
Price Level by Customer/Product Line

SO-1005

Overview

This Extended Solution allows pricing of Inventory items based upon a customer price level that can be set for each Product Line, Product Line/Price Code, or a Product Line/Ship-To Code combination.

A Copy utility allows a customer's price level setup to be copied to a range of other customers.



The MAS 90 MAS 200 Inventory module must be Activated in order for this Extended Solution to function.

Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm

Installing Your Extended Solutions under Windows

From a CD

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

From the Sage FTP site

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions, and a Shipping Manifest. If you have any problems with this order, please email extendedsolutions.na@sage.com and we will assist you during normal business hours.

Extended Solutions Control Center

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals

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- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install a Sage Software Extended Solution.

Setup

Upon completion of software installation, you will need to access Extended Solutions Setup from the Sales Order Setup menu. Select this part number and the Setup screen for this Extended Solution will appear (Figure 1). Check the 'Enable Extended Solution' box to activate this Extended Solution. The manual for this Extended Solution can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

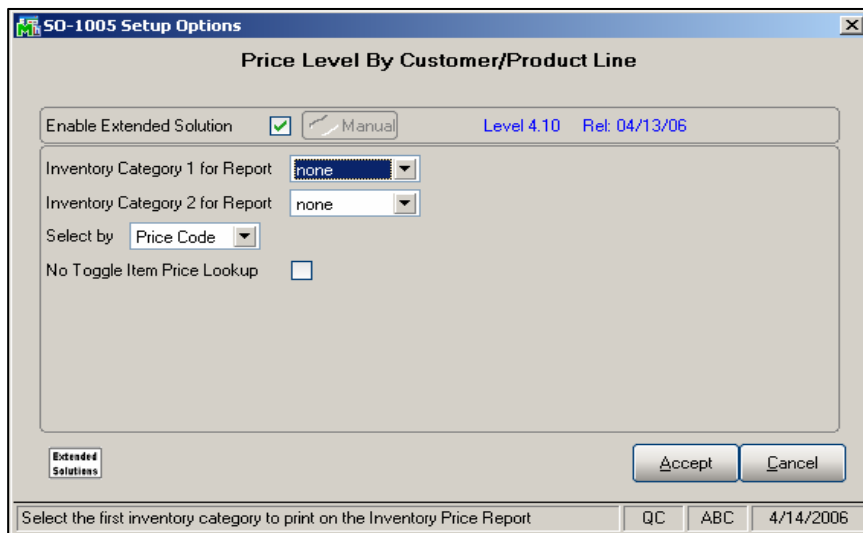


Figure 1

Answer the following prompts:

If you will be using the Inventory Price Report, enter the Inventory user defined category code (any two of the four Inventory categories as defined in I/M Setup) to be used on the Inventory Price Report.

INVENTORY CATEGORY 1 FOR REPORT: Enter the first Inventory user defined category to be used on the Inventory Price Report.

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INVENTORY CATEGORY 2 FOR REPORT: Enter a second Inventory user defined category to be used on the Inventory Price Report.

SELECT BY: Chose 'Price Code' or 'Ship To Code' to denote what type of the Price Level records to create.

NO TOGGLE ITEM PRICE LOOKUP: Check this box to remove the toggle button that allows you to view other pricing options for a customer in I/M Inquiry's Item Price Lookup.

Roles/Tasks

The following Tasks have been added to Accounts Receivable, Reports/Forms:

- 'Customer Price Level Report'
- 'Inventory Price Report'

Please review your security setup in Role Maintenance and make appropriate changes.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Operation

Customer Maintenance

Price Level Maintenance by Product Line can be accessed via the 'Prc Lvl...' drop list button in Customer Maintenance (Figure 2). Access to Price Level Maintenance by Product Line is controlled by the same permissions that control access to Customer Maintenance.

Customer Maintenance (ABC) 4/14/2006

Customer No. 01-ABF
Name American Business Futures

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/O's

Address: 2131 N. 14th Street, Suite 100, Accounting Department, Milwaukee, WI 53205-1204
City: Milwaukee, State: WI
Country: USA, United States of America
Residential Addr:
Salesperson: 0100, Jim Kentley
Telephone: (414) 655-4787, Ext: 219
Fax:

E-mail Address: artie@abf.com
URL Address: www.abf.com
E-mail Statements:

Terms Code: 01, Net 30 Days
Primary Contact: ARTIE JOHN, Artie Johnson
Ship Code: UPS BLUE
Primary Ship To: 2, American Business Futur

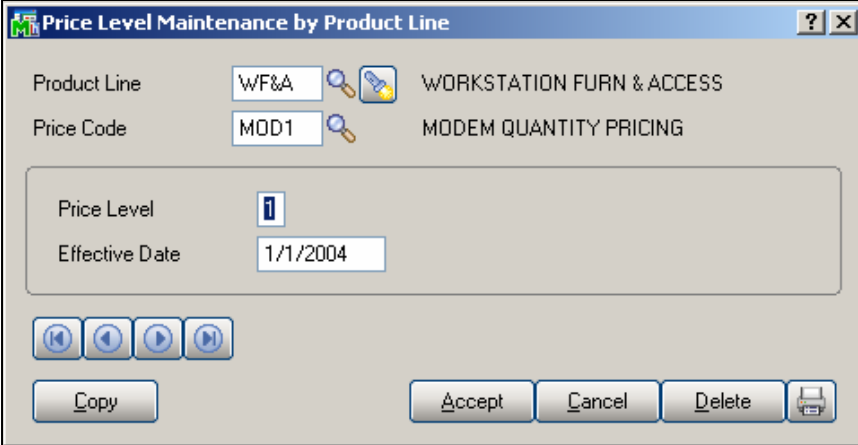
Tax Schedule: WI MILMIL, Milwaukee
Exemptions...
Credit Hold:
Credit Limit: 120,000.00

Prc Lvl... Accept Cancel Delete

Figure 2

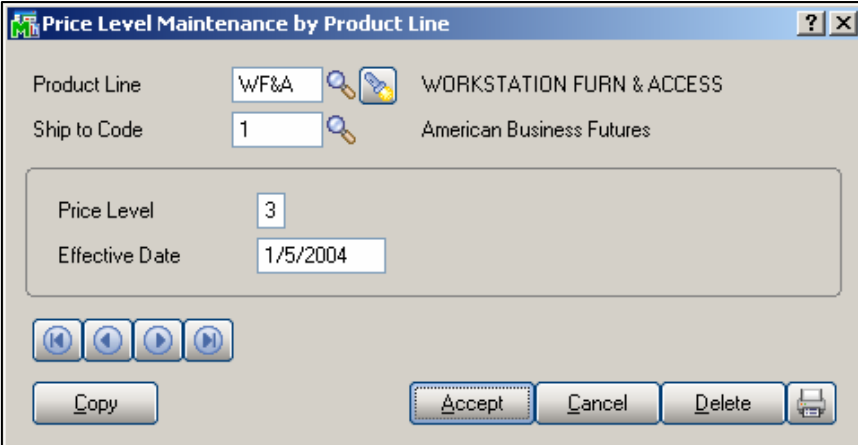
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If you specified in Setup to Select By Price Codes, then the Price Level Maintenance by Product Line screen will include a Price Code field (Figure 3a). If you specified to use Ship To Codes, then the screen will include a Ship To Code field (Figure 3b)



The screenshot shows the 'Price Level Maintenance by Product Line' window. The 'Product Line' field contains 'WF&A' with a description of 'WORKSTATION FURN & ACCESS'. The 'Price Code' field contains 'MOD1' with a description of 'MODEM QUANTITY PRICING'. Below these, the 'Price Level' is set to '1' and the 'Effective Date' is '1/1/2004'. At the bottom, there are navigation buttons (back, forward, etc.), a 'Copy' button, and 'Accept', 'Cancel', 'Delete' buttons with a printer icon.

Figure 3a



The screenshot shows the 'Price Level Maintenance by Product Line' window. The 'Product Line' field contains 'WF&A' with a description of 'WORKSTATION FURN & ACCESS'. The 'Ship to Code' field contains '1' with a description of 'American Business Futures'. Below these, the 'Price Level' is set to '3' and the 'Effective Date' is '1/5/2004'. At the bottom, there are navigation buttons (back, forward, etc.), a 'Copy' button, and 'Accept', 'Cancel', 'Delete' buttons with a printer icon.

Figure 3b

Price levels and effective dates may be set up for each product line either with or without a Price Code/Ship To Code. If you wish to set up price levels by product line only, leave the Price Code/Ship To Code field blank. Click the navigate button to the right of the product line lookup to view a list of on-file entries for the current customer (Figure 4).

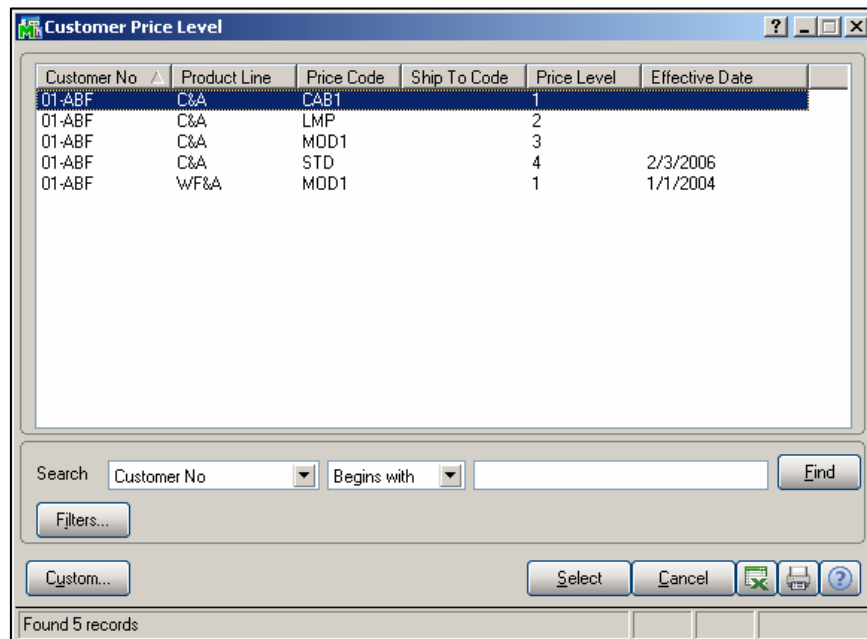


Figure 4

To copy a price level record from one customer to a range of other customer numbers, click the 'Copy' button (Figure 5).

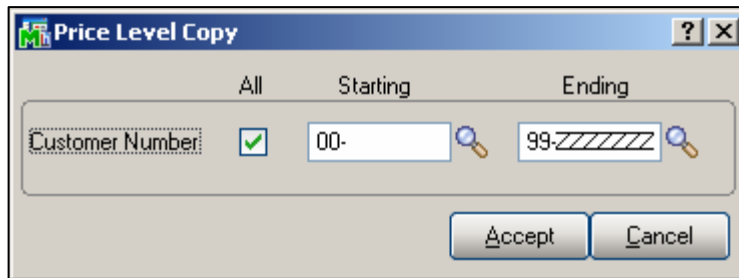


Figure 5

After you enter a beginning and ending customer number, the price level records for the current customer will be copied to each customer in the range. Any existing price level records that have the same product line or Product Line/Price Code combination will be overwritten.

Click the printer button launch the Price Level Report for the current customer.

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Sales Order Processing

When an inventory item is first added to the order/invoice, the following processing takes place to determine what the default price level should be for the line. (The references to 'code' below refer to either the price code or the ship-to code depending upon the Setup option you selected.) If you are using the Ship To Code option, the code from the header of the Sales Order or sales invoice is used; if you are using the Price Code option, the price code from the inventory masterfile is used. In either case, the product line is taken from the inventory masterfile, and the customer number is taken from the header of the Sales Order or Sales Order invoice.


- 1) The customer price level file is checked to see if that product line/code is set up for this customer. If a match is found and the effective date of that record is less than or equal to the Sales Order module date, go to step 3.
- 2) If a match on product line/code is not found, the customer price level file is checked to see if that product line with no code is set up for this customer. If no match is found or if the effective date is greater than the Sales Order system date, then the price level (and hence the price) are unaffected by this Extended Solution.
- 3) If a match was found on either product line/code or just product line and the effective date of the record is less than or equal to the Sales Order system date, then the price level from that record becomes the default price level on that line and standard MAS 90 MAS 200 pricing logic takes over.




This Extended Solution does not affect the actual calculation or determination of the item price. It simply changes what the default price level is on inventory items added to a Sales Order or sales invoice. If the standard MAS 90 MAS 200 pricing logic does not use a price level in its determination of the price (for whatever reason), then this Extended Solution will have no affect on the price.

Inventory Inquiry

If you have left unchecked the option for 'No Toggle Item Price Lookup' in Setup then both the 'Item Price Lookup' (Figure 6) and 'Item Pricing Inquiry' (Figure 7) options of Inventory Inquiry have been enhanced to use the Customer Price Level file. After you have entered a Customer Number, the 'Level by Cust/Prod/Code' button allows you to toggle between the standard pricing inquiry by customer and an inquiry using the customer number, product line and price code.



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Price Code-Customer Price Level: CAB1-1

Customer No. 01-ABF American Business Futures

Price Level

Pricing Method Price discount %

Sale Starting Date

Sale Ending Date

Sale Price .000

Std Price .200

Std Cost .110

| Step | From Qty | To Qty | % Discount | Unit Price |
|------|----------|---------|------------|------------|
| 1 | 1 | 100 | 50.000 | .100 |
| 2 | 101 | 500 | 5.000 | .190 |
| 3 | 501 | 999,999 | 10.000 | .180 |
| 4 | | | | |
| 5 | | | | |

Order Qty 0.000 U/M FT Unit Price .000 Extension .000

Level by Cust/Prod/Code

OK ?

Figure 6

Pricing Option Customer Price Schedule Item No. PFS-007-CABLE

Customer No. 01-ABF

Standard Price .200

Standard Cost .110

Pricing Method

| Step | From Quantity | To Quantity | Discount Amount | Unit Price |
|------|---------------|-------------|-----------------|------------|
| 1 | | | .000 | .000 |
| 2 | | | .000 | .000 |
| 3 | | | .000 | .000 |
| 4 | | | .000 | .000 |
| 5 | | | .000 | .000 |

Level by Cust/Prod/Code

OK ?

Figure 7

On both screens, if you are pricing by Ship To Code, you will be prompted for a Ship To Code after exiting the customer number (Figure 8).

Ship-to Code

Accept Cancel

Figure 8

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If you have checked the option for 'No Toggle Item Price Lookup' in Setup, then this button will be unavailable on only the Item Price Lookup.

Customer Price Level Report

This report can be found on the Accounts Receivable Reports menu. Records can be selected by a range of customer numbers (Figure 9).

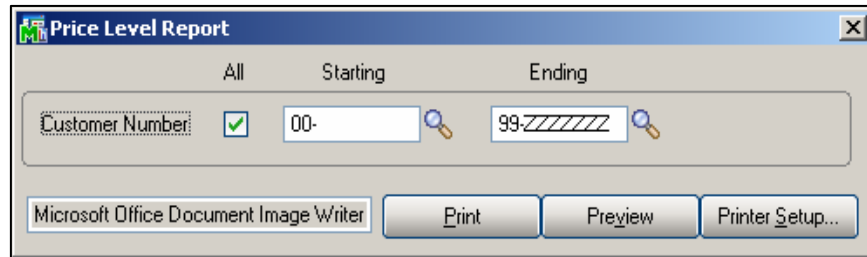


Figure 9

This report lists all SO-1005 pricing records for each customer; it page breaks by customer (Figure 10).

| CUSTOMER PRICE LEVEL REPORT | | | | Drexfus Occidental Corporation | |
|-----------------------------|----------------|--------------------------------|------------|--------------------------------|--|
| | | | | CUSTOMER PRICE LEVEL REPORT | |
| | EFFECTIVE DATE | PRODUCT LINE | PRICE CODE | PRICE LEVEL | |
| 01-ABF | Lebowski, | Dude | | | |
| | 03/01/97 | C&A CABLES & ACCESSORIES | | 1 | |
| | 03/01/97 | C&A CABLES & ACCESSORIES | CAB1 | 1 | |
| | 03/01/97 | C&A CABLES & ACCESSORIES | LMP | 1 | |
| | 03/01/97 | C&A CABLES & ACCESSORIES | MOD1 | 1 | |
| | 03/01/97 | C&A CABLES & ACCESSORIES | STD | 1 | |
| | 03/01/97 | DC DATA COMMUNICATIONS | | 1 | |
| | 10/10/89 | DC DATA COMMUNICATIONS | SCA | 1 | |
| | 03/01/97 | FD&A FLEMABLE DISKS & ACCESS. | | 1 | |
| | 01/01/99 | PS&A PRINTER SUPPLIES & ACCESS | STD | 3 | |
| | 05/15/99 | WF&A WORKSTATION FURN & ACCESS | MOD1 | 2 | |

Figure 10

Inventory Pricing Report

This report can be found on the Accounts Receivable Reports menu. Its selection includes a range of Inventory Item Numbers, Customer Numbers, Product Lines, and Price Codes (Figure 11). List the Price levels to include in the 27 character Price Level field; commas are not necessary.

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You may choose to print the 'Price Level' column on the report, or not.
 You may elect to print only item numbers that have a sales history on file for that customer.

The report page breaks between Customers and Product Lines. You may select whether or not to page break by Price Code.

Three 60-character user defined comment lines are available for entry. They will print at the bottom of each page break (Figure 12).

Figure 11

| ABC Distribution and Service Corp. | | | | | |
|---|--------------------------------|--------|-------------|--------|--------|
| INVENTORY PRICE REPORT | | | | | |
| ITEM NUMBER | DESCRIPTION | WEIGHT | PRICE LEVEL | PRICE | STATUS |
| CUSTOMER: 01-ABF, American Business Futures | | | | | |
| PRODUCT LINE: C&A, CABLES & ACCESSORIES | | | | | |
| PRICE CODE: CAB1, CABLE QUANTITY PRICING | | | | | |
| PFS-004-CABLE | EIA RS232 CABLE 4 CONDUCTOR | | 4 | .090 | |
| PFS-007-CABLE | EIA RS232 CABLE 7 CONDUCTOR | | 4 | .100 | |
| PRICE CODE: LMP, LAMP QUANTITY PRICING | | | | | |
| PFS-004-CONN-F | EIA RS232 CONECT 4 CONDUCTOR F | | 4 | 12.000 | |
| PRICE CODE: STD, STANDARD QUANTITY PRICING | | | | | |
| BB1850 | A-B SWITCH - 25-PIN | | 4 | .000 | |
| GB-EL04MS-07 | RJ-11 4 WIRE MOD CABLE 7 FT | | 4 | 2.600 | |
| GB-EL04MS-14 | RJ-11 4 WIRE MOD CABLE 14 FT | | 4 | 3.860 | |
| GB-EL04MS-25 | RJ-11 4 WIRE MOD CABLE 25 FT | | 4 | 4.960 | |
| GB-EQ380-10-MF | CENTRONICS CABLE 10 FT M/F | | 4 | 34.500 | |
| GB-EQ380-10-MM | CENTRONICS CABLE 10 FT M/M | | 4 | 34.500 | |
| GB-EQ380-5-MF | CENTRONICS CABLE 5 FT M/F | | 4 | 30.250 | |
| GB-EQ380-5-MM | CENTRONICS CABLE 5 FT M/M | | 4 | 30.250 | |
| Comment line number 1 | | | | | |
| Comment line number 2 | | | | | |
| Comment line number 3 | | | | | |

Figure 12

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If you select in Printer Setup to output the report's data to an ASCII comma-delimited file (Figures 13 and 14), then the following will occur:

- Report headers, column titles, and break titles will be eliminated.
- The Customer Division, Customer Number, and Customer Name will be included as part of the detail records of the file (i.e., Division Code, 7-character Customer Number, 30-character Customer Name).
- The page break option is ignored

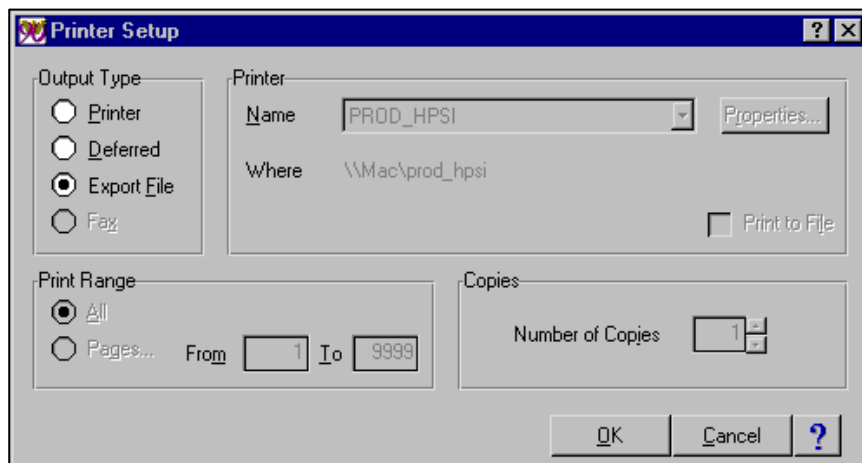


Figure 13

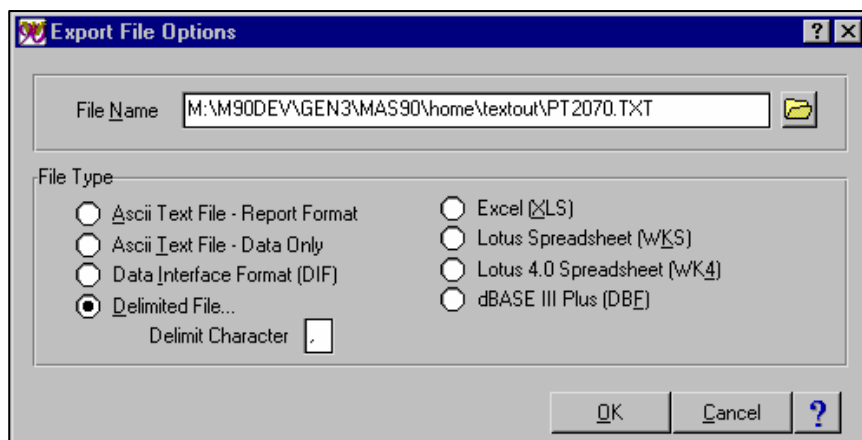


Figure 14

Helpful Hints

- Creating a new customer via the Customer Copy feature will *not* copy in the customer price level records. You must enter the customer price levels by product lines for each new customer or use the Copy option described in the 'OPERATION' section above.
- The Price Code referenced is the Price Code entered in the Item Masterfile.

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ODBC Dictionary

The files listed below have been added, or changed, in the ODBC Dictionaries by this Extended Solution for Crystal Reports purposes.

| <i>File</i> | <i>Fields</i> |
|---------------------------|---------------|
| AR_CustomerPriceLevel_001 | All Fields |

Be aware that the ODBC Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

What's New

With the 04-14-2006 release:

- Converted to Business Framework
- Merged with AR-1127: *Price Level by Customer/Product Line*

Upgrades and Compatibility

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.



Documentation

Only changes made by Sage Software, Inc. to the standard operation of Sage Software, Inc. MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

Acknowledgments

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