

# Myridas

## Extended Pricing Enhancements

### User Guide

Version 12 for Dynamics GP 2013

Document version: 1.0

Date: 31<sup>st</sup> March 2013

# Contents

|  |           |
|--|-----------|
| <b>CONTENTS.....</b>   | <b>2</b>  |
| <b>EXTENDED PRICING ENHANCEMENTS .....</b>   | <b>5</b>  |
| 1. EXTENDED PRICING EXTRAS SETUP WINDOW .....  | 6         |
| 1.1 <i>Setting Defaults for Extended Pricing Enhancements</i> .....  | 6         |
| 2. EXTENDED PRICING ENHANCEMENTS DEBTOR/PROSPECT MAINTENANCE WINDOW 9  |           |
| 2.1 <i>Setting Up Debtors for Extended Pricing Enhancements Functionality</i> .....  | 9         |
| <b>COST UPLIFT PRICING.....</b>  | <b>11</b> |
| 3. SETTING UP COST UPLIFT PRICES .....   | 11        |
| 4. HOW COST UPLIFT PRICES ARE CALCULATED.....  | 11        |
| <b>PROMOTIONS .....</b>  | <b>13</b> |
| 5. PROMOTIONS IN THE EXTENDED PRICING ENHANCEMENTS MODULE.....   | 13        |
| 6. AVAILABLE PROMOTIONS INFORMATION WINDOW .....   | 14        |
| 6.1 <i>Viewing Promotions for Sales Items</i> .....  | 14        |
| <b>NEGATIVE ADJUSTMENTS IN PRICE SHEETS.....</b>   | <b>15</b> |
| 7. SETTING UP NEGATIVE ADJUSTMENTS IN PRICE SHEETS.....  | 15        |
| <b>VISIBLE DISCOUNTS.....</b>  | <b>16</b> |
| 8. SETTING UP VISIBLE DISCOUNTS .....  | 16        |
| <b>AGGREGATE PRICING .....</b>   | <b>17</b> |
| 9. HOW AGGREGATE PRICES ARE CALCULATED.....  | 18        |
| 10. AGGREGATE PRICING GROUP MAINTENANCE WINDOW .....   | 20        |
| 10.1 <i>Setting Up Aggregate Pricing Groups</i> .....  | 20        |
| 11. AGGREGATE PRICING GROUP BREAKS WINDOW.....   | 21        |
| 11.1 <i>Setting Up Quantity Breaks for Aggregate Pricing</i> .....   | 21        |
| 12. AGGREGATE PRICING GROUP ALLOCATION WINDOW .....  | 23        |
| 12.1 <i>Allocating Items to Aggregate Pricing Groups</i> .....   | 23        |
| 13. AGGREGATE PRICING GROUP ALLOCATION RANGE WINDOW .....  | 24        |
| 13.1 <i>Assigning Ranges of Items to a Group Code</i> .....  | 24        |
| 14. AGGREGATE PRICING UNIT ITEM MAINTENANCE WINDOW .....   | 26        |
| 14.1 <i>Setting Up Individual Items for Aggregate Pricing</i> .....  | 26        |
| 15. AGGREGATE PRICING UNIT OF MEASURE MAINTENANCE WINDOW .....   | 27        |
| 15.1 <i>Setting Up Aggregate Pricing Units for Unit of Measure Schedules</i> .....   | 27        |
| 16. AGGREGATE PRICING DEBTOR/PROSPECT ACTIVATION BY RANGE WINDOW .....   | 27        |
| 16.1 <i>Activating Aggregate Pricing for a range of debtors or prospects in the Aggregate Pricing – Debtor/Prospect Activation by Range window</i> ..... | 28        |
| 17. AGGREGATE PRICING GROUP DEALS – ASSIGN DEBTORS WINDOW .....  | 29        |
| 17.1 <i>Assigning debtors to aggregate deals in the Aggregate Pricing Group Deals – Assign Debtors window</i> .....                                      | 29        |
| 18. AGGREGATE PRICING GROUP DEALS – ASSIGN DEBTORS BY RANGE WINDOW .....   | 31        |
| 18.1 <i>Assigning Ranges of Debtors to an Aggregate Pricing Group Deal</i> .....   | 31        |
| 19. SALES TRANSACTION ENTRY WITH AGGREGATE PRICING .....   | 33        |
| 20. AGGREGATE PRICING REWORK WINDOW .....  | 34        |
| 20.1 <i>Selecting Aggregate Prices in the Aggregate Pricing Rework window</i> .....  | 34        |
| 21. AGGREGATE PRICING TRACKER WINDOW .....   | 35        |
| 21.1 <i>Viewing Aggregate Pricing Quantity Details During Sales Transaction Entry</i> .....  | 36        |
| 22. AGGREGATE PRICING GROUP DETAIL VIEW WINDOW .....   | 36        |
| 22.1 <i>Viewing Aggregate Group Details During Sales Transaction Entry</i> .....   | 37        |
| 23. AGGREGATE PRICING PRICE TRACE WINDOW.....  | 38        |

|  |           |
|--|-----------|
| 23.1 Tracing an Aggregate Price Calculation.....   | 38        |
| <b>SITE SPECIFIC PRICING.....</b>  | <b>40</b> |
| 24. SITE PRICE TYPE MAINTENANCE WINDOW .....   | 41        |
| 24.1 Setting Up Site Price Types.....  | 41        |
| 25. ASSIGN SITE PRICE TYPE TO SITE ID WINDOW .....   | 41        |
| 25.1 Assigning a Site Price Type to a Site ID.....   | 42        |
| 26. ASSIGN SITE IDS TO SITE PRICE TYPES WINDOW .....   | 43        |
| 26.1 Assigning a Site Price Type to Multiple Sites .....   | 43        |
| 27. ASSIGN SITE IDS TO SITE PRICE TYPES - BY RANGE WINDOW.....                                   | 44        |
| 27.1 Assigning a Site Price Type to a Range of Sites.....  | 45        |
| 28. ASSIGN SITE PRICE TYPE TO PRICE SHEET ID WINDOW.....   | 46        |
| 28.1 Assigning a Site Price Type to a Price Sheet .....  | 46        |
| 29. ASSIGN PRICE SHEETS TO SITE PRICE TYPES WINDOW .....   | 47        |
| 29.1 Assigning Multiple Price Sheets to a Site Price Type.....                                   | 47        |
| 30. ASSIGN PRICE SHEETS TO SITE PRICE TYPES - BY RANGE WINDOW .....                              | 48        |
| 30.1 Assigning Ranges of Price Sheets to a Site Price Type .....                                 | 48        |
| 31. PRICE TRACE ENQUIRY - SITE ID WINDOW.....  | 50        |
| 31.1 Tracing a Site Specific Price.....  | 50        |
| <b>ORDER VALUE DISCOUNTS .....</b>   | <b>50</b> |
| 32. HOW ORDER VALUE DISCOUNT IS CALCULATED .....   | 51        |
| 33. ORDER VALUE DISCOUNT SETUP WINDOW.....   | 51        |
| 33.1 Setting Up Order Value Discount options .....   | 52        |
| 34. ORDER VALUE DISCOUNT GROUP MAINTENANCE WINDOW .....  | 53        |
| 34.1 Setting Up Order Value Discount Groups .....  | 53        |
| 35. ORDER VALUE DISCOUNTS – ASSIGN DEBTORS WINDOW .....  | 55        |
| 35.1 Assigning Debtors to Order Value Discount Groups.....                                       | 55        |
| 36. ORDER VALUE DISCOUNTS – ASSIGN DEBTOR RANGES WINDOW .....                                    | 57        |
| 36.1 Assigning Ranges of Debtors to an Order Value Discount Group.....                           | 57        |
| 37. ORDER VALUE DISCOUNT RATES WINDOW .....  | 58        |
| 37.1 Maintaining Order Value break points and discount percentages.....                          | 58        |
| 38. ORDER VALUE DISCOUNTS – EXCLUDED ITEMS WINDOW .....  | 60        |
| 38.1 Excluding Items from Order Value Discount.....  | 60        |
| 39. ORDER VALUE DISCOUNTS – EXCLUDED ITEMS RANGE WINDOW .....                                    | 61        |
| 39.1 Excluding Ranges of Items from Order Value Discounts .....                                  | 61        |
| 40. SALES TRANSACTION ENTRY WITH ORDER VALUE DISCOUNTS.....                                      | 62        |
| 41. THE ORDER VALUE DISCOUNTS WINDOW .....   | 62        |
| 41.1 Viewing Order Value Discount for a sales document in the Order Value Discounts window ..... | 62        |
| 42. THE ORDER VALUE DISCOUNT DOCUMENT WINDOW .....   | 63        |
| 42.1 Overriding the Order Value Discount for a document.....                                     | 64        |
| 43. THE ORDER VALUE DISCOUNT LINE ITEM WINDOW .....  | 64        |
| 43.1 Excluding a line item from Order Value Discount.....  | 64        |
| <b>AGGREGATE PROMOTIONS .....</b>  | <b>65</b> |
| 44. HOW AGGREGATE PROMOTIONS ARE CALCULATED .....  | 65        |
| 44.1 Total Quantity Promotions .....   | 65        |
| 44.2 Points Allocation Promotions .....  | 66        |
| 45. AGGREGATE PROMOTIONS MAINTENANCE WINDOW .....  | 67        |
| 45.1 Setting Up Aggregate Promotions.....  | 67        |
| 46. AGGREGATE PROMOTIONS MAINTENANCE – FREE ITEMS WINDOW .....                                   | 69        |
| 46.1 Maintaining Aggregate Promotion Break Points.....   | 69        |
| 47. AGGREGATE PROMOTIONS – ASSIGN DEBTORS WINDOW .....   | 71        |
| 47.1 Assigning Debtors to Aggregate Promotions.....  | 71        |

|  |            |
|--|------------|
| 48. AGGREGATE PROMOTIONS – ASSIGN DEBTORS BY RANGE WINDOW .....                      | 72         |
| 48.1 <i>Assigning a Range of Debtors to an Aggregate Promotion</i> .....             | 72         |
| 49. AGGREGATE PROMOTIONS – ASSIGN DEBTOR GROUPS BY RANGE WINDOW .....                | 74         |
| 49.1 <i>Assigning a Range of Debtor Groups to an Aggregate Promotion</i> .....       | 74         |
| 50. AGGREGATE PROMOTIONS – ASSIGN ITEMS WINDOW .....                                 | 76         |
| 50.1 <i>Assigning Items to Aggregate Promotions</i> .....                            | 76         |
| 51. AGGREGATE PROMOTIONS – ASSIGN ITEMS BY RANGE WINDOW .....                        | 78         |
| 51.1 <i>Assigning Ranges of Items to an Aggregate Promotion</i> .....                | 78         |
| 52. FREE ITEM LIST MAINTENANCE WINDOW .....  | 80         |
| 52.1 <i>Maintaining Free Item Lists</i> .....  | 80         |
| 53. FREE ITEM LIST MAINTENANCE – RANGE ALLOCATION .....                              | 82         |
| 53.1 <i>Assigning Ranges of Items to a Free Item List</i> .....                      | 82         |
| 54. AGGREGATE PROMOTIONS – DEBTOR GROUP MAINTENANCE WINDOW .....                     | 84         |
| 54.1 <i>Maintaining Aggregate Promotion Debtor Groups</i> .....                      | 84         |
| 55. AGGREGATE PROMOTIONS - DEBTOR GROUP - ASSIGN BY RANGE .....                      | 85         |
| 55.1 <i>Assigning Ranges of Debtors to an Aggregate Promotion Debtor Group</i> ..... | 85         |
| 56. AGGREGATE PROMOTIONS IN SALES TRANSACTION ENTRY .....                            | 87         |
| 57. AGGREGATE PROMOTION TRACKER WINDOW .....   | 88         |
| 57.1 <i>Viewing the status of aggregate promotions</i> .....                         | 89         |
| 57.2 <i>Viewing the available free items for a Points Allocation Promotion</i> ..... | 90         |
| 58. AGGREGATE PROMOTIONS– SELECT PROMOTIONS WINDOW .....                             | 91         |
| 58.1 <i>Adding Free Items to an Order</i> .....                                      | 91         |
| 58.2 <i>Selecting Free Items from a List</i> .....                                   | 92         |
| 58.3 <i>Selecting Free Items from a List – Points Allocation</i> .....               | 93         |
| 59. AGGREGATE PROMOTIONS ENQUIRY .....   | 93         |
| 59.1 <i>Viewing Aggregate Promotions for a debtor or item</i> .....                  | 94         |
| <b>DEBTOR PRICE REPORT .....</b>   | <b>95</b>  |
| 60. DEBTOR PRICE LIST PRODUCTION WINDOW .....  | 95         |
| 60.1 <i>Reporting on Debtor Price Lists</i> .....                                    | 96         |
| 60.2 <i>Clearing Price Report data</i> .....   | 98         |
| <b>APPENDIX A .....</b>  | <b>99</b>  |
| EXTENDED PRICING ENHANCEMENTS – ACCESS TO WINDOWS .....                              | 99         |
| <b>APPENDIX B .....</b>  | <b>105</b> |
| AMENDED MICROSOFT DYNAMICS™ GP WINDOWS .....   | 105        |
| <b>APPENDIX C .....</b>  | <b>106</b> |
| WINDOWS SHOWING SITE SPECIFIC PRICING .....  | 106        |
| <b>APPENDIX D .....</b>  | <b>107</b> |
| EXTENDED PRICING ENHANCEMENTS - REPORTS .....  | 107        |
| <i>Extended Pricing Enhancements Report Functions</i> .....                          | 107        |
| <b>APPENDIX E .....</b>  | <b>109</b> |
| ABOUT MYRIDAS .....  | 109        |
| <b>INDEX .....</b>   | <b>110</b> |

## Extended Pricing Enhancements

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

The key features of the Extended Pricing Enhancement module are:

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

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

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

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

## 1. Extended Pricing Extras Setup window

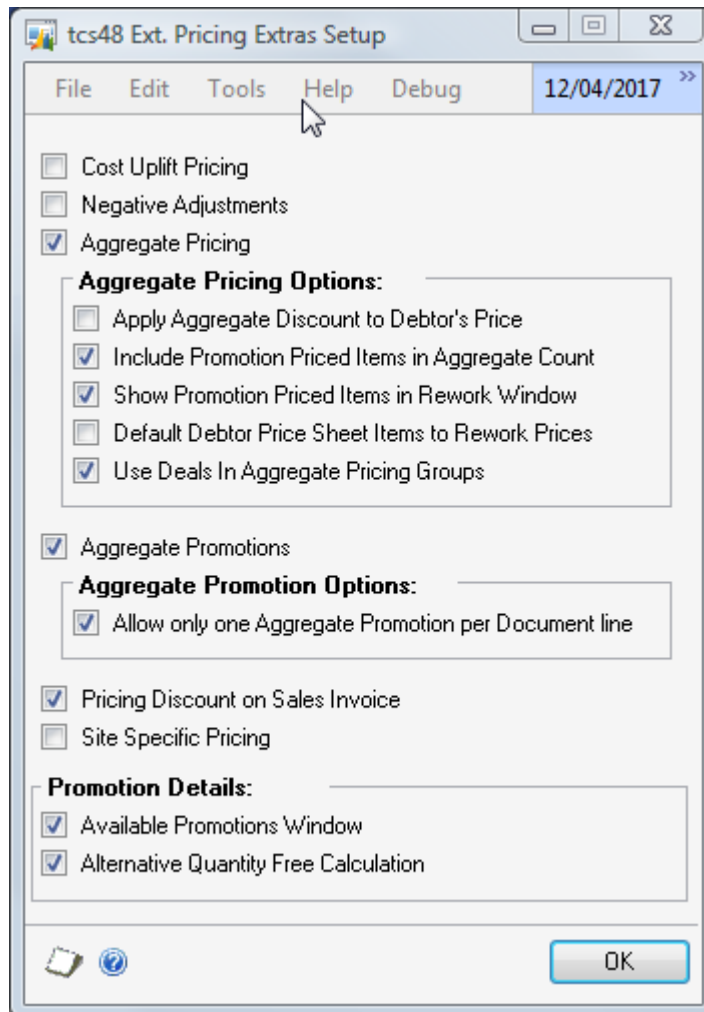


*Tools >> Setup >> m-hance >> Extended Pricing Enhancements>> Extended Pricing Enhancements Setup*

Use the Extended Pricing Extras Setup window to:

- Set defaults for extended pricing enhancements

*The Extended Pricing Extras Setup window*



### 1.1 Setting Defaults for Extended Pricing Enhancements

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

1. The following settings are available in the window:

|                      |  |
|----------------------|--|
| Cost Uplift Pricing  | Enables you to calculate a selling price by adding a percentage or value to the cost price. See <a href="#">Cost Uplift Pricing</a> .            |
| Negative Adjustments | Enables you to enter negative values for value adjustments against price sheet items. See <a href="#">Negative Adjustments in Price Sheets</a> . |
| Aggregate Pricing    | Enables prices to be determined from the total   |

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

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

- Set up debtors for Extended Pricing Enhancements functionality

*The Extended Pricing Enhancements Debtor/Prospect Maintenance window*

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

### 2.1 Setting Up Debtors for Extended Pricing Enhancements Functionality

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

1. Click to select Customer or Prospect to set up for extended pricing enhancements functionality.
2. Enter a debtor/prospect ID or select one using the lookup.
3. Click the Aggregate Pricing check box to set the selected debtor/prospect for **aggregate pricing** functionality.
4. Enter an Aggregate Starting Quantity if required. If you enter an aggregate starting quantity then when sales transactions for this debtor are entered with an aggregate starting quantity greater than the accumulated quantity in the transaction, the aggregate starting quantity will be used to establish the price book that aggregate prices are taken from rather than the actual accumulated transaction quantity.
5. Click the Pricing Discount on Sales Invoice check box to set the selected debtor/prospect for **visible discounts** functionality.
6. Click Save to save your changes and close the window.

*Unassigning  
debtors/prospects from  
Extended Pricing  
Enhancements  
functionality*

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.

## Cost Uplift Pricing

### 3. Setting Up Cost Uplift Prices

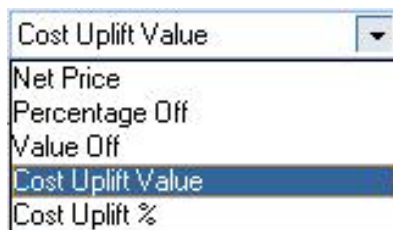
Cost uplift pricing is when a selling price for sales transactions is calculated by adding a value or percentage to the unit cost price. New, mainly underlying, functionality allows you to create cost uplift prices using the Microsoft Dynamics™ GP Extended Pricing windows.

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

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

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

*Cost uplift options*



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

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

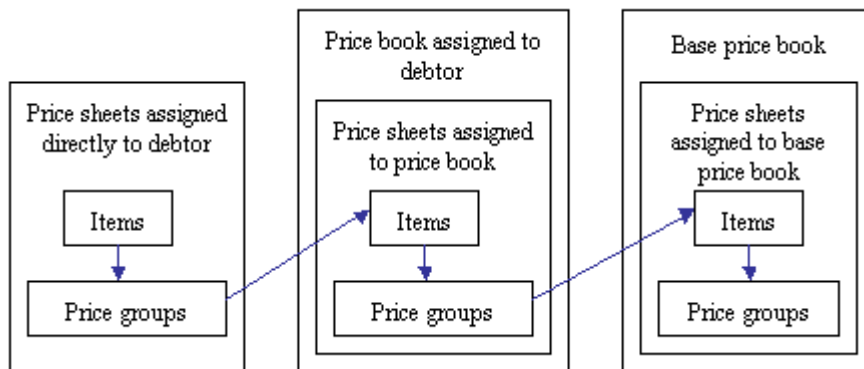
### 4. How Cost Uplift Prices are Calculated

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

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

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

Refer to the illustration for more information.



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

## Promotions

### 5. Promotions in the Extended Pricing Enhancements module

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

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

#### Available Promotions Window option

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

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

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

#### Alternative Quantity Free Calculation

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

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

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

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

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

## 6. Available Promotions Information window



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

Use the Available Promotions Information window to:

- View promotions for sales items

*The Available Promotions Information window*

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

### 6.1 Viewing Promotions for Sales Items

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

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

## Negative Adjustments in Price Sheets

### 7. Setting Up Negative Adjustments in Price Sheets

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

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

Note that negative values are displayed in brackets.

## Visible Discounts

### 8. Setting Up Visible Discounts

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

With 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 Extended Pricing Enhancements Reports](#) for details on how to implement this functionality in documents and reports.

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



## Aggregate Pricing

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

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

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

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

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

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

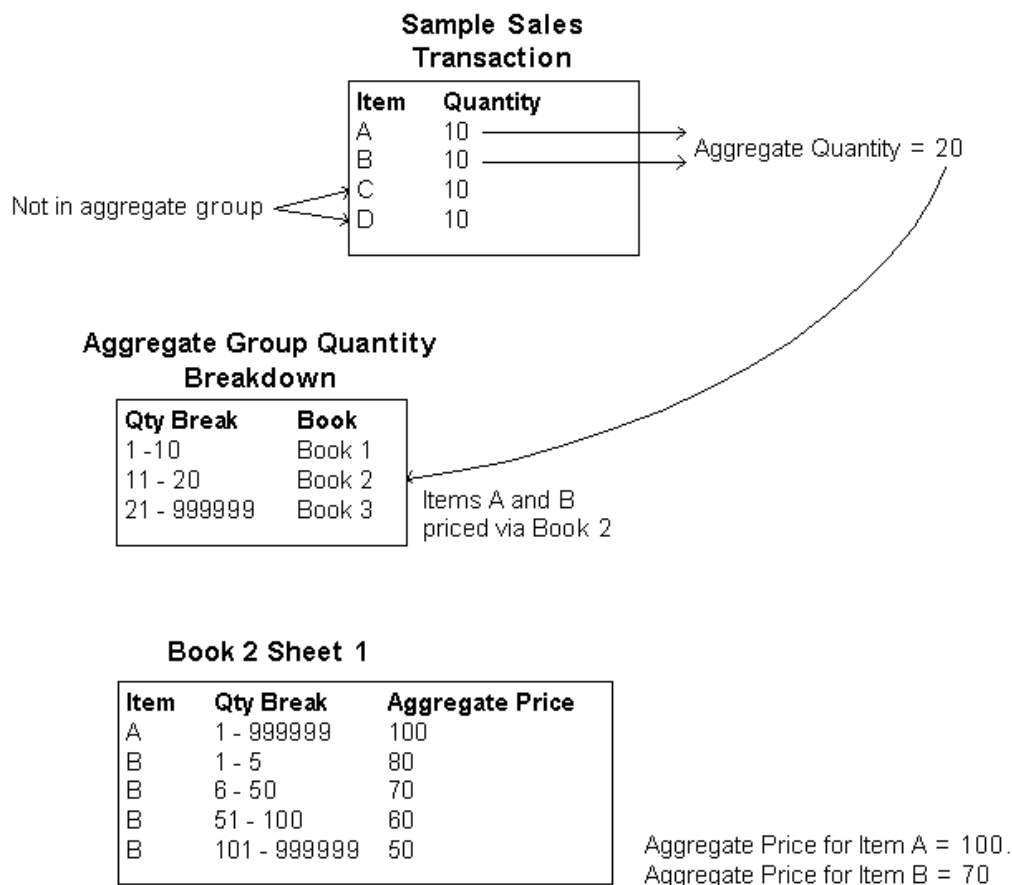
## 9. How Aggregate Prices are Calculated

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

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

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

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



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

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

## 10. Aggregate Pricing Group Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance*

Use the Aggregate Pricing Group Maintenance window to:

- Set up aggregate pricing groups

*The  
Aggregate  
Pricing  
Group  
Maintenance  
window*

### 10.1 Setting Up Aggregate Pricing Groups

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

1. Enter a Group Code or select one using the lookup.
2. If you are entering a new group code, enter a description.  
Click the Assign button to display the [Aggregate Pricing Group Allocation window](#) where you can assign items to a group code. Click the Deals/Quantity Breaks button to display the [Aggregate Pricing Group Breaks window](#) where you set up price books against quantity breaks for the group code.
3. Select an Aggregate Price Type from the drop down list:  
Quantity Breaks Represent Total Quantity if the price break achieved is determined from the total quantity ordered of the items in the group,  
or  
Quantity Breaks Represent Item Count if the price break achieved is determined from the number of different items ordered.
4. If you have chosen to Use Deals In Aggregate Pricing Groups in the [Extended Pricing Extras Setup window](#), you have the option to specify a Default Deal. This will be used for any customer not linked to a specific deal. If a default deal is not specified, any customer not assigned to a specific deal will not receive aggregate prices for this group. Note that you cannot specify a default deal until you have used the [Aggregate Pricing Group Breaks window](#) to set up price books against quantity breaks for the group code.

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

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

Click Delete to delete group codes.

*Deleting  
groups*

## 11. Aggregate Pricing Group Breaks window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance >> Deals / Quantity Breaks button*

Use the Aggregate Pricing Group Breaks window to:

- Set up quantity breaks for aggregate pricing

*The  
Aggregate  
Pricing  
Group  
Breaks  
window*

| From Qty | Price Book | Price Book Description |
|----------|------------|------------------------|
| 10.00    | SPECIAL    | special - aggregate    |
| 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. If you are using Aggregate Price deals, enter a Price Deal code and description. If you are not using Aggregate Price Deals, the Deal code will be set automatically to “DEFAULT DEAL” and cannot be changed.

3. Enter the quantity breaks for the aggregate price group and deal, and enter the price books that quantity break prices will be based on or select them using the lookup. See [How Aggregate Prices are Calculated](#) for further details.
4. Click OK to return to the [Aggregate Pricing Group Maintenance window](#).

## 12. Aggregate Pricing Group Allocation window



*Cards >> m-hance >> Extended Pricing, Enhancements >> Aggregate Pricing Group Allocation*

Use the Aggregate Pricing Group Allocation window to:

- Allocate items to aggregate price groups

*The  
Aggregate  
Pricing  
Group  
Allocation  
window*

| Item Number | 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.

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

*Unassigning items  
from group codes*

## 13. Aggregate Pricing Group Allocation Range window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Aggregate Pricing Group Allocation >> Ranges button*

Use the Aggregate Pricing Group Allocation Range window to:

- Assign ranges of items to a group code

*The  
Aggregate  
Pricing  
Group  
Allocation  
Range  
window*

| Item Number | Item Description | Generic Desc | Group Code | 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.

1. Click All to assign all records or From to assign a selection of records for item number, generic description and class ID. If you select From, enter To and From values to specify a range, or use the lookups.



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

|                   |   |
|-------------------|---|
| <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. |

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

## 14. Aggregate Pricing Unit Item Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Unit Item Maintenance*

Use the Aggregate Pricing Unit Item Maintenance window to:

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

*The  
Aggregate  
Pricing Unit  
Item  
Maintenance  
window*

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

### 14.1 Setting Up Individual Items for Aggregate Pricing

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

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

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

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

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

Note that you do not need to select an aggregate pricing unit in this window.

An aggregate pricing unit can be set for all items sharing a unit of measure schedule in the [Aggregate Pricing Unit Of Measure Maintenance window](#).

Aggregate pricing units assigned to a specific item in this window will be used rather than any assigned to the unit of measure schedule as a whole.

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



*Tools >> Setup >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Unit of Measure Maintenance*

Use the Aggregate Pricing Unit Of Measure Maintenance window to:

- Set up aggregate pricing units for unit of measure schedules

*The  
Aggregate  
Pricing Unit  
of Measure  
Maintenance  
window*

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

### 15.1 Setting Up Aggregate Pricing Units for Unit of Measure Schedules

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

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 unit set up for displayed unit of measure schedule.

*Deleting aggregate  
pricing units*

## 16. Aggregate Pricing Debtor/Prospect Activation by Range window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing - Debtor/Prospect Activation by Range*

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

- Set a range of debtors to use Aggregate Pricing

*The Aggregate Pricing Debtor/Prospect Activation by Range window*

sa Fabrikam, Inc. 12/05/2017

File Edit Tools Help

OK Clear Preview Process

☒ Debtor ☐ Prospect

Debtor ID ☐ All ☒ From:  To:

Class ID ☐ All ☒ From: AUSTRALIA-T8 To: AUSTRALIA-T8

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

| Debtor ID | Name | Class ID | Activate |
|-----------|------|----------|----------|
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |
|           |      |          |          |

Mark All Unmark All

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

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

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

## 17. Aggregate Pricing Group Deals – Assign Debtors window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals - Assign Debtors*

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

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

*The Aggregate Pricing Group Deals – Assign Debtors window*

| Debtor ID    | Debtor Name              |
|--------------|--------------------------|
| ADVANCED0001 | Advanced Paper Co.       |
| ATMORE0001   | Atmore Retirement Center |
| BOYLES0001   | Boyle's Country Inn's    |
|              |                          |
|              |                          |
|              |                          |
|              |                          |
|              |                          |
|              |                          |
|              |                          |

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

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

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

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

- Click Save to save changes and close the window.

*Unassigning  
debtors from  
aggregate deals*

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

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

*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors >> Ranges button*

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

- Assign ranges of debtors to an aggregate pricing group deal

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

**tcs60 Aggregate Pricing Group Deals - Assign Debtors By Range**

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

|            |      |      |
|------------|------|------|
| Group Code | AGP3 | agp3 |
| Deal       | A1   | a1   |

Debtor ID ☒ All ☐ From:  To:

Sales Person ID ☒ All ☐ From:  To:

Debtor Class ID ☐ All ☒ From:  To:

Select Debtor whose Group Code/Deal is set to:

☒ Unassigned ☐ Any ☐ Specified:

Group Code  Deal

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

Preview Assign OK

### 18.1 Assigning Ranges of Debtors to an Aggregate Pricing Group Deal

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

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

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

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

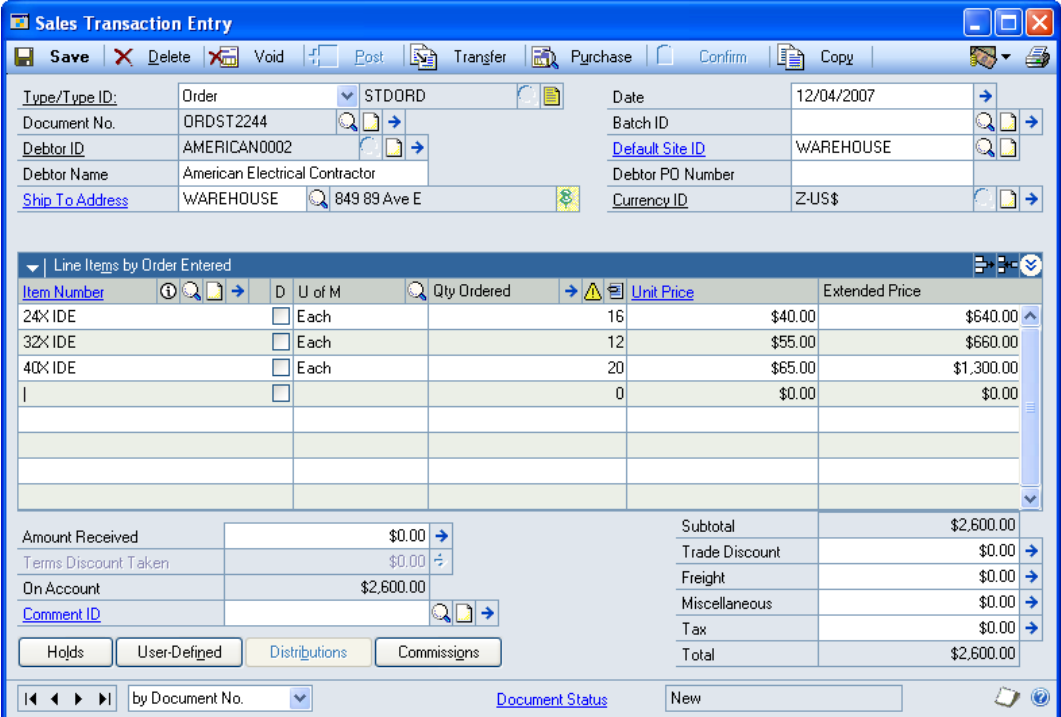
3. Click the Preview button to preview your selection in the scrolling window.
4. Click the Assign button to assign the selected range of debtors to the current group code.
5. Click OK to close the window.



## 19. Sales Transaction Entry with Aggregate Pricing

*Transactions >> Sales >> Sales Transaction Entry*

  
The Sales  
Transaction  
Entry  
window



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

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

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

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

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

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

## 20. Aggregate Pricing Rework window



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

Use the Aggregate Pricing Rework window to:

- View and select aggregate prices

*The  
Aggregate  
Pricing  
Rework  
window*

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

### 20.1 Selecting Aggregate Prices in the Aggregate Pricing Rework window

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

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

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

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

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

- When the required items are selected click Process. The window will close and the displayed new unit prices will replace the original unit prices in the sales transaction.

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

## 21. Aggregate Pricing Tracker window



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

Use the Aggregate Pricing Tracker window to:

- View aggregate pricing quantity details during sales transaction entry

*The  
Aggregate  
Pricing  
Tracker  
window*

**tcs73 Aggregate Pricing Tracker**

Document Type: Order  
 Document Number: ORDST2430  
 Debtor ID: ADAMPARK0001  
 Debtor Aggregate Starting Quantity: 20.00

Active Aggregate Pricing Groups in Document

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

Items in Highlighted Aggregate Group

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

Redisplay OK

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

## 21.1 Viewing Aggregate Pricing Quantity Details During Sales Transaction Entry

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

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

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

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

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

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

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

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

## 22. Aggregate Pricing Group Detail View window



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

Use the Aggregate Pricing Group Detail View window to:

- View aggregate group details during sales transaction entry

*The  
Aggregate  
Pricing  
Group  
Detail View  
window*

**tcs Aggregate Pricing Group Detail View**

Aggregate Pricing Group CD ROMS  
Aggregate pricing group for CD ROMS

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

Items in this Group

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

OK

## 22.1 Viewing Aggregate Group Details During Sales Transaction Entry

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

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

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

2. Click OK to close the window.

## 23. Aggregate Pricing Price Trace window



*Enquiries >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Price Trace*

Use the Aggregate Pricing Price Trace window to:

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

*The  
Aggregate  
Pricing  
Price Trace  
window*

The screenshot shows the 'tcs60 Aggregate Pricing Price Trace' window. It has a title bar with standard window controls. Below the title bar are buttons for 'Trace', 'OK', and 'Clear'. The main area contains two radio buttons: 'Debtor' (selected) and 'Prospect'. Below these are three fields with lookup icons: 'Debtor ID' (AMERICAN0002), 'Currency ID' (Z-US\$), and 'Item Number' (24X IDE). To the right of these are three text boxes: 'American Electrical Contractor', 'US Dollars', and '24x CD-ROM'. Below these are two sections. The left section has 'U Of M' (Each), 'Date' (12/04/2007), and 'Quantity' (0). The right section has 'Accumulated Quantity in Aggregate Unit' with a dropdown set to 'Each' and a value of 1, and 'Aggregate Starting Quantity' with a value of 10. At the bottom, there is a 'Price Book Achieved' field with the value 'CD ROMS BK1'.

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

### 23.1 Tracing an Aggregate Price Calculation

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

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

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

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

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

Note that the current date will be selected by default.

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

8. Click Trace.

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

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

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

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

## Site Specific Pricing

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

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

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

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

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



## 24. Site Price Type Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Site Price Type Maintenance*

Use the Site Price Type Maintenance window to:

- Set up site price types

*The Site Price Type Maintenance window*

### 24.1 Setting Up Site Price Types

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

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

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

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

*Deleting site price types*

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

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



*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID*

Use the Assign Site Price Type To Site ID window:

- Assign a site price type to a site ID

*The Assign  
Site Price  
Type To Site  
ID window*

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

## 25.1 Assigning a Site Price Type to a Site ID

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

1. The currently selected site ID will be displayed by default. Click the lookup to select an alternate site ID.
2. Enter a site price type to assign to the site ID or select one using the lookup.  
Note that a site can only be assigned to one site price type.
3. Click Save to save any changes made in the window.

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

*Unassigning site  
price types*

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



*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Site ID's To Site Price Types*

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

- Assign a site price type to multiple sites

*The Assign Site IDs To Site Price Types window*

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

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

### 26.1 Assigning a Site Price Type to Multiple Sites

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

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

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

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

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

*Unassigning site IDs*

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



*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Site ID's To Site Price Types >> Ranges button*

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

- Assign a site price type to a range of sites

**tcs78 Assign Site IDs To Site Price Types - By Range**

Site Price Type RETAIL  
Retail Price Type

Site ID ☐ All ☒ From: WC1 To: WC3

Select Site ID's whose Site Price Type is set to:  
☒ Unassigned ☐ Any ☐ Specified:

| Site ID | Site Price Type |
|---------|-----------------|
| WC1     |                 |
| WC2     |                 |
| WC3     |                 |
|         |                 |
|         |                 |
|         |                 |
|         |                 |

Transfer OK Preview

## 27.1 Assigning a Site Price Type to a Range of Sites

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

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

|                   |   |
|-------------------|---|
| <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.

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



*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Site Price Type To Price Sheet ID*

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

- Assign a site price type to a price sheet

*The Assign Site Price Type To Price Sheet ID window*

### 28.1 Assigning a Site Price Type to a Price Sheet

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

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

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

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

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

*Unassigning site price types*

## 29. Assign Price Sheets To Site Price Types window



*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types*

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

- Assign multiple price sheets to a site price

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

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

### 29.1 Assigning Multiple Price Sheets to a Site Price Type

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

1. Enter a site price type or select one using the lookup.  
If you opened this window from the [Site Price Type Maintenance window](#) then the site price type will be displayed by default.
2. Enter a price sheet ID to assign to the site price type or select one using the lookup. You can assign as many price sheets to the site price type as required. A price sheet may only be assigned to one site price type at a time.

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

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

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

*Unassigning  
price sheets*

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

*Cards >> m-hance >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types >> Ranges button*

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

- Assign ranges of price sheets to a site price type

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

### 30.1 Assigning Ranges of Price Sheets to a Site Price Type

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

1. All price book IDs will be selected by default. Accept this selection or click From and enter from and to values or use the lookups to specify a range.



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

|                   |  |
|-------------------|--|
| <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.

## 31. Price Trace Enquiry - Site ID window

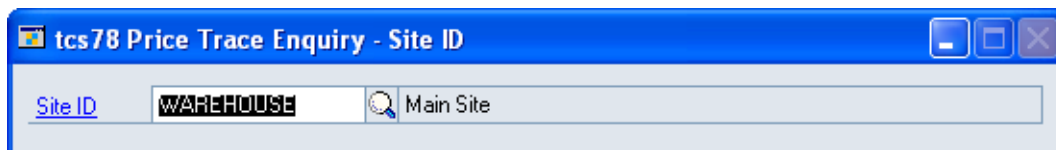


*Enquiry >> Inventory >> Extended Pricing >> Price Trace*

Use the Price Trace Enquiry - Site ID window to:

- Trace a site specific price

*The Price  
Trace Enquiry  
- Site ID  
window*



### 31.1 Tracing a Site Specific Price

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

1. The Price Trace Enquiry - Site ID window will be displayed by default when you open the Microsoft Dynamics™ GP Price Trace window if you have Site Specific Pricing switched on in the [Extended Pricing Extras Setup window](#).  
If you have site specific pricing switched on then you are required to enter a site ID prior to performing a price trace.
2. Enter a site ID or select one using the lookup.

## Order Value Discounts

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

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

See the [Order Value Discount Group maintenance window](#) for details of how to set up Order Value Discount groups, the [Order Value Discounts – Assign Debtors window](#) for details of how to assign customers to Order Value Discount Groups,

and [the Order Value Discount Rates window](#) for details of how to set up order value bands and discount percentages.

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

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

## 32. How Order Value Discount is calculated

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

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

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

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

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

## 33. Order Value Discount Setup window

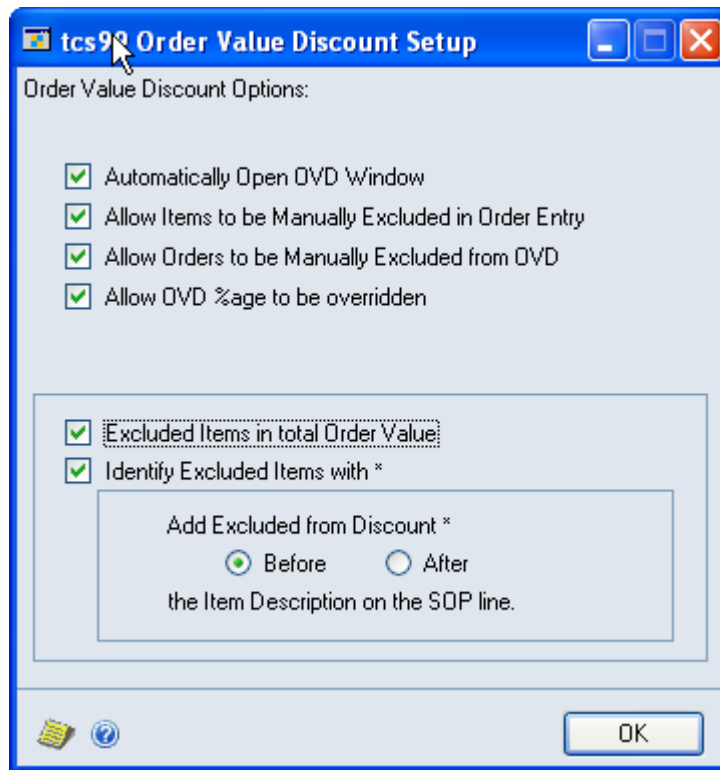


*Tools >> Setup >> m-hance >> Extended Pricing Enhancements >> Order Value Discount Setup*

Use the Order Value Discount Setup window to:

- Set up Order Value Discount options

*The Order  
Value  
Discount  
Setup  
window*



### 33.1 Setting Up Order Value Discount options

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

Six options are available within this window:

|  |   |
|--|---|
| Automatically Open OVD window                      | Select this option if you would like the Order Value Discounts information window to open automatically in Sales Transaction Entry. If this option is not selected, the Order Value Discounts information window can be opened from Sales Transaction entry by selecting Additional >> Order Value Discounts. |
| Allow Items to be Manually Excluded in Order Entry | This option allows individual line items to be selected for exclusion from the Order value discount calculation during entry of a sales document in Sales Transaction Entry.  |
| Allow Orders to be Manually Excluded from OVD      | This option allows the calculation of Order Value Discount to be switched off for individual documents.   |
| Allow OVD %age to be overridden                    | This option allows the Order Value Discount percentage to be manually changed for a document.   |
| Excluded Items in total Order Value                | If this option is selected, items which are excluded from the Order Value Discount calculation will be included in the total order value used to determine the  |

|                                |  |
|--------------------------------|--|
|                                | <p>value break point and the discount applicable. If the option is not selected, excluded items will not be included in the total order value.</p> <p>The value of excluded items will never be included in the value to which the discount percentage is applied, regardless of the setting of this option.</p> |
| Identify excluded items with * | <p>If this option is selected, items excluded from order value discount will have an * added to the item description on the sales document. There is an additional selection to add the * before or after the standard item description.</p>   |

## 34. Order Value Discount Group Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Order Value Discount Groups*

Use the Order Value Discount Group Maintenance window to:

- Set up Order Value Discount Groups

*The Order Value Discount Group Maintenance window*

### 34.1 Setting Up Order Value Discount Groups

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

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

*Deleting  
Order Value  
Discount  
Groups*

Click Delete to delete an Order Value Discount Group.

## 35. Order Value Discounts – Assign Debtors window



*Cards >> m-hance >> Extended Pricing Enhancements >> Order Value Discount Assign*

Use the Order Value Discounts – Assign Debtors window to:

- Assign debtors to an Order Value Discount Group

*The Order Value Discount Assign Debtors window*

### 35.1 Assigning Debtors to Order Value Discount Groups

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

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

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

Alternatively click the Ranges button to display the [Order Value Discounts](#)

– [Assign Debtor Ranges window](#) where you can assign ranges of debtors and classes to the group code.

4. Click Save to save changes.

*Unassigning  
debtors from group  
codes*

Click Delete to unassign all debtors from the group code.



## 36. Order Value Discounts – Assign Debtor Ranges window



*Cards >> m-hance >> Extended Pricing, Enhancements >> Order Value Discount Assign >> Ranges button*

Use the Order Value Discounts Assign Debtor Ranges window to:

- Assign ranges of debtors to an Order Value Discount Group

*The Order Value Discount Assign Debtor Ranges window*

| Debtor ID    | Debtor Name | Class ID      | Group Code |
|--------------|-------------|---------------|------------|
| BAKERSEM0001 |             | USA-INMI-T2   |            |
| BERRYMED0001 |             | USA-MNWI-T4   |            |
| BLUEYOND0001 |             | USA-IAKSNE-T3 |            |
| BOYLESCO0001 |             | AUSTRALIA-T8  |            |
| BREAKTHR0001 |             | CAN-PQMT-T5   |            |

### 36.1 Assigning Ranges of Debtors to an Order Value Discount Group

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

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

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

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

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

## 37. Order Value Discount Rates window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Order Value Discount Rates*

Use the Order Value Discount Rates window to:

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

*The Order Value Discount Rates window*

| All                                 | Amount From | Amount To           | Trade Discount %age |
|-------------------------------------|-------------|---------------------|---------------------|
| <input type="checkbox"/>            | \$0.01      | \$99.99             | 0.00%               |
| <input type="checkbox"/>            | \$100.00    | \$999.99            | 5.00%               |
| <input checked="" type="checkbox"/> | \$1,000.00  | \$99,999,999,999.99 | 10.00%              |
| <input type="checkbox"/>            | \$0.00      | \$0.00              | 0.00%               |

### 37.1 Maintaining Order Value break points and discount percentages

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

- Enter an Order Value Discount group code or select one using the lookup.

2. In the scrolling window, enter order value ranges and the applicable discounts. For example to give a discount of 5% on orders over £500, enter:

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

3. Click Save to save changes.

*Deleting order  
value break points*

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

## 38. Order Value Discounts – Excluded Items window



*Cards >> m-hance >> Extended Pricing Enhancements >> Order Value Discount Excluded Items*

Use the Order Value Discounts – Excluded Items window to:

- Exclude Items from the Order Value Discount calculation

*The Order Value Discount Excluded Items window*

### 38.1 Excluding Items from Order Value Discount

**To exclude items from Order Value Discount using the Order Value Discounts Excluded Items window:**

1. In the scrolling window, choose a line type of item class or item number from the drop down list.
2. Enter an item number or class id or select one using the lookup.

Repeat steps 1 and 2 until all required items and class ids have been added to the scrolling window.

Alternatively click the Ranges button to display the [Order Value Discounts – Excluded Items Range window](#) where you can exclude ranges of items from Order Value Discount.

3. Click Save to save changes.
- 4.

Click Delete to clear the list of excluded items.

## 39. Order Value Discounts – Excluded Items Range window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Order Value Discount Excluded Items >> Ranges button*

Use the Order Value Discounts Excluded Items Range window to:

- Exclude ranges of items from Order Value Discounts

*The Order Value Discounts Excluded Items Range window*

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

### 39.1 Excluding Ranges of Items from Order Value Discounts

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

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

## 40. Sales Transaction Entry with Order Value Discounts

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

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

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

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

## 41. The Order Value Discounts window

*Sales Transaction Entry >> Additional >> Order Value Discount*

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

Use the Order Value Discounts window to:

- View the OVD percentage achieved.

*The Order Value Discounts window – new documents*

|         | Order Value | Current %age |
|---------|-------------|--------------|
| Current | \$1,879.40  | 10.00%       |

*The Order Value Discounts window – after transfer*

OVD Percentage: 5.00%

### 41.1 Viewing Order Value Discount for a sales document in the Order Value Discounts window

**To view the Order Value Discount for a Sales Document using the Order Value Discounts window:**

1. For new documents, the window will show the current order value and discount percentage achieved. If relevant the next available breakpoint and associated percentage will also be displayed. Once a document has been

2. Click the Order Value expansion button or Details button to show the OVD Discount Lines window, which displays the line values making up the Current Order Value. Excluded items will be identified with an E and manually excluded items with an M in the Excl column. Click OK to close the OVD Discount Lines window.

[illegible]

- ## 42. The Order Value Discount Document window

Use the Order Value Discount - Document window to:

- The Order  
Value  
Discount -  
Document  
window*

tcs99 OrderValue Disc.- Document

☐ Exclude Document From Order Value Discount

Discount Percent ☒ Calculated ☐ Manual

Override %age to 5.00%

OK

## 42.1 Overriding the Order Value Discount for a document

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

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

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

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

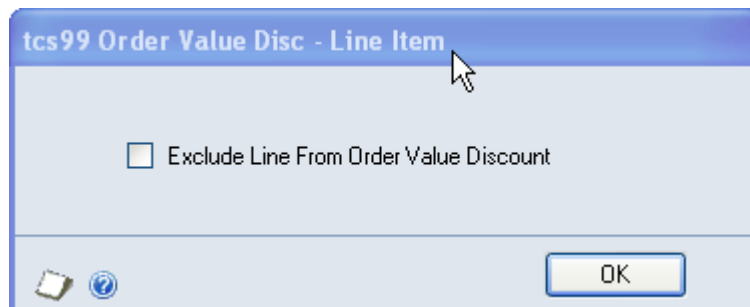
## 43. The Order Value Discount Line Item window

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

Use the Order Value Discount Line Item window to:

- Exclude a line item from Order Value Discount

*The Order  
Value  
Discount  
Line Item  
window*



### 43.1 Excluding a line item from Order Value Discount

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

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



## Aggregate Promotions

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

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

Four types of Aggregate Promotion can be set up:

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

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

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

## 44. How Aggregate Promotions are Calculated

### 44.1 Total Quantity Promotions

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

For example:

| From Quantity | Free Item Number or List |         | U of M | Quantity Free | Maximum Quantity Free |
|---------------|--------------------------|---------|--------|---------------|-----------------------|
| 10            | Item Number              | D/12345 | Each   | 1             | 0                     |
| 100           | List                     | PRLIST  | N/A    | 2             | 2                     |

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

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

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

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

## 44.2 Points Allocation Promotions

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

For example:

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

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

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

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

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

## 45. Aggregate Promotions Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance*

Use the Aggregate Promotions Maintenance window to:

- Set up Aggregate Promotions

*The  
Aggregate  
Promotions  
Maintenance  
window*

### 45.1 Setting Up Aggregate Promotions

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

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

|                        |   |
|------------------------|---|
| Total Quantity         | When a sales order is entered, the total quantity of the contributing items is accumulated. This quantity is then checked against quantity break points to determine whether the order qualifies for the promotion. |
| Every Item in List     | In order to qualify for this type of promotion, a minimum quantity of every item in a list must be ordered.   |
| Variable Quantity List | In order to qualify for the free item, a specified quantity of every item in a list must be ordered   |
| Points Allocation      | Similar to Total Quantity promotions, but the total order quantity is used as a points value. The order qualifies   |

|  |   |
|--|---|
|  | for one or more free items from a list, depending on the number of points achieved. |
|--|---|

5. Select Allow Free Items from multiple Quantity Breaks to allow multiple quantity breaks to be active. See [How Aggregate Promotions are calculated](#) for more details. Note this option is only available for Total Quantity type promotions.
6. Select Supplier Funded to indicate that this promotion is funded by a supplier. This is for information only, and does not affect the Aggregate Promotion calculation.
7. For Points Allocation type promotions only, select the option to Default from Highest Breakpoint if you would like the system to offer default free items for the number of points achieved. The default allocation will start with the free item for the highest break point achieved. The points allocation may be changed by the user. If this option is not set, no free items will be given by default. If the default allocation involves selection from a free item list, the default item from the list will be used if one has been specified. If a list with no default item is encountered, the default points allocation will stop at that breakpoint.
8. Note that you can click Clear at any point to clear any entries made in the window.

Click Delete to delete an Aggregate Promotion.

*Deleting  
Aggregate  
Promotions*

## 46. Aggregate Promotions Maintenance – Free Items window



Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions Maintenance >> Free Item(s) button

Use the Aggregate Promotions Maintenance – Free Items window to:

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

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

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

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

Promotion ID: AGP2    list of items

Quantity Required Per Item: 1.00

Free Item Number or Item List: Item Number

Item Number: A/123/457

Unit Of Measure: Each

Quantity Free: 1

Maximum Quantity Free: 5

### 46.1 Maintaining Aggregate Promotion Break Points

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

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

1. In the scrolling window, enter the quantity which must be ordered to qualify for the aggregate promotion.
2. From the drop down list select Free Item Number or Item List. You should select Item List if a choice of free items will be offered.
3. If you selected Free Item Number, enter the item number and unit of measure that will be given free on orders qualifying for the promotion. If you selected

Item List, enter a Free Item List ID. See [Free Item List Maintenance](#) for details of how to set up lists of free items.

4. Enter the quantity to be given free when the From Quantity is ordered. Note that for Points Allocation promotions this quantity is set to 1 and cannot be changed.
5. Enter the maximum quantity to be given free. If zero is entered, there is no limit to the number of free items that will be given. Note that this field is not available for Points Allocation promotions.
6. If there are multiple quantity breaks with different free items at different break points, repeat steps 1 to 5 to enter further break points.

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

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

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

## 47. Aggregate Promotions – Assign Debtors window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Debtors*

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

Use the Aggregate Promotions – Assign Debtors window to:

- Assign Debtors to an Aggregate Promotion

*The  
Aggregate  
Promotions  
– Assign  
Debtors  
window*

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

### 47.1 Assigning Debtors to Aggregate Promotions

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

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

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

[Assign Debtor Groups by Range](#) window where you can assign ranges of groups to the promotion.

5. Click Save to save changes.

Click Delete to unassign all debtors from the promotion.

*Unassigning  
debtors from a  
promotion*

## 48. Aggregate Promotions – Assign Debtors by Range window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Aggregate Promotions – Assign Debtors>> Ranges button>>Assign Debtors option*

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

- Assign ranges of debtors to an Aggregate Promotion

*The  
Aggregate  
Promotions  
– Assign  
Debtors by  
Range  
window*

| Debtor ID    | Debtor Name                    |
|--------------|--------------------------------|
| 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.          |

### 48.1 Assigning a Range of Debtors to an Aggregate Promotion

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

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



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

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

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

Click OK to close the window.

## 49. Aggregate Promotions – Assign Debtor Groups by Range window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Aggregate Promotions – Assign Debtors>> Ranges button>>Assign Debtor Groups option*

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

- Assign ranges of debtor groups to an Aggregate Promotion

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

### 49.1 Assigning a Range of Debtor Groups to an Aggregate Promotion

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

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

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

|                   |  |
|-------------------|--|
| <b>Unassigned</b> | Only debtor groups not currently assigned to any |
|-------------------|--|

|                 |  |
|-----------------|--|
|                 | Aggregate Promotion will be included in the range.   |
| <b>Any</b>      | All debtor groups will be included in the range.   |
| <b>Specific</b> | If you select specific, enter an Aggregate Promotion ID or select one using the lookup. Only debtor groups assigned to this promotion will be included in the range. |

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

Click OK to close the window.

## 50. Aggregate Promotions – Assign Items window



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions – Assign Items*

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

Use the Aggregate Promotions – Assign Items window to:

- Assign Items to an Aggregate Promotion

*The  
Aggregate  
Promotions  
– Assign  
Items  
window*

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

### 50.1 Assigning Items to Aggregate Promotions

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

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

When the item number is entered the Unit of Measure will be set to a default value, using the following hierarchy:

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

**Aggregate Pricing Unit of Measure Maintenance window**

- the default selling unit for the item
- the base unit of measure for the item

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

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

6. Click Save to save changes.

Click Delete to unassign all items from the promotion.

*Unassigning items  
from a promotion*

## 51. Aggregate Promotions – Assign Items by Range window



*Cards >> m-hance >> Extended Pricing. Enhancements >> Aggregate Promotions – Assign Items>> Ranges button*

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

- Assign ranges of items to an Aggregate Promotion

*The  
Aggregate  
Promotions  
– Assign  
Items by  
Range  
window*

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

### 51.1 Assigning Ranges of Items to an Aggregate Promotion

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

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

1. Click All to assign all records or From to assign a range of items, generic descriptions or class ids. If you select From, enter To and From values to specify a range, or use the lookups.

2. For the Select Items whose Promotion ID is set to option select one of the following:

|                   |   |
|-------------------|---|
| <b>Unassigned</b> | Only items not currently assigned to any Aggregate Promotion 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 an Aggregate Promotion ID or select one using the lookup. Only items assigned to this promotion will be included in the range. |

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

## 52. Free Item List Maintenance window



*Cards >> m-hance >> Extended Pricing Enhancements >> Free Item List Maintenance*

Use the Free Item List Maintenance window to:

- Maintain lists of items available to qualifying aggregate promotions

*The Free Item List Maintenance window*

| Item Number | U Of M | Number Of Units |
|-------------|--------|-----------------|
| F/14567     | Each   | 1               |
| F/14789     | Each   | 5               |
| F/15678     | Each   | 1               |
| F/32456     | Each   | 1               |
|             |        | 0.00            |
|             |        |                 |
|             |        |                 |
|             |        |                 |
|             |        |                 |

### 52.1 Maintaining Free Item Lists

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

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

For example, if LIST A is set up as:



|           |      |   |
|-----------|------|---|
| Product A | Each | 5 |
| Product B | Each | 1 |

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

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

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

7. Optionally enter a Default Item Number. If an order qualifies for an item from a Free Item List which has a specified default item, the default item will initially be assigned by the system. The user may then choose an alternative item from the list if required.
8. Click Save to save changes.

Click Delete to delete the list of free items.

*Deleting free item  
lists*

## 53. Free Item List Maintenance – Range Allocation



*Cards >> m-hance >> Extended Pricing Enhancements >> Free Item List Maintenance >> Ranges Button*

Use the Free Item List Maintenance Range Allocation window to:

- Assign ranges of items to a list of free items

*The Free Item List Maintenance – Range Allocation window*

tcs100 Free Item List Maintenance - Range Allocation

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

Free Item List ID: L1

Free Promotion Illist

Item Number: ☐ All ☒ From: F To: F/Z

Generic Description: ☒ All ☐ From: To:

Class ID: ☒ All ☐ From: To:

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

Default Number Of Units: 1.00

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

Preview Transfer OK

### 53.1 Assigning Ranges of Items to a Free Item List

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

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

1. Click All to assign all records or From to assign a range of items, generic descriptions or class ids. If you select From, enter To and From values to specify a range, or use the lookups.

2. For the Select Items whose Free Item List ID is set to option select one of the following:

|                   |   |
|-------------------|---|
| <b>Unassigned</b> | Only items not currently assigned to any Free Item List 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 Free Item List ID or select one using the lookup. Only items assigned to this Free Item List ID will be included in the range. |

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

## 54. Aggregate Promotions – Debtor Group Maintenance window

*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions - Debtor Group Maintenance*

Use the Aggregate Promotions Debtor Group Maintenance window to:

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

*The  
Aggregate  
Promotion  
Debtor Group  
Maintenance  
window*

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

### 54.1 Maintaining Aggregate Promotion Debtor Groups

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

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

*Deleting debtor  
groups*

Click Delete to delete an aggregate promotion debtor group.

## 55. Aggregate Promotions - Debtor Group - Assign by Range



*Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions - Debtor Group Maintenance >> Ranges Button*

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

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

*The  
Aggregate  
Promotions  
- Debtor  
Group -  
Assign by  
Range  
window*

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

### 55.1 Assigning Ranges of Debtors to an Aggregate Promotion Debtor Group

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

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

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

2. For the Select Debtors whose Group ID is set to option, select one of the following:

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

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

## 56. Aggregate Promotions in Sales Transaction Entry

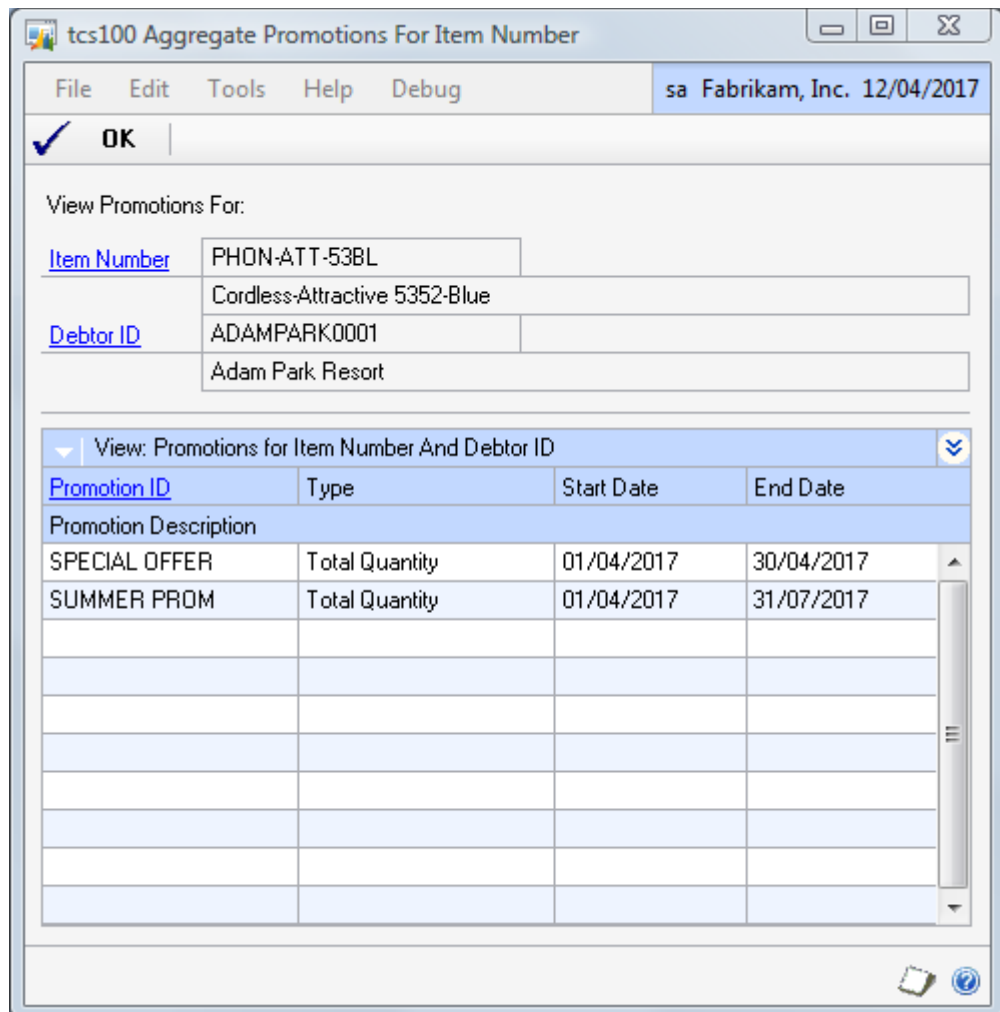
As items are entered onto an order, the Aggregate Promotion Available window informs the user if the item contributes to one or more aggregate promotions. If the item contributes to one promotion, the promotion name will be displayed; if the item contributes to multiple promotions the text “\*\*\* Multiple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

*The  
Aggregate  
Promotion  
Available  
window*



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

*The  
Aggregate  
Promotions  
for Item  
Number  
window*



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

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

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

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

**tcs100 Assign Aggregate Promotion To Document Line**

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

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

**Select**

## 57. Aggregate Promotion Tracker window

*Sales Transaction Entry >> Additional >> Aggregate Promotion Information*

Use the Aggregate Promotion Tracker window to:

- View the status of aggregate promotion quantities

*The  
Aggregate  
Promotion  
Tracker  
window*



tcs100 Aggregate Promotion Tracker

Document Type: Order    Debtor ID: ADAMPARK0001    Document Date: 12/04/2007  
 Document Number: ORDST2239    Adam Park Resort

View: All Promotions

| Promotion Description       | Quantity Ordered | Qty Break Achieved | Next Qty Break | Qty Free Achieved |
|-----------------------------|------------------|--------------------|----------------|-------------------|
| Buy any 10, get 1 free      | 1.00             | 0.00               | 10.00          | 0                 |
| Buy all 6 items, get 1 free | 0.00             | 0.00               | 1.00           | 0                 |
| Special multiple promotion  | N/A              | N/A                | N/A            | 0                 |
|                             |                  |                    |                |                   |
|                             |                  |                    |                |                   |
|                             |                  |                    |                |                   |
|                             |                  |                    |                |                   |

View: Items On Promotion; by Item Number

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

OK

## 57.1 Viewing the status of aggregate promotions

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

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

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

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

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

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

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

For Every Item in List and Variable Quantity List type promotions, a letter P

next to the promotion id indicates that some of the items have been ordered.

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

2. Press OK to close the window.

## 57.2 Viewing the available free items for a Points Allocation Promotion

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

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

The screenshot shows a software window titled "tcs100 Aggregate Promotions - Points Allocation Enquiry". The window has a menu bar with "File", "Edit", "Tools", "Help", and "Debug". The user is logged in as "sa Fabrikam, Inc." on "12/04/2017".

Below the menu bar, there are two input fields: "Promotion ID" with the value "P1" and "Points aggregate 1".

A dropdown menu is set to "View: Item Numbers And Lists For The Points Achieved". Below this is a table with the following columns: "Points Required", "Free Item Number or Item List", "U Of M", and "Quantity Free".

| Points Required | Free Item Number or Item List | U Of M | Quantity Free |
|-----------------|-------------------------------|--------|---------------|
| 10.00           | Item Number: 128 SDRAM        | Case   | 1             |
| 20.00           | Item List: LIST               | N/A    | 1.00          |
| 30.00           | Item Number: ACCS-HDS-1EAR    | Case   | 2             |
| 50.00           | Item List: L1                 | N/A    | 1.00          |
|                 |                               |        |               |
|                 |                               |        |               |
|                 |                               |        |               |
|                 |                               |        |               |
|                 |                               |        |               |

At the bottom of the table, there is a "Points Achieved" field with the value "100.00".

The window has a status bar at the bottom with a question mark icon and an "OK" button.

## 58. Aggregate Promotions– Select Promotions window

*Sales Transaction Entry >> Additional >> Aggregate Promotion Selection*

Use the Aggregate Promotions – Select Promotions window to:

- Review free items and add them to the order

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

*The  
Aggregate  
Promotions  
– Select  
Promotions  
window*

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

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

### 58.1 Adding Free Items to an Order

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

1. The upper scrolling window shows the Aggregate Promotions for which the current order has qualified. For all promotion types except Points Allocation type, the Qty Free Achieved field shows the quantity of the free item that this order has qualified for, and the Qty Taken field shows the quantity of the free item which will be added to the order. For Points Allocation type promotions, the Points Achieved and Points Allocated are shown in these two columns. This is highlighted with a letter P.
2. If the resulting free item is a single item, Qty Taken will have a default value equal to Qty Free Achieved.
3. If the resulting free item has to be selected from a Free Item List, or if the promotion is a Points Allocation type, the initial value of Qty Taken will depend on whether the system has allocated any default free items. If no defaults have been allocated Qty Taken will be set to 0. If defaults have been used, this will be indicated with a **D**. Use the Qty Taken expansion button to

select or edit the items to be added as free items. The expansion button will open the [Aggregate Promotions – Select Promotions – Free Items](#) window or the [Aggregate Promotions – Select Promotions – Points Allocation](#) window, depending on the promotion type.

- Unless an error is detected, the Include check box will be ticked automatically for any line which has a value in Qty Taken. You can omit free lines by removing the tick from the Include checkbox.
- Click Save to save your free item selections and continue with entry of the sales order., or click Add Free Items to add the lines to the order. The Add Free Items button is only available when the Aggregate Promotions – Select Promotions window is opened on Saving the sales document.
- As the free items are added, if the system encounters any errors or questions that cannot be answered automatically, the addition of lines will stop and the Sales Item Detail Entry window will open. After replying to the question or dealing with the error you should press save, at which point the addition of any further free lines will continue.

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

## 58.2 Selecting Free Items from a List

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

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

| Item Number   | U Of M | QTY Available | Number Of Units | QTY Taken                           | Total Free Qty |
|---------------|--------|---------------|-----------------|-------------------------------------|----------------|
| 256 SDRAM     | Case   | 1,588         | 1               | <input checked="" type="checkbox"/> | 0              |
| 256 meg SDRAM |        |               |                 |                                     |                |
| F/14567       | Each   | 10            | 1               | 0                                   | 0              |
| f/14567       |        |               |                 |                                     |                |
| F/14789       | Each   | 10            | 5               | 0                                   | 0              |
| F/14789       |        |               |                 |                                     |                |
| F/15678       | Each   | 0             | 1               | 0                                   | 0              |
| f/15678       |        |               |                 |                                     |                |
| F/32456       | Each   | 0             | 1               | 0                                   | 0              |
| F/32456       |        |               |                 |                                     |                |

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

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

### 58.3 Selecting Free Items from a List – Points Allocation

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

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

| Item Number   | U Of M | QTY Available | Number Of Units | Points Required | QTY Taken | Total Free Qty |
|---------------|--------|---------------|-----------------|-----------------|-----------|----------------|
| 128 SDRAM     | Case   | 5,934         | 1               | 10.00           | 0         | 0              |
| 24X IDE       | Each   | 9,693         | 4               | 20.00           | 0         | 0              |
| PHAN-PHN-0001 | Case   | 0             | 1               | 20.00           | 0         | 0              |
| PHON-ATT-53BK | Case   | 3             | 1               | 20.00           | 0         | 0              |
| ACCS-HDS-1EAR | Case   | 861           | 2               | 30.00           | 0         | 0              |
| 256 SDRAM     | Case   | 718           | 1               | 50.00           | 0         | 0              |
| F/14567       | Each   | 10            | 1               | 50.00           | 0         | 0              |
| F/14789       | Each   | 10            | 5               | 50.00           | 0         | 0              |
| F/15678       | Each   | 0             | 1               | 50.00           | 0         | 0              |
| F/32456       | Each   | 0             | 1               | 50.00           | 0         | 0              |

Points: Achieved 110.00 Allocated 0.00 Remaining 110.00

Clear All Quantities OK

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

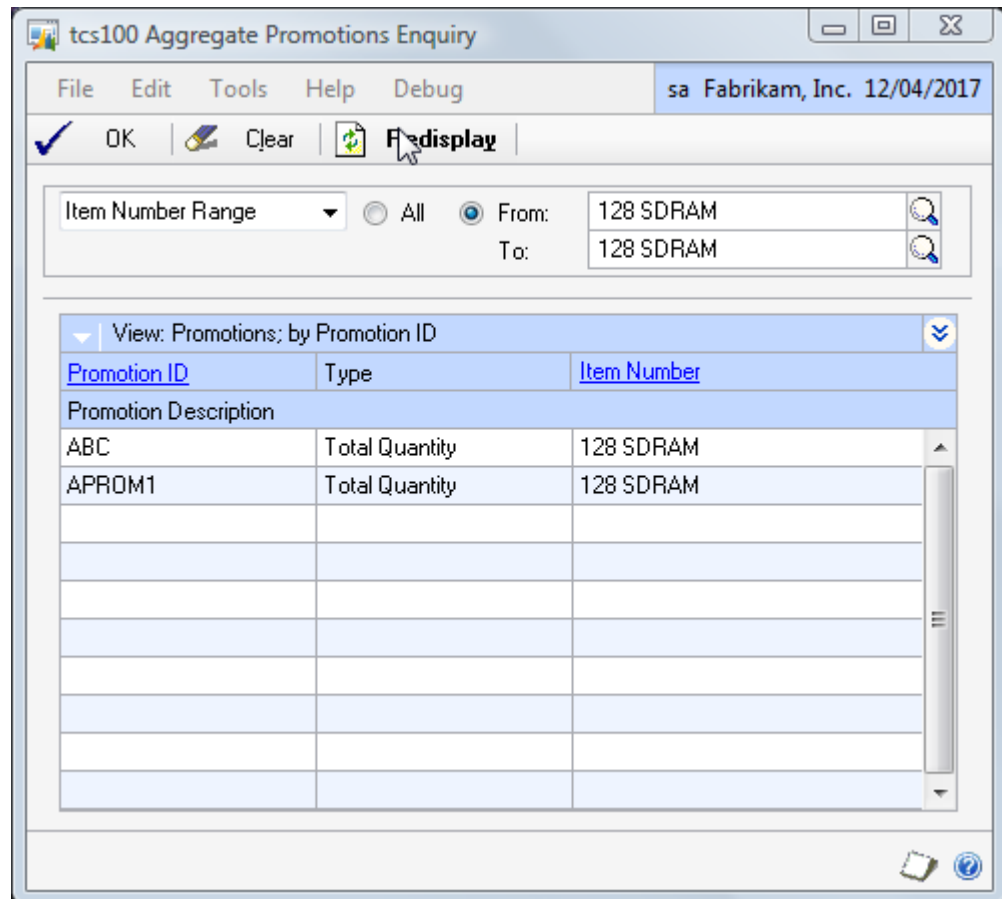
## 59. Aggregate Promotions Enquiry

*Enquiry >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions Enquiry*

Use the Aggregate Promotions Enquiry window to:

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

*The  
Aggregate  
Promotions  
Enquiry  
window*



### 59.1 Viewing Aggregate Promotions for a debtor or item

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

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

## Debtor Price Report

With the Debtor Price List Production window you can produce reports of customer price lists. The reports can be printed in text or graphical format and based on a wide variety of parameters. Prices produced on the reports are held in a SQL table - tcsSOPTB00096\_DP\_DTL. The table can be used by SmartList Builder or Crystal Reports or used to export prices to Excel in conjunction with a suitable data tool.

### 60. Debtor Price List Production window



*Reports >> m-hance >> Extended Pricing Enhancements >> Customer Price Reports*

Use the Debtor Price List Production window to:

- Report on debtor prices

*The Debtor  
Price List  
Production  
window*

## 60.1 Reporting on Debtor Price Lists

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

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

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

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

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

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

*The Price List  
Purge window*



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

6. If you are working in a multi-currency system then the default functional currency will be displayed. Enter a new currency ID or select one using the lookup as required.
7. From the U Of M drop-down menu select to print prices for the Default Selling U Of M only or for All units of measure.
8. From the Get Prices From drop-down menu select to get price from Price Sheets and Books or Price Sheets Only. If you choose Price Sheets and Books, an additional Include Base option is given. Select this to include items where the debtor's price is taken from the Base book.
9. If you are working with [Site Specific Pricing](#) you need to enter a site ID or select one using the lookup.
10. If you want to include [promotional prices](#) in the debtor price report then click the Include Promotions checkbox.
11. By default the price report will be produced in text format. Click the Graphical Cut-down Version checkbox if you want produce the report in graphical format. Note that graphical reports will display only one price for an item.  
  
If you have selected to include promotional prices and are printing a graphical report then by default available promotional prices will be displayed on the report. If you select the Use Best Price only option then the best price will be displayed, even if this is not the promotional price.
12. Click Print then from the Report Destination dialogue box select where the Debtor Prices Report should be printed to.
13. Click OK to close the window.



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

## 60.2 Clearing Price Report data

Price list reporting data generated by the Debtor Price List Production window is stored in table tcsSOPTB00096\_DP\_DTL to allow it to be used by external reporting tools. To clear the contents of this table select Options->Clear Tables.

## Appendix A

### Extended Pricing Enhancements – Access to Windows

| Window Name   |  Menu Access              |  Other Access                     |
|---|--|--|
| Aggregate Pricing – Debtor/Prospect Activation by Range | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Debtor Prospect Activation by Range |  |
| Aggregate Pricing Group Allocation                      | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Allocation                    |  |
| Aggregate Pricing Group Allocation Range                |  | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Allocation >> Ranges button             |
| Aggregate Pricing Group Breaks                          |  | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Maintenance >> Quantity Breaks button   |
| Aggregate Pricing Group Deals – Assign Debtors          | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors        |  |
| Aggregate Pricing Group Deals – Assign Debtors by Range |  | Cards >> m-hance >> Extended Pricing Enhancements >> Aggregate Pricing Group Deals – Assign Debtors >> Ranges button |
| Aggregate Pricing Group Detail View                     |  | Aggregate Pricing Tracker window >>  |

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

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

|   |  |   |
|---|--|---|
| Aggregate Promotions Available                              |  | Sales Transaction Entry<br>>> Enter an Item on an aggregate promotion                                   |
| Aggregate Promotions for Item Number                        |  | Aggregate Promotions Available >> Zoom  |
| Aggregate Promotion Tracker                                 |  | Sales Transaction Entry<br>>> Additional >> Aggregate Promotion Information                             |
| Aggregate Promotion – Select Promotions                     |  | Sales Transaction Entry<br>>> Additional >> Aggregate Promotion Selection                               |
| Aggregate Promotion – Select Promotions – Free Items        |  | Sales Transaction Entry<br>>> Additional >> Aggregate Promotion Selection >> Qty Taken Expansion button |
| Aggregate Promotion – Select Promotions – Points Allocation |  | Sales Transaction Entry<br>>> Additional >> Aggregate Promotion Selection >> Qty Taken Expansion button |
| Aggregate Promotions Enquiry                                | Enquiry >> m-hance >> Extended Pricing Enhancements >> Aggregate Promotions Enquiry          |   |
| Assign Price Sheets To Site Price Types                     | Cards >> m-hance >> Extended Pricing Enhancements >> Assign Price Sheets To Site Price Types |   |
| Assign Site IDs To Site Price Types                         | Cards >> Cards >> Extended Pricing Enhancements >> Assign Site IDs To Site Price Types       |   |
| Assign Site IDs To Site Price Types - By Range              |  | Cards >> m-hance >> Extended Pricing Enhancements >> Assign   |

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

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



## Appendix B

### Amended Microsoft Dynamics™ GP Windows

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

| Window Name                    | Amended Functionality  |
|--------------------------------|--|
| Price Book Maintenance         | BASECOSTBOOK cannot be deleted or assigned non-net only price sheets   |
| Price Sheet Maintenance        | A price sheet on the BASECOSTBOOK cannot be amended to non-net only  |
| Price Sheet Assignment         | Only net price only sheets can be added to the BASECOSTBOOK  |
| Price Sheet Assignment Ranges  | Only net price only sheets can be added to the BASECOSTBOOK  |
| Price Sheet Detail Maintenance | <p>Option to select cost uplift value or cost uplift %</p> <p>If cost uplifts options are selected:</p> <ul style="list-style-type: none"> <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

### Windows showing Site Specific Pricing

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

## Appendix D

### Extended Pricing Enhancements - Reports

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

### 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.

## Appendix E

### About Myridas



*Help >> About Microsoft Dynamics GP >> Additional >> About m-hance Myridas Suite*

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

*The About m-hance Myridas Suite window*

**tcs00 About m-hance Myridas Suite** sa Fabrikam, Inc. 12/04/2017

File Edit Tools Help Debug

**m-hancements** **m-hance**

**License Information**

|              |                                 |                      |                                |           |
|--------------|---------------------------------|----------------------|--------------------------------|-----------|
| Company Name | m-hance Limited                 |                      |                                | Edit Keys |
| Max Users    | 99                              |                      |                                |           |
| Key 1        | 31JDHN30HQRSTUVIL26YIZY2628XTZ0 | Key 2                | JJIIIG28TSRQXWVX29VSYSUVSQ260  |           |
| Key 3        | ILKNMP30STQRWXYVYV28TMU29WVW3   | Key 4                | PNMZ262726VUXWRIBBU30R28LL31L1 |           |
| Key 5        | 29M31YZ2627BIPEIAHQ30RXMU0      | Required Key Version | 12                             |           |

**Installation Details**

|                   |                |                    |          |
|-------------------|----------------|--------------------|----------|
| Company ID        | Fabrikam, Inc. |                    |          |
| Installer Version | 12.0.0         | Dictionary Build   | 12.0.0.0 |
|                   |                | Myridas Extensions | 12.0.0.0 |

| Module                       | Registered                          | Installed                           |
|------------------------------|-------------------------------------|-------------------------------------|
| Additional Charges           | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Adv. Inventory Replenishment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Automated Data Capture       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Call Scheduling              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Catalogue Based Sales        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Catchweights                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

OK

# Index

## A

|  |        |
|--|--------|
| Aggregate Pricing.....                                       | 17     |
| allocating items to groups.....                              | 23     |
| allocating ranges of items to groups.....                    | 24, 31 |
| calculating aggregate prices.....                            | 18     |
| sales transaction entry.....                                 | 33     |
| selecting aggregate prices.....                              | 34     |
| setting up aggregate price groups....                        | 20     |
| setting up debtors and prospects .....                       | 9      |
| setting up individual items.....                             | 26     |
| setting up quantity breaks.....                              | 21     |
| tracing prices.....  | 38     |
| viewing group details during sales transaction entry.....    | 37     |
| viewing quantity details during sales transaction entry..... | 36     |
| Aggregate Pricing Group Allocation Range window.....         | 24     |
| Aggregate Pricing Group Allocation window.....               | 23     |
| Aggregate Pricing Group Breaks window.....                   | 21     |
| Aggregate Pricing Group Detail View window.....              | 36     |
| Aggregate Pricing Group Maintenance window.....              | 20     |
| Aggregate Pricing Groups                                     |        |
| allocating items.....  | 23     |
| allocating ranges of items.....                              | 24, 31 |
| setting up.....  | 20     |
| Aggregate Pricing Price Trace window.....                    | 38     |
| Aggregate Pricing Rework window ...                          | 34     |
| Aggregate Pricing Tracker window....                         | 35     |
| Aggregate Pricing Unit Item Maintenance window.....          | 26     |
| Aggregate Pricing Unit Of Measure Maintenance window.....    | 27     |
| Aggregate Pricing Units.....                                 | 17     |
| assigning to items.....                                      | 26     |
| setting up for units of measure.....                         | 27     |
| Aggregate Promotions.....                                    | 65     |
| assigning debtors.....                                       | 71     |
| assigning items.....   | 76     |
| calculation.....   | 65     |
| free item lists.....   | 80     |
| free items.....  | 69     |
| sales transaction entry.....                                 | 87     |
| setup.....   | 67     |
| Aggregate Starting Quantity.....                             | 9      |
| Alternate quantity free calculation .....                    | 13     |

|  |    |
|--|----|
| Assign Price Sheets To Site Price Types - By Range window..... | 48 |
| Assign Price Sheets To Site Price Types window.....            | 47 |
| Assign Site IDs To Site Price Types - By Range window.....     | 44 |
| Assign Site IDs To Site Price Types window.....                | 43 |
| Assign Site Price Type To Price Sheet ID window.....           | 46 |
| Assign Site Price Type To Site ID window.....                  | 41 |
| Available Promotions Information window.....                   | 14 |
| Available promotions window option .                           | 13 |

## B

|                     |    |
|---------------------|----|
| Base cost book..... | 11 |
|---------------------|----|

## C

|  |    |
|--|----|
| Calculating cost uplift prices.....      | 11 |
| Cost uplift options.....                 | 11 |
| Cost uplift prices in sales transactions | 11 |

## D

|                                       |    |
|---------------------------------------|----|
| Debtor Price List Production window . | 95 |
| Debtor Price Report.....              | 95 |
| printing.....                         | 96 |

## E

|   |   |
|---|---|
| Extended Pricing Enhancements.....                                    | 5 |
| setting defaults.....   | 6 |
| Extended Pricing Enhancements Debtor/Prospect Maintenance window..... | 9 |
| Extended Pricing Extras Setup window                                  | 6 |

## N

|                                       |    |
|---------------------------------------|----|
| Negative Adjustments in Price Sheets. | 15 |
|---------------------------------------|----|

## O

|                              |    |
|------------------------------|----|
| Order Value Discounts.....   | 50 |
| assign debtors.....          | 55 |
| calculation.....             | 51 |
| excluding items.....         | 60 |
| groups.....                  | 53 |
| rates.....                   | 58 |
| sales transaction entry..... | 62 |
| setup window.....            | 51 |

## P

|                              |    |
|------------------------------|----|
| Price List Purge window..... | 97 |
|------------------------------|----|

|   |    |  |     |
|---|----|--|-----|
| Price Sheet Detail Maintenance window ..... | 11 | Setting up cost uplift prices .....      | 11  |
| Price Sheets                                |    | Site Price Type                          |     |
| assigning multiple sheets to a site         |    | assigning multiple price sheets .....    | 47  |
| price type .....                            | 47 | assigning ranges of price sheets .....   | 48  |
| assigning ranges of sheets to a site        |    | assigning to a price sheet .....         | 46  |
| price type .....                            | 48 | assigning to a range of sites .....      | 45  |
| assigning to a price type .....             | 46 | assigning to multiple sites .....        | 43  |
| entering negative quantities .....          | 15 | Site Price Type Maintenance window ..... | 41  |
| Price Trace                                 |    | Site Price Types                         |     |
| aggregate prices .....                      | 38 | assigning to a site ID .....             | 42  |
| tracing site specific prices .....          | 50 | deleting .....                           | 41  |
| Price Trace Enquiry - Site ID window .....  | 50 | setting up .....                         | 41  |
| Promotions .....                            | 13 | Site Specific Pricing .....              | 40  |
| viewing in transactions .....               | 14 | site price types .....                   | 41  |
|   |    | tracing a site specific price .....      | 50  |
| <b>Q</b>                                    |    | <b>U</b>                                 |     |
| Quantity Breaks                             |    | Units of Measure                         |     |
| aggregate pricing .....                     | 21 | aggregate pricing .....                  | 17  |
| Quantity free .....                         | 13 | setting aggregate pricing units .....    | 27  |
| <b>S</b>                                    |    | <b>V</b>                                 |     |
| Sales Transactions                          |    | Viewing promotions for sales items ....  | 14  |
| aggregate pricing .....                     | 33 | Visible Discounts .....                  | 16  |
| viewing aggregate pricing group             |    | modifying reports .....                  | 107 |
| details .....                               | 37 | setting up debtors and prospects .....   | 9   |
| viewing aggregate pricing quantity          |    |  |     |
| details .....                               | 36 |  |     |