Advanced Pricing 9.1 Volume 1

Updated for 9.2 User Interface

Contents

Introduction ____ ***5***

Advanced Pricing – Case Study ____ ***7***
- The Scenario ____ 7
- Issues in the Current System ____ 8

Using Advanced Pricing for the Base Price ____ ***9***

Advanced Pricing – Overview ____ ***11***
- Advanced Price and Adjustments – G42311 ____ 11
- Advanced Pricing: The Building Blocks ____ 16
- Scenario ____ 17
- Hierarchies ____ 18
- Price Adjustment Definitions ____ 23
- Price Schedules ____ 29
- Price Adjustment Details ____ 31

Groups in Advanced Pricing ____ ***45***

Simple Groups ____ **45**

Complex Price Groups ____ **46**
- Set Up a Complex Group Adjustment ____ 49
- Scenario ____ 49
- Scenario Data ____ 49
- Scenario Steps ____ 49
- Test a Price Using Check Price & Availability ____ 56

Customer Group Discounts ____ **62**
- Set up an Order Detail Group ____ 62
- Add Order Detail Group to BASE Price Rule ____ 63
- Additional Customer Group Discounts ____ 69
- Debug Your Advanced Pricing Setup ____ 80

Build Customer and Item Groups; an Optional but Useful Step ____ **80**
- View Valid Group Combinations ____ 80
- Generate Valid Group Combinations ____ 83
- Use the Group Code Selection Form ____ 85

Mark-up Over Cost ____ ***87***
- Preference Hierarchy ____ 87
- Define Price Groups ____ 95
- Price Adjustment Definition ____ 97
- Price Adjustment Schedule ____ 100

Price Code 2 – Optional Adjustments ____ ***107***

Basket and Order Repricing ____ ***125***

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Discount for Ordering Over Quantity Threshold 126
Add Preference Hierarchy 126
Add Basket Reprice Group to Items 128
Add Price Adjustment Definition 133
Price Adjustment Schedule 135

Discount for Ordering Over Dollar Amount 146
Review Repricing 160

Minimum Dollar Amount Order Fee Adjustment 164
Line Types and Order Activity Rules 165

Enhanced Basket Repricing 177
Enhanced Basket Repricing Functionality 177
Identify/Set Up the Enhanced Basket Items 178
Set Up an Enhanced Basket Adjustment Definition 182
Set Up Adjustment Details for Basket Master Items 183

Item/Customer Contract Pricing 197
Price Adjustment Definitions 200

Rounding Rules – East & West of the "Xe Line" 209

East of the Line 209
Price Adjustment Definition 209
Price Adjustment Details 213
Price Adjustment Schedule 215

West of the Line 219

Business Requirement 219

Rounding Rules Functionality 219
Scenario Data 219
Scenario Steps 220
Set Up Rounding Rules 224
Enter Test Prices 225

Other Uses for Rounding Rules 229

Advanced Tips – Currency Conversions "Name Your Currency Price" 231

Unit of Measure Conversions 243
System Constants 243
Adjustment Details 252
Enter Test Sales Order 256
How to Sell an Item to Specific Customers with a Different Pricing Unit of Measure 259

Multiple Units of Measure in Pricing 273
Units of Measure pre-EnterpriseOne 8.10 273
Multiple UoM Functionality 273
Disable Partial Case Discounts 288

Additional Price UoM Retrieval 291
Additional Price Search UoM Functionality 293
Why Have a Price Search UoM Hierarchy? 296
Set Up Multiple UoM Hierarchy 301

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Pricing by Secondary UoM 306
What's the Point? 308
What's the Catch? 308

Update Sales Price/Cost (R42950) 309
Introduction 309
How to Correct Prices to Avoid Credits and Rebills 309

How to Protect Prices but Still Allow Overrides to Base Price 327
Manual Add/Change 329

Price Protection 332
Overview 332

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Advanced Pricing 9.1 Volume 2

Updated for 9.2 User Interface.

Contents

Introduction ____ ***5***

Item Restrictions ____ ***7***

Item Restrictions ____ **8**
Mandatory Adjustment ____ 12
Advanced Tips – How to Prevent Selling an Item Prior to Its Introduction Date ____ 27

Effective Dates – How They Work in Advanced Pricing ____ ***33***
Change Prices Frequently ____ 41

Free Goods ____ ***47***
Scenario — Buy a Bike –Get a Helmet Free ____ 47
Buy One Get One (BOGO) – Buy Three More and Get One More ____ 57
Free Goods Gotchas ____ 58
Free Goods with a Minimum Quantity Requirement ____ 59
Non Stock Free Goods ____ 70
Special Charges Calculation Process ____ 74
Free Goods Catalog Functionality ____ 84
Review Free Goods Catalog ____ 85
Activate Free Goods Warning in Sales Order Entry ____ 88

Advanced Tips – Kit Pricing ____ ***93***
Verify Kit Setup ____ 94
Enter a Sales Order ____ 100
Change the Kit Pricing Method ____ 105

Absolute Value Adjustments ____ ***107***

Transfer Pricing ____ ***127***

Formula and Variable Based Pricing ____ ***145***
Formulas ____ 147

How Preferences Can Drive Pricing More Efficiently ____ ***165***
How to Stop Torturing Pricing Just to Get Customer Related Data into Sales History ____ 165
Preference Overview ____ 165
Define a Buying Group ____ 166
Assign the Customers to the Preference Group ____ 175
Set Up Pricing to Use the End Use Field as a Price Driver ____ 177
Enable Preference Processing ____ 183
Enter a Test Sales Order ____ 185

Price Schedules in Order Processing ____ ***189***

Or…Price Schedules: Not just for Billing Instructions Anymore! ____ **189**
Manual Overrides ____ 189
Direct Price Adjustments ____ 189

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Agreement Quantity File 189
Price Adjustment Schedule Preference 189
Business Requirement 192

Direct Price Adjustments 201
Set the Price Adjustment Retrieval Method 201
Attach Price Adjustments to a Customer Address 203

Buying Structures 211
Configure the System for Buying Structures 211
View Buying Structures 214
Add New Members to a Buying Structure 217
Use Price Adjustments for Buying Structures 220

Adjustment Control Codes and Invoice Print 233
Price Adjustment Definition 233
Price Adjustment Schedule 237
Enter a Sales Order 238
Customer Billing Instructions 240
Invoice Print 240

Supplier Proof-of-Sale Rebates 243
Supplier Proof-of-Sale Rebate Functionality 243
Setting Up Supplier Proof-of-Sale Rebates 243
Set Up a Preference Hierarchy 244
Define Item Groups and Customer Groups 245
Review AAIs for Supplier POS Rebate Accounting 247
Set Up the Price Adjustment Definition 249
Define Items and Customers to Groups 253
Enter a Rebate-Qualifying Sales Order 259
Inquire on Rebate Activity 265
Generate Rebate Claims 267

Preferences in Advanced Pricing 279

Extended Payment Terms 279
Identify Preference Hierarchy 280
Define Items to a Basket Reprice Group 281
Set Up Basket Price Adjustment Definition 282
Attach Direct Price Adjustment to Customer 284
Set Up Price Adjustment Details 286
Set Up Preference Details 287

Sales Price Based-On Date 303
Set Up Preference Details 304
Check Price and Availability Inquiry 310

Gross Profit Margin Pricing 317
Gross Profit Margin Pricing Functionality 317
Activate GPM Checking in Sales Order Entry 317
Check Price and Availability 318
Review Preference Hierarchy 320
Last Minute Business Requirement Wrinkle 322
Review Preference Definition 323
Set Up Preference Details 325

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Repeat Check Price and Availability Inquiries 330

Appendix: Rebates 333

Rebate Setup Process 333

Advanced Rebate Topics 355

Advanced Rebate Calculations 355

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Advanced Pricing 9.1 Volume 3

Updated for 9.2 User Interface

Introduction 5

How to Reduce the Number of Schedules and Adjustments per Schedule 7

Mutually Exclusive Price Adjustments 11
Price Adjustment Schedule 11
Price Adjustment Definition 21

Sliding Rate Adjustments 33

Volume Discounting Pre-EnterpriseOne 8.9 33

Sliding Rate Adjustments – A "New & Improved" Volume Discount 35
Business Requirement 35
Set Up a Sliding Rate Adjustment Definition 36
Add the Sliding Rate Adjustment 39

Volume-Based Upselling 51

Volume-Based Upselling Functionality 51
Business Requirement 51
Set Up a New Hierarchy 52
Set Up Adjustment Definition 52
Add Adjustment Definition to Price Schedule 55
Set Up Adjustment Details 56
Enable the Upsell Processing Option 57
Enter Sales Orders 57

Volume Incentive Deals 63

Volume Incentive Deals Functionality 63
Business Requirement 63
Other Considerations with Volume Incentive Deals 79

Pricing Workbench 81

Pricing Workbench Functionality 81
Generate a Pricing Workbench Query 81
View the Results of a Generated Query 85
Regenerate a Pricing Search Query 87

Mass Maintenance 89
Accessing Mass Maintenance 89
Mass Maintenance via Pricing Workbench 89
Mass Maintenance via Search Agent 97
Mass Maintenance using Search Agent 103

Customer Price Lists 105

Customer Price List Functionality 105
Create a Customer Price List 106

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Define Price Adjustments to Groups 110
Group Price Adjustments by Column 111
Build a Price List Shell 113
Generate Prices 114
Print Customer Price Lists 115

Price Matrix 117
Adjustment Definition 117
Edit Price Matrix Application – P4590 120
Adjustment Definition 121
Enter Adjustment Details 126

Pricing Resolution Engine 131
Enable the Pricing Resolution Engine 131
Accelerated Pricing Resolution Engine Workbench 134
A Quick Step up on the Soapbox 136

MIN-MAX Price Rules 137

Setting up a MIN Level Adjustment 137
Define MIN Adjustment Definition 138
Attach Adjustment Definition to the Price Schedule 140
Enter MIN Adjustment Detail 141
Validate the MIN Configuration 141
Where can I position MIN and MAX Adjustments? 144

Formula Enhancements in 8.12 147

Price Formula Selector Screen 147

Validating the Target Application 148

New Formulas and Functions 150
MIN, MAX and AVG 150
Adjustment Detail Reference 151

Advanced Pricing Data Fields – Post Xe 157

Price Adjustment Definition 158
Price Adjustment Schedule 160
Introducing a New Basis Code 170

EnterpriseOne 9.2 User Interface 173

Introduction 173

Queries 174

Sharing User Defined Objects 175

One View Watchlists 176

Grid Formats 179

Composite Application Framework (aka CafeOne) 180

Personal Forms 185

EnterpriseOne Search 187

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.

Images 189
EnterpriseOne Pages 191
Attachments via Side Panel 197
UX One 197
Summary 198

Protected by copyright (c) JDEtips, Inc.
Unauthorized use is a copyright infringement.