Omni Price

User Guide

WINTHROP
DEXTERITY CONSULTANTS

http://www.winthropdc.com
info@winthropdc.com

P O Box 4279, Myaree Business Centre
MYAREE WA 6960, Australia

52 Sutherland Crescent
WINTHROP WA 6150, Australia

Telephone: +61 8 9332 9446
Facsimile: +61 8 9332 9464
Mobile: +61 410 499 464

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Chapter 1:   Introduction

Omni Price has been developed to provide a powerful and flexible pricing system to be used with the Invoicing and Sales Order Processing modules of Microsoft® Business Solutions–Great Plains®. It also provides other optional enhancements to the Sales Order Processing module.

Omni Price contains the following component modules:

Module	Description
Core Module	Customer Pricing Module including Contract Maintenance with Pricing Matrix and Customer, Item, Date and Additional Filters
SOP Enhancements	Allow edit of SOP Unit Cost
	Post through SOP Unit Cost
	Restrict by Item Class in SOP
	Pop up Customer Notes in SOP
	Pop up Customer Additional Info in SOP
	Pop up Item Notes in SOP
	Pop up Item Additional Info in SOP
	SOP Lookup Shortcuts

Chapter 2:   Installation

Omni Price is easy to install and register. It should be loaded on each workstation. Omni Price is compatible with Windows 95, Windows 98, Windows NT, Windows 2000 and Windows XP.

The latest version is always available from Winthrop Dexterity Consultants web site's Products page, located at http://www.winthropdc.com.

This chapter contains the following sections:

- *Installing & Registering Omni Price*
- *Registering Omni Price at a later stage*

Installing & Registering Omni Price

Prior to installing Omni Price, close all other applications, including Great Plains, on the workstation. Make sure that no other applications are running in the background or are minimized.

You must install the same version of Omni Price as the version of Great Plains already installed and operating on the workstation. To check the version, launch Great Plains and choose Help >> About Great Plains. If the Dictionary version is not the same, please contact your supplier about obtaining the correct version.

To install Omni Price:

1. Download the appropriate OPRC_XXX.EXE file, where XXX is the correct version number. The executable file is a self-extracting archive containing the chunk (.CNK) file and this manual in Adobe Acrobat (.PDF) format.

2. Double-click on the file, specify the directory where the Great Plains application is installed and choose Unzip.

3.   Start Great Plains. A message will appear asking if you want to include new code. Choose Yes. The About Omni Price window will be displayed and you will get a message asking whether this is a new install of Omni Price. If so, choose New Install and log in. For Great Plains SQL version, you must log in as sa.

Omni Price Installation Wizard:

4.   The Omni Price Installation Wizard will open. Please follow the on-screen instructions to complete the installation. If you want to use the Classic Installation Window, please choose Classic and proceed to Step 11.
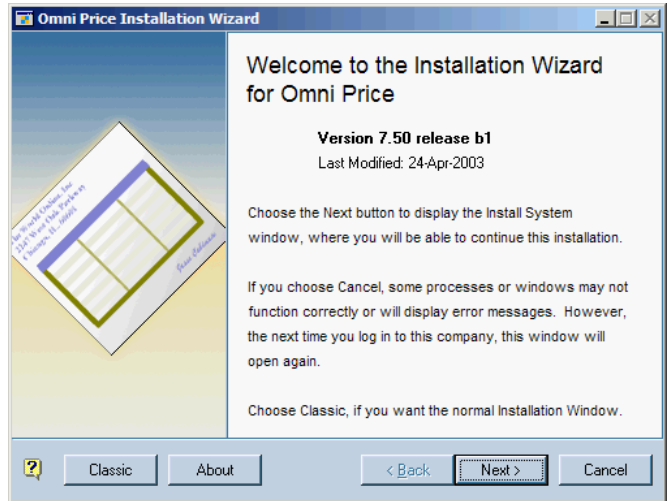
5.   Please select the Registration Mode you wish to use. If you have permanent Registration Keys, please select the first option. If you have trial (date limited) Registration Keys, please select the second option. If you do not have any Registration Keys, please select the third option which will allow the system to work for the Lesson Company only. If you have selected the third option, please proceed to Step 7.
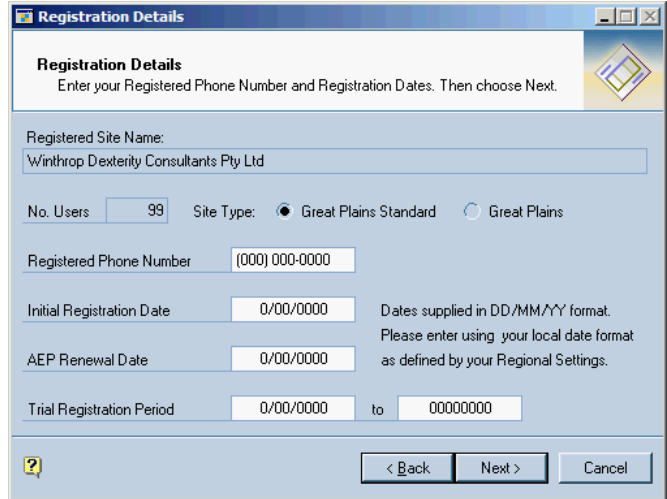
If your Great Plains system is not registered, you will only be able to select the third option; Registered for Lesson Company only.
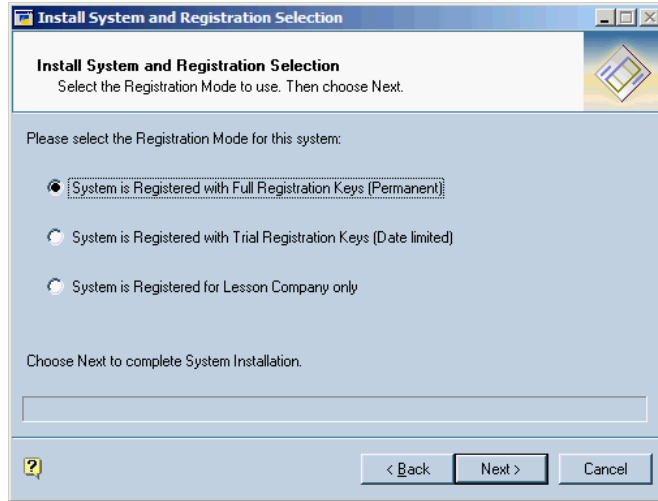
6. Your Registered Site details will now be shown, please enter your Registered Phone Number and the Registration and AEP (Annual Enhancement Plan) dates. If you are using Trial Registration Keys, please enter the start and end dates of your trial period.

7. Please select the modules to register or activate. If entering Registration Keys, the modules must match the modules registered on the keys. If registering for Lesson Company only, you may select any or all modules, then proceed to Step 9.

8. Please enter the Registration Keys as supplied by Winthrop Dexterity Consultants. If there is a problem Registering the system you will get a warning message and then be able to correct the problem. Please see the F.A.Q. on http://www.winthropdc.com if you continue having problems registering your system.
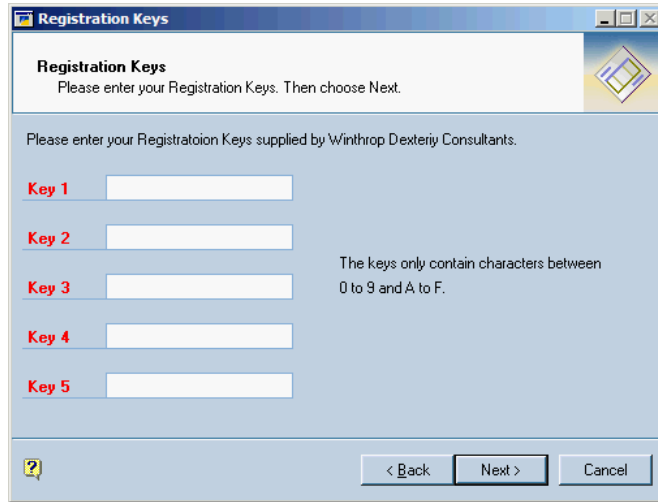
9. Finally, you may have the option to apply security changes for Alternate Windows and Reports and then can complete the installation for this Company.
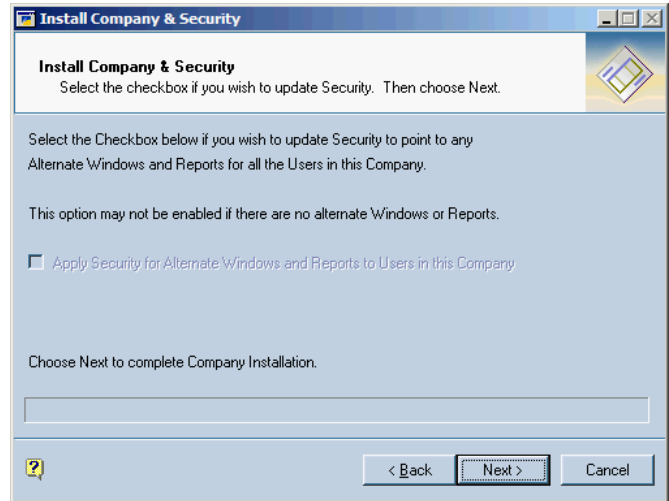
10. You have completed the installation for the current company. If you have more companies you need to install Omni Price into, please select the first option and login to the next company. If you have completed all the companies required, please select either the second or third option. It is recommended to exit and re-launch Great Plains after you have completed the installation.
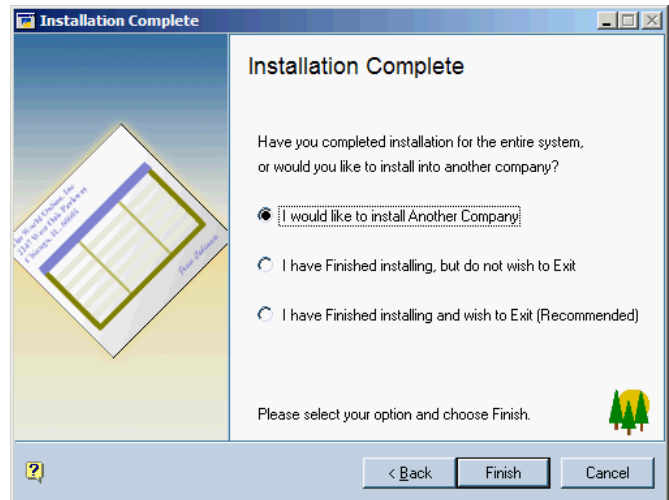
Omni Price Installation Window:

1. You can also use the Omni Price Install window to install manually. In this window, you must complete several tasks at both a System and Company level. You may choose the Wizard button to return to the Installation Wizard at any time.
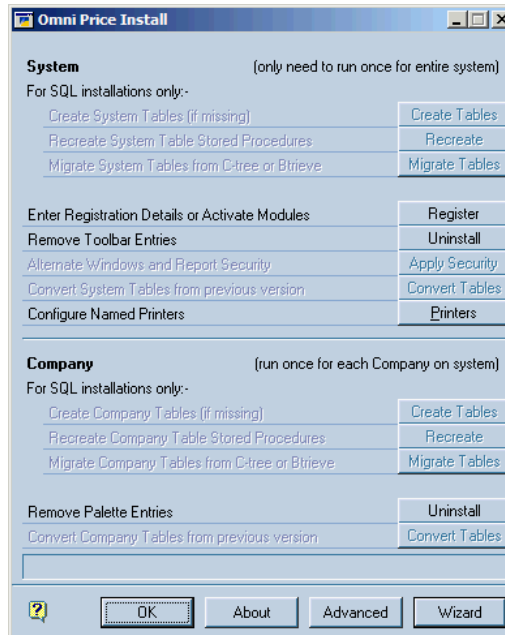
The System steps only need to be completed once for the entire System. The Company steps must be completed for each company.

2. For Great Plains SQL version only, choose to Create System Tables. Once complete you will be notified that access to the SQL tables has been granted automatically.

To register Omni Price:

3. Choose Register from the Omni Price Install window to open the Omni Price Registration window. This window is used to enter or request the Registration information.

⚠️ *Even if you do not have Registration Keys you must use this window to activate the modules you plan to trial.*

4. If you already have Registration Keys, please enter them now and activate the appropriate modules.

5. If you do not have keys and wish to request some, please fill in your Registered Phone number and the modules you wish to use and Print the Request Form.

6. If you do not have keys and wish to trial the software with the lesson company, The World Online, Inc., please just activate the modules you wish to trial.

7. Select OK to return to the Install window

To complete the Omni Price installation:

8.   Choose the System Install button to add Toolbar and System Path Entries. This will add the required Toolbar changes to the system.

9.   Choose to Apply Security to Alternate Forms and Reports, if required. This will adjust the security information for all users to use the Alternate Forms and Reports

10. For Great Plains SQL version only, choose to Create Company Tables. Once complete you will be notified that access to the SQL tables has been granted automatically.

11. Choose the Company Install button to add Palette and Company Path Entries. This will add the Omni Price items to the company's palettes.

12. Choose OK. You will be asked whether you want to install this product for another company. If so, choose Another and login to the next company, or if you are done, choose Finish.

Registering Omni Price at a later stage

If you have installed Omni Price to trial with The World Online, Inc. and have now purchased Registration Keys, use the following steps to enter them into Omni Price.

1. Choose Help >> About Great Plains, then choose Extras >> About Omni Price to open the About Omni Price window.

2. Select the Install button to open the Omni Price Install window, then press the Register button to open the Omni Price Registration window.

3. Follow the steps earlier in this chapter to enter the Registration Keys.

You do not need to re-install, but it is recommended to download and install the latest version from the Winthrop Dexterity Consultants Web Site.

Chapter 3: Using Omni Price Customer Pricing

When Omni Price has been installed, the features listed below are activated in the Omni Price Registration window as the Core Module.

This chapter includes the following sections:

- *Omni Price Setup*
- *Contract Maintenance with Pricing Matrix*
- *Customer Filter*
- *Item Filter*
- *Date Filter*
- *Additional Filter*
- *Price Check*
- *Price List Report*
- *Transaction Logging*
- *Omni Price Control Panel*

Omni Price Setup

The Omni Price setup window is used to activate the Customer Pricing System and set some system wide options for the Customer Pricing System. Use Cards >> Omni Price >> Setup Omni Price to open the window below.
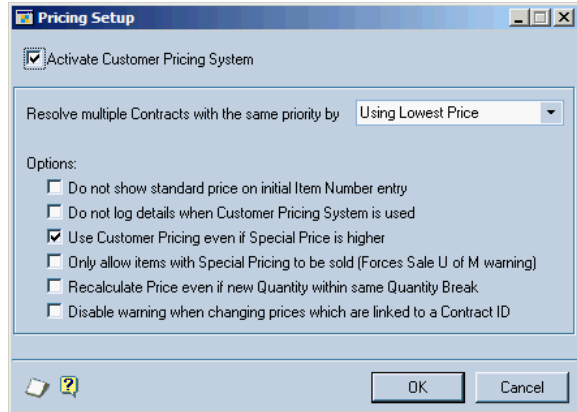
Once the Customer Pricing System is activated you can control the following options:

Resolve multiple Contracts with the same priority

When two or more contracts are valid for a particular sale of an item, Omni Price uses the Contract Priority to select the contracts with the highest priority. If there are two or more contracts valid at this highest priority, this setting tells Omni price which contract to use. The default is to use the lowest price.

Do not show standard price on initial Item Number entry

When entering an Item Number into a transaction, it initially shows a default price for its base unit of measure for a quantity of 1. After the actual unit of measure or quantity is entered, the final price is calculated. Check this option if you want the initial price to be set by Omni Price rather than just show the standard price.

Do not log details when Customer Pricing System is used

Omni Price has the ability to log the pricing information every time it changes a price. Check this option if you do not want this transaction logging active. See the section later in this chapter for more information.

Use Customer Pricing even if Special Price is higher

Once Omni Price has calculated a Special Price for an item, it will (by default) only use that price if it is lower than the standard pricing. It is working on the assumption that if you have a sale of an item that brings a price lower than an agreed Special Price, that you would want the lower sale price used. Check this option if you wish to force the agreed Special price regardless.

Only allow items with Special Pricing to be sold

Check this option if you wish to only be allowed to sell items which have a valid Omni Price contract. Once this option is selected, any item which does not get its price from the Customer Pricing System will generate a "Sales are not allowed in this unit of measure" error.

Recalculate Price even if new Quantity within same Quantity Break

Check this option if you wish Omni price to always recalculate price when Quantity changes. This will overwrite manually edited Unit Prices.

Disable warning when changing prices which are linked to a Contract ID

If you manually change the unit price or markdown amount or percentage for a line which is linked to a Contract ID, the system will now remove the link as this is no longer the contracted price. By default, you will receive a warning that this will happen and can decide not to continue. Check this option disable the warning when you manually change the unit price or markdown of a line item.

Contract Maintenance with Pricing Matrix

Omni Price works by having a number of Contracts created by the user. When a price is required, all the relevant information is compared and the valid contracts are selected. From the valid contracts only the contracts with highest Contract Priority are processed to obtain the final price. Whether the highest or lowest price is selected when there is more than one contract at the highest priority is controlled by the Omni Price setup.

Use Cards >> Omni Price >> Contract to open the Contract Maintenance window. This window is the core window to the Customer Pricing System; from here you can describe the behavior of the Contract as well as what selections it will be valid for, and what pricing changes you want for various items.

The Contract Maintenance window is divided into 2 sections; the Contract description and selection information and the Pricing Matrix. The Contract description includes the Contract ID, Description, Priority, Active Modules and the Markdown Mode. The Contract selection includes how Customers, Items, Dates and Transactions are selected. The Pricing Matrix is then used to specify what pricing methods and prices should be applied to which items.

Creating a Contract

1. Enter a Contract ID and Description for this contract.

2. Select the Active Modules; you can use Shift and Ctrl to multi-select. Note that you can temporarily de-activate a contract by using Ctrl with a mouse click to unselect all modules.

3. Select a Contract Priority. This is used to resolve situations where more than one contract is valid. Only contracts with the highest Contract Priority will be processed to obtain the final price.

4. Select a Markdown Mode. This controls how the Special Price is implemented. You may select from the following 5 options:

No Markdown, alter Unit Price
    In this mode the Unit Price is altered so that the Special Price is implemented transparently.

Use Markdown Amount, default Account
    In this mode the Unit Price is left unchanged and the effective Unit Price is altered by the addition of a Markdown Amount. This amount is distributed to the default Markdown Account.

Use Markdown Amount, specified Account
    In this mode the Unit Price is left unchanged and the effective Unit Price is altered by the addition of a Markdown Amount. This amount is distributed to the account specified in the Markdown Account field.

Use Markdown Percent, default Account

In this mode the Unit Price is left unchanged and the effective Unit Price is altered by the addition of a Markdown Percentage. The actual Markdown Amount is distributed to the default Markdown Account.

Use Markdown Percent, specified Account

In this mode the Unit Price is left unchanged and the effective Unit Price is altered by the addition of a Markdown Percentage. The actual Markdown Amount is distributed to the account specified in the Markdown Account field.

Note that due to rounding options and various other factors, a percentage entered into the Pricing Matrix may not flow through exactly to the Markdown Percentage.

5. Choose your Customer Selection mode from the following 3 options:

All Customers

In this mode the contract will be applied against all customers in the system.

Specified Customer

In this mode the contract will only be applied against the customer specified in the Customer ID field.

Use Customer Filter

In this mode the contract will be applied against all customers that meet the restrictions described in the Customer Filter specified in the Customer Filter ID field. See the following section for more information on creating a Customer Filter.

6. Choose your Item Selection mode from the following 3 options:

All Items

In this mode the contact will be applied to all items in the system.

Use Item Filter for all items

In this mode the contract will be applied against all items that meet the restrictions described in the Item Filter specified in the Item Filter ID field. If an item is specified in the Pricing Matrix and it is not contained in the Item Filter it will be ignored. See the following section for more information on creating an Item Filter.

Use Item Filter for non specified items

In this mode the contract will be applied against all items that meet the restrictions described in the Item Filter specified in the Item Filter ID field. However, now items which are not contained in the Item Filter can be specified in the Pricing Matrix and will not be ignored.   See the following section for more information on creating an Item Filter.

7.   Choose your Date Selection mode from the following 2 options:

No Date Restrictions

In this mode the contact will be applied regardless of the Document Date.

Use Date Filter

In this mode the contract will only be applied if the Document Date falls within the Date Filter specified in the Date Filter ID field. See the following section for more information on creating a Date Filter.

8.   Choose your Additional Selections mode from the following 2 options

No Additional Restrictions

In this mode the contract will be applied regardless of the values of certain fields stored against the transaction.

Use Additional Filter

In this mode the contract will only be applied if the values of certain fields stored against the transaction meet the restrictions described in the Additional Filter specified in the Additional Filter ID field. See the following section for more information on creating an Additional Filter.

9. Enter the pricing changes required into the Pricing Matrix. See the following section for more information.

10. Press the Options button to configure the optional rounding information. Press OK when you have finished

11. Press the Save Button to save the completed contract.

While you have a contract displayed, you can use the Print Button to print out the setup of that contract. You can also use the Duplicate Button to copy the current contract to another Contract ID. Drilling down on the Contract ID will open the Contract Enquiry window.

Pricing Matrix

The Pricing Matrix is the bottom half of the Contract Maintenance window. It is used to describe exactly what price changes are required for this contract. The tree on the left hand side can be used to change the view of the Pricing Matrix to only show a subset of all the items included in the list on the right hand side. You can use the view button at the top of the tree to change the way in which the tree expands. The Remove button at the bottom of the tree can be used to delete all lines currently being displayed, depending on the selection made in the tree.

▼	by Item	Item Number			Pricing Mode		Percentage	Adjustment/Price
	US PHONE XMAS	Site ID		Currency ID	Price Level	U of M	All	Start Quantity	End Quantity
	All Items				% of Calculated Price	▼	80.00%	$0.00
	All Sites					☑	0	0
	All Currencies	100XLG			Fixed Adjustment	▼	0.00%	($20.00)
	All Levels	NORTH				☐	1	500
	All Units	100XLG			Fixed Price	▼	0.00%	$50.00
	100XLG	NORTH				☐	501	999,999,999,999
	NORTH	100XLG			% Discount - List Price	▼	10.00%	£0.00
	All Currencies	NORTH	Z-UK			☑	1	999,999,999,999
	Remove							

If the Item Number, Site ID, Currency ID, Price Level or Unit of Measure fields are left blank, that line will apply for all values of the fields left empty.

Entering lines in the Pricing Matrix

1. Select an Item Number. If you leave the Item Number blank this line will be applied to all items or all items contained in the Item Filter if one is specified. If you enter an Item Number, you can override settings on lines where no item number is entered. Whether the item must be included in the Item Filter is controlled by the Item Selection mode.

2. Select a Site ID, Currency ID, Price Level. If any of these fields are left blank, the line will be applied to all values of the blank field.

3. If you have specified an item, you may enter a Unit of Measure to limit this line. If the Unit of Measure field is left blank, the line will be applied against the base Unit of Measure for that item and then adjusted accordingly for the Unit of Measure used in the transaction.

4. Change the Quantity Breaks by changing the End Quantity. A new line will automatically be created so that the complete range of quantities is maintained. To remove all the quantity breaks just check the All Checkbox.

5. Select a Pricing Mode from the 13 available options:

Fixed Price
> The price to be used is specified directly.

Fixed Adjustment
> The price calculated by Great Plains is adjusted up or down by the specified amount. Use negative amounts to decrease the price.

% of Standard Cost
> The price is calculated as a percentage of the Standard Cost. 100% is equal to the Standard Cost.

% of Current Cost
> The price is calculated as a percentage of the Current Cost. 100% is equal to the Current Cost.

% of List Price
> The price is calculated as a percentage of the List Price. 100% is equal to the List Price.

% of Calculated Price
> The price is calculated as a percentage of the price calculated by Great Plains. 100% is equal to the calculated price, so there will be no change.

% Markup - Current Cost
> The price is calculated as a percentage markup on the Current Cost.

% Markup - Standard Cost
> The price is calculated as a percentage markup on the Standard Cost.

% Margin - Current Cost
> The price is calculated to obtain a percentage margin on the Current Cost.

% Margin - Standard Cost
> The price is calculated to obtain a percentage margin on the Standard Cost.

% Discount - List Price
> The price is calculated as a percentage markdown or discount on the List Price.

% Discount - Calculated Price
> The price is calculated as a percentage markdown or discount on the price calculated by Great Plains.

No Special Price
> No change to the price calculated by Great Plains. This mode should be used to leave the price unaltered when only certain quantity breaks have a special price.

6. Enter the Percentage or Adjustment/Price fields as appropriate.

When no item number or currency has been specified for a line, the number of decimal places for amounts and quantities is controlled by the drop down lists at the bottom of the window under the Pricing Matrix.

Contract Enquiry

Omni Price includes a number of multi dimensional enquiry windows for viewing the configuration of contracts and filters. Use Enquiry >> Omni Price >> Contract to open the Contract Enquiry window. The Contract Enquiry window has three view modes; by Contract; by Customer and by Item.
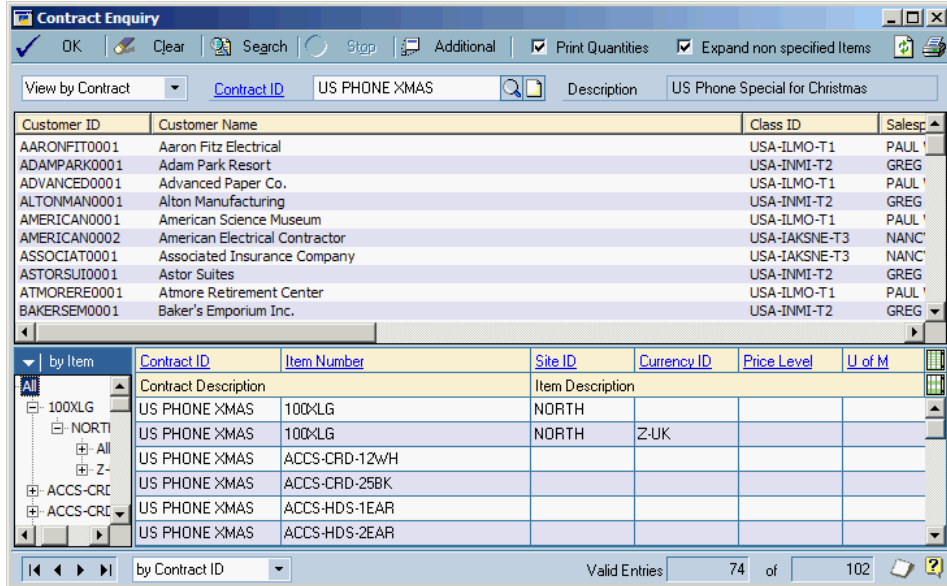
In by Contract mode, when a contract is selected you will be shown all the customers for which the contract is valid and all the items for which the contract is valid.

In by Customer mode; when a customer is selected you will be shown all the contracts which are valid for the customer and all the items on those contracts.

In by Item mode; when an item is selected you will be shown all the contracts which contain that item and the details for that item.

If you select a contract, customer or item before changing the view mode, it will be automatically used as the initial value to that view.

If you have a non specified item (blank item number in the Pricing Matrix), select the Expand non specified Items checkbox to show a record for each item in the Item Filter.

You may also use the tree in the bottom left hand side of the window in the same manner as the tree in the Pricing Matrix to limit the records shown in the list on the bottom right hand side.

Double clicking on an item in the list of items will open a window to show the quantity breaks and pricing details.

All	Start Quantity	End Quantity	Pricing Mode	Percentage	Adjustment/Price
☐	1	500	Fixed Adjustment	0.00%	($20.00)
☐	501	999,999,999,999	Fixed Price	0.00%	$50.00

Contract ID	Item Number	Site ID	Currency ID	Price Level	U of M
US PHONE XMAS	100XLG	NORTH			

The Additional Button can be used to specify additional information to restrict the contract enquiry by.
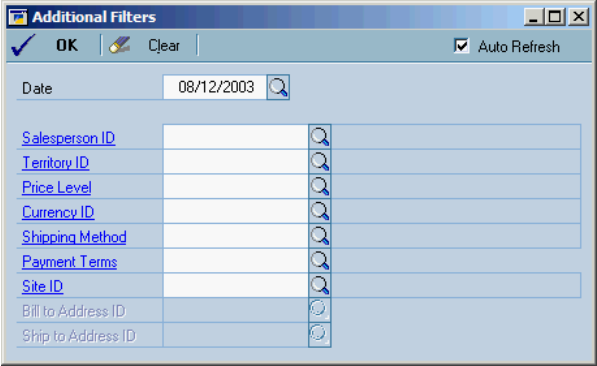
The Print Button in the top right of the window can be used to print whatever is currently displayed in the window. Check the Print Quantities checkbox to include the quantity breaks and pricing details in the report.

Customer Filter

The Customer Filter window can be opened by drilling down from the Contract Maintenance window or by selecting Cards >> Omni Price >> Customer Filter. The Customer Filter is used to create a subset of all the customers in the system based on certain criteria. It works like a standard Great Plains report restriction window.

Customer Filters can have restrictions applied on the following fields: Customer ID, Customer Name, Class ID, Salesperson ID, Territory ID, Price Level, Default Currency ID, Shipping Method, Payment Terms, User Defined 1 & 2, City, State, Zip or Postal Code, Country, Carrier Zone and Created Date.
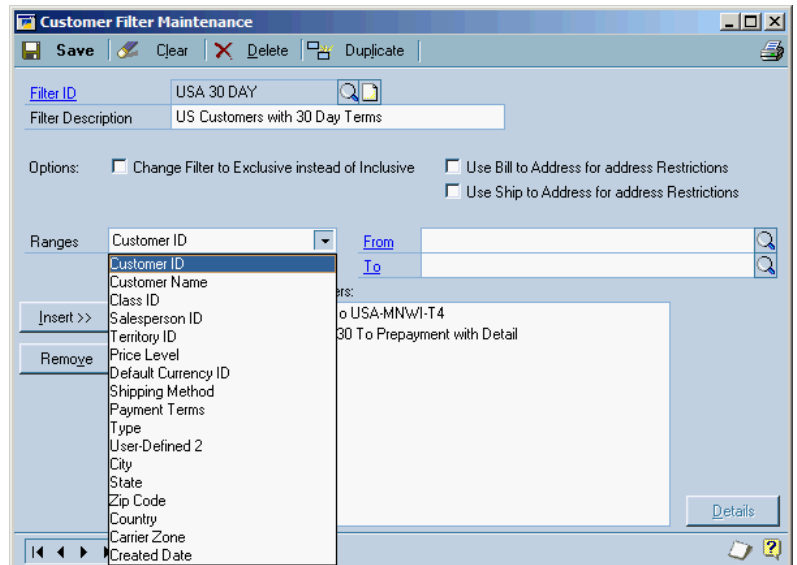
The Customer Filter can be swapped to exclude the selected customers using the Change Filter to Exclusive instead of Inclusive option.

Also when using address based restrictions you can select to use the Customer's Bill to Address or Ship to address using the Use Bill to Address for address restrictions or Use Ship to Address for address restrictions options, leaving both options uncheck will use the Customer's primary address.

While you have a Customer Filter displayed, you can use the Print Button to print out the setup of that filter. You can also use the Duplicate Button to copy the current filter to another Filter ID. Drilling down on the Customer Filter ID will open the Customer Filter Enquiry window.

Intra range selection is available for most of the ranges on the Customer Filter; see the section below for more information.

Intra Range Selection

Intra range selection is the ability to selection records within the selected start and end values of a range added as a restriction. This feature is available on most ranges available on the Customer Filter, Item Filter and Additional Filter windows.

Using Intra Range Selection

1. Insert a restriction into the filter ensuring that the range selected includes all possible values that you may wish to include.

2. Click on the newly added restriction in the list of restrictions and if intra range selection is available the Details Button will become enabled.

3. Click on the Details Button, Item Filter and Additional Filter to open the details window.

4. Select the records within the range that you want included. You may also use the Mark All, Unmark All and Invert All buttons to change the selections. If the list of records shown is long, you can use the Find button to jump to a particular location in the list.

5. Once you have completed your selections press the OK button. Now the restriction in the list of restrictions will show as having detail.

Customer Filter Details

✓ **OK** | Mark All | Unmark All | Invert All | Find

| Filter ID | USA 30 DAY |
| Filter Description | US Customers with 30 Day Terms |

	Please select Detailed Range Restriction (Unmark All to remove Detail)
☑ 2% 10/Net 30	
☐ 2% EOM/Net 15th	
☑ 2% EOM/Net 30	
☑ 3% 15th/Net 30	
☐ C.O.D.	
☐ Cash	
☐ Check	
☐ Credit Card	
☐ Due 20th	
☐ EOM	
☑ Net 30	
☐ Prepayment	

⚠ *If no records are selected when the OK button is pressed, the details will be removed and all records in that range will be valid*

Customer Filter Enquiry

The Customer Filter Enquiry window is opened from Enquiry >> Omni Price >> Customer Filter. It can be used to identify which customers are included with a particular Customer Filter and which Customer Filters a particular customer belongs to.
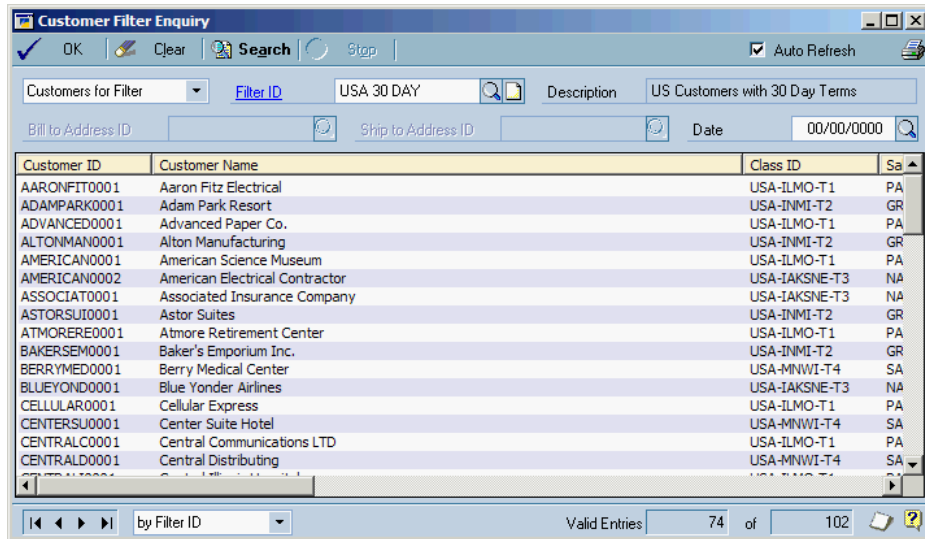

If you select a customer filter or a customer before changing the view mode, it will be automatically used as the initial value to that view.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

Item Filter

The Item Filter window can be opened by drilling down from the Contract Maintenance window or by selecting Cards >> Omni Price >> Item Filter. The Item Filter is used to create a subset of all the items in the system based on certain criteria. It works like a standard Great Plains report restriction window.

Item Filters can have restrictions applied on the following fields: Item Number, Item Description, Short Description, Generic Description, Item Class, User Categories 1 to 6, Product Group & Subgroup (see following section), Price Group, Price Level, Currency ID, Site ID, Unit of Measure Schedule, Unit of Measure and Created Date.
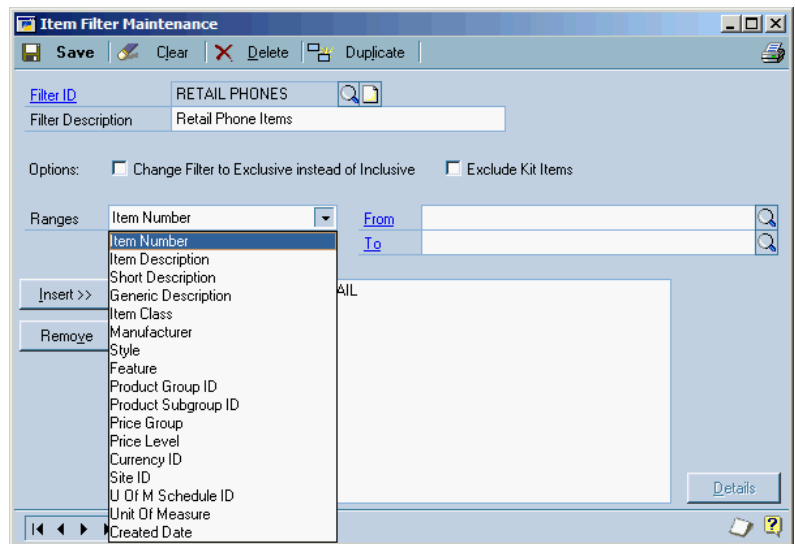
The Item Filter can be swapped to exclude the selected items using the Change Filter to Exclusive instead of Inclusive option. Also you have the option of excluding Kit items using the Exclude Kit Items option.

While you have an Item Filter displayed, you can use the Print Button to print out the setup of that filter. You can also use the Duplicate Button to copy the current filter to another Filter ID. Drilling down on the Item Filter ID will open the Item Filter Enquiry window.

Intra range selection is available for most of the ranges on the Item Filter; see the section above for more information.

Product Groups

Great Plains has Item Classes and Price Groups as a method of group similar items. However, these are also used for other purposes such as assigning accounts or pricing. Omni Price offers Product Groups and Product Subgroups as a method of grouping items with a 2 level hierarchy. This hierarchy can then be used with an Item Filter to help with the selection of items.

Open the Product Group Setup window using Cards >> Omni Price >> Product Group Setup.
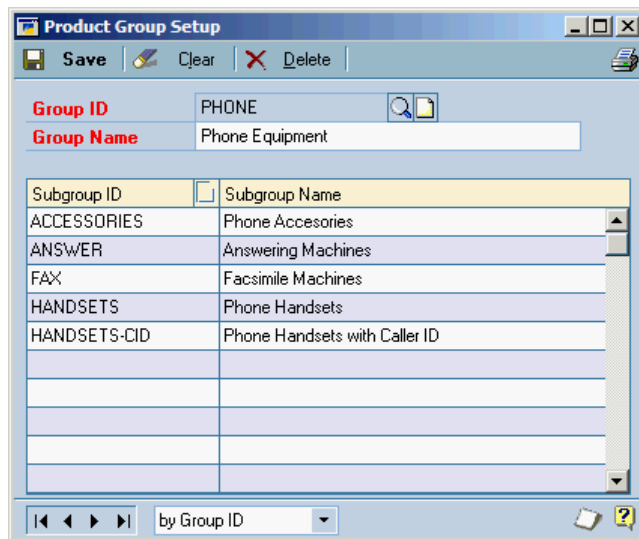
Enter a Group ID and Group Name and then enter as many Subgroup IDs and Subgroup Names as required. Press the Save button once you are finished. You can print the completed setup with the Print Button.

Once you have set up your Product Groups and Product Subgroups you can assign items using the Item Product Maintenance window, which is accessed from Cards >> Omni Price >> Item Product Setup.
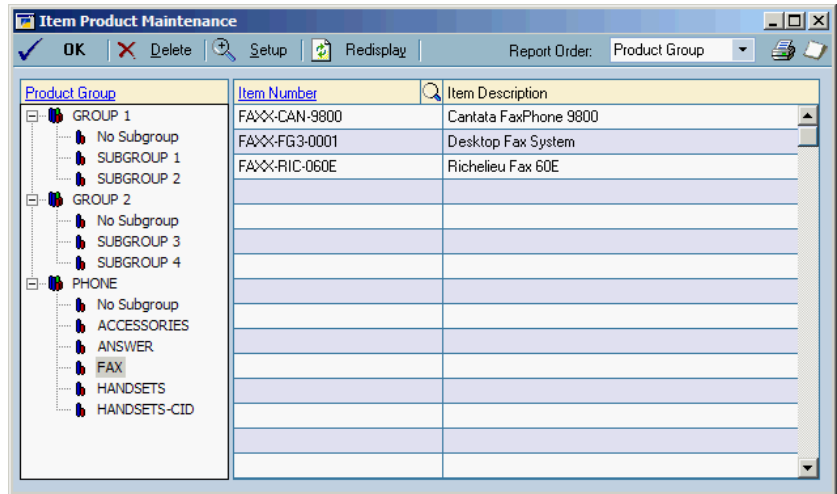
Using this window you can assign items directly to a Group ID (with no Subgroup) or to a Subgroup ID. You can use the tree to only view items in a single Product Group or Product Subgroup. Use the Print Button to print the completed setup.

Item Filter Enquiry

The Item Filter Enquiry window is opened from Enquiry >> Omni Price >> Item Filter. It can be used to identify which items are included with a particular Item Filter and which Item Filters a particular item belongs to.
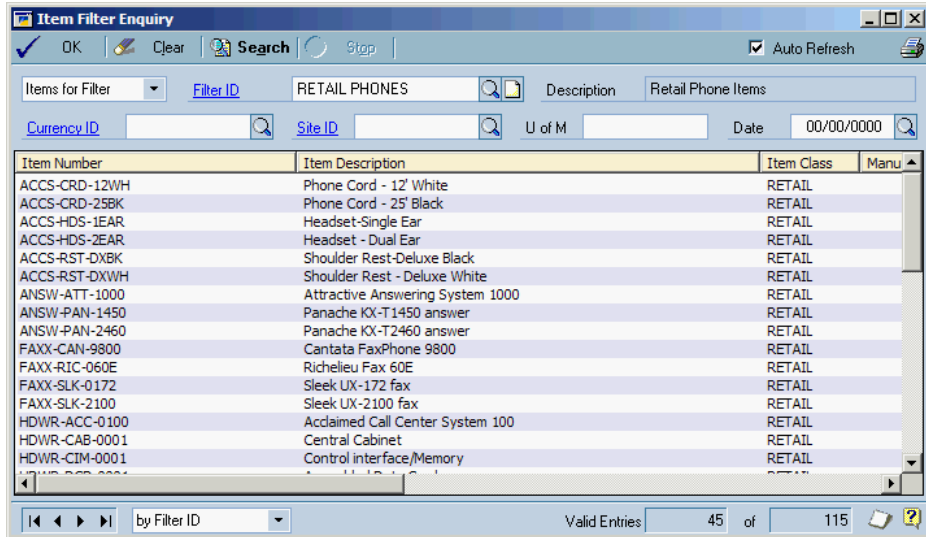
If you select an item filter or an item before changing the view mode, it will be automatically used as the initial value to that view.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

Date Filter

The Date Filter window can be opened by drilling down from the Contract Maintenance window or by selecting Cards >> Omni Price >> Date Filter. The Date Filter is used to create a selection of dates for which a contract is valid.   It works like a standard Great Plains report restriction window.

Date Filters can have the dates selected by using an Effective Date Range, up to 4 Additional Date Ranges and Days of the Week.   The Effective Date Range can be selected by entering dates or by using the token dates to work with months, periods or years.
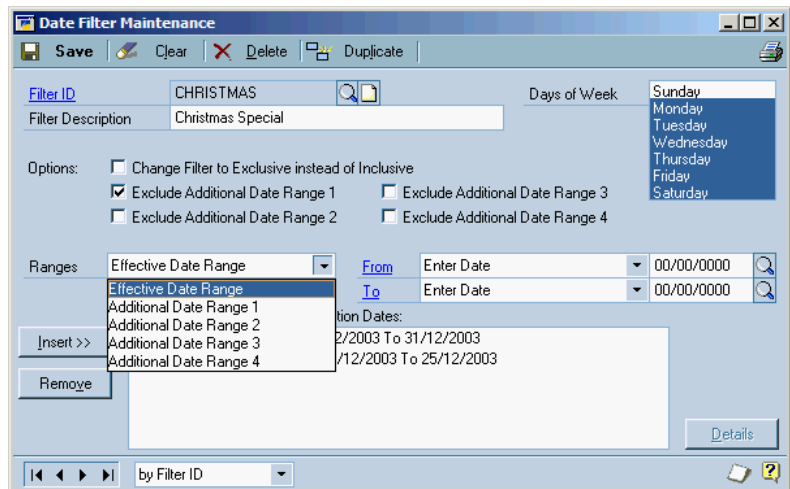
The Date Filter can be swapped to exclude the selected dates using the Change Filter to Exclusive instead of Inclusive option.

Also the Additional Date Ranges can be used to create another range of valid dates or to exclude a range of dates from the Effective Date Range using the Exclude Additional Date Range options.

While you have a Date Filter displayed, you can use the Print Button to print out the setup of that filter. You can also use the Duplicate Button to copy the current filter to another Filter ID. Drilling down on the Date Filter ID will open the Date Filter Enquiry window.

No intra range selection is available for this filter.

Date Lookup

Everywhere Omni Price asks for a date to be entered you will find a lookup button. Using the lookup button will open the following Date Lookup which you can use to select your dates from a calendar style interface.
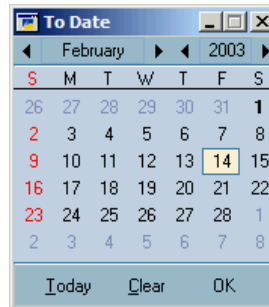
Date Filter Enquiry

The Date Filter Enquiry window is opened from Enquiry >> Omni Price >> Date Filter. It can be used to identify which dates are included with a particular Date Filter and which Date Filters contain a specified date.
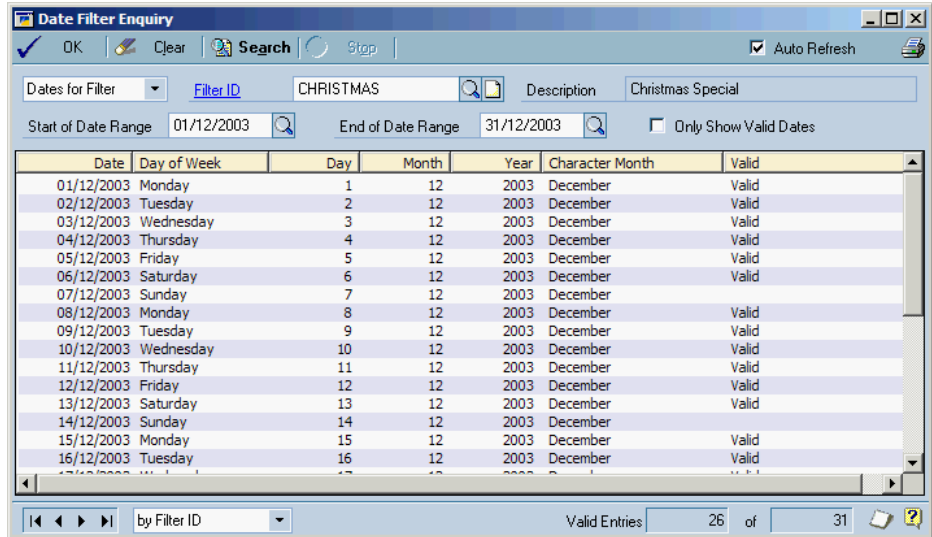
If you only wish to see valid dates in the list, please check the Only Show Valid Dates option.

If you select a date filter or a date before changing the view mode, it will be automatically used as the initial value to that view.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

Additional Filter

The Additional Filter window can be opened by drilling down from the Contract Maintenance window or by selecting Cards >> Omni Price >> Additional Filter. The Additional Filter is used to restrict the transactions that a contract is valid for based on certain criteria. It works like a standard Great Plains report restriction window.

Additional Filters can have restrictions applied on the following fields: Salesperson ID, Territory ID, Price Level, Currency ID, Shipping Method, Payment Terms and Site ID. Note that these are compared to the fields on the actual transaction and not to fields on the Customer master records.
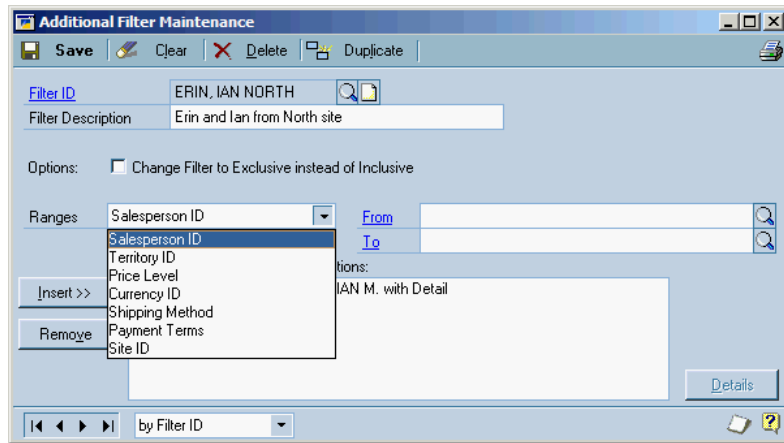
The Additional Filter can be swapped to exclude the selected transactions using the Change Filter to Exclusive instead of Inclusive option.

While you have an Additional Filter displayed, you can use the Print Button to print out the setup of that filter. You can also use the Duplicate Button to copy the current filter to another Filter ID. Drilling down on the Additional Filter ID will open the Additional Filter Enquiry window.

Intra range selection is available for most of the ranges on the Item Filter; see the section above for more information.

Additional Filter Enquiry

The Additional Filter Enquiry window is opened from Enquiry >> Omni Price >> Additional Filter. It can be used to identify which of the various field values are contained in an Additional Filter and which Additional Filters are valid for a particular field value.
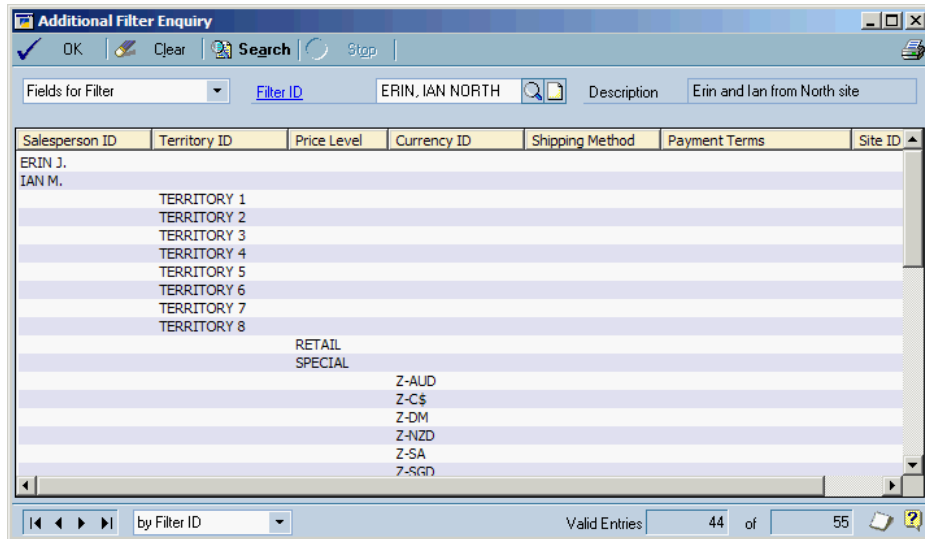
If you select an additional filter or a field value before changing the view mode, it will be automatically used as the initial value to that view.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

Price Check

Omni Price has the ability to confirm an individual item's price using the Price Check window. This window can be opened by selecting Extras >> Customer Pricing – Price Check from the Invoicing or Sales Order Processing transaction window or by using Transactions >> Omni Price >> Price Check.

The Price Check window allows you to enter all of the information that the Customer Pricing module is sensitive to and will display all the valid contracts as well as which contract (if any) was selected to obtain the final price.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

Price List Report

If you wish to obtain a Customer Price List which includes the special pricing for Omni Price, use Reports >> Omni Price >> Price Lists to open the Price List Maintenance window.

This window can be used to specify the criteria to be used by Omni Price to calculate the pricing and to select the Items and Item Types to be included on the report.

You can use an Item Filter ID to limit the items selected for the Price List report. However, the best performance can be gained if you can limit the items to be processed using the Start Item Number and End Item Number.

There are a number of checkbox options which can be set to control how the report prints, below is a description of each one.

Show Only Specified Price Level on Price List

This option restricts the Price List to only show Price Levels which match the Price Level specified. Usually you would only want to show the information for the Customer's default Price Level.

Show Only Specified Currency ID on Price List

This option restricts the Price List to only show currencies which match the Currency ID specified. Usually you would only want to show the information for the Customer's default currency.

Show Only Items with Special Pricing on Price List

This option will restrict the Price List to only include items which have a valid special price defined in Omni Price.

Show Original Price and Contract ID on Price List

This option will include the Original Price, Discount and the Contract ID used on the Price List. This is useful to check the Price List before sending a version to the customer with this option unchecked.

Show Only Lowest Quantity on Price List

This option will only show the first quantity break on the Price List report. If you use lots of Quantity Breaks you might want to simplify the report with this option.

Show Standard Pricing Quantity Breaks on Price List

This option controls whether the Quantity Breaks from Standard Pricing are shown on the Price List Report.

Show Special Pricing Quantity Breaks on Price List

This option controls whether the Quantity Breaks from the Special Pricing are shown on the Price List Report. If this option and the option above are both selected the Quantity Breaks on the Price List will be a combination of both sets of Quantity Breaks.
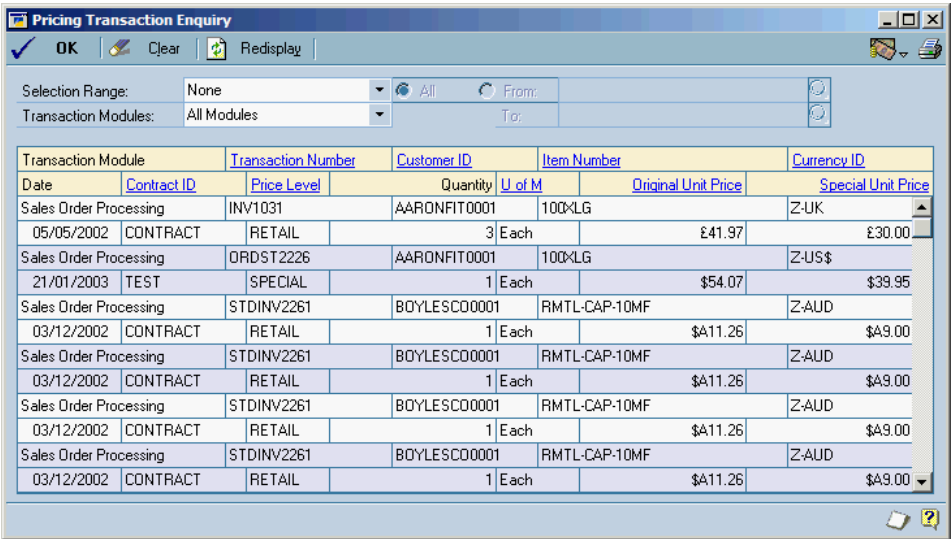
Show Only Base Unit Of Measure on Price List

This option allows you to simplify the Price List report by limiting it to only show the base Unit of Measure for an item.

Once all the settings and options are selected, use the Print Button to start the Report Processing. You can use the Duplicate Button to copy the current Price List setup to another Price List ID.

Transaction Logging

By default Omni Price will log every time it applies a special price to a transaction. This option can be disabled in the Omni Price Setup. To view the Transaction Log use Enquiry >> Omni Price >> Pricing Transactions to open the Pricing Transaction Enquiry window.

In this window you can choose the order you wish to see the data and also limit the records shown using the Selection Range.   You also limit transactions to a particular module in the sales series.

The Print Button in the top right of the window can be used to print whatever is currently displayed in the window.

The Transaction Log will continue to grow as time goes on. Records are removed if the associated transaction is removed from the system, however, you can also manually remove the history.

Use Routines >> Omni Price >> Remove History to open the Remove Pricing History window.
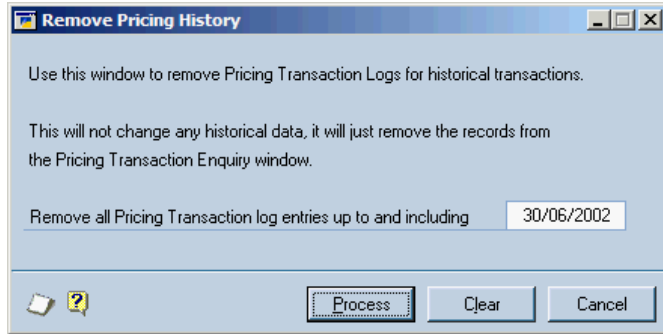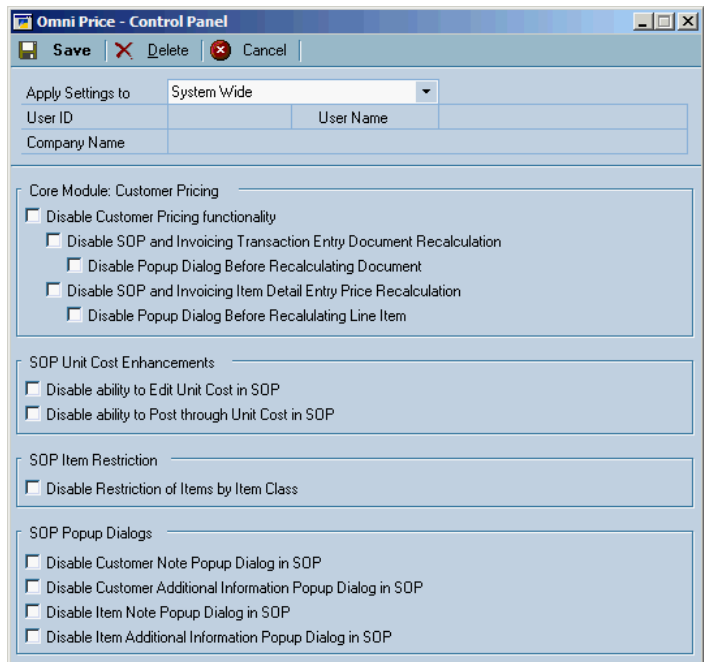
To use this window, enter a date and press the process button. This will permanently remove all Transaction Log records up to and including the specified date. It does not affect any other standard Great Plains tables.

Omni Price Control Panel

The Omni Price – Control Panel allows the configuration of many of the additional features offered by the various modules of Omni Price.

The Control Panel settings can be applied to 4 levels; System Wide, All Users of the current Company, All Companies for the current User, and for a specific User and Company combination.

The order of priority is the reverse of the levels listed here. For example: Settings for a specific User and Company will be used before System Wide defaults are used.

Chapter 4: Using Omni Price Additional Features

When Omni Price has been installed, the Additional Features listed below can be activated in the Omni Price Registration window.

This chapter includes the following sections:

- *Allow Edit of SOP Unit Cost*
- *Post through SOP Unit Cost*
- *Restrict by Item Class in SOP*
- *Pop up Customer Note in SOP*
- *Pop up Customer Additional Info in SOP*
- *Pop up Item Note in SOP*
- *Pop up Item Additional Info in SOP*
- *SOP Lookup Shortcuts*

Allow Edit of SOP Unit Cost

If this feature is activated from the Omni Price Registration window, you will be allowed to edit the Unit Cost on a SOP Transaction Line. Normally this can only be altered for Returns. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

Unless the feature below is also activated, the Unit Cost will be updated during the SOP Posting process.

Post through SOP Unit Cost

If this feature is activated from the Omni Price Registration window, the Unit Cost showing on the SOP Transaction Line will be posted through to inventory as is. Normally the cost is updated during the SOP Posting process. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

This feature is best used in conjunction with the feature above. However, the Unit Cost of all SOP Transaction Lines, whether edited or not, will be posted through without being updated

Note that posting through an entered cost will probably cause your inventory to become un-reconciled to your GL control accounts.

Restrict by Item Class in SOP

If this feature is activated from the Omni Price Registration window, the items available to select in SOP will be restricted by the Item Class of the Item. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

This feature works as follows:-

1. Items belong to Item Classes as entered into Item Maintenance.

2. Item Classes can be group together by having the same first letter in the Item Class ID.

3. The User Defined 2 field of each Customer is used to define which Item Class Groups should be available to that Customer. The User Defined Field should contain the first letters of any Item Classes that the Customer can purchase.

4. When using the Item Lookup from SOP, it will be restricted to only show Items from the specified Item Class Groups, or Items not assigned to an Item Class.

5. When Adding an Item onto a SOP Transaction Line, it will be rejected if it belongs to an Item Class which is not one of the specified classes.

Pop up Customer Note in SOP

If this feature is activated from the Omni Price Registration window, you will be presented with a dialog containing the customer's record level note (if there is information stored in it) after entering the Customer ID into a Sales Order Processing Transaction. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

Pop up Customer Additional Info in SOP

If this feature is activated from the Omni Price Registration window, you will be presented with a dialog containing the customer's Bill to address's internet additional information (if there is information stored in it) after entering the Customer ID and Address ID into a Sales Order Processing Transaction. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

Pop up Item Note in SOP

If this feature is activated from the Omni Price Registration window, you will be presented with a dialog containing the item's record level note (if there is information stored in it) after entering the Item Number into a Sales Order Processing Transaction. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

Pop up Item Additional Info in SOP
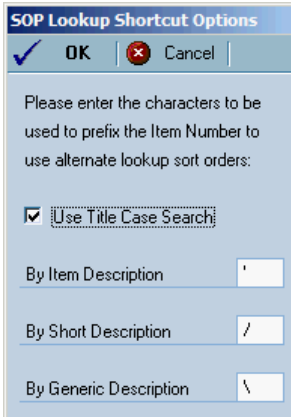
If this feature is activated from the Omni Price Registration window, you will be presented with a dialog containing the item's internet additional information (if there is information stored in it) after entering the Item Number into a Sales Order Processing Transaction. This feature can be disabled using the Omni Price Control Panel discussed in the previous chapter.

SOP Lookup Shortcuts

If this feature is activated from the Omni Price Registration window, you will be able to use the SOP Lookup Shortcuts feature from the Sales Order Processing Transaction Entry window.

SOP Lookup Shortcut allows fast entry of items without knowing the Item Number. Using single character prefixes when entering into the Item Number field, you may enter the first few letters of the Item Description, Short Description or Generic Description and press Tab. The Item Lookup will then open to the item closest matching the information typed in, you may then choose the correct item and continue as normal.

Selecting *Setup SOP Lookup Shortcut* from the *Extras* menu opens the following window.

This window allows the selection of the prefix characters for each of the different Item Description types. You may also select the option to user Proper Case searching, if unselected all searching will be in UPPER CASE.

Chapter 5:   Administering Omni Price

There are some Administrator functions available in the Omni Price product. These are described in this chapter.

This chapter includes the following sections:

- *About Omni Price window*
- *Omni Price File Maintenance*

About Omni Price window

The About Omni Price window displays the version and last modified date for Omni Price as well as Winthrop Dexterity Consultants' contact details.

To reach this window, choose Help >> About Great Plains, then choose Extras >> About Omni Price.

Details button
The Details button can be used to display further information about the Omni Price product.

Install button

The Install button can be used to open the Omni Price Install window as described in Chapter 2.

Omni Price File Maintenance

The standard File Maintenance options of Shrink, Rebuild and Clear are available for the Omni Price tables from the Omni Price File Maintenance window.

To reach this window, choose Routines >> Omni Price >> File Maintenance.
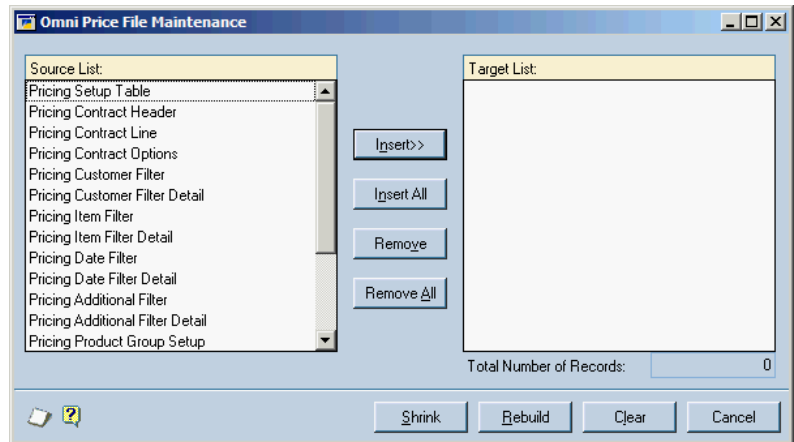
Insert the files to be processed and then press the Shrink, Rebuild or Clear button.

Chapter 6:   FAQ

Below are the answers to the Frequently Asked Questions (FAQ) about Omni Price.

Omni Price Palette entries have disappeared or do not work

Check Help >> About Great Plains and then select the Options button to see if the Omni Price product is still installed. If it is not installed, follow the normal installation procedure in Chapter 2.

If Omni Price is installed, please select Extras >> About Omni Price from the About Great Plains window, and then select the Install button. This will open the Omni Price Install window. Then follow the normal installation procedure in Chapter 2 from Step 4 onwards.

How do I Remove Omni Price?

The following instructions will allow you to remove Omni Price:

1. Open the Omni Price Install window (see above), and choose Uninstall at both the System and Company levels.

2. Exit Great Plains.

3. Edit the Dynamics.set launch file; Decrease the number on the first line by one, delete the Omni Price line and the line above it, and delete the line referring to OMNIPRCE.DIC and the two lines below that. Save your changes only if you are confident they are correct.

4. Delete the OMNIPRCE.DIC file from the Great Plains directory.

5. Delete the OPRC_FRM.DIC and OPRC_RPT.DIC from the Great Plains directory, if they exist.

6. Delete the WDC*.dat and WDC*.idx or WDC*.btr files from the Great Plains System directory and appropriate Company directories.

7. For Great Plains SQL versions only, use ISQL or Enterprise Manager to remove the WDC* tables and stored procedures.

Omni Price Index

** End of document - OmniPrce.doc - DM - 2 April 2005 **