Enter a Group Code or select one using the lookup.
2. If you are setting up a new Group Code then enter a Description.
3. Select the Decimal Places Quantity that you want items assigned to the Group Code to run to. This is the number of decimal places to which you can set quantity breaks for the group.

Note that if Item Numbers are not set to run to the same number of decimal places as the Group Code to which you assign them, quantity break settings may be effected.

4. Select the Decimal Places Currency that you want items assigned to the Group to run to. This is the number of decimal places to which currency should run for group discounts.

Note that if Item Numbers are not set to have their currency run to the same number of decimal places as the Group Code to which you assign them, quantity break settings may be effected.

5. Click to select or deselect the Aggregate option.

Aggregate selected	Quantities or values for all items within the Group are accumulated before having discount calculated on them - discounting will apply to the aggregated quantity or value
Aggregate not selected	Discounts are calculated on individual items within the group

6. Click Save.

Note that you can click Assign to display the Retrospective Discount Group Allocation window where you can assign items to a group.

Also note that you can choose to clear your selection at any point by clicking the Clear button.

Deleting Group Codes

Click Delete to delete a Group Code.

10. Retrospective Discount Group Allocation window



Cards >> Myridas >> Sales Retrospective Discounts >> Group Allocation

Use the Retrospective Discount Group Allocation window to:

- Assign Item Numbers to Retrospective Discount Groups

The Retrospective Discount 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 the window can also be displayed by clicking the Assign button on the [Retrospective Discount Group Maintenance window](#).

10.1 Assigning Items to Retrospective Discount Groups

To assign items to groups in the Retrospective Discount Group Allocation window:

1. Enter a Group Code or select one using the lookup.

Note that if you have opened this window from the Retrospective Discount Group Maintenance window then the currently selected Group Code will be displayed.

2. Enter an Item Number or select one using the lookup. Repeat this until all the Item Numbers to be assigned to the Group Code are displayed in the scrolling window.

Note that you can click the Ranges button to display the [Retrospective Discount Group Allocation Range window](#).

3. Click Save.

Deleting Group Allocations

To Delete Group allocations click the Delete button.

11. Retrospective Discount Group Allocation Range window



Cards >> Myridas >> Sales Retrospective Discounts >> Group Allocation >> Ranges button

Use the Retrospective Discount Group Allocation Range window to:

- Assign ranges of items to a Retrospective Discount Group

The Retrospective Discount 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

11.1 Assigning Ranges of Items to Group Codes

To assign ranges of items to group codes in the Retrospective Discount Group Allocation Range window:

1. The Group Code selected in the [Retrospective Discount Group Allocation window](#) will be displayed.
2. Select All to assign All Item Numbers to the Group Code or click From to select a range of Item Numbers. If you select From then enter From and To values or select them using the lookups.
3. Select All to assign All Generic Descriptions to the Group Code or click From to select a range of Generic Descriptions. If you select From then enter From and To values or select them using the lookups.
4. Select All to assign All Class IDs to the Group Code or click From to select a range of Class IDs. If you select From then enter From and To values or select them using the lookups.
5. Under Select Items whose Group Code is set to, select either Unassigned, Any or Specified.

Unassigned	Only Items not assigned to a Group Code will be available for assigning
Any	Items assigned to any Group Code (or not assigned to a Group Code) will be available for assigning
Specified	If selecting this option you should enter a Group Code or select one using the lookup. Only Items assigned to this Group Code will be available for assigning.

6. Click Preview to display your range selection in the scrolling window.
7. Click Transfer to assign the selected item range to the selected Group Code.
8. Click OK to close the window.

12. Retrospective Discount Main Account Group Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Main Account Group Maint

Use the Retrospective Discount Main Account Group Maintenance window to:

- Set up and maintain Retrospective Discount main account groups

The Retrospective Discount Main Account Group Maintenance window

Debtor ID	Name	Main A/C
AARONFIT0001	Aaron Fitz Electrical	<input checked="" type="checkbox"/>
ADVANCED0001	Advanced Paper Co.	<input type="checkbox"/>
ADVANCED0002	Advanced Tech Satellite System	<input type="checkbox"/>

12.1 Setting Up Retrospective Discount Main Account Groups

To set up Retrospective Discount Main Account Groups in the Retrospective Discount Main Account Group Maintenance window:

1. Enter a group ID or select one using the lookup.
2. If you are creating a new group ID then enter a description.
3. Enter an R. D. Schedule ID or select one using the lookup. If you select a group ID that has already been assigned to an R.D. Schedule ID then the schedule will be displayed by default.

Note that all group IDs must be assigned to a discount schedule and only debtors assigned to the selected schedule may be assigned to the group ID.

4. Enter a debtor ID or select one using the lookup. Repeat to assign further debtors to the group ID.

Note that debtors set up to have retrospective discounts calculated at address level rather than debtor level cannot be added to a main account group.

Also note that you can also click the Ranges button to display the Retrospective Discount Main Account Group - Debtor Range Allocation window where you can assign a range of debtors to the main account group.

5. Click the Main A/C checkbox for one debtor ID only to set this debtor as the main account in the main account group.
6. Click Save to close the window.

Deleting main account groups

Click the Delete button to delete a main account group.

13. Retrospective Discount Main Account Group - Debtor Range Allocation window



Retrospective Discount Main Account Group Maintenance window >> Ranges button

Use the Retrospective Discount Main Account Group - Debtor Range Allocation window to:

- Assign ranges of debtors to a main account group

The Retrospective Discount Main Account Group - Debtor Range Allocation window

Debtor ID	Name
AARONFIT0001	Aaron Fitz Electrical
ADVANCED0001	Advanced Paper Co.
ADVANCED0002	Advanced Tech Satellite System

13.1 Assigning Ranges of Debtors to a Main Account Group

To assign ranges of debtors to a main account group in the Retrospective Discount Main Account Group - Debtor Range Allocation window:

1. The window will be open with the currently selected group ID displayed.
2. Click All to select all debtors or From to select a range of debtors. If you select From you should enter From and To values or select them using the lookups.
3. Under Select Debtors assigned to Group, select either Unassigned, Any or Specified.

Unassigned	Only debtors not assigned to a group ID will be available for assigning.
Any	Debtors assigned to any group ID (or not assigned to a group ID) will be available for assigning.
Specified	If selecting this option you should enter a group ID or select one using the lookup. Only debtors assigned to this group ID will be available for assigning.

4. Click Preview to display your range selection in the scrolling window.

Note that only debtors assigned to the discount schedule that the displayed group ID is assigned to will be displayed in the scrolling window.

5. Click Transfer to assign your range selection to the selected group ID.
6. Click OK to close the window and return to the [Retrospective Discount Main Account Group Maintenance window](#).

14. Retrospective Discount Plan Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Plan Maintenance

Use the Retrospective Discount Plan Maintenance window to:

- Set up and maintain Retrospective Discount Plans

The Retrospective Discount Plan Maintenance window

Line Type	Item Number/Group Code	Accumulate By
Group	CD ROMS	Quantity
	discount group for CD ROMS	% Off

14.1 Setting Up and Maintaining Retrospective Discount Plans

To set up and maintain retrospective discount plans in the Retrospective Discount Plan Maintenance window:

1. Enter an R.D. Plan, or if you are maintaining plans, you can select one using the lookup.
2. Enter a Description for the Plan.
3. Enter a From and To Date Range for the Plan.
4. By default new Plans will be assigned to All Sites. To apply the plan to a particular Site ID, deselect the All Sites check box and enter a Site ID or select one using the lookup.
5. From the Line Type drop-down menu, select Group or Item.

6. Enter either a Group or an Item Number, depending on the Line Type option you selected, or select one using the lookup.
7. Under Accumulate By, select either Quantity or Value.
8. Under Discount, select either % Off or Value Off.

Note that if you selected Value as the Accumulate By option then you can only select % Off.

9. Repeat steps 5 to 9 until you have entered all the Item Numbers/Groups that you require.
10. Click Save.

Deleting Plans

Click Delete to delete a Retrospective Discount Plan. You cannot delete a Plan that has been assigned to a Retrospective Discount Schedule. To delete an assigned Plan you should first unassign it from any schedules, then click Delete in this window.

15. Retrospective Discount Plan Item Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> Plan Maintenance >> Item Number/Group Extras button

Use the Retrospective Discount Plan Item Maintenance to:

- Specify discount values for Item Numbers/Groups on a Discount Plan

The Retrospective Discount Plan Item Maintenance window

All	From Quantity	To Quantity	Percentage Off
<input type="checkbox"/>	1	10	0.00%
<input type="checkbox"/>	11	20	10.00%
<input type="checkbox"/>	21	30	20.00%
<input type="checkbox"/>	31	40	30.00%
<input checked="" type="checkbox"/>	41	999,999,999,999	50.00%
<input type="checkbox"/>	0.00	0.00	

15.1 Specifying Discount Values for Item Numbers/Groups on a Discount Plan

To specify discount values for Item Numbers/Groups on a Discount Plan in the Retrospective Discount Plan Item Maintenance window:

1. The R.D. Plan and Item Number/Discount Group selected in the [Retrospective Discount Plan Maintenance window](#) will be displayed automatically.
2. From the Accumulate Total By drop-down menu select either Quantity or Value.
3. From the Apply Discount As drop-down menu select either Percentage Off or Value Off.

Note that if you selected Value as the Accumulate By option then you can only select Percentage Off.

4. Enter a quantity range and Value/Percentage Off for each line in the range.

The From and To Quantities represent the quantity range that would need to be accumulated over the qualifying period to achieve the specified discount (percentage or value off) for each line. For example, if you used the setting in the example below, where a customer accumulated a total of 35 items, they would qualify for a discount of 5%.

Note that when you enter a Value Off this will be a value off the selling price, which will be deducted from the selling price in the main selling unit. Care should be taken with items sold in different selling units, as the same Value Off will be applied regardless of unit.

When you tab off the Percentage/Value Off field the From Quantity on the next line will be calculated automatically. When you have entered the final From Quantity you should click the **All** check box. The To Quantity will then be calculated automatically.

Below is an example of how you could set up discount quantities.

*Sample
Discount
settings*

All	From Quantity	To Quantity	Percentage Off
	1	11	0.00%
	12	23	2.50%
	24	35	5.00%
✓	36	999,999,999,999	7.50%



If there are any gaps/overlaps in your setup then you will receive a warning and must amend then setup before you proceed.

5. Click Save

*Deleting Discount
Plan specified
quantities*

Click Delete to delete Discount Plan specified quantities.

16. Retrospective Discount Schedule/Plan Maintenance window



Cards >> Myridas >> Sales Retrospective Discounts >> R. Sched/Plan Maint.

Use the Retrospective Discount Schedule/Plan Maintenance window to:

- Set up retrospective discount schedules
- Assign Discount Plans to a retrospective discount schedule

*The Retrospective
Discount
Schedule/Plan
Maintenance
window*

R.D. Plan	Site	Start Date	End Date
SPRINGCDROMS	All	01/03/2007	31/05/2007
		00/00/0000	00/00/0000

Note that Schedules can also be set up and maintained using the [Retrospective Discount Schedule/Debtors Maintenance window](#).

16.1 Setting Up Retrospective Discount Schedules

To set up retrospective discount schedules in the Retrospective Discount Schedule/Plan Maintenance window:

1. Enter an R.D. Schedule ID or select one using the lookup.

If you are creating a new R.D. Schedule ID you should also enter a Description for the schedule.

2. Enter a Qualifying Start Date. This is the date from which retrospective discount totals will start being accumulated for all Debtors/ship to addresses assigned to this schedule.

Note that the current date will be displayed by default when you are setting up a new R.D. Schedule ID. The date will not be amendable where you are maintaining an existing R.D. Schedule ID.

3. Enter a Qualifying End Date. This is the date that retrospective discount totals will stop being accumulated for all debtors/ship to addresses assigned to this schedule for the current discount qualifying period.

Note that the date will not be amendable where you are maintaining an existing R.D. Schedule ID.

4. Click the Default Schedule to set this Schedule ID as the default Schedule ID.

Note that it is recommended that you set a default R.D. Schedule ID when all or most of your retrospective discounting will be based upon this R.D. Schedule ID. Users will automatically be prompted to select the default R.D. Schedule ID when assigning debtors or plans to an R.D. Schedule ID.

5. Select the Apply Settlement Discount before Retrospective Discount option if you want any relevant settlement discounts to be calculated prior to the retrospective discounts being charged. (Settlement discounts are discounts that may be applied where an account is settled within a specified period).

6. The Run Number will be selected automatically for you. This displays the current run. Whenever you select a new qualifying period for retrospective discounts (using the [Retrospective Discount Open Next Qualifying Period window](#)) the Run Number will be incremented by 1.

7. Enter Comments as required. These comments are attached to the current retrospective discount qualifying period.

8. Click Save to save the R.D. Schedule ID.

Note that you can assign plans to an R.D. Schedule ID by using the scrolling window or clicking the Ranges button to display the Retrospective Discounts Schedule/Plan Maintenance Range Allocation window.

You can click the Assign Debtors button to display the Retrospective Discount Schedule/Debtor Maintenance window where you can assign debtors to an R.D. Schedule ID.

*Deleting a R.D.
Schedule ID*

Click Delete to delete an R.D. Schedule ID.

16.2 Assigning Plans to an R.D. Schedule ID

To assign plans to an R.D. Schedule ID in the Retrospective Discount Schedule/Plan Maintenance window:

1. Enter or select an R.D. Schedule ID as per [14.1](#).
2. Enter an R.D. Plan or select one using the lookup. When you select an R.D. Plan the Site and Start and End Dates for the Plan will be displayed.

Note that R.D. Plans already assigned to the R.D. Schedule ID will be displayed in the scrolling window.

3. Select as many R.D. Plans in the scrolling window as required.

You cannot assign multiple plans where they contain one or more of the same items or groups, and have overlapping Start or End Dates.

You can assign multiple plans where they have overlapping Start or End Dates, but contain different items or groups.

Note that you can click the Ranges button at any point to display the [Retrospective Discounts Schedule/Plan Maintenance Range Allocation window](#), where you can assign a range of R.D. Plans to an R.D. Schedule ID.

4. Click Save.

*Deleting R.D.
Plans from a
Schedule*

To Delete R.D. Plans from an R.D. Schedule ID click File, then Delete Row. Note that if you do delete an R.D. Plan from an R.D. Schedule ID then all retrospective history for the deleted R.D. Plan on this schedule will also be deleted.

17. Retrospective Discount Schedule/Plan Maintenance - Range Allocation window



Cards >> Myridas >> Sales Retrospective Discounts >> R. Sched/Plan Maint. >> Ranges button

Use the Retrospective Discount Schedule/Plan Maintenance - Range Allocation window to:

- Assign ranges of R.D. Plans to an R.D. Schedule ID

The Retrospective Discount Schedule/Plan Maintenance - Range Allocation window

R.D. Schedule ID: SCHEDULE4
retrospective discount schedule 4

R.D. Plan: All From: SPRINGCDROMS
To: SPRINGCDROMS

Site: All From:

Date: All From: 00/00/0000
To: 00/00/0000

Select R.D. Plan whose R.D. Schedule ID is set to:
 Unassigned Any Specified:

R.D. Plan	Site	Date From	Date To
Description			
SPRINGCDROMS	All	01/03/2007	31/05/2007

Transfer OK Preview

17.1 Assigning Ranges of R.D. Plans to an R.D. Schedule ID

To assign ranges of R.D. Plans to an R.D. Schedule ID in the Retrospective Discount Schedule/Plan Maintenance - Range Allocation window:

1. The window will be open with the currently selected R.D. Schedule ID displayed.
2. Click All to select All R.D. Plans or From to select a range of Plans. If you select From you should enter From and To values or select them using the lookups.
3. Click All to select All Sites or From to select a range of Sites. If you select From you should enter From and To values or select them using the lookups.
4. Click All to select All Dates or From to select a range of Dates. If you select From you should enter From and To values.
5. Under Select R.D. Plan whose R.D. Schedule ID is set to, select either Unassigned, Any or Specified.

Unassigned	Only Plans not assigned to an R.D. Schedule ID will be available for assigning
Any	Plans assigned to any R.D. Schedule ID (or not assigned to an R.D. Schedule ID) will be available for assigning
Specified	If selecting this option you should enter an R.D. Schedule ID or select one using the lookup. Only Plans assigned to this R.D. Schedule ID will be available for assigning.

6. Click Preview to display your range selection in the scrolling window.
7. Click Transfer to assign your range selection to the selected R.D. Schedule ID.
8. Click OK to close the window and return to the Retrospective Discount Schedule/Plan Maintenance window.

Routines

18. Retrospective Discount Open Next Qualifying Period window



Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Open Next Q. Period

Use the Retrospective Discount Open Next Qualifying Period window to:

- Open a new qualifying period for an R.D. Schedule ID

The Retrospective Discount Open Next Qualifying Period window

18.1 Opening New Qualifying Periods for R.D. Schedule IDs

To open a new qualifying period for R.D. Schedule IDs in the Retrospective Discount Open Next Qualifying Period window:

1. Enter an R.D. Schedule ID or select one using the lookup.

The Description, Run Number and Qualifying Dates will be displayed automatically.

2. Enter the End Date For Next Qualifying Period.

The current displayed Qualifying End Date will become the Qualifying Start Date for the Schedules next run number. The End Date entered will become the Qualifying End Date for that schedule run number.

For example, You may select Schedule1, which is on Run Number 1, with a Qualifying Start Date of 01/05/02 and a Qualifying End Date of 30/09/02.

You could now enter the End Date For Next Qualifying Period as 30/10/02. Clicking Update would result in the opening of Schedule1, Run Number 2, with Qualifying Dates of 30/09/02 through to 30/10/02.

3. Click Update.

Note that you can choose to clear your selection at any point by clicking Clear.

19. Retrospective Discount Update window

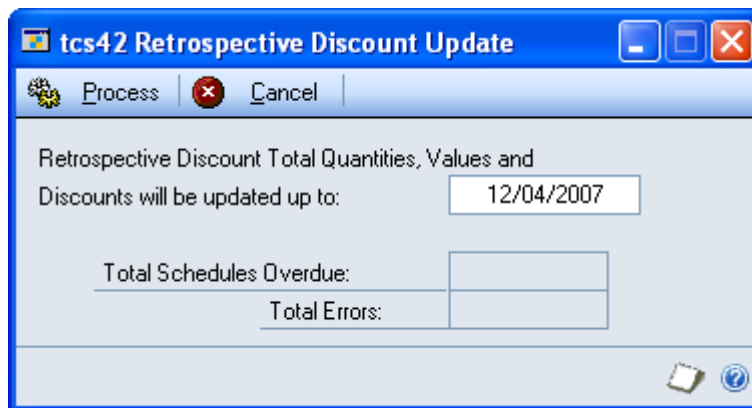


Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Update Discounts

Use the Retrospective Discount Update window to:

- Update accumulated retrospective discounts

*The
Retrospective
Discount
Update window*



19.1 Updating Retrospective Discounts

To update retrospective discounts in the Retrospective Discount Update window:

1. Enter the date that you want Discount Schedules to be updated until. Accumulated discount quantities and discount values for current Discount Schedules will be updated up to and including the date entered.

All values from the last DEX ROW ID ([Retrospective Discount Setup window](#)) will be updated.

This date should be the current date or an earlier date. Any schedules with current run numbers with end dates of the current day or earlier will be detailed in the Overdue Schedule Report. The Overdue Schedule Report will be printed when you click to process any schedules with current run numbers with end dates of the current day or earlier.

Print out reports for all such schedules then proceed purge the schedule using the [Retrospective Discount Purge window](#) or advance the schedule to the next run number using the [Retrospective Discount Open Next Qualifying Period window](#).

Processing a date later than the current date will result in an Overdue Schedule Report being printed.

2. Click Process to update Retrospective Discounts.

The Total Schedules Overdue will display the number of Discount Schedules that are overdue for the selected date.

Total Errors will display the number of errors that were encountered during processing.

Errors will result when:

- Discount totals have been accumulated against a plan that has since been deleted
- Discount totals have been accumulated for a group that has since been deleted
- No retrospective discount unit has been set up against an item or it's Unit of Measure Schedule where accumulation is by quantity for the item.

3. Click Cancel to close the window.

20. Retrospective Discount Purge window

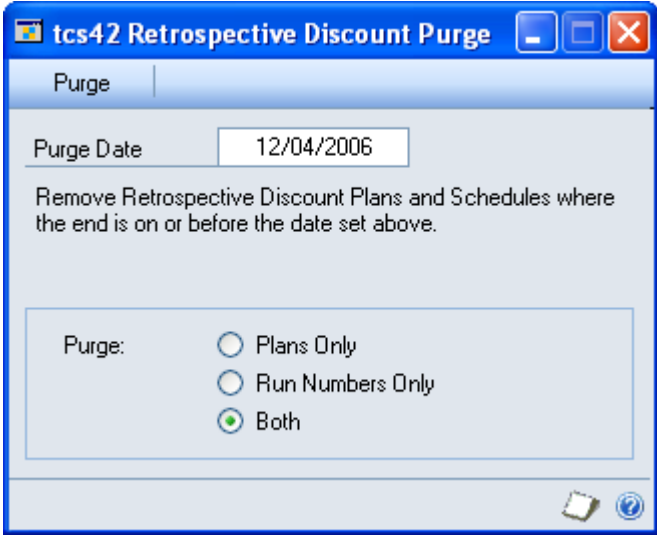


Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Discount Purge

Use the Retrospective Discount Purge window to:

- Purge expired Discount Plans and closed Schedule run numbers

The Retrospective Discount Purge window



20.1 Purging Closed Discount Plans and Schedules

To purge expired Discount Plans and closed Schedule run numbers in the Retrospective Discount Purge window:

1. Under Purge Date, enter the date that plans and schedules should be purged up to.

All plans and schedules with an end date prior to or on the entered date will be purged.

2. Click to select purging of Plans Only, Run Number or Both.

Plans Only	Only Plans will be purged
Run Numbers Only	Only Schedules will be purged
Both	Plans and Schedules will be purged

3. Click Purge.

Enquiries

21. Retrospective Discount Summary Enquiry window



Enquiry >> Myridas >> Sales Retrospective Discounts >> Summary Enquiry

Use the Retrospective Discount Summary Enquiry window to:

- View retrospective discount debtor, address and qualifying period summaries

*The
Retrospective
Discount
Summary
window*

Debtor ID	Debtor Name	Address	B.D. Satchel ID	Total Quantity	Fun Number	Total Value	Start Date	Discount Value	End Date
AARDNFIT 0001				11.00		\$440.00		\$44.00	

Discount summaries can be displayed by Main Account Debtor ID, Debtor ID, Address or Run Number.



Note that if you select to display the Retrospective Discount Summary Enquiry window and discount totals have not been updated today you will be asked if you want to update the totals.

Click yes to display the [Retrospective Discount Update window](#) where you can update discount totals. Click No to display the Retrospective Discount Summary window, which will still function as standard, but be aware that totals shown may not be accurate.

21.1 Viewing Retrospective Discount Enquiries

To view retrospective discount summaries in the Retrospective Discount Summary Enquiry window:

1. To view discount summaries for a main account debtor ID enter a Main Account Debtor ID or select one using the lookup. The Main Account Group will be displayed by default.
2. Click All to select All Debtor IDs or From to select a range of Debtor IDs. If you select From you should enter From and To values or select them using the lookups.
3. Click All to select All Addresses or From to select a range of Addresses. If you select From you should enter From and To values or select them using the lookups.

Note that this option is only available where you have the same Debtor ID entered as the From and To Debtor, and where that Debtor is set up for retrospective discounts at address level).

4. Click to view All run numbers or Current Only run numbers.
5. Click Redisplay to view your selection in the scrolling window.

Selected Debtors will be displayed with the Total Quantity applicable to retrospective discounts, the Total Value of this quantity, and the Discount Value that is applicable.



Click the Show button to view associated Schedule ID, Run Number, Start Date and End Date.

Click on a line then click Zoom to display the line details in the Retrospective Discount Detail Enquiry window.

Click the print button to print the Retrospective Discounts Summary Report.

6. Click OK to close the window.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Also note that this window can also be displayed by clicking the Zoom button in the [Retrospective Discount Main Account Group Summary Enquiry window](#).

22. Retrospective Discount Detail Enquiry window



Enquiry >> Myridas >> Sales Retrospective Discounts >> Detail Enquiry

Use the Retrospective Discount Detail Enquiry window to:

- View retrospective discount item and group details

*The
Retrospective
Discount Detail
Enquiry window*

R.D. Plan	Group Code	Item Number	Total Quantity	Total Value	Discount Value
SPRINGCOROMS	CD ROOMS	24K IDE	11	\$440.00	\$44.00

Note that if you select to display the Retrospective Discount Detail Enquiry window and discount totals have not been updated today you will be asked if you want to update the totals.

Click yes to display the [Retrospective Discount Update window](#) where you can update discount totals. Click No to display the Retrospective Discount Detail Enquiry window, which will still function as standard, but be aware that totals shown may not be accurate.

Also note that this window can also be displayed by clicking the Zoom button in the Retrospective Discount Summary Enquiry window.

22.1 Viewing Retrospective Discount Details

To view retrospective discount details in the Retrospective Discount Detail Enquiry window:

1. Enter a Debtor ID or select one using the lookup.

If the selected Debtor ID is assigned to a main account group then the Main Account Debtor ID and Main Account Group will be displayed by default.

2. If the Debtor ID is set up for retrospective discounts at address level enter an Address ID or select one using the lookup or browse buttons.
3. The R.D. Schedule ID, Start and End Dates and Current Run Number will be displayed. Use the browse buttons to view previous Run Numbers.
4. Detailed information will be displayed in the scrolling window.

Where discount items are within an aggregate discount group, the first line of the group will be a consolidation line. For example, you could have 14 different items, all belonging to the same discount group. The discount value against each line item would be zero; the top line will display the Total Quantity and Total Value of all items displayed, and the total discount value.

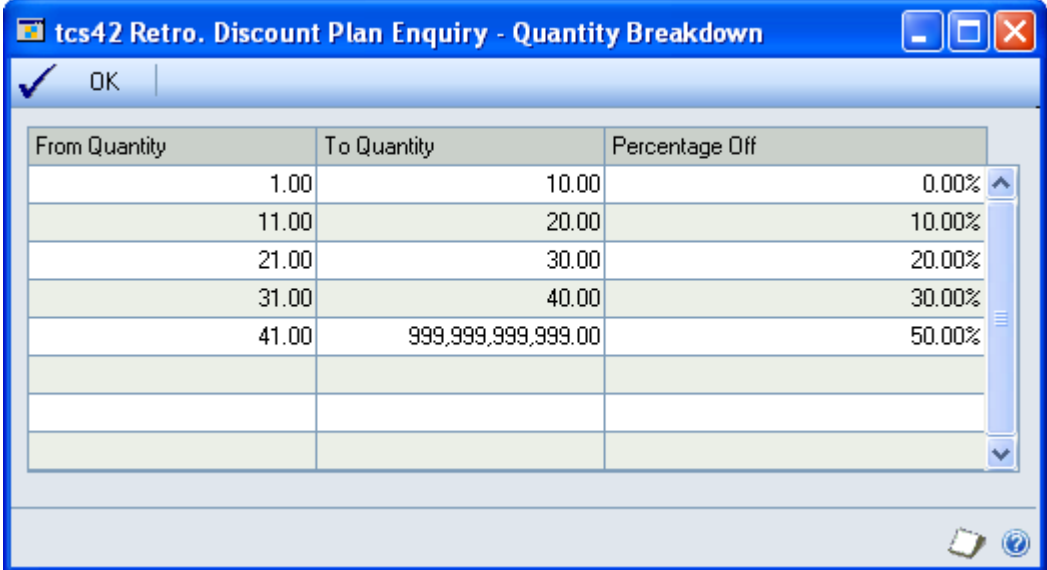
Click the print button to print the Retrospective Discounts Detail Report.

5. Click OK to close the window.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Click the Redisplay button to redisplay the results of an amended enquiry in the scrolling window.

*The
Retrospective
Discount Plan
Enquiry -
Quantity
Breakdown
window*



From Quantity	To Quantity	Percentage Off
1.00	10.00	0.00%
11.00	20.00	10.00%
21.00	30.00	20.00%
31.00	40.00	30.00%
41.00	999,999,999,999.00	50.00%

Click OK to close the quantity breakdown window and return to the Retrospective Discount Plan Enquiry window.

4. Click OK to close the window.

Note that you can choose to clear your selection at any point by clicking the Clear button.

24. Retrospective Discount Item Plan Enquiry

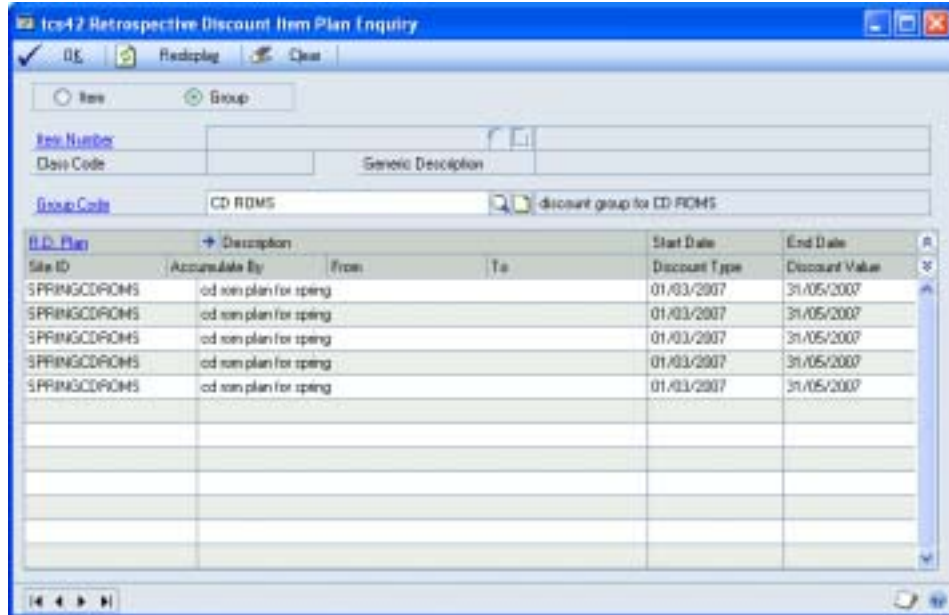


Enquiry >> Myridas >> Sales Retrospective Discounts >> Item Plan Enquiry

Use the Retrospective Discount Item Plan Enquiry to:

- View plan details for a selected item or group

*The
Retrospective
Discount Item
Plan Enquiry
window*



24.1 Viewing Plan Details for a Selected Item and Group

To view plan details for selected items and groups in the Retrospective Discount Item Plan Enquiry window:

1. Click to select whether to view plan details for an Item or Group.
2. If you selected Item enter an Item Number or select one using the lookup.
3. If you selected Group enter a Group Code or select one using the lookup.
4. Details of all R.D. Plans that the selected Item or Group is assigned to will be displayed in the scrolling window.

The Description and Start and End Dates will be displayed.



Click the Show button to display the Accumulate By type and Discount Type and Value for each quantity break level on the R.D. Plan.

Note that if you select an Item Number that exists on a Plan as part of a group but not individually, the Group Code will be displayed but not Plan details. To view Plan details for the Group select Group and Proceed from step 1.

5. Click OK to close the window.

Note that you can choose to clear your selection at any point by clicking Clear.

25. Retrospective Discount Uplift Price Trace Enquiry window



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

Use the Retrospective Discount Uplift Price Trace window to:

- View uplifted discount prices

*The
Retrospective
Discount Price
Trace Enquiry
window*

Total Price:		\$55.00
Settlement Discount Percent:	0.00%	
Retrospective Discount Percent:	0.00%	
Uplifted Total Price:		\$55.00

This window will be displayed automatically when you open a price trace in the Price Trace Enquiry window for a Debtor ID with settlement or retrospective discounts set to uplift.

25.1 Viewing Uplifted Discount Prices

To view uplifted discount prices in the Retrospective Discount Uplift Price Trace Enquiry window:

1. The window will open with the currently selected Debtor ID displayed.
2. If the Debtor ID is set for retrospective discounts at address level, select an Address ID to view using the browse buttons or lookup button.

If the Debtor ID is not set for retrospective discounts at address level then you will be unable to select an Address ID.

3. If the Debtor ID (and where applicable Address ID) has retrospective discounts set for a specified Site ID only then the Uplift Price Total will be displayed.

If the Debtor ID (and where applicable Address ID) has retrospective discounts set for multiple or all Site IDs use the browse buttons or lookup button to view the Uplift Price Total for the required Site ID.

4. Click OK to close the window.

26. Retrospective Discount Main Account Summary Enquiry window



Enquiry >> Myridas >> Sales Retrospective Discounts >> Main Account Summary

Use the Retrospective Discount Main Account Summary Enquiry window to:

- View retrospective discount main account details

The Retrospective Discount Main Account Summary Enquiry window

Main Account Debtor ID	Main Account Group	Total Quantity	Total Value	Discount Value
Main Account Debtor Name	R.D. Schedule ID	Run Number	Start Date	End Date
AARONFIT0001	AARONFITZ GROUP	11.00	\$440.00	\$44.00

26.1 Viewing Retrospective Discount Main Account Details

To view retrospective discount main account details using the Retrospective Discount Main Account Summary Enquiry window:

1. All Main Account Debtor IDs will be selected by default. To select a range of main account debtors select From then enter From and To values or select them using the lookups.
2. Current Only run numbers will be selected by default. Select All to view discount summaries for all run numbers.
3. Click Redisplay. Main account debtors with accumulated discounts will be displayed in the scrolling window. Select a line and click the Zoom button to display the [Retrospective Discount Summary Enquiry window](#) where you can view a breakdown of the main account accumulated discounts.

Click the print icon to print the Retrospective Discount Main Account Summary Enquiry Report.

4. Click OK to close the window.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Reports

27. Retrospective Discount Report window



Reports >> Myridas >> Sales Retrospective Discounts >> Discount Report

Use the Retrospective Discount Report window to:

- Print retrospective discount reports

*The
Retrospective
Discount Report
window*

Retrospective Discount Reports detail all items or groups with accumulated discounts for the selected debtor or schedule range.

27.1 Printing Retrospective Discount Reports

To print retrospective discount reports from the Retrospective Discount Report window:

1. From the Report Type drop-down menu select whether you want to view a report for Debtors or Schedules.
2. Depending on your Report Type selection click All to print a report for all Debtors/Schedules or From to print a report for specified Debtors/Schedules. If you select From enter a Debtor/Schedule range or select them using the lookups.
3. Under Plan Date Range click All to view all plans, or From to view only plans within a certain date range. If you select From enter From and To dates.
4. Click Print to print the report.

28. Retrospective Discount Price Uplift Report window



Reports >> Myridas >> Sales Retrospective Discounts >> Price Uplift Report

Use the Retrospective Discount Price Uplift Report window to:

- Print reports on retrospective discount price uplifts

The Retrospective Discount Price Uplift Report window

The screenshot shows the 'tcs42 Retrospective Discount Price Uplift Report' window. At the top, there are 'Clear' and 'Print' buttons. Below them is a 'Report Type' dropdown menu currently set to 'With Uplift Detail Breakdown'. A 'Date' field contains '12/04/2007'. The 'Currency ID' section has two radio buttons: 'Default' (selected) and 'Specific:'. The 'Debtor Range' section has three radio buttons: 'All' (selected), 'From:', and 'To:'. The 'Address Range' section has three radio buttons: 'All' (selected), 'From:', and 'To:'. The 'Site ID Range' section has three radio buttons: 'All', 'From:' (selected), and 'To:'. The 'From:' and 'To:' fields for Site ID Range both contain 'WAREHOUSE'. The 'Get Prices From' section has three radio buttons: 'Price Sheets Only' (selected), 'Price Sheets & Price Book', and 'Price Sheets, Price Book & Base Price Book'. At the bottom right, there are icons for a folder and a help icon.

28.1 Printing Reports on Retrospective Discount Price Uplifts

To print reports on retrospective discount price uplifts in the Retrospective Discount Price Uplift Report window:

1. From the drop-down menu select whether to print a report With Uplift Detail Breakdown or Without Uplift Detail Breakdown.

Without Detail will display only the uplifted price, Without Detail will display the price before uplift, discount percentages, and uplifted price.

2. The current date will be displayed by default. Enter an alternative date if required.
3. Under Currency ID select your system Default Currency ID or click Specific and enter a Currency ID or select one using the lookup.

Note that if you select a specific Currency ID, items not set up for this currency will be excluded from the report.

4. Under Debtor Range select All or click From and enter From and To values, or select them using the lookups.
5. Under Address Range select All or click From and enter From and To values, or select them using the lookups.

Note that you can only select an Address Range if you have selected a single debtor in the Debtor Range.

6. Under Site ID Range select All or click From and enter From and To values, or select them using the lookups.
7. Select the Get Prices From Option that you want to print.

Option	Description
Price Sheets Only	Prices will be reported for price sheets assigned directly to the debtor
Price Sheets and Price Books	Prices will be reported for price sheets assigned directly to the debtor, and price sheets assigned to the debtor's price book
Price Sheets, Price Books and Base book	Prices will be reported for price sheets assigned directly to the debtor, price sheets assigned to the debtor, and price sheets assigned to the base price book



8. Click Print to print the required report.

Note that you can choose to clear your selection at any point by clicking the Clear button.

Appendix A

Access to Myridas Windows

Sales Retrospective Discounts

Window Name	 Menu Access	 Other Access
Prepare Debtor Range for Retrospective Discounts	Tools >> Setup >> Myridas >> Sales Retrospective Discounts >> Prepare Debtor Range	
Retrospective Discount Address Details Maintenance	Cards >> Cards >> Sales Retrospective Discounts >> Address Details	Cards >> Sales >> Addresses >> Extras >> Additional >> Retro. Discount Address Maint.
Retrospective Discount Debtor Details Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Debtor Details	Cards >> Sales >> Debtor >> Extras >> Additional >> Retro. Discount Debtor Details
Retrospective Discount Detail Enquiry	Enquiry >> Myridas >> Sales Retrospective Discounts >> Detail Enquiry	
Retrospective Discount Group Allocation	Cards >> Myridas >> Sales Retrospective Discounts >> Group Allocation	
Retrospective Discount Group Allocation Range		Cards >> Myridas >> Sales Retrospective Discounts >> Group Allocation >> Ranges button
Retrospective Discount Group Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Group Maintenance	
Retrospective Discount Item Plan Enquiry	Enquiry >> Myridas >> Sales Retrospective Discounts >> Item Plan Enquiry	
Retrospective Discount Main Account Group -		Retrospective Discount Main

Debtor Range Allocation		Account Group Maintenance window >> Ranges button
Retrospective Discount Main Account Group Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Main Account Group Maint.	
Retrospective Discount Main Account Summary Enquiry	Enquiry >> Myridas >> Sales Retrospective Discounts >> Main Account Summary	
Retrospective Discount Open Next Qualifying Period	Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Open Next Q Period	
Retrospective Discount Plan Enquiry	Enquiry >> Myridas >> Sales Retrospective Discounts >> Plan Enquiry	
Retrospective Discount Plan Item Maintenance		Cards >> Myridas >> Sales Retrospective Discounts >> Plan Maintenance >> Item Number/Group Extras button
Retrospective Discount Plan Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Plan Maintenance	
Retrospective Discount Price Trace Enquiry	Enquiry >> Inventory >> Extended Pricing >> Price Trace >> Trace button	
Retrospective Discount Price Uplift Report window	Reports >> Myridas >> Sales Retrospective Discounts >> Price Uplift Report	
Retrospective Discount Purge	Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Discount Purge	
Retrospective Discount Report	Reports >> Myridas >> Sales Retrospective Discounts >> Discount Report	

Retrospective Discount Schedule/Debtor Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Sched/Debtor Maint	
Retrospective Discount Schedule/Debtor Maintenance - Range Allocation		Cards >> Myridas >> Sales Retrospective Discounts >> Sched/Debtor Maint >> Ranges button
Retrospective Discount Schedule/Plan Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> R. Sched/Plan Maint	
Retrospective Discount Schedule/Plan Maintenance - Range Allocation		Cards >> Myridas >> Sales Retrospective Discounts >> R. Sched/Plan Maint >> Ranges button
Retrospective Discount Setup	Tools >> Setup >> Myridas >> Sales Retrospective Discounts >> Discount Setup	
Retrospective Discount Summary Enquiry	Enquiry >> Myridas >> Sales Retrospective Discounts >> Summary Enquiry	
Retrospective Discount Unit Item Details Maintenance	Cards >> Myridas >> Sales Retrospective Discounts >> Item Details	Cards >> Inventory >> Item >> Extras >> Additional >> Retro. Discount Unit Item Maint.
Retrospective Discount Unit of Measure Details Maintenance	Cards >> Myridas >> Sales Retrospective Disc. >> U of M Details	Setup >> Inventory >> U of M Schedule >> Extras >> Additional >> Retro. Discount U of M Maint.
Retrospective Discount Update	Tools >> Routines >> Myridas >> Sales Retrospective Discounts >> Update Discounts	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Module	Functionality
Retrospective Discount Main Account Summary Enquiry Report	Sales Retrospective Discounts	Prints summary report on retrospective discount main account accumulated discounts for the selected debtor range
Retrospective Discount Report	Sales Retrospective Discounts	Retrospective Discount Reports detail all items or groups with accumulated discounts for the selected debtor or schedule range
Retrospective Discount Price Uplift Report	Sales Retrospective Discounts	Print detail or summary reports on retrospective discount price uplifts for a selected debtor

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