
Item Pricing by Total Quantity

SO-1173

Overview

This Extended Solution to the standard [MAS 90 MAS 200](#) Sales Order module allows the price of Inventory Items entered on a Sales Order to be recalculated using one of the following methods:

- Total Quantity of all items in a Product Line
- Total Quantity of all items on the Sales Order
- Sum of the Quantity Ordered
- Total Quantity of all items that reference the same IM-1077 UDF, only available if you have IM-1077: *User Defined Inventory Masterfile Fields* installed and enabled.
- Total Quantity of all items in a Category Code



Additional functionality is available for option 1 if you have IM-1099: *User Defined Fields in Product Line Maintenance* installed and enabled.

This Extended Solution supports only the following Extended Solutions pricing options:

IM-1097: *Additional Pricing Tiers for Item Pricing*

IM-1069: *Contract Pricing by Valid Date*

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

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
- 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 this 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).

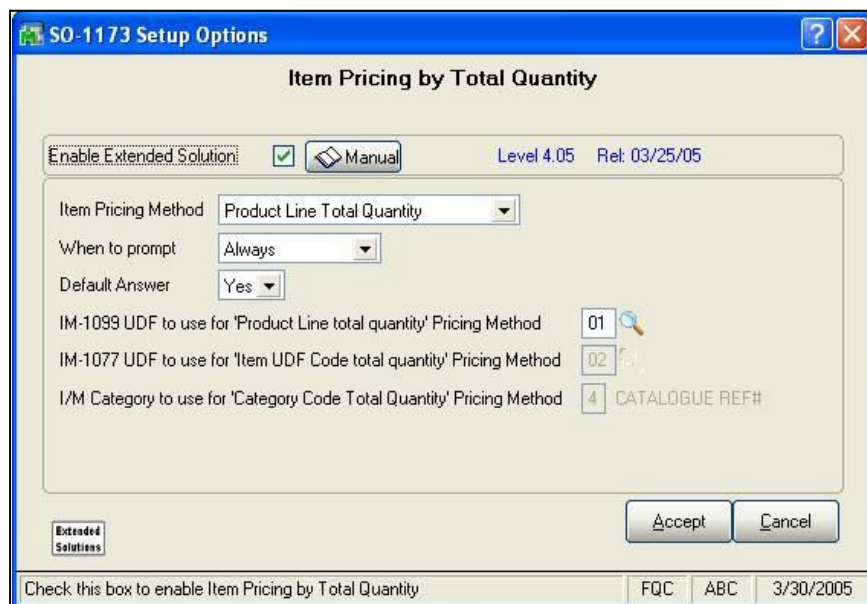


Figure 1

Extended Solutions

Answer the following prompts:

ITEM PRICING METHOD: Select the format: Product Line Total Quantity, Sales Order Total Quantity, Sum of the Quantity Ordered, Item UDF 'Code' Total Quantity (with IM-1077), or the Category Code Total Quantity.

WHEN TO PROMPT: select one of the following

- Never - the calculation during Sales Order Data Entry will proceed every time the lines are accessed and the prompt 'Do You Want to Proceed with Item Price Recalculation' will never appear.
- Old Orders Only - the calculation will proceed if the order is new; if not, you will be prompted.
- Always - you will be prompted before any action is taken
- Button - lines will be re-priced only when you click a button in sales order entry

DEFAULT ANSWER: Select 'Yes' or 'No' as the default answer to the 'Do You Want to Proceed with Item Price Recalculation' prompt discussed above.

If you have IM-1099: *User Defined Fields in Product Line Maintenance* installed and enabled and you have selected 'Product Line Total Quantity,' then you will have access to this option:

IM-1099 UDF FOR ITEM PRICING BY PRODUCT LINE TOTAL: Specify which checkbox type IM-1099 UDF to use for calculating Item pricing by certain Product Lines. During Sales Order data entry, recalculation will take place only for Items in the Product Lines with a check in their UDFs.

If you have IM-1077: *User Defined Fields for Inventory Maintenance* installed and enabled and you have selected to use 'Item UDF Code Total Quantity,' then you will have access to this option:

IM-1077 UDF TO USE FOR 'ITEM UDF CODE' TOTAL QUANTITY PRICING METHOD: Enter an IM-1077 UDF to hold the 'code' to be referenced for recalculation.

If you selected to use the 'Category Code Total Quantity' then you will have access to this option:

I/M CATEGORY CODE TO USE FOR 'CATEGORY CODE TOTAL QUANTITY' PRICING METHOD: Enter the I/M Category Code you wish to use for the 'Category Code Total Quantity' Pricing Method.

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

Role Maintenance

The following Task has been added to Sales Order, Setup Options:

- Extended Solutions Setup

Extended Solutions

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

Operation

If you answered 'Button' to the setup option 'When To Prompt' an 'Itm Prcg' button will be added to the Lines tab of Sales Order Entry (Figure 2). The unit price of items will only be recalculated only when the button is selected.

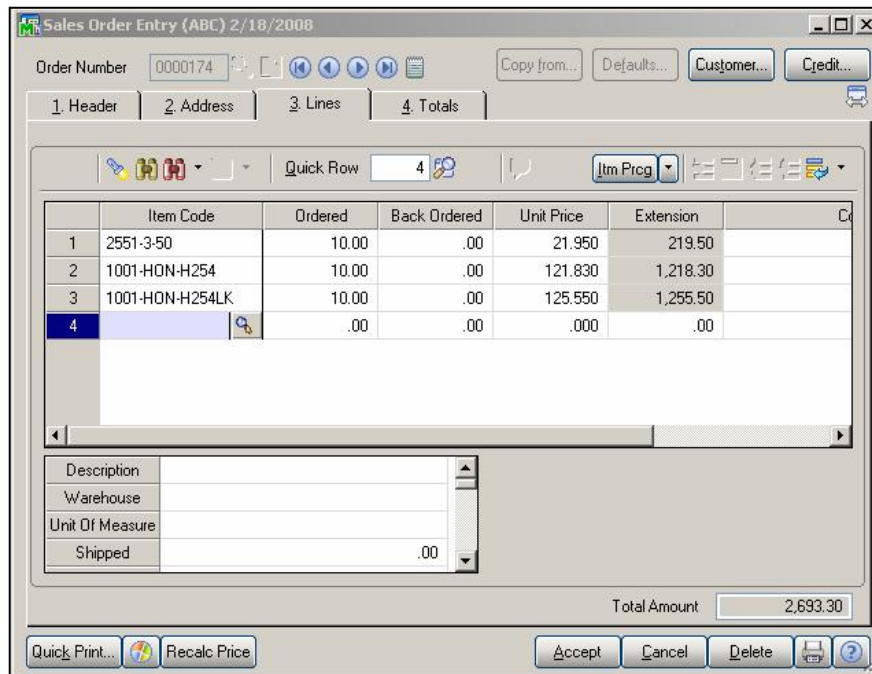


Figure 2

If you answered 'Old Orders Only' or 'Always' to the setup option 'When to Prompt' you will be prompted to perform a price recalculation when exiting the Lines tab (Figure 3).



Figure 3

If answered 'Never', then the recalculation will take place automatically each time you exit the Lines Tab to the Totals Tab.



The prompt does not appear, nor does auto recalculation take place if you Accept an Order while on the Lines Tab.

Item Pricing Based On Product Line Quantity

During Sales Order data entry, the recalculation function totals all Quantities Ordered by Product Line or for Product lines with a checked IM-1099 UDF. This total is used as the Quantity to calculate the discount tier level for each Inventory item in that Product Line. After recalculating the Quantity, the Price will be refreshed with the price tier corresponding to the Quantity Ordered within that Product Line.



Kit Option Pricing is not calculated with this option, and pricing recalculation will not take place if Pricing by Item or Customer is not set up.

Item Pricing Based On Sales Order Total Quantity

During Sales Order data entry, the recalculation function totals all Quantities Ordered in the unit of measure referenced on the lines (e.g., 2 Tons and 2 Ounces will equal a Total Quantity of 4). This total is used as the Quantity to calculate the discount tier level for Inventory item on the order. Inventory Price records are read with the Total Quantity, rather than with each individual line quantity. After recalculating the Quantity, the Price will be refreshed with the price tier corresponding to the Total Quantity Ordered. Note: line items for which a line item discount percent has been entered will not have their prices refreshed. The quantities of these lines will be included in the Total Quantity, but their prices will not be changed.

Item Pricing based on the Sum of the Quantity Ordered

This option sums the Quantity Ordered for all Inventory lines, regardless of UOM, on this order. Next, it applies this result to each Inventory line item on the order by multiplying that result times the item's I/M Masterfile Sales UOM conversion factor. The result of this calculation is then used to determine which Quantity Tier to look to in I/M Item Pricing. The Unit Price from that Item Pricing Tier will then be placed in the Unit Price field on the Sales Order line.



The Quantity is calculated using the Sales Unit of Measure from the Inventory Masterfile. If you are calculating items with different UOMs, you may get undesirable results.

Item Pricing Based on Item UDF 'Code' Total Quantity (with IM-1077)

When adding or removing lines in Sales Order Data Entry, each line item will be reviewed. If an Inventory Item has a 'code' maintained in IM-1077 that matches any other 'code'

Extended Solutions

maintained for any other Inventory Item on the Sales Order, the Quantity Ordered for these Inventory Items will be totaled and that will be the quantity used to determine the Unit Price for each item. The program will look at the Item pricing file maintained for each Item Number using the new 'quantity' to determine the Line Item's Unit Price. If this calculated Unit Price is less than the line's existing Unit Price, the Unit Price field will be filled in with the new Unit price. If the calculated Unit Price is equal to or greater than the existing line's Unit Price, no changes will be made to the Unit price field. The Unit Price will be refreshed whenever a line is added to or removed from the Sales Order. No changes have been made to S/O Invoice Data Entry.

Item Pricing Based on the I/M Category Code Total Quantity

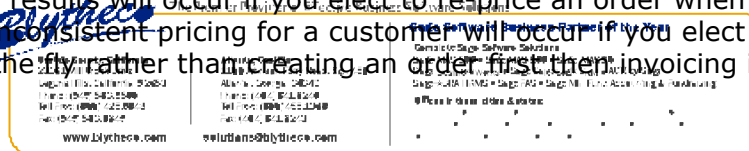
When adding or removing lines in Sales Order Data Entry, each line item will be reviewed. If an Inventory Item has a value maintained in the I/M Category Code specified in Setup that matches any other value maintained in the same Category Code for any other Inventory Item on the Sales Order, the Quantity Ordered for these Inventory Items will be totaled, and that will be the quantity used to determine the Unit Price for each item. The program will look at the Item pricing file maintained for each Item Number using the new 'quantity' to determine the Line Item's Unit Price. If this calculated Unit Price is less than the line's existing Unit Price, the Unit Price field will be filled in with the new Unit price. If the calculated Unit Price is equal to or greater than the existing line's Unit Price, no changes will be made to the Unit price field. The Unit Price will be refreshed whenever a line is added to or removed from the Sales Order. No changes have been made to S/O Invoice Data Entry.

With IM-1069, Contract Pricing by Valid Date

As SO-1173 recalculates pricing in order entry, it will check to see if any IM-1069 pricing records exist which meet the date criteria. If so, the IM-1069 pricing record will be used.



IM-1069 supports pricing in Invoice Entry as well as an option to re-price an order when it is being invoiced. Because SO-1173 does not modify Invoice Entry, undesirable results will occur if you elect to re-price an order when it is being invoiced. **Consistent pricing for a customer will occur if you elect to create an invoice on the fly rather than creating an order first then invoicing it.**



Helpful Hint

- This Extended Solution is active in Sales Order data entry only. Sales Order Invoice data entry is not affected.

What's New

With the 02-11-08 release:

- Added 'Button' option to the Setup Option 'When to Prompt'.

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

© 2008 Sage Software, Inc. All rights reserved. Sage Software, [MAS 90](#) and [MAS 200](#) are registered trademarks or trademarks of Sage Software, Inc. All other trademarks are the property of their respective owners.



MTSI
Marshall Technology
Solutions, Inc.

SOLUTIONS

Sage MAS 90 • MAS 90 Training • MAS 90 Support
Sage MAS 200 • MAS 200 Training • MAS 200 Support

www.mtsisolutions.com | Call Us at **866-848-2957** (Toll Free)