

Advanced Pricing Mastery Level Workshop

Contents

Introduction	9
Advanced Pricing 8.12 Navigation	13
Hot Keys for Navigation	28
Advanced Pricing – Case Study	35
The Scenario	35
Issues in the Current System	36
Using Advanced Pricing for the Base Price	39
Advanced Pricing – Overview	41
8.12 Web-Based Environment	41
Advanced Price and Adjustments – G42311	41
Advanced Pricing: The Building Blocks	46
Hierarchies	47
Price Adjustment Definitions	51
Price Schedules	54
Price Adjustment Details	56
Groups in Advanced Pricing	63
Simple Groups	63
Complex Price Groups	65
Order Detail and Customer Group	79
Additional Customer Group Discounts	86
Debug Your Advanced Pricing Setup	92
Markup Over Cost	95
Price Code 2 – Optional Adjustments	111
Using a Price Code to Give Will Call (Customer Pickup) Discount.....	111
Setting Up Requirements for Will Call Orders.....	111
Basket and Order Repricing.....	121
Discount for Ordering Over Quantity Threshold	122
Note on Navigation.....	122
Hierarchy.....	122
Add Basket Reprice Group to Items	123
Price Adjustment Definitions	124
Price Adjustment Schedule	125

Discount for Ordering Over Dollar Amount	130
Over Dollar Amount Discounts Adjustment Process	130
Review Repricing	139
Minimum Dollar Amount Order Fee Adjustment	142
Line Types and Order Activity Rules	143
Enhanced Basket Repricing	149
Basket Repricing Pre-EnterpriseOne 8.10	149
E1 8.10 Enhanced Basket Repricing Functionality	150
Identify/Set Up the Enhanced Basket Items	151
Set Up an Enhanced Basket Adjustment Definition	154
Set Up Adjustment Details for Basket Master Items	156
Item/Customer Contract Pricing	163
Price Adjustment Definitions	166
Rebates	171
Rebate Setup Process	171
Generate Credit Orders – R42770	182
Advanced Rebate Topics	188
Advanced Rebate Calculations	188
Effective Dates and Rebates – What to Do When	189
Rebate Credit Accounting	190
"Catching Up" a Customer Who Wasn't Set Up at the Beginning of the Period	190
Negative Rebates	191
How to Reduce the Number of Schedules and Adjustments per Schedule	193
Advanced Tips – How to Round Prices to the Nearest Cent, Dime, or Dollar	195
Rounding Rules	199
Rounding Rules pre EnterpriseOne 8.10	199
Rounding Rules Functionality	199
Select a Preference Hierarchy	200
Set Up the Adjustment Definition	200
Set Up Adjustment Details	202
Set Up Rounding Rules	202
Enter Test Prices	203
Other Uses for Rounding Rules	205
Item Price and Customer Price Group Fields	207
Advanced Tips – Currency Conversions "Name Your Currency Price"	213
Unit of Measure Conversions	221

How to Sell an Item to Some Customers with a Different Pricing Unit of Measure	229
Update Sales Price/Cost (R42950).....	239
Introduction.....	239
How to Correct Prices to Avoid Credits and Rebills.....	239
How to Protect Prices but Still Allow Overrides to Base Price	253
Manual Add/Change	254
Price Protection	258
Item Restrictions	263
Item Restrictions	263
Mandatory Adjustment	266
Advanced Tips – How to Prevent Selling an Item Prior to Its Introduction Date.....	276
Build Customer and Item Price Groups (R40931,R40932), an Optional but Useful Step	281
Use the Group Code Selection Form.....	283
Effectivity Dates – How They Work in Advanced Pricing	285
Change Prices Frequently.....	291
Use Variable Tables for Frequent Manual Daily Updates to Pricing.....	294
Free Goods	297
Scenario — Buy a Bike –Get a Helmet Free	297
Buy One Get One (BOGO)	304
Buy One Get One, Buy Three More and Get One More.....	304
Free Goods Gotchas.....	305
Free Goods with a Minimum Quantity Requirement.....	306
Non Stock Free Goods.....	312
Special Charges Calculation Process.....	315
Free Goods Catalog Functionality	320
Review Free Goods Catalog.....	320
Activate Free Goods Warning in Sales Order Entry	323
Adjustment Control Codes and Invoice Print	329
Advanced Tips – Kit Pricing.....	337
Absolute Value Adjustments	345
Transfer Pricing.....	357
Variable Pricing	367
Formulas	369
How Preferences Can Drive Your Pricing More Efficiently.....	379
Preference Overview.....	379

Set the Preference Hierarchy	380
Add Preference Details	383
Assign the Customers to the Preference Group	386
Set Up Pricing to Use the End Use Field as a Price Driver	388
Attach the Price Adjustment to the ABC Schedule	389
Enable Preference Processing	391
Price Schedule	395
How Many to Use and How Are They Assigned to Sales Order Lines	395
Assign the Price Schedule Using Price Adjustment Schedule Preference	398
Direct Price Adjustments	407
Set the Price Adjustment Retrieval Method	407
Attach Price Adjustments to a Customer Address	408
Advanced Preferences	415
What Are Preferences, Anyhow?	415
How Preferences Work	415
Basic Preferences vs. Advanced Preferences	416
The Advanced Preference List	417
How to Access and Maintain Advanced Preferences	417
Advanced Preference Schedule Revisions	418
Advanced Preference Name Revisions	419
Advanced Preference Detail Revisions	421
Extended Payment Terms	425
Payment Terms Preference Pre-EnterpriseOne 8.10	425
Extended Payment Terms Functionality	425
Modify Preference Hierarchy	426
Define Items to a Basket Reprice Group	427
Set Up Basket Price Adjustment Definition	428
Attach Direct Price Adjustment to Customer	430
Set Up Price Adjustment Details	431
Set Up Preference Details	432
Sales Price Based-On Date	441
Sales Price Based-On Date Pre-EnterpriseOne 8.10	441
E1 8.10 Sales Price Based-On Date Functionality	442
Set Up Preference Details	443
Check Price and Availability Inquiry	446
Gross Profit Margin Pricing	449
Margin Pricing pre-EnterpriseOne 8.10	449

Gross Profit Margin Pricing Functionality.....	449
Activate GPM Checking in Sales Order Entry.....	450
Check Price and Availability.....	450
Review Preference Hierarchy	451
Last Minute Scenario Wrinkle	452
Review Preference Definition.....	454
Set Up Preference Details.....	454
Repeat Check Price and Availability Inquiries	458
Buying Structures	461
Configure the System for Buying Structures.....	461
View Buying Structures	462
Add New Members to a Buying Structure.....	464
Use Price Adjustments for Buying Structures	467
Tier Structure Rebates.....	475
Rebate Beneficiaries	475
Rebate Beneficiary.....	476
Beneficiary Tier	481
Accumulate at Tier	481
Beneficiary Address	483
Supplier Rebate Type	483
Sliding Rate Adjustments.....	491
Volume Discounting Pre-EnterpriseOne 8.10	491
Test the Operation of a Standard Volume Discount	492
Sliding Rate Adjustments; a "New & Improved" Volume Discount	494
Set Up a Sliding Rate Adjustment Definition.....	496
Attach the Sliding Rate Adjustment to the Customer.....	497
Check Price and Availability.....	499
Supplier Proof-of-Sale Rebates	505
Supplier Proof-of-Sale Rebate Functionality.....	505
Setting Up Supplier Proof-of-Sale Rebates	506
Set Up a Preference Hierarchy	506
Define Item Groups and Customer Groups	507
Define Items and Customers to Groups.....	512
Enter a Rebate-Qualifying Sales Order	517
Inquire on Rebate Activity	520
Generate Rebate Claims.....	521
Volume Incentive Deals	525

Volume Incentive Deals Functionality	525
Other Considerations with Volume Incentive Deals	536
Multiple UoMs in Price Deals.....	537
Units of Measure pre-EnterpriseOne 8.10.....	537
Multiple UoM Functionality	537
Verify Preference Hierarchy	541
Attach Direct Price Adjustment to the Customer	544
Disable Partial Case Discounts	547
Additional Price UoM Retrieval	549
Multiple UoM Pricing pre-EnterpriseOne 8.10.....	549
Mommy, Where Do Units of Measure Come From?	549
Additional Price Search UoM Functionality	552
Why Have a Price Search UoM Hierarchy?	553
Set Up Multiple UoM Hierarchy	556
Pricing by Secondary UoM	558
What's the Benefit?.....	559
What's the Catch?	560
Volume-Based Upselling	561
Volume-Based Upselling Functionality.....	561
Set Up a New Hierarchy	562
Set Up Adjustment Definition.....	562
Attach Direct Price Adjustment to Customer	563
Set Up Adjustment Details.....	564
Set Up the Upsell Processing Option	565
Enter Sales Orders	565
Related Items	569
Related Items pre-EnterpriseOne 8.10.....	569
Related Items Functionality	569
Review Cross-Reference Records	572
Related Items and Advanced Pricing Adjustments	585
Customer Master Category Codes.....	587
Category Codes pre-EnterpriseOne 8.10.....	587
Customer Master or Address Book?	587
Date Effective Category Code Functionality.....	588
Enable Date Effective Category Codes	589
Add a New UDC Value	591
Review Customer Category Code Setup	591

Run UBE R03012A – Update Effective Date Category Codes	595
Pricing Workbench	599
Pricing Workbench pre-EnterpriseOne 8.10	599
Pricing Workbench Functionality	599
Generate a Pricing Workbench Query	600
View the Results of a Generated Query	602
Regenerate a Pricing Search Query	604
Mass Maintenance	607
Accessing Mass Maintenance	607
Mass Maintenance via Pricing Workbench	607
Mass Maintenance via Search Agent	613
Observations	617
Mass Maintenance Program	617
Search Agent	617
Customer Price Lists	619
Customer Price List Functionality	619
Create a Customer Price List	620
Define Price Adjustments to Groups	622
Group Price Adjustments by Column	623
Build a Price List Shell	624
Generate Prices	624
Print Customer Price Lists	625
Mutually Exclusive Price Adjustments	627
Price Adjustment Schedule	627
Price Adjustment Definition	632
Potpourri	639
Price Adjustment Definition	639
Price Adjustment Schedule	641
Price Matrix	647
Price Resolution Engine	657
Price Approval Processing	661
Overview	661
Use Approval Status Codes	661
Set Up the System for Price Approval Processing	662