

Using a Catalog Code in Order/Basket Repricing to Drive Specific Promotions

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Editor's note: In July of 2002, Klee Associates, Inc. traveled to Carolina Biological to teach a four day Mastery Workshop on Advanced Pricing. Little did I realize that just a few months later I would receive from one of the students one of the best tips I've ever published. Obviously; they learned their lessons well, and more importantly; were able to independently extend their new knowledge into uncharted waters. Bravo, Lisa! This is what makes teaching and consulting so rewarding. Note: This tip applies equally to WorldSoftware™ and OneWorld®.

After Andy Klee's (and Sue Maiwald's) class, we were amazed at all the discounts and promotions that we could do with JDE®'s Advanced Pricing module. The one exception was the lack of a way to enter a promotional code from our sales catalog and have it generate an appropriate order/basket level discount.

Our company offers many different types of promotions to our customers. These promotions are offered through brochures/catalogs mailed during the year, each identified with a unique promotion number. The same customer may receive several different types of promotions, one of which may be our most successful, the \$ off a \$ order amount.

We knew that this would be no problem for normal line level discounts, but it turns out to be a big problem with order/basket level discounts.

The reason that entering a catalog code in Order Entry doesn't work with Order/Basket adjust-

Figure 1: Order and Basket Level Adjustments do not allow Order Detail Groups.

ments is hard coded in the software. You just can't attach an order detail group to an Order/Basket level adjustment. See Figure 1.

As you can see in Figure 1, a basket level adjustment does not allow attachment of an Order Detail group. (The same is true for Order Level adjustments; however, a line level adjustment does allow this.) If it had allowed this, then we could just enter the Promotional Code into a field in the Sales Order detail and that would have been a 'key' for finding the correct adjustment detail.

We even tried forcing the Order Detail Group field into the Price Adjustment Definition through the back door, but that still didn't work.

What to do? Well we thought, and we thought, and we somehow came up with the following idea.

What if we used the Customer Price Group field in the header to drive finding the correct promotional adjustment detail? We had already learned that the Customer Price Group field could be used by Order/Basket level adjustments to find the right detail record. So we'll just try turning this functionality around a bit, and see if it works.

And it did!

The following example will show how the **same** customer can actually utilize two different price groups, plus how this **same** customer can receive order level and basket level adjustment pricing using the same items.

There are no tricks or fancy ways to set this up, only a different and creative way of using the fields available in advanced pricing to get the desired results. Here's the set-up:

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1. Let's make sure the items used in our promotions are setup properly so that they will be used in both adjustments.

The screenshot shows a software interface with a tab labeled 'Additional Info.'. Below the tab are several input fields and their corresponding values:

- Item Price Group: [Empty field] Blank - Pricing Rule 40/PI
- Basket Reprice Group: CLOTHING Clothing
- Order Reprice Group: PROMO Promotional Group
- Margin Maintenance (%): [Empty field]
- Shelf Life Days: [Empty field]

Figure 2: The item is tied to a Basket Reprice Group of Clothing and an Order Reprice Group of Promo.

2. Next, the Order Level Adjustment.

The screenshot shows the 'Order Level Adjustment Details' screen. It includes the following fields:

- Adjustment Name: SOFF\$ORD Dollar Off - Dollar Order
- Order Reprice Group: PROMO Promotional Group
- Customer Price Group: A1 \$ Dollar \$ Amount

A callout box on the right states: "The order level adjustment will use a customer group of A1, which has been defined in the 40/PC UDC table. Any customers using the value of A1 with a combination of items from the item group PROMO will receive, depending on their order amount, either \$10 or \$25 discounted from the entire order."

Ⓢ	From Level	Factor Value Numeric	B C	Basis Code	Cur Cod	Effect From	Effect Thru	Cost Meth	Formula Name	Variable Table	Object Library	F G	Customer Group	Item Group
	100.0000	10.0000-5		Add on Amount	USD	11/7/2002	12/30/2020					N	A1	PROMO
	200.0000	25.0000-5		Add on Amount	USD	11/7/2002	12/30/2020					N	A1	PROMO

Figure 3: Order Level Adjustment Details

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