ACME Co.

DS0052

Price Sheet Update Utility
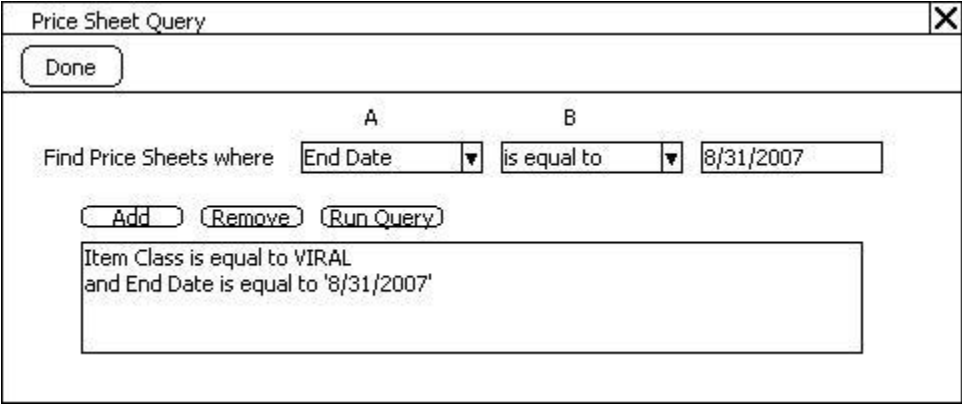
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Problem Definition

Problem Definition	CCDA
ACME Co. makes extensive use of Extended Pricing Price Sheets. They have a large number of products and customers, the combination of which results in a large number of difficult to maintain Price Sheets. Price changes, introduction of new products, and inactivation of current products require updates to a large number of Price Sheets. This process is currently performed by a labor intensive and error prone process of exporting data to spreadsheets, making additions, changes and updates to the spreadsheets, and re-importing the data. ACME Co. desires a more automated solution that allows them to perform all Price Sheet maintenance activities inside of Dynamics GP. They would also like the ability to be able to report on the history of price sheet changes. The following pages describe a solution that will allow ACME Co. to: - create ad-hoc selection queries to identify a sub-set of Price Sheets that need to be updated - identify a list of Items on those Price Sheets to be updated, or new items to be added - preview the planned changes - apply the planned changes - track change history	

Design Features

Price Sheet Query	CCDA

The first step in the Price Sheet Maintenance routine is to identify one or more Price Sheets to work with. This is done by building an ad-hoc query in the Price Sheet Query window. This window will be accessed from Tools >> Utilities >> Inventory >> Price Sheet Update
 	
Selection criteria (A) are:
   - Price Sheet ID
   - Price Sheet Description
   - Start Date
   - End Date
   - Item Number
   - Item Class
   - Item User Defined Fields
   - Customer ID
   - Customer Class	

Operation criteria are:
- Is equal to (=)
- Is less than (<)
- Is less than or equal to (<=)
- Is greater than (>)
- Is greater than or equal to (>=)
- Contains

A query is built by adding selection criteria to the query. As shown above, the query will return all Price Sheets that contain Item Numbers in the Item Class = VIRAL, and where the Price Sheet End Date = 8/31/2007.

When all selection criteria have been entered, RUN QUERY will execute the query, and open the Price Sheet Update window.

Price Sheet Update	CCDA
Price Sheet Update is opened from Price Sheet Query when the Run Query button is clicked. The top scrolling window shows the Price Sheets that were identified by the query. By default, all returned Price Sheets will be marked. To further restrict the list, individual Price Sheets can be un-marked to exclude them from the update.	

Price Sheet Update is opened from Price Sheet Query when the Run Query button is clicked. The top scrolling window shows the Price Sheets that were identified by the query.

```
┌─────────────────────────────────────────────────┐
│ Price Sheet Update                           [X] │
│ ( Back )  ( Preview )  ( Apply )                 │
│                                                   │
│ Mark Price Sheets to update:  (MARK ALL) (UNMARK ALL)│
│   ┌─┬──────────────┬───────────────┬──────────┬─────────┐│
│   │X│Price Sheet ID│Description    │Start Date│End Date ││
│   │X│SCHEDULE A    │Standard Pricing│7/1/07   │8/31/07  ││
│   │ │SCHEDULE A2   │Standard Pricing│8/1/07   │7/31/08  ││
│   │ │              │               │          │         ││
│   └─┴──────────────┴───────────────┴──────────┴─────────┘│
│  Task │Update Pricing    │▼│                      │
│                                                   │
│  Enter Item(s) to update:(MARK ALL) (UNMARK ALL) (PRICING)│
│   ┌─┬────────────┬───────────┬─────────────┐      │
│   │X│Item Number ⊂⊃│Description│Price Sheet ID ⊂-≥│
│   │X│2K2417      │Magnesium  │SCHEDULE A   │      │
│   └─┴────────────┴───────────┴─────────────┘      │
└─────────────────────────────────────────────────┘
```

⊂-≥ = Expansion Button (to U of M Pricing Options window)

⊂⊃ = Lookup Button (to Add Items window)

By default, all returned Price Sheets will be marked. To further restrict the list, individual Price Sheets can be un-marked to exclude them from the update.
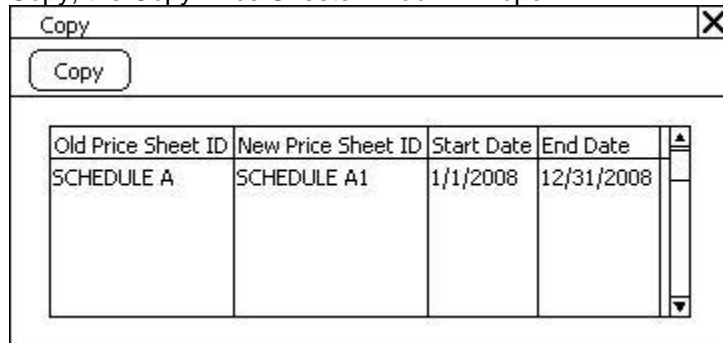
Tasks are:
- Update Item Pricing
- Inactivate Items
- Add Items

When Update Item Price or Inactivate Items is selected, the bottom scrolling window will fill with all of the Item Numbers contained on the selected Price Sheets. The Item Number Lookup button will be disabled. By default, no items will be marked.

If Add Items is selected, the bottom scrolling window will be empty, and the Item Number Lookup will be enabled. The lookup button will open the Add Items window.

The Price Sheet ID Expansion button will open the U of M Pricing Options window and allow editing the Pricing Options for one item selected in the scrolling window. The PRICING button opens the same window, but changes will be applied to all selected items.

Changed added 11/8/07: ACME requested the ability to copy price sheets. A Copy button will be added to the window above. After selecting one or more price sheets, and clicking Copy, the Copy Price Sheets window will open.

Copy				X
Copy				
Old Price Sheet ID	New Price Sheet ID	Start Date	End Date	
SCHEDULE A	SCHEDULE A1	1/1/2008	12/31/2008	

The New Price Sheet ID will be composed of the first 5-characters of the old Price Sheet ID (assuming this is the Customer ID), and appending the End Date (YYYY-MM-DD).

The system will attempt to calculate new Start/End dates by looking at the time frame covered by the Start/End dates for the Old Price Sheet ID. For example, if the previous Start/End covered a 3 month period from 4/1/07 to 6/30/07, it will assume the next Start/End
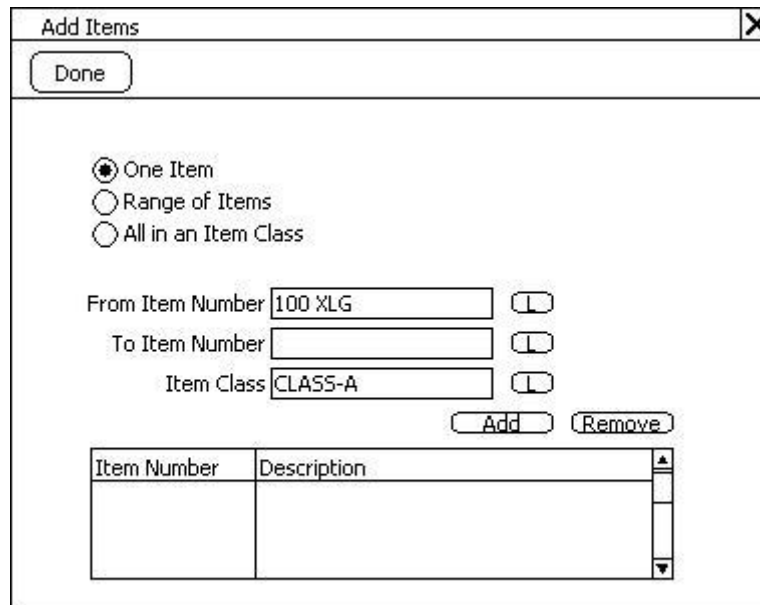
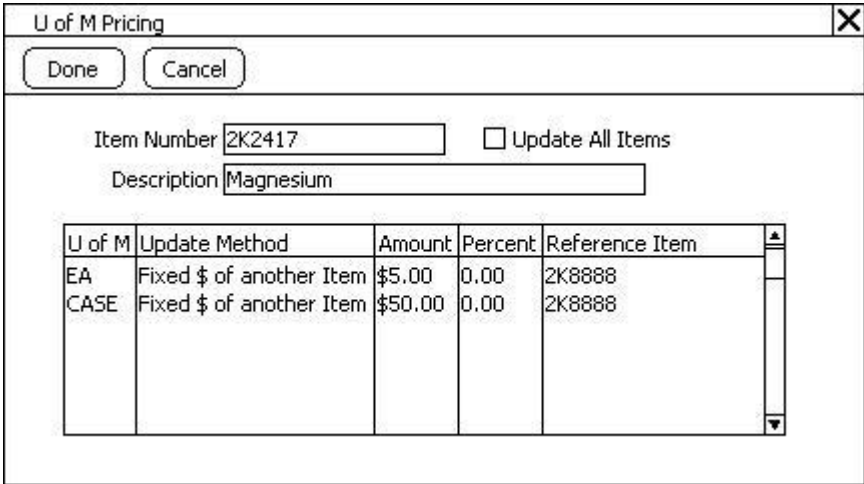|	
will cover a 3 month period starting on the 1st day of the current month. The user can edit New Price Sheet ID, Start Date and End Date before the Copy process creates new Price Sheets. All data from the old Price Sheet(s) will be copied to the new Price Sheets (Price Sheet Assignment, Price Sheet Maintenance, Price Sheet Detail Maintenance, and so on).	

Add Items	CCDA
The Add Items window is only used when the Price Sheet Task is Add Items. The Add Items window provides the ability to add items one at a time, and two different ways to mass add items. Items added to the list here, will be returned to the Price Sheet Update window when the DONE button is clicked.	

U of M Pricing Options	CCDA

The U of M Pricing Options window is used to specify how to change the Pricing for Items marked on the Price Sheet Update window. U of M Pricing Options provides the ability to specify, if desired, different update methods for each U of M on an Item's Unit of Measure Schedule.

```
┌─ U of M Pricing ──────────────────────────────────────[X]─┐
│                                                            │
│  ( Done )  ( Cancel )                                      │
│                                                            │
│      Item Number 2K2417        ☐ Update All Items          │
│      Description Magnesium                                  │
│                                                            │
│   ┌──────┬──────────────────┬──────┬───────┬──────────┬─┐  │
│   │U of M│Update Method     │Amount│Percent│Reference Item│▲│
│   │EA    │Fixed $ of another Item│$5.00 │0.00   │2K8888    │ │
│   │CASE  │Fixed $ of another Item│$50.00│0.00   │2K8888    │ │
│   │      │                  │      │       │          │ │  │
│   │      │                  │      │       │          │▼│  │
│   └──────┴──────────────────┴──────┴───────┴──────────┴─┘  │
│                                                            │
└────────────────────────────────────────────────────────────┘
```

Done returns to the Price Sheet Update window and, if the Update All Items box is marked, applies the U of M Pricing options to all selected items.

Cancel closes U of M Pricing Options window and makes no changes.

Update Method is a drop-down list that has the following options:
- No Change (default option)
- Fixed $ (adds or subtracts a fixed dollar amount from the current Net Price on the Price Sheet)
- Percent (adds or subtracts a calculated dollar amount from the current Net Price, calculated as Net Price * Percent)

- Fixed $ of Other Item (calculates the Net Price of the Item by adding/subtracting a fixed dollar amount to the Net Price of a different Item on the selected Price Sheet) - Percent of Other Item (calculates the Net Price of the Item by adding/subtracting a dollar amount calculated as Net Price of Other Item * Percent).	

Preview	CCDA
The Price Sheet Update Preview window will display before and after information for all items selected for update. Preview Done 	Item Number	Price Sheet ID	U of M	Old Net Price	New Net Price	Old Status	New Status
100XLG	SCHEDULE A	EA	$60.00	$65.00	Active	Active		

Price Sheet History	CCDA
When the Price Sheet Update utility applies changes, it will record the current values of Price Sheet Items. This historical table will record the Time, Date and User that made the change, along with the current value (before change) of the Net Price.	

CHANGE REQUEST	

Description of Change

Description of Need:

ACME needs to be able to mass add items to price sheets based on the price sheet assignment of a similar item. The Each price of the new item will be = to the Each price of the original item, and the Case price will be calculated based on the U of M Schedule for the new item. In addition to
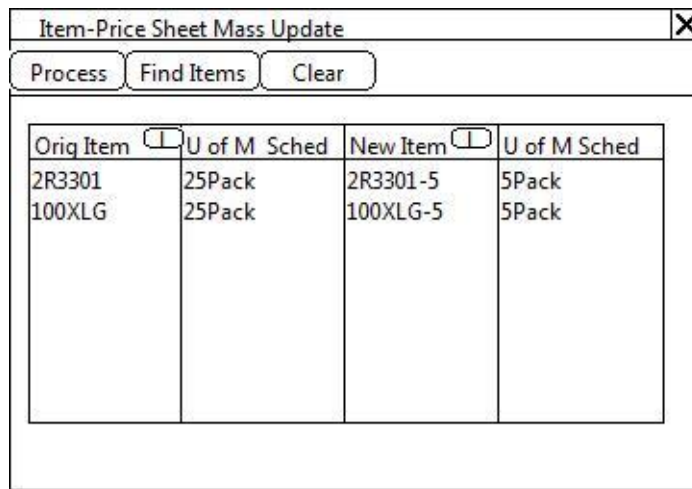
creating the new item, the original item should be inactivated at the same time.

ACME also needs the ability to be able to reactivate the items at a later date.

NOTE: This estimate does not include the commenting out of the changes addressed in V32 and V33.

Description of Solution:

A new window will be added called Item-Price Sheet Mass Update. It will be accessed from Tools >> Utilities >> Inventory >> Item-Price Sheet Mass Update.

Item-Price Sheet Mass Update	X

Process	Find Items	Clear

Orig Item ⬭	U of M Sched	New Item ⬭	U of M Sched
2R3301	25Pack	2R3301-5	5Pack
100XLG	25Pack	100XLG-5	5Pack

⬭ = Lookup

Field	Function
Orig Item	Items returned from the Item Select Query will populate this field. The user has the option to enter or lookup additional

	Item Numbers or remove items from the list.
U of M	The U of M Schedule of the original item will be displayed
New Item	Enter or lookup an Item Number. The item will be validated to make sure it exists in the item master. This is the item that will be added to the Price Sheets.
U of M	The U of M Schedule of the new item will be displayed

Button	Function
Process	Adds the new item to all Price Sheets that the original item exists. The Price of the Base U of M (Each) will be copied to the new Item, and the additional U of M (Case) will be calculated using the qty of the base unit of measure. If the New item already exists in a Price Sheet, it will be skipped.
Find Items	Opens the Item Select Query window where the user can build a selection set to mass add items original items to the scrolling window.
Clear	Clears the scrolling window to start over.

ACME will use this window to link new item numbers to source item numbers. When they are ready to process, the new item will be added to ALL price sheets that already have the original item. The Each price of the new item will be = to the Each price of the original item, and the Case price will be calculated based on the U of M Schedule for the new item.

For example:
An existing Item number of 2R3301 has a U of M Schedule of 25Pack and it exists on 3 Price Sheets as follows:
PriceSheet 111 Each = $1 and Case = $25
PriceSheet 222 Each = $2 and Case = $50
PriceSheet 333 Each = $3 and Case = $75

ACME will create a new item number 2R3301-5 which has a U of M Schedule of 5Pack. When Process is clicked it will add the new item of 2R3301-5 as follows based on original item as shown below.
PriceSheet 111 Each = $1 and Case = $5
PriceSheet 222 Each = $2 and Case = $10
PriceSheet 333 Each = $3 and Case = $15

Activating Items
A new Task will be added to the Price Sheet Update window called Activate Items. This task is used to activate inactive items on the selected Price Sheets.
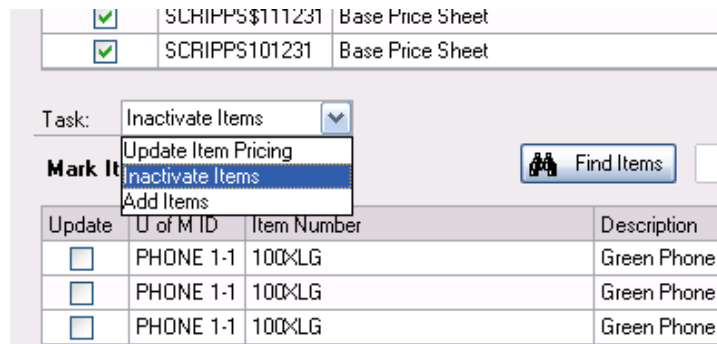
After selecting this Task, select Find Items button to open the Item Select Query and choose the item(s) to activate.

Click Add To Batch when the list is compiled and process the list as the other Tasks are processed.