Omni Price

For Dynamics GP 2013
Documentation dated January 7, 2015

1/7/2015

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Enjoy!

Rockton Software Omni Price – Table of Contents

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 Dynamics™ GP. 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

Navigation

An Omni Price menu is added to the Setup, Utilities, Cards, Inquiry, Reports, and File Maintenance menus in Dynamics GP. You will be able to access all of Omni Price's functionality from these menus.

However, you may find it more convenient to use the Omni Price Toolbar for day-to-day usage. The toolbar includes these four buttons:

- Omni Price Setup menu
- Contract Maintenance
- Price Check
- Contract Mass Update

Chapter 2: Installation

Omni Price is easy to install and register. It should be loaded on each workstation. The latest version is always available from the Rockton Software web site's Products page, located at http://www.rocktonsoftware.com.

This chapter contains the following sections:

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

System Requirements

Server Operating System	One of the following: • Microsoft Windows Server 2012 x64 Essentials Edition • Microsoft Windows Small Business Server 2011 Standard Edition with Premium Add-on • Microsoft Windows Server 2008 Standard Edition SP2 or later • Microsoft Windows Small Business Server 2008 Premium Edition SP2 or later • Microsoft Windows Server 2008 R2 x64 Standard Edition SP1 or later
Client Operating System	One of the following: • Microsoft Windows 8 Professional or Ultimate Editions • Microsoft Windows 7 Professional or Ultimate Editions
Available hard disk space	5 Meg in the Dynamics GP install folder; 5 Meg in the DYNAMICS database
Minimum RAM	2 GB (more recommended)
Microsoft SQL Server	One of the following: • SQL Server 2012 Standard, Workgroup, or Express Editions • SQL Server 2008 R2 Standard, Workgroup, or Express Editions, with SP1 or later • SQL Server 2008 Standard, Workgroup, or Express Editions, with SP3 or later
Microsoft Dynamics GP	Version 2013
Adobe Acrobat Reader	Adobe XI, X, 9.0, 8.0, 7.0, or 6.0

Installing & Registering Omni Price

Please read these instructions in their entirety before installing this software.

Prior to installing Omni Price, close all other applications, including Dynamics GP, 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 Dynamics GP already installed and operating on the workstation. To check the version, launch Dynamics GP and choose Help >> About Microsoft Dynamics GP.

To install Omni Price:

1. From the first computer you wish to install Omni Price, extract **all of the files and folders** in the zip file you downloaded to a folder where you can access it from all workstations that you are going to install.

2. From each computer on which you wish to install Omni Price, run the Omni Price setup program (**OmniPriceSetup.exe**).

3. Select the folder where Dynamics GP is installed.

Important! *Install Omni Price to the same directory where Dynamics GP is installed. If the default directory on the Omni Price Installation Wizard window is not the same as the Dynamics GP installation directory, modify the default directory.*

If you enter this incorrectly, Omni Price will not function!

4. Click the Install button. This will copy the **OmniPrce.cnk** file and any other files as appropriate. It will also install any other components that are necessary to run Omni Price. On some installations, you may have to reboot your system.

5. Verify that the Status shows "Installed Successfully." for each item listed. Then click the Exit button on the setup window.

6. Include the new chunk file code into Dynamics GP by launching Dynamics GP. The following message may appear:

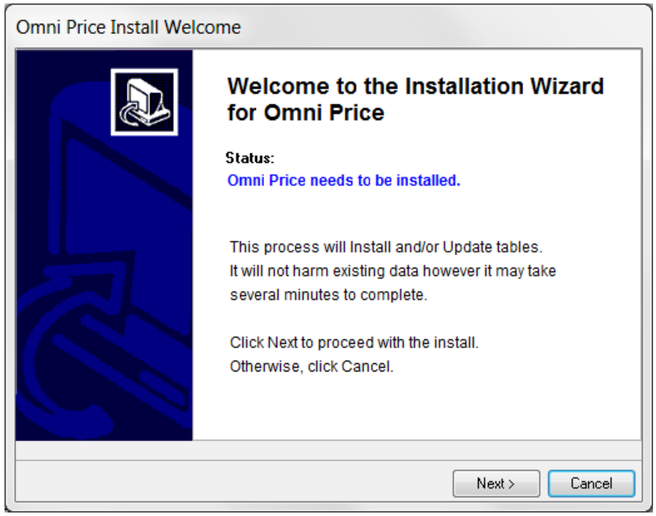
> *New code must be included in the DYNAMICS.SET dictionary. Do you wish to include new code now?*

Choose Yes. This process will modify your DYNAMICS.SET to include Omni Price information, and the **OmniPrce.cnk** file will create an **OmniPrce.dic** file.

7. Log in as any User that has sufficient SQL Server rights to be able to create Tables. This user must either be in the 'sysadmin' fixed server role or the 'db_owner' role for the DYNAMICS database.

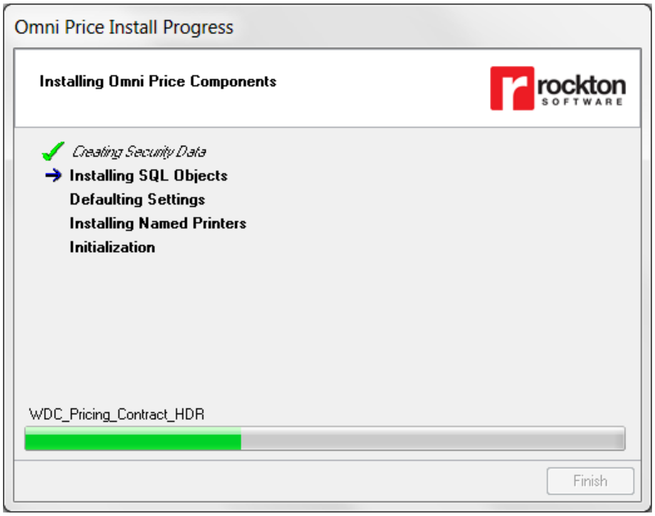
8. Log into any company. Omni Price maintains data at the System and Company levels, therefore it is necessary to install the software in each company. If you are evaluating the software and do not yet have a registration key, it is recommended that you first log into the Dynamics GP lesson company. Without a valid registration key, Omni Price will not work in other companies.

9. Next, the Omni Price Install Welcome window will open. Note the status message. This indicates whether you will be installing from scratch or upgrading from an earlier build.

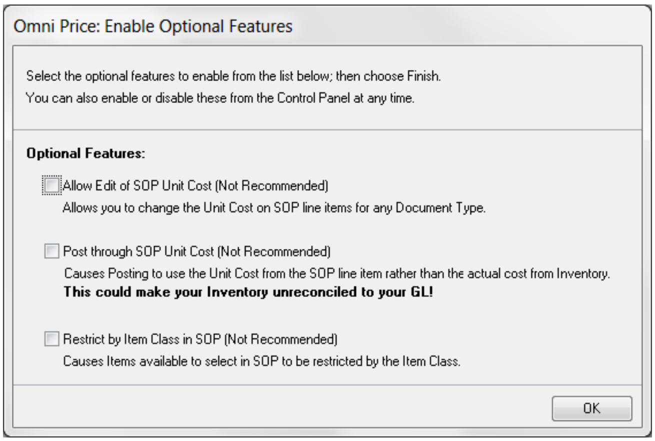


Click the Next button to review the License Agreement.

10. Mark the **Accept License Agreement** check box, then click the Next button to launch the Install Progress dialog. You may see some informational messages as the installation continues. Take note of these and click OK or respond to them as necessary.



11. When the installation has completed, click the Finish button. This will open the Omni Price: Enable Optional Features window. Click the OK button to proceed.

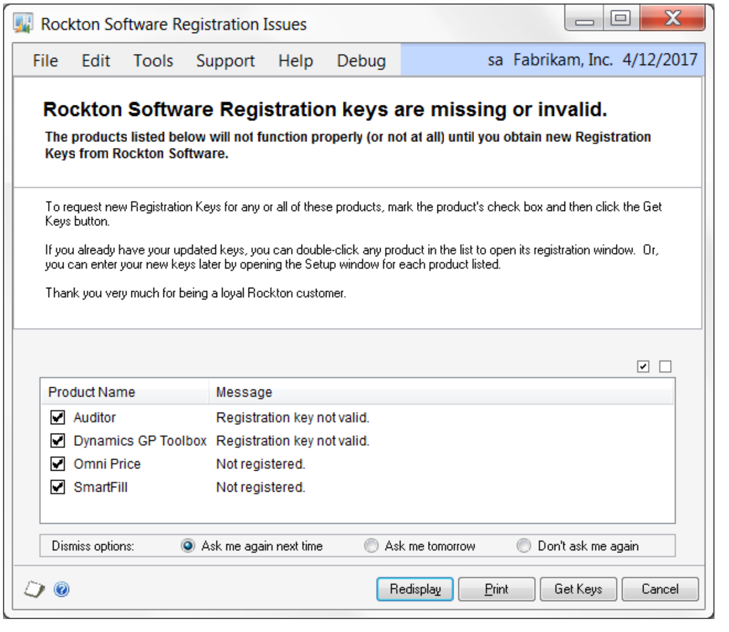


The options on the Omni Price Enable Optional Features window are intended only for very specific situations. We recommend that you leave them unmarked unless you know that your organization currently uses these options.

12. Next, you will see a dialog that asks, "*Would you like to install Omni Price for another company, or have you finished?*" Choose "Another" and the Company Login window will open and allow you to install into the next Company. Repeat steps 8 through 12 for each Company that you wish to install. When you have completed the last Company, choose "Finished".

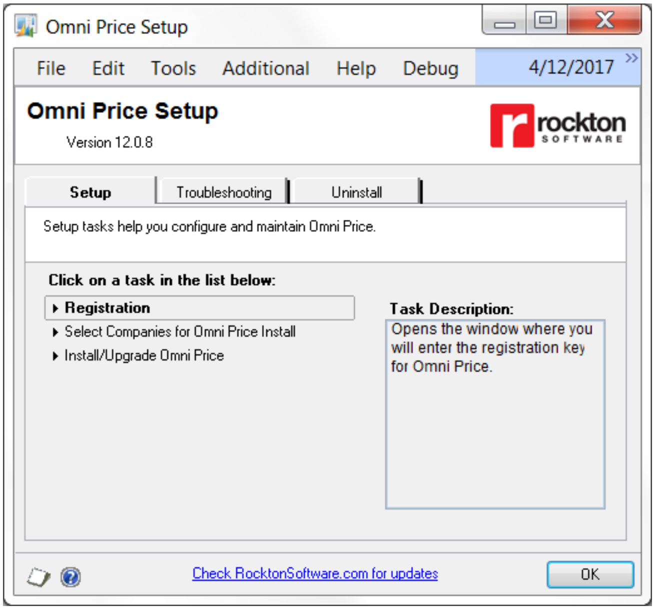
13. The Omni Price Install Status window will open. Take note of any messages on the Install Status window and click OK.

14. If you have not previously entered a valid registration key, the following window will open:

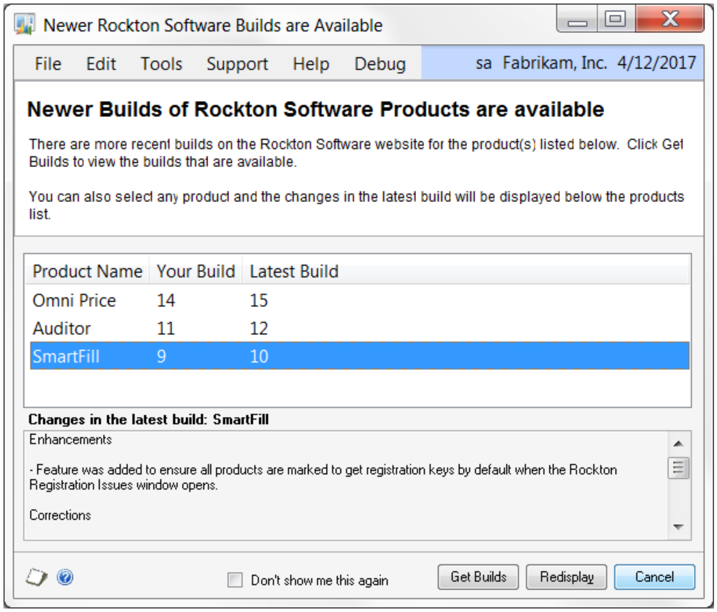


This will show any Rockton Software products that are not currently registered. If you wish, you can click the Get Keys button to have your registration keys loaded automatically.

15. If you wish to enter your registration keys manually, you can do so on the Omni Price Setup window. Choose the Registration task and the Omni Price Registration window will open. Carefully enter the Registration Key and press the OK Button.



16. In some cases, you may see this window:



This will show any installed Rockton Software products for which there are newer builds available on our website. Click Get Builds to download and install any updates.

The installation is now complete. After registering the product, you can install Omni Price on all other network workstations by following steps 1 through 6 above. No further workstation-specific installation is required.

Granting Security access to Omni Price Alternate GP windows (optional):

You may want grant Users of this Company security access to Omni Price's alternate GP windows.

Omni Price has alternate SOP and Invoicing Transaction and Inquiry windows. Displaying these windows is not required for Omni Price to function, however when they are used, the Omni Price Contract ID is displayed (Transaction logging must not be disabled for the Contact ID to show).

To do this, you will need to either update an existing Alternate/Modified Forms and Reports ID or create a new one. Then, on the User Security window, assign that Alternate/Modified Forms and Reports ID to each User and Company for which you want to use the Omni Price alternate windows.

Refer to the Dynamics GP System Setup manual for information about how to set Security access to Alternate GP windows.

Registering Omni Price at a later stage

If you have installed Omni Price to trial with the lesson company and have now purchased Registration Keys, use the following steps to enter them into Omni Price.

1. Choose Microsoft Dynamics GP > Tools > Setup > Omni Price Setup, or select Omni Price Setup from the Administration Area Page.

2. Select the Registration task to open the Omni Price Registration window.

3. Enter the Registration Keys.

Removing Omni Price

The following steps will completely remove Omni Price from both workstation and server:

1. Log on to Dynamics GP as ‘sa’ or ‘DYNSA’ and open the Omni Price Setup window.

2. Select Uninstall Omni Price from the drop-down and click the Process button. When this process completes, click OK on the message to close Dynamics GP.

3. Delete the following files from the Dynamics GP installation directory (you may not find all of these files):

OMNIPRCE.DIC
FRMS1999.DIC
RPTS1999.DIC
Omni Price ReadMe.txt
Omni Price Manual.pdf
OmniPrce.cnk

4. Log on to Dynamics GP as a User with access to the Security windows. Remove the OMNI PRICE ADMIN Security Role and the ADMIN_OMNIPRICE_01 Security Task.

Chapter 3: Using Omni Price Customer Pricing

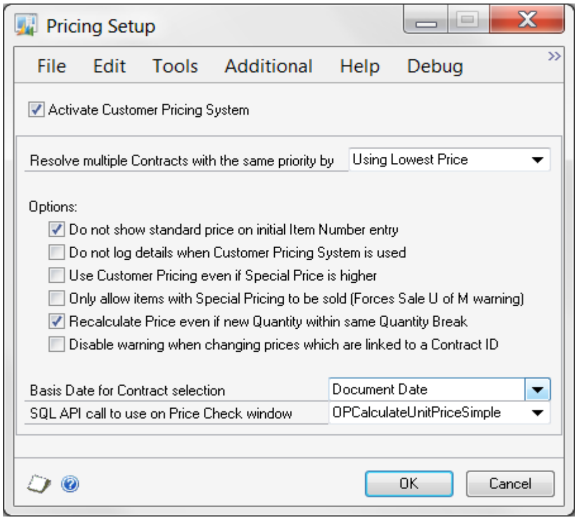
When Omni Price has been installed, the features listed below are activated in the Omni Price Registration window as the Core Module.

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*

Pricing Setup

The Pricing setup window is used to activate the Customer Pricing System and set some system wide options for the Customer Pricing System. Use Microsoft Dynamics GP >> Tools >> Setup >> Omni Price >> Pricing Setup 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.

Basis Date for Contract selection

This is the date on the Sales document that is used to determine whether or not a Contract applies to any Date Filter that is set up for that Contract. By default, this will be the Document Date.

SQL API call to use on Price Check window

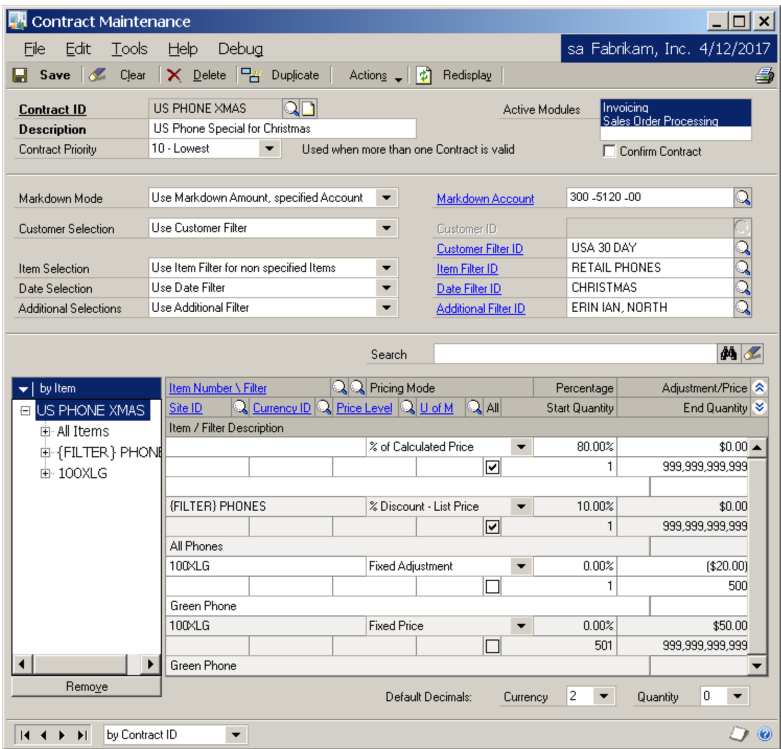
This is only needed if you are also using another application that has integrated with Omni Price using the Omni Price SQL API. You would need to refer to the organization that developed that application in order to determine which SQL API procedure they used. You would then select it in this drop-down.

The Price Check window has a checkbox at the bottom labeled, “Use SQL API.” When you check this box, you will be able to see the Unit Price returned from the SQL API as a result of calling the procedure that you specified here.

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 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.

3. 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.

4. Select whether you want a confirmation dialog during Transaction Entry before the contract is applied.

5. 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.

6. Choose your Customer Selection mode from the following 4 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.

Specified National Account

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

7. Choose your Item Selection mode from these options:

All Items

The contact will be applied to all items in the system.

Use Item Filter for all items

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 Item Filters.

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.

8. Choose your Date Selection mode from these options:

No Date Restrictions

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

The Basis Date is selected on the Pricing Setup window. By default, it is the Document Date.

Use Date Filter

In this mode the contract will only be applied if the basis 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.

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

No Additional Restrictions

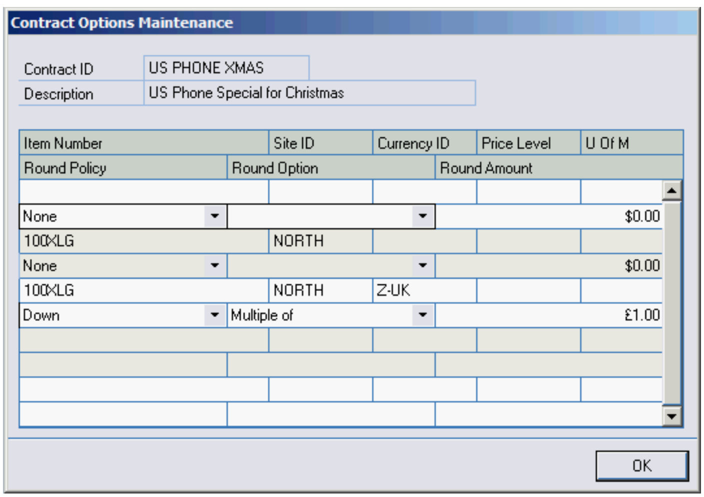
In this mode the contract will be applied regardless of the values of certain fields stored against the transaction.

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.

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

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



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

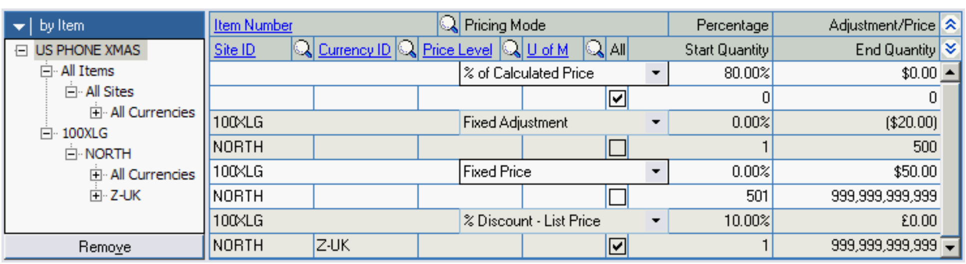
While you have a contract displayed, you can use the Print Button to print out the setup of that contract. You can also use the Duplicate Button to copy the current contract to another Contract ID. Drilling down on the Contract ID will open the Contract Enquiry window.

While either the Contract Maintenance window or the Sales Transaction Entry window is open, no User will be allowed to open the Sales Transaction Entry window or the Contract Mass Update window, and no user may perform an import on the Import / Export Contracts using Excel 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. This tree is loaded in the background, so for contracts with a large number of line items you may see a progress bar below the tree that indicates how much of the tree has been loaded.

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.



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 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 Dynamics GP 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 Dynamics GP. 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 Dynamics GP.

No Special Price

No change to the price calculated by Dynamics GP. 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.

Searching for items in the Pricing Matrix

On contracts that have a large number of line items in the Pricing Matrix, you may find it difficult to find a particular line item. If you enter a value in the Search field (above and to the right of the Pricing Matrix), then the items displayed will be filtered by that text. In other words, only lines that match on any of the following fields will be displayed:

- Item Number or Item Filter
- Item or Item Filter Description
- Pricing Mode
- Site ID
- Currency ID
- Price Level
- U Of M

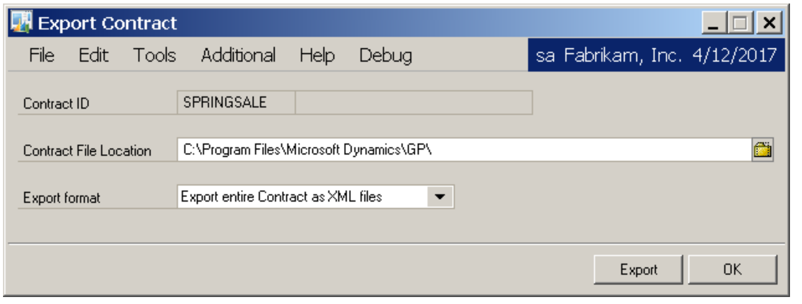
Importing and Exporting Contracts

The Actions button opens the Contract Import and Contract Export windows. This will allow you to export all contract information, including filters and options, as XML files. This is useful if you want to uninstall and reinstall Omni Price, but don’t want to lose your contract setups. It is also useful if you want to move contract setups from one site to another. Optionally, you can also export Contract Lines as a CSV file, which then can be edited in Microsoft Excel or any text editor.

Exporting Contract Information

1. Open the Contract Maintenance window and enter or select a Contract ID.

2. From the Actions button, choose Export Contract. This will open the Export Contract window:



3. Select the Contract File Location. This is the location where you want the exported file(s) to reside.

4. Select the Export format from the following two options:

Export entire Contract as XML files

All of the contract information, including the Pricing Matrix and any Filters used, will be exported as XML files. The Contract header and Pricing Matrix lines, along with any Options selected, will be contained in the main export file. The file name will be of the following format:

RSOP_CONTRACT_<contractID>.XML,

where <contractID> is the Contract ID being exported. Each Filter used will be contained in its own xml file named as follows, depending upon the type of filter:

RSOP_CUSTFILTER_<contractID>.XML

RSOP_DATEFILTER_<contractID>.XML

RSOP_ITEMFILTER_<contractID>.XML

RSOP_ADDLFILTER_<contractID>.XML

Although you can edit these CSV files in Microsoft Excel, it is not recommended because they will not be saved in the proper format to be imported again. If you want to edit and re-import Contract information, use the *Export only Contract lines as CSV file* option below.

Export only Contract lines as CSV file

Only the information in the Pricing Matrix (including any Options selected) will be exported as a CSV (comma-delimited) file. You will find that this is more suitable to edit the file in a program such as Microsoft Excel. You will then be able to import the CSV file again after saving your changes.

The file will be named:

RSOP_CONTRACT_<contractID>.CSV,

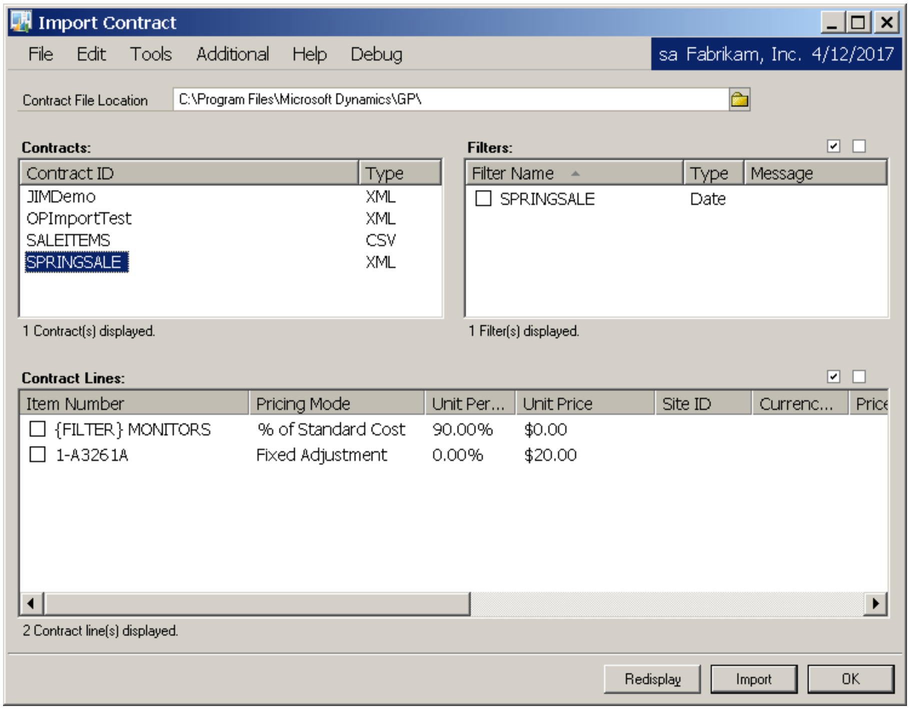
where <contractID> is the Contract ID being exported.

5. Press the Export button.

Importing Contract Information

1. Open the Contract Maintenance window. If you want to import only Contract line (Pricing Matrix) information, then enter or select the Contract ID to which you want to add that information.

2. From the Actions button, choose Import Contract. This will open the Import Contract window:



3. Select the Contract File Location. This is the location where you the file(s) to import reside. The Contracts list box will be automatically filled with any import files found at this location.

4. Select the Contract that you want to import from the Contracts list box. The Filters list box will be automatically filled with any filter import files found for the selected Contract at this location. In addition, the Contract Lines list box will automatically be filled with the Pricing Matrix information found for the selected Contract.

5. If you want to import any of the displayed Filters, select them by marking their check boxes. You can also use the Mark All and Unmark All boxes to the upper-right of the list.

6. If you want to import any of the displayed Contract lines, select them by marking their check boxes. You can also use the Mark All and Unmark All boxes to the upper-right of the list.

7. Press the Import button. Choose one of the two options that drop down below this button:

Entire Contract

All of the contract information, including all of the Contract Lines and Filters displayed, will be imported. Note that the selected Contract must not already exist on file.

Selected Line(s) And Filter(s) Only

Only the marked Contract lines and Filters will be imported. Contract Lines will be added to the Contract ID that is displayed on the Contract Maintenance window.

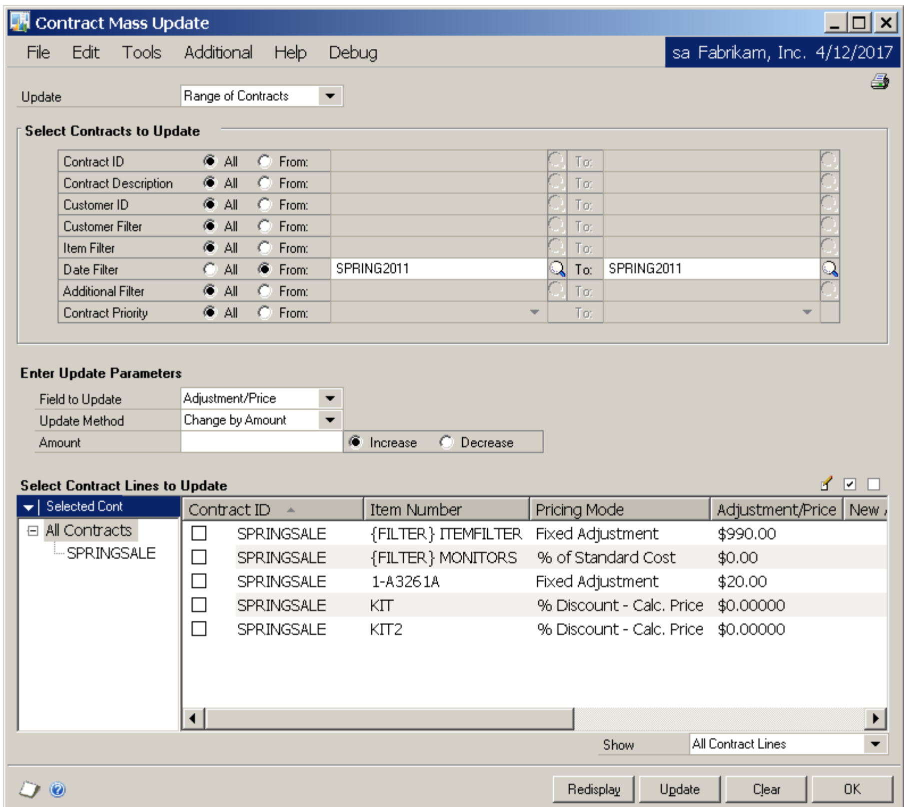
8. Press OK when you are done.

Contract Mass Update

There may be times when you want to update the Adjustment/Price or Percentage on a group of Contracts, using the same parameters. For instance, you may have a Spring sale where you want to offer a 10% discount on all items listed on a given contract. This can be done quite easily with the Contract Mass Update window.

Updating Contracts En Masse

1. Open the Contract Mass Update window by going to Microsoft Dynamics GP > Tools > Utilities > Omni Price > Contract Mass Update. The following window will open:



2. At the top of the window, select whether to update *All Contracts* or a *Range of Contracts*. If you have selected *Range of Contracts*, enter the criteria to select the Contracts that you want to update by choosing the From radio button for any of the listed ranges. You can select multiple ranges, but keep in mind that each condition you select will further narrow down the range of Contracts that you will be updating (in other words, these are all "AND" conditions). Also, note that you cannot select both a Customer ID range and a Customer Filter range at the same time because you can only specify one or the other of these on a given Contract.

3. When you are done specifying your Contract ranges, press the Redisplay button. The selected Contracts will be listed in the tree at the bottom-left of the window. Also, all Contract Lines for all selected Contracts will be displayed in the list at the right.

4. Enter your update parameters in the middle section of the window. First choose the field that you want to update, either the Adjustment/Price or Percentage.

5. Choose the Update Method from the drop-down. The four options available are:

Change by Amount

Recalculate the Adjustment/Price or Percentage on each selected Contract Line by adding or subtracting a specified value.

Change by Percent

Recalculate the Adjustment/Price or Percentage on each selected Contract Line by adding or subtracting a specified percentage of its current value.

Replace with Amount

Replace the Adjustment/Price on each selected Contract Line with the specified value.

Replace with Percent

Replace the Percentage on each selected Contract Line with the specified value.

6. Enter the Amount or Percentage, depending upon what you selected for Update Method.

7. If you have selected *Change by Amount* or *Change by Percent* for Update Method, choose whether you want the change to be added to (Increase) or subtracted from (Decrease) the field selected in Field to Update.

8. Select the Contract Lines that you want to update by marking their check boxes. You can also use the Mark All and Unmark All boxes to the upper-right of the list.

9. As you mark each Contract Line, you will see that the New Adjustment/Price or New Percentage is shown in the list. If you want to manually adjust this value, you can double-click the line you want to adjust and a window will open where you can enter the new value. After you are done, click OK on this window and the value you entered will appear in the list. Note that there will now be an Edit icon () next to that item. This indicates that you have manually changed this value.

10. When you are done making changes to the lines for the Contracts you have selected, you can go back to step 2 and choose to see a different set of Contracts. You can then make additional changes to the Contract Lines for these Contracts as well by repeating steps 2 thru 9. All of the changes you make to all Contracts will be saved until you are ready to actually update them. To view all Contracts, not just the ones you have selected in the criteria at the top of the window, click the column heading at the top of the Contracts tree and choose All Contracts from the drop-list.

11. You may optionally choose to print an edit list before you apply your changes. You can do this by clicking the Print button in the upper-right of the window.

12. Once you have completed all of your changes, click the Update button to apply them to the Contracts. A report will be printed afterwards that shows you the status of each line that was updated.

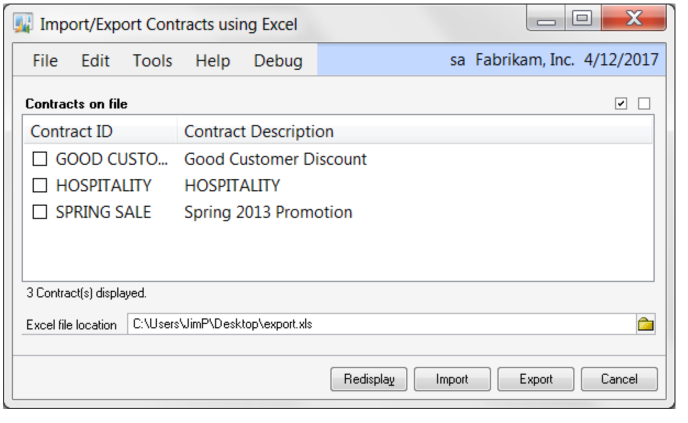
In order to actually perform an update, no User may be currently entering transactions in the Sales Transaction Entry window, updating Contracts on the Contract Maintenance window, or performing an import on the Import / Export Contracts using Excel window. Also, while performing a Contract Mass Update, no User will be allowed to open the Sales Transaction Entry window or the Contract Maintenance window, and no user will be allowed to perform an import on the Import / Export Contracts using Excel window.

Import / Export Contracts using Excel

If you are more comfortable working in Microsoft Excel, you can update Contract lines by first exporting them to an XLS file, making changes, and then importing your changes. This window will allow you to use all the power of Excel to make whatever updates you need to make.

Exporting Contract lines to Excel

1. Open the Import / Export Contracts using Excel window by going to Microsoft Dynamics GP > Tools > Utilities > Omni Price > Excel Import / Export. The following window will open:



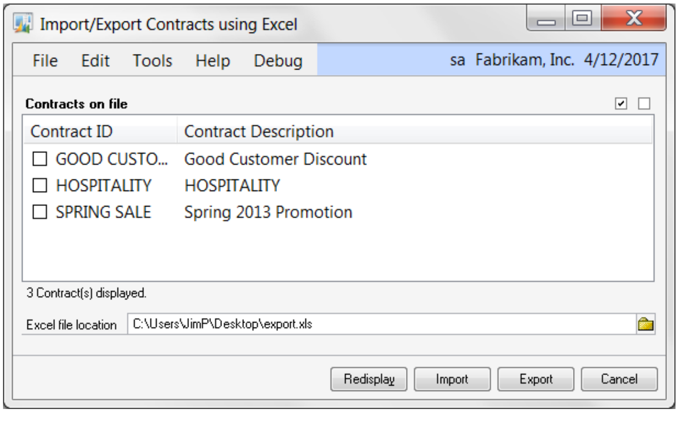
2. Select the Contract(s) that you want to export by marking the box to the left of the Contract ID in the Contracts on file list box. You can also use the Mark All (☑) and Unmark All (☐) buttons to help you select a group of Contracts.

3. Enter the path and file name of the Excel file to which you want to export Contract line information. You can also use the Path button () to open a dialog that will allow you to browse to a path on your computer. Note that the file name must have an extension of "xls".

4. Click the Export button. All of the Contract lines for the Contracts selected in step 2 will be written to the file in step 3. If any errors are found during this process, a report will open detailing those errors.

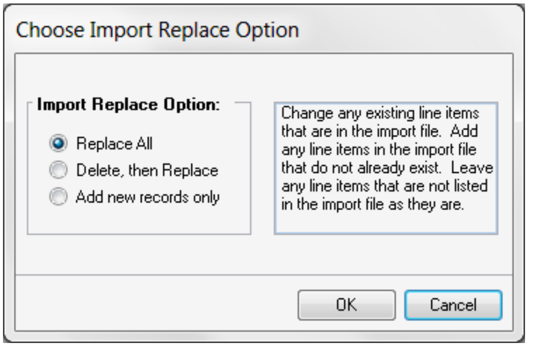
Importing Contract lines from Excel

1. Open the Import / Export Contracts using Excel window by going to Microsoft Dynamics GP > Tools > Utilities > Omni Price > Excel Import / Export. The following window will open:



2. Enter the path and file name of the Excel file that contains the Contract line information that you want to import. You can also use the Path button ( ) to open a dialog that will allow you to browse to this file on your computer. Note that the file name must have an extension of “xls”.

3. Click the Import button. The following window will open:



4. Choose the replace option that you want to use, then click the OK button:

   Replace All
   Change any existing line items that are in the import file. Add any line items in the import file that do not already exist. Leave any line items that are not listed in the import file as they are.

   Delete, then Replace
   Delete all line items for any Contracts that are contained in the import file. Then import.

   Add new records only
   Add new line items only. Ignore any line items in the import file that already exist.

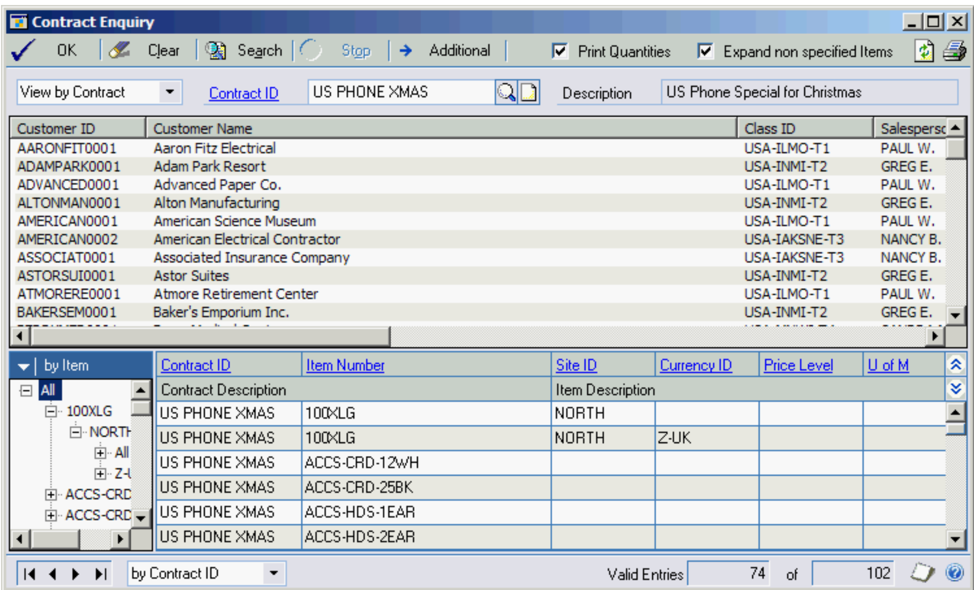
5. All of the Contract lines contained in the file you selected in step 2 will now be imported. If any errors are found during this process, a report will open detailing those errors.

The requirements for formatting the Excel input file can be found in Chapter 6: Excel Import File Format.

In order to actually perform an import, no User may be currently entering transactions in the Sales Transaction Entry window, updating Contracts on the Contract Maintenance window, or using the Contract Mass Update window. Also, while performing an import, no User will be allowed to open the Sales Transaction Entry window, the Contract Maintenance window, or the Contract Mass Update window.

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.

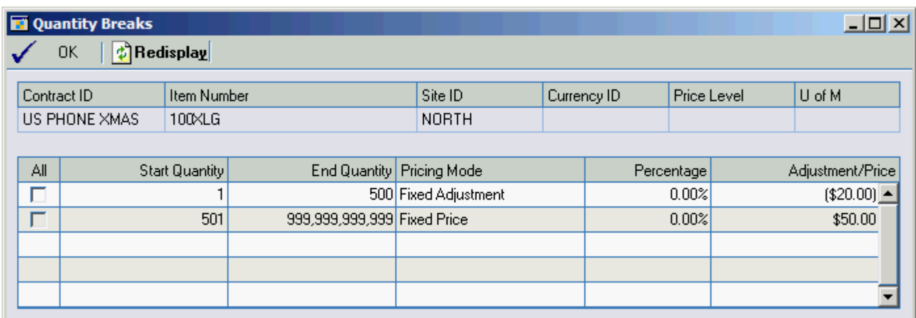
In by Item mode; when an item is selected you will be shown all the contracts which contain that item and the details for that item.

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.

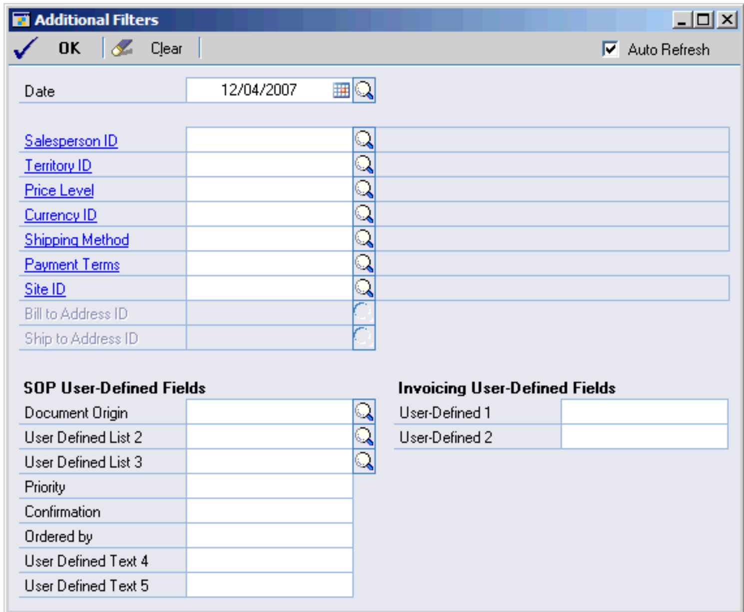
If you have a non specified item (blank item number in the Pricing Matrix), select the Expand non specified Items checkbox to show a record for each item in the Item Filter.

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.



The Additional Button can be used to specify additional information to restrict the contract enquiry by.

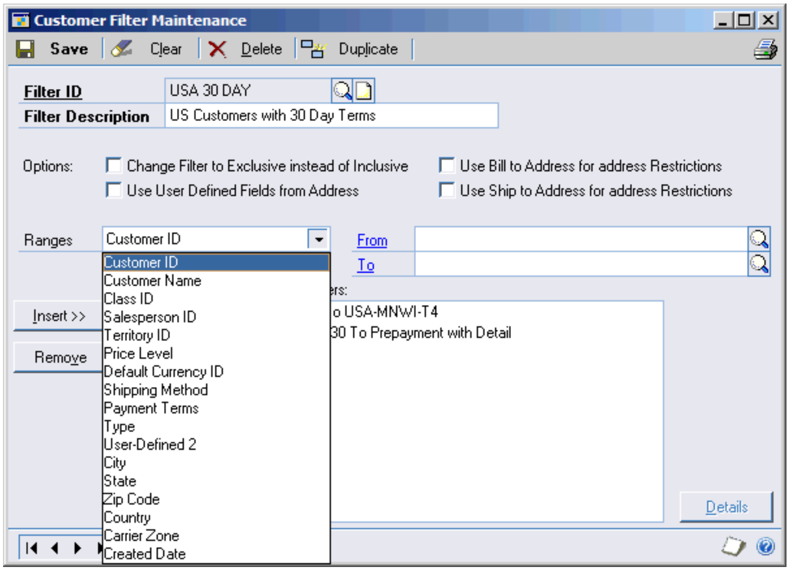


The Print Button in the top right of the window can be used to print whatever is currently displayed in the window. Check the Print Quantities checkbox to include the quantity breaks and pricing details in the report.

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 Dynamics GP 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. You can specify which User Defined Fields are to be used, either from the Customer Record (default) or the Address Record.

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 select records within the 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

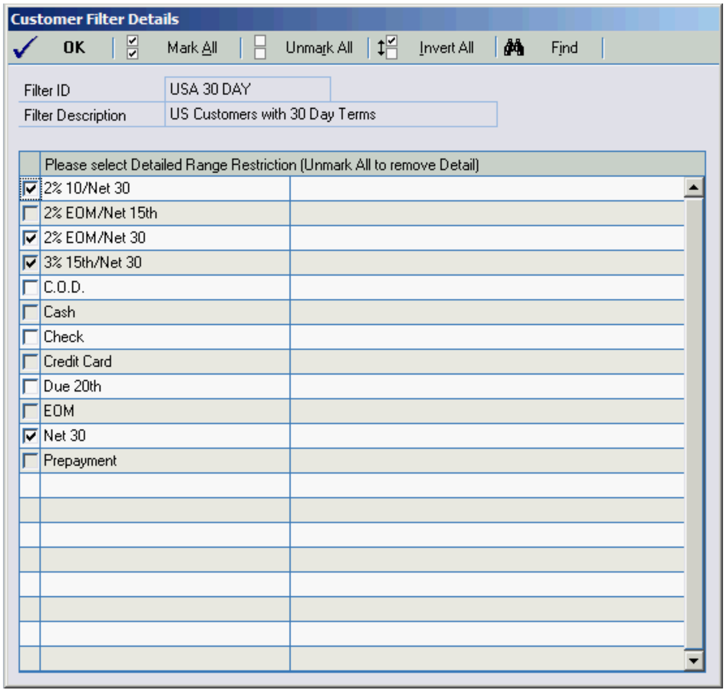
1. Insert a restriction into the filter ensuring that the range selected includes all possible values that you may wish to include.

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.

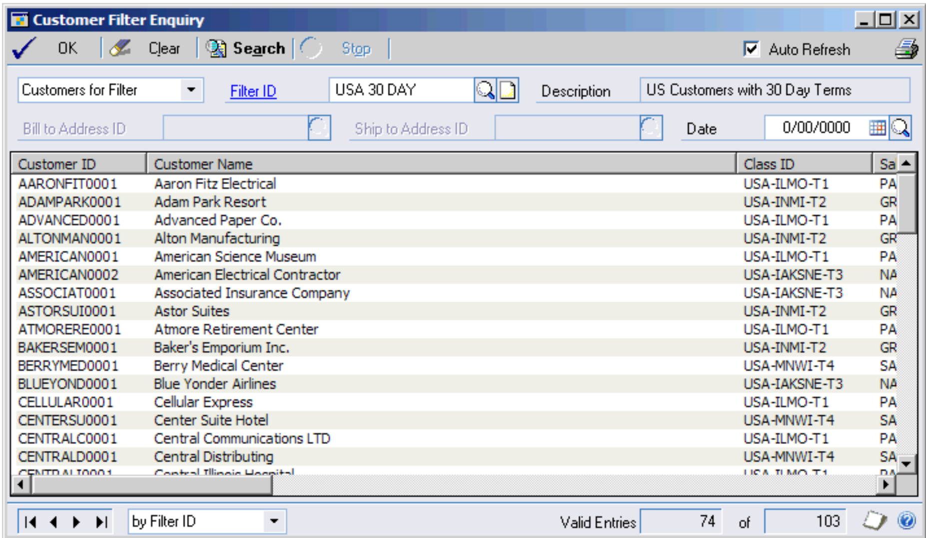
5. Once you have completed your selections press the OK button. Now the restriction in the list of restrictions will show as having detail.



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.



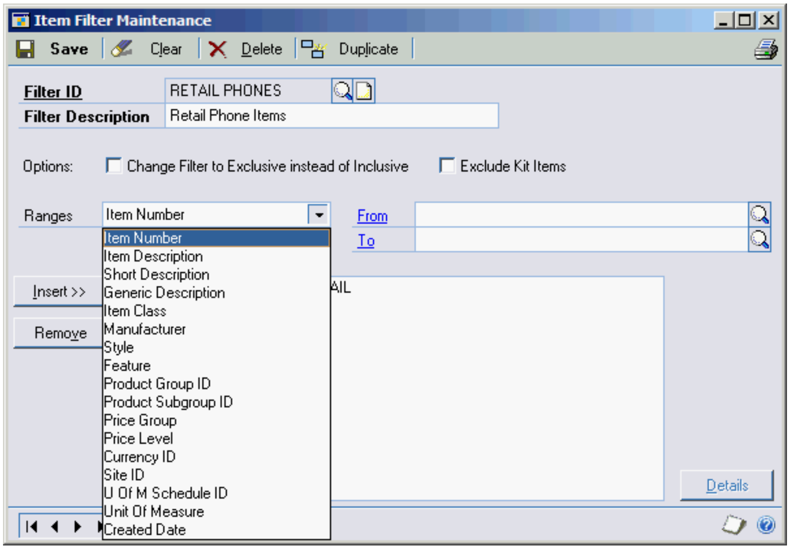
If you select a customer filter or a customer before changing the view mode, it will be automatically used as the initial value to that view.

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 Dynamics GP 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.

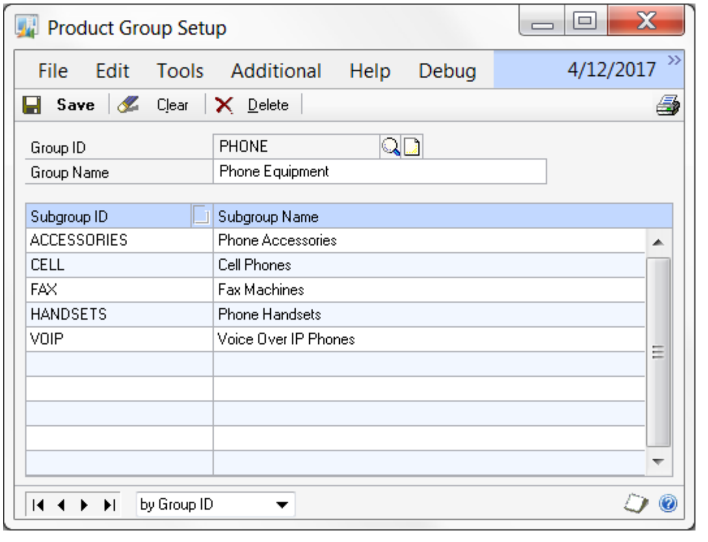
While you have an Item Filter displayed, you can use the Print Button to print out the setup of that filter. You can also use the Duplicate Button to copy the current filter to another Filter ID. Drilling down on the Item Filter ID will open the Item Filter Enquiry window.

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

Product Groups

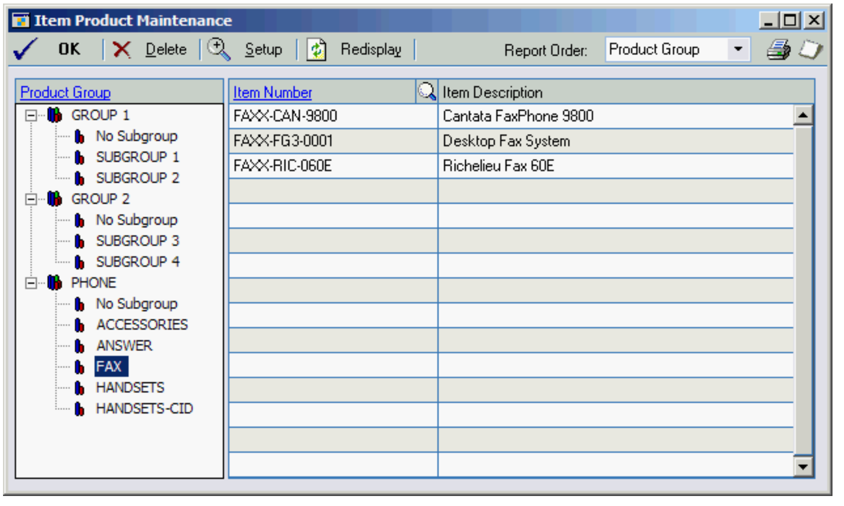
Dynamics GP has Item Classes and Price Groups as a method of group similar items. However, these are also used for other purposes such as assigning accounts or pricing. Omni Price offers Product Groups and Product Subgroups as a method of grouping items with a 2 level hierarchy. This hierarchy can then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

Open the Product Group Setup window using Microsoft Dynamics GP >> Tools >> Setup >> 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.

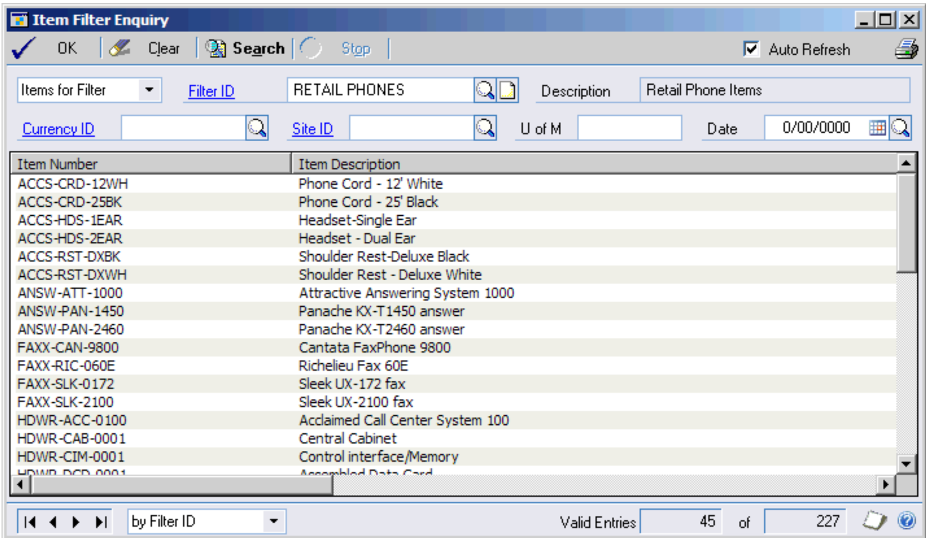
Once you have set up your Product Groups and Product Subgroups you can assign items using the Item Product Maintenance window, which is accessed from Microsoft Dynamics GP >> Tools >> Setup >> Omni Price >> Item Product Setup.



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.



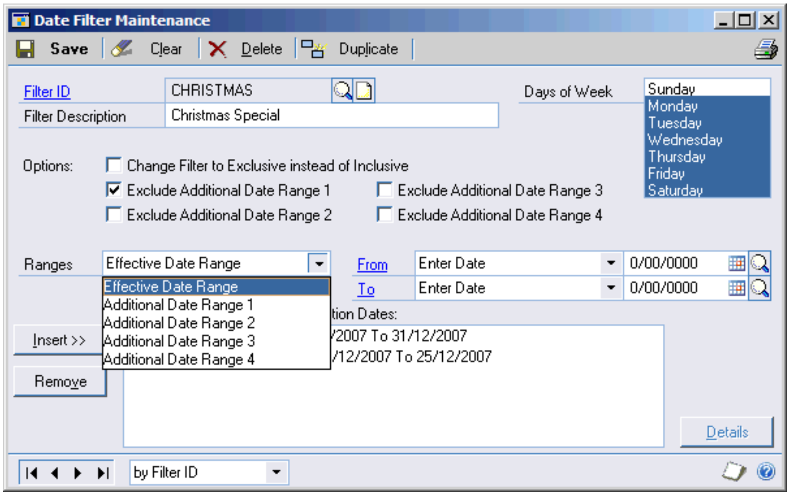
If you select an item filter or an item before changing the view mode, it will be automatically used as the initial value to that view.

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 Dynamics GP 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.

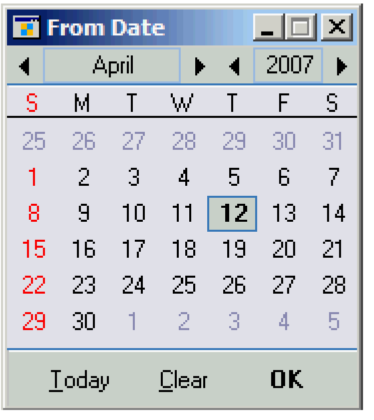
Also the Additional Date Ranges can be used to create another range of valid dates or to exclude a range of dates from the Effective Date Range using the Exclude Additional Date Range options.

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.

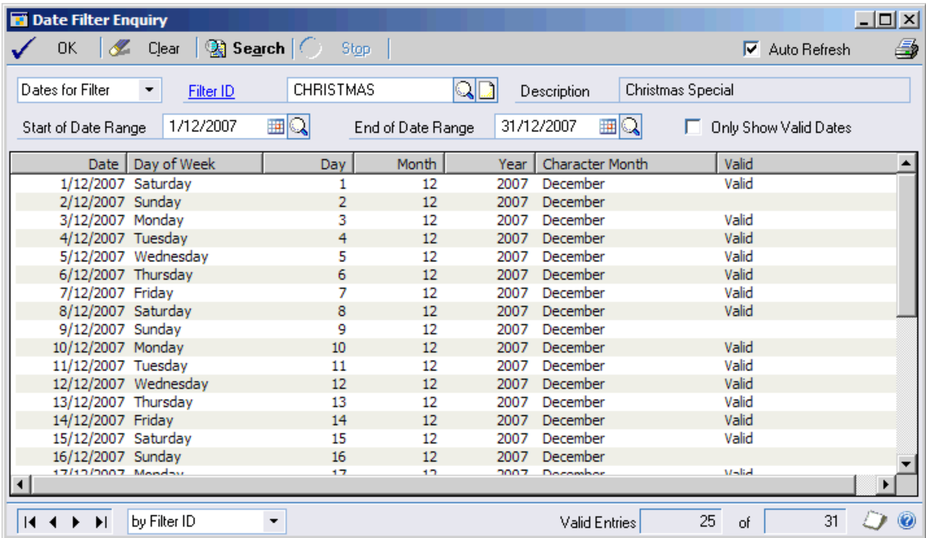
Date Lookup

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.

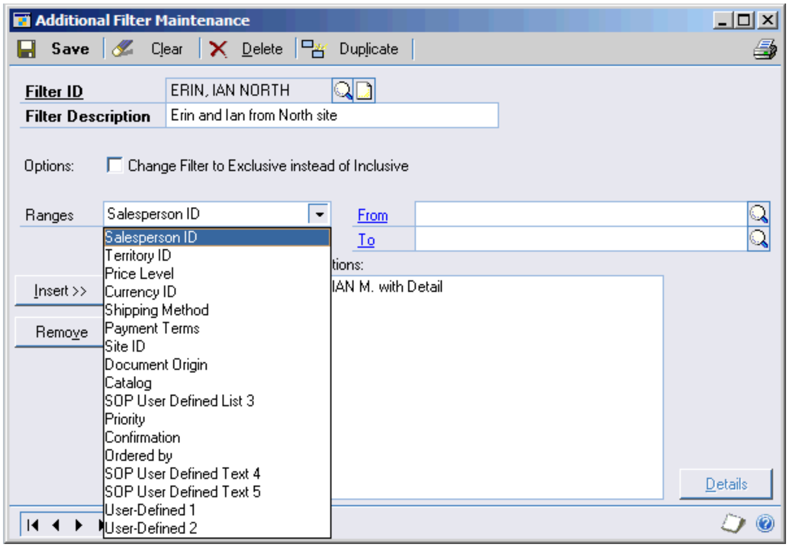
If you select a date filter or a date before changing the view mode, it will be automatically used as the initial value to that view.

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 Dynamics GP 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, Site ID, SOP User Defined Lists 1-3, SOP User Defined Text 1-5, and Invoicing User Defined 1-2. Note that these are compared to the fields on the actual transaction and not to fields on the Customer master records.



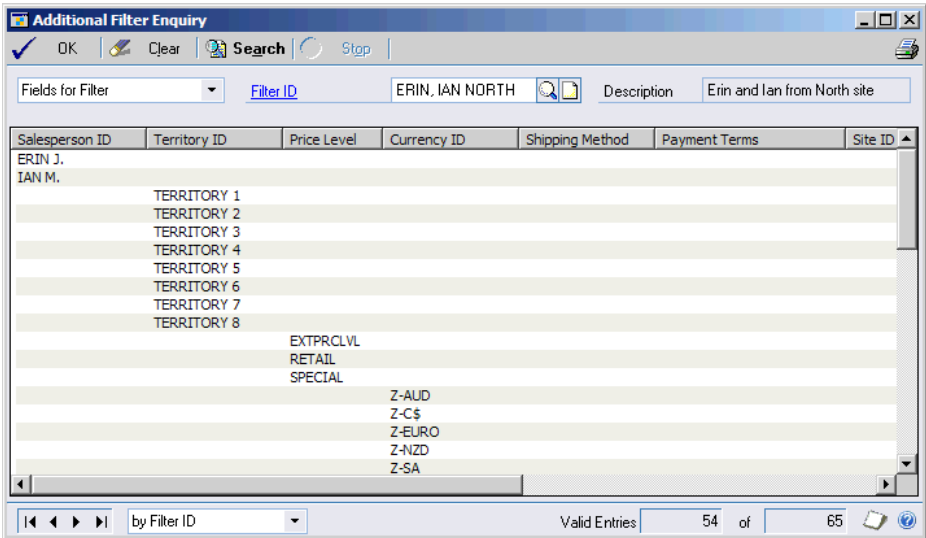
The Additional Filter can be swapped to exclude the selected transactions using the Change Filter to Exclusive instead of Inclusive option.

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 Additional 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.

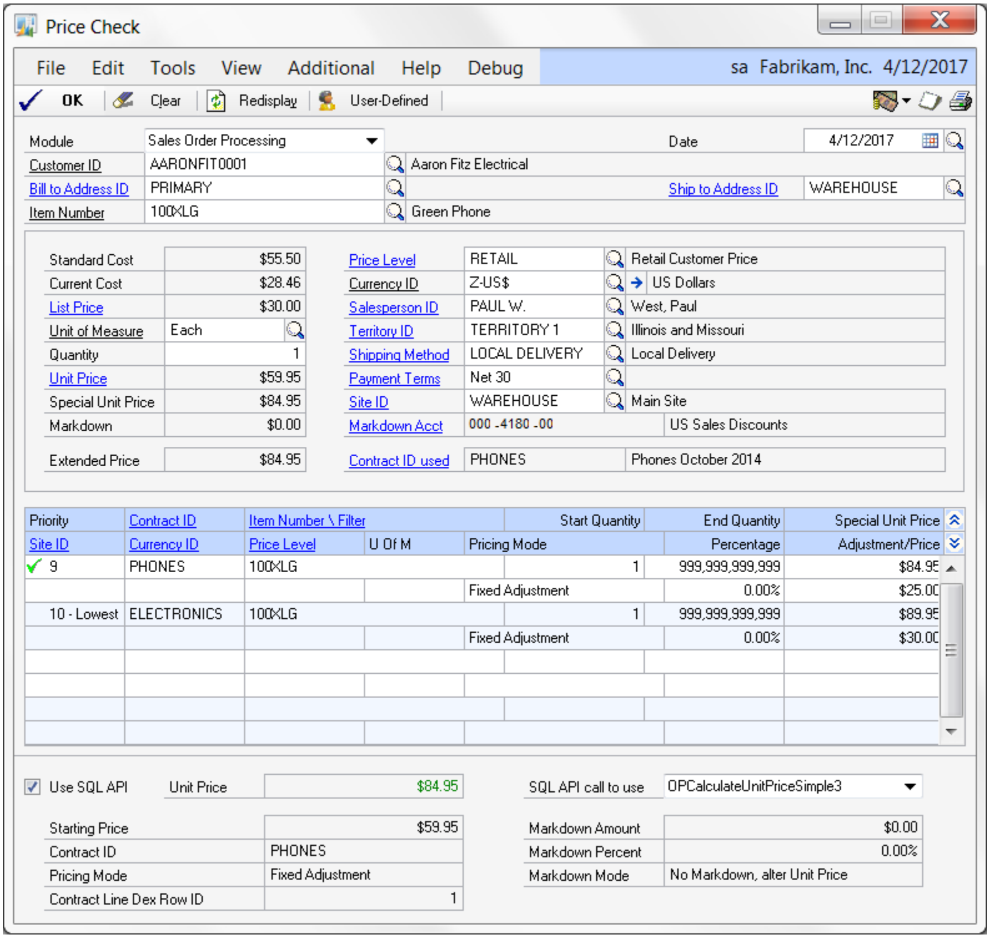


If you select an additional filter or a field value before changing the view mode, it will be automatically used as the initial value to that view.

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

Price Check

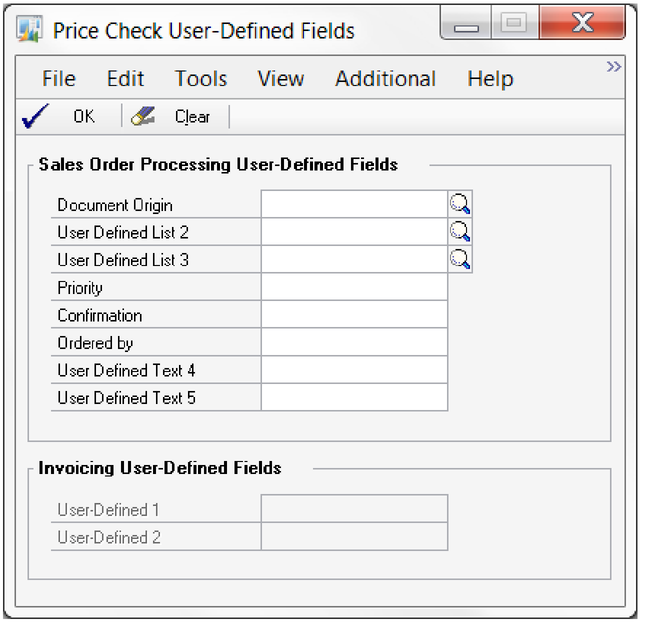
Omni Price has the ability to confirm an individual item's price using the Price Check window. This window can be opened by selecting Additional >> Customer Pricing – Price Check from the Invoicing or Sales Order Processing transaction window or by using Enquiry >> Omni Price >> Price Check. You can also open it by selecting the Price Check item ( ) from the Omni Price toolbar.



The Price Check window allows you to enter all of the pricing-sensitive information 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 what is currently displayed in the window.

The User-Defined Button opens the Price Check User-Defined Fields window, which specifies values for the Sales Order processing or Invoicing User-Defined Fields.

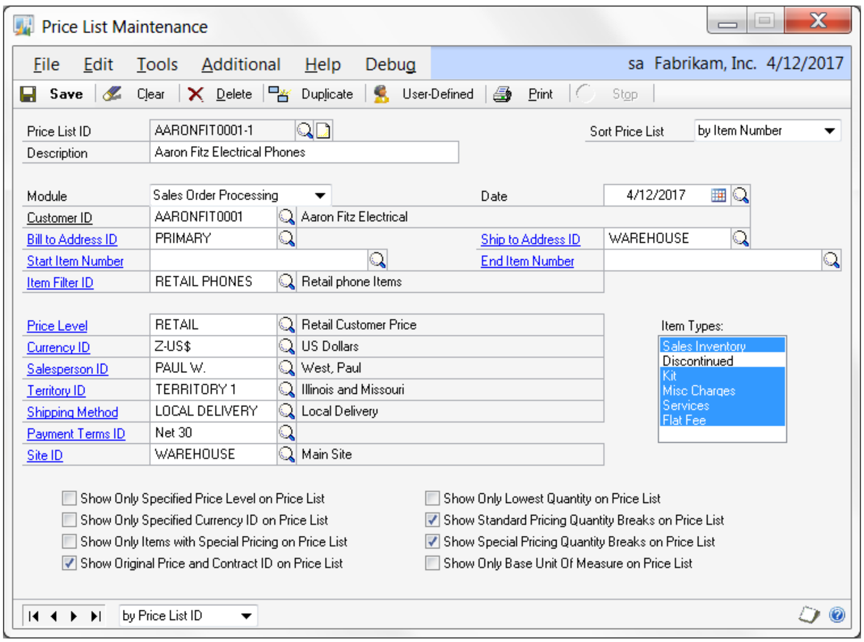


Checking the Use SQL API check box at the bottom of the window will show the Unit Price returned from the Omni Price SQL API. This is only useful when you have another product installed that has integrated with Omni Price using the SQL API. In general, the price returned from the SQL API should be the same as the price that is shown on the Price Check window. If they are different, then the Unit Price displayed will be in red, rather than in green as is shown in the screen shot.

One reason that the two prices may not be the same is if the Price Check window is not using the same SQL API call as the integrating product is using. The default SQL API call to use is selected on the Pricing Setup window. However, you can also tell the Price Check window to use a different call by selecting "SQL API Call selection" from the View menu while on the Price Check window. This will display a "SQL API call to use" drop-down at the bottom of the window. Note that some calls display more information than others do. This is normal behavior.

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

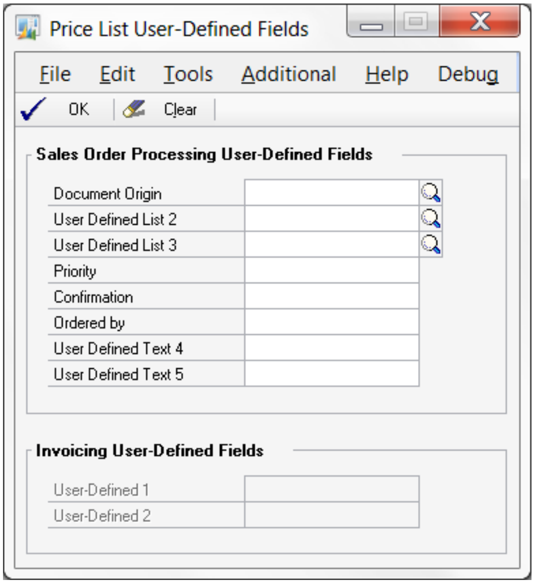
This option controls whether the Quantity Breaks from the Special Pricing are shown on the Price List Report. If this option and the option above are both selected the Quantity Breaks on the Price List will be a combination of both sets of Quantity Breaks.

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.

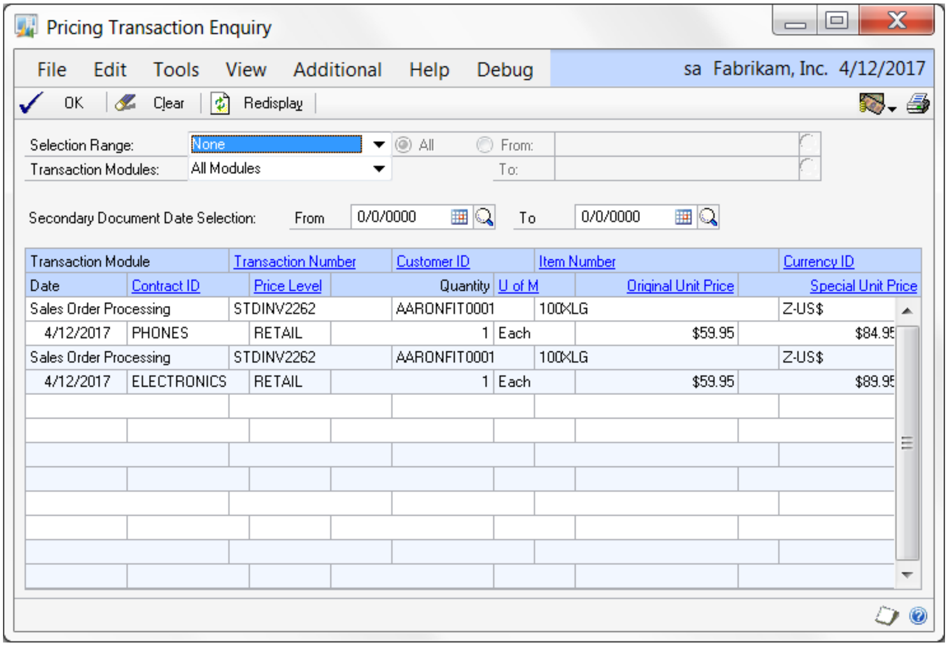
Once all the settings and options are selected, use the Print Button to start the Report Processing. You can use the Duplicate Button to copy the current Price List setup to another Price List ID.

You can also use the User-Defined Button to open the Price List User-Defined Fields window to specify values for the Sales Order processing or Invoicing User-Defined Fields.


Price List User-Defined Fields
File
Edit
Tools
Additional
Help
Debug
OK
Clear
Sales Order Processing User-Defined Fields
Document Origin
User Defined List 2
User Defined List 3
Priority
Confirmation
Ordered by
User Defined Text 4
User Defined Text 5
Invoicing User-Defined Fields
User-Defined 1
User-Defined 2

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.

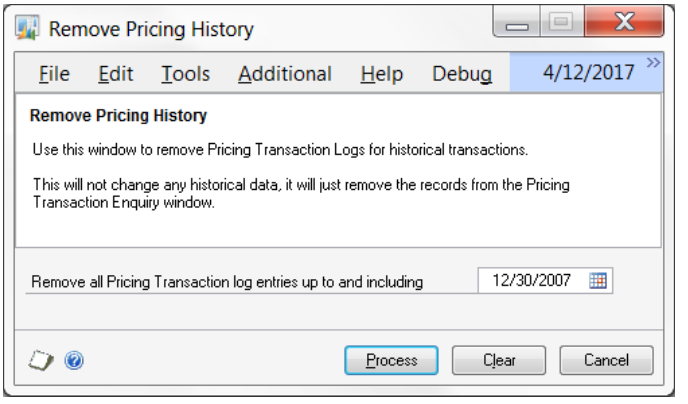


In this window you can choose the order you wish to see the data and also limit the records shown using the Selection Range. You also limit transactions to a particular module in the sales series.

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 Microsoft Dynamics GP >> Tools >> Utilities >> Omni Price >> Remove History to open the Remove Pricing History window.



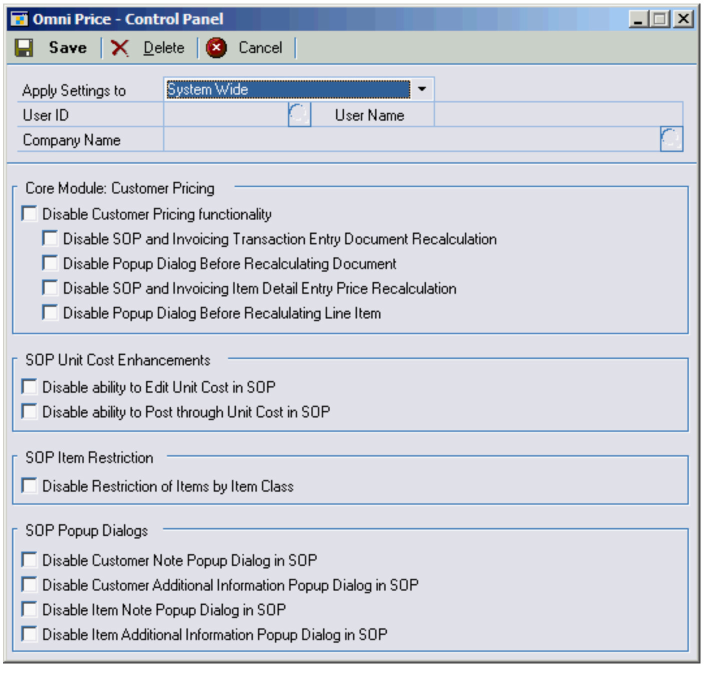
To use this window, enter a date and press the process button. This will permanently remove all Transaction Log records up to and including the specified date. It does not affect any other standard Dynamics GP tables.

Omni Price has alternate SOP and Invoicing Transaction and Inquiry windows. Displaying these windows is not required for Omni Price to function, however when they are used, the Contract ID for the Omni Price contracts is displayed (Transaction logging must not be disabled for the Contact ID to show).

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

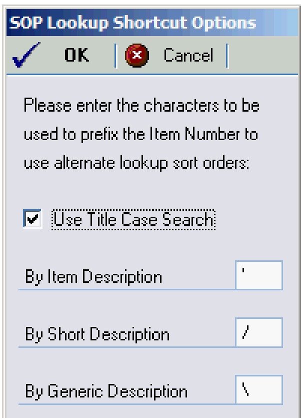
If this feature is activated from the Omni Price Registration window, you will be presented with a dialog containing the item's internet additional information (if there is information stored in it) after entering the Item Number into a Sales Order Processing Transaction. This feature can be disabled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

Administrator functions in Omni Price are described here.

This chapter includes the following sections:

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

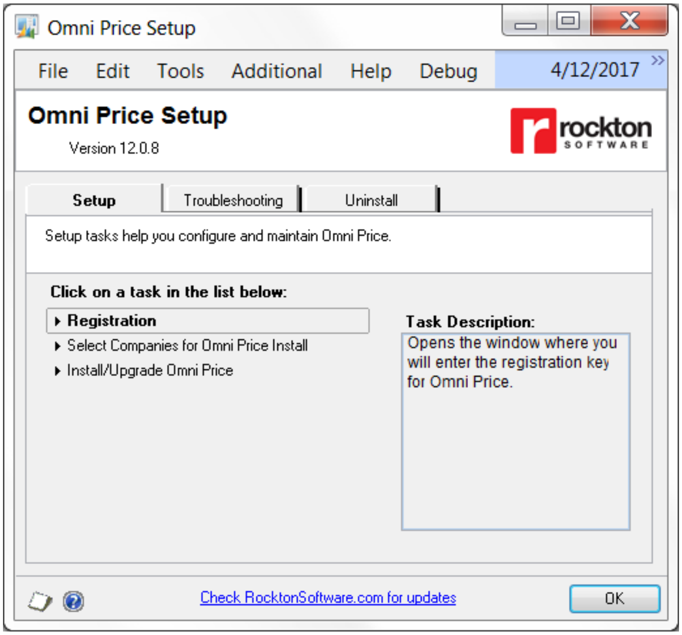
About Omni Price window

The About Omni Price window shows the Omni Price version as well as Rockton Software's contact details. To open this window, go to Help >> About Microsoft Dynamics GP; then go to Additional >> About Omni Price.

Register button

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

Omni Price Setup



The Omni Price Setup window allows you to perform setup and maintenance tasks.

To reach this window, choose Microsoft Dynamics GP >> Tools >> Setup >> Omni Price Setup.

The Omni Price Setup window gives you access to all of the tasks you will need to configure and maintain Omni Price. It contains three tabs: Setup, Troubleshooting and Install. You can see a brief description of each task by moving your cursor over any of the tasks in the list. To select a task, simply click on the task name.

Clicking the "Check RocktonSoftware.com for updates" link will take you to the Downloads web page for this product. Here you can verify that you are installing the latest build.

The tasks available for each tab are described below:

Setup tab

Setup tasks help you configure and maintain Omni Price.

Registration

Opens the window where you enter the Omni Price Registration Key.

Select Companies for Omni Price Install

Opens the window where you can select the companies in which you want to install Omni Price.

Install/Upgrade Omni Price

Installs or upgrades from a previous version. This may take several minutes. It will also set table permissions to all users in the system and company databases. You can perform this task multiple times.

Troubleshooting tab

These tasks are for troubleshooting only. You may be asked to use them by Rockton Support.

Re-add Security Data

Adds Security Roles and Tasks, if they have been deleted.

Move to First Position

Moves Omni Price to the first position in the launch file after Dynamics GP.

Remove from Launch File

Removes Omni Price from the launch file.

Reset Menus

Removes Omni Price from the Menu Master table. Afterwards, you will need to exit Dynamics GP and log in again to see the refreshed menus.

Enable Script Logging

Enables script logging, beginning with the next time you log into Dynamics GP from this workstation.

Debug Mode

This option may gather diagnostics, create log files, open the Code window or other things that may be helpful to Rockton Support.

Uninstall tab

These tasks can be used to uninstall Omni Price from the system or just from this workstation.

Workstation Uninstall

Removes Omni Price from the launch file. Also removes settings from the Defaults file.

Complete Uninstall

Tables will be removed from the database(s), Named Printer definitions will be removed and Omni Price will be removed from the launch file.

Omni Price Security Settings

Security in Omni Price can be administered via the following Security items:

OMNI PRICE ADMIN Security Role.

Used to set access to an Administrator of Omni Price.

ADMIN_OMNIPRICE_001 Security Task

Contains all windows necessary to setup and administer Omni Price. Typical Users do not need to have access to these windows.

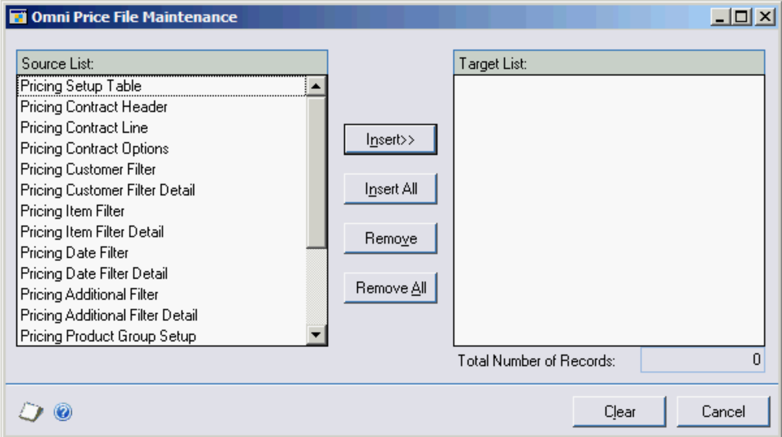
DEFAULT_USER Security Task

Contains all the windows that are required for the average User to be able to use Omni Price, typically the Inquiry and lookup windows. No setup and administration windows are included.

Omni Price File Maintenance

Makes the standard File Maintenance options of Shrink, Rebuild and Clear available for Omni Price tables.

To reach this window, choose Microsoft Dynamics GP >> Maintenance >> Omni Price.



Insert the files to be processed and then press the Shrink, Rebuild or Clear button.

Chapter 6: Excel Import File Format

When importing Contract Line information using the Import / Export Contracts using Excel window, your Microsoft Excel input file must adhere to certain requirements. This chapter details these requirements.

1. You must use the first workbook of the Excel spreadsheet. The name of the workbook doesn't matter.

2. Columns past column 100 will be ignored.

3. The first row must contain the column headings. These headings must correspond to the SQL column names of the fields in the Pricing Contract Line table (WDC02102). See the table below for details.

4. You may rearrange the order of the columns, as long as the headings are correct, as defined in the table below.

5. You may leave columns out of the Excel spreadsheet; however any omitted columns will get the default, or "empty", value for that column's data type. Any additional columns you add will be ignored.

Field name	Column Heading	Format	Default
Contract ID	WDC_Contract_ID	Text	Blank
Pricing Mode	WDC_Pricing_Mode	Custom: #	0
Item Number \ Filter	ITEMNMBR	Text	Blank
Site ID	LOCNCODE	Text	Blank
Currency ID	CURNCYID	Text	Blank
Price Level	PRCLEVEL	Text	Blank
U of M	UOFM	Text	Blank
All	ALLQTY	Custom: #	0
Start Quantity	FROMQTY	Custom: #	0
End Quantity	TOQTY	Custom: #	0
Percentage	UNITPRCT	Custom: #	0
Adjustment/Price	UNITPRCE	Custom: #	0
Round Policy	ROUNDTO	Custom: #	0
Round Option	ROUNDHOW	Custom: #	0
Round Amount	RNDGAMNT	Custom: #	0

Chapter 7: FAQ

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

Omni Price Menu entries have disappeared or do not work

Check Help >> About Microsoft Dynamics GP 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 open the Omni Price Setup window by going to Microsoft Dynamics GP >> Tools >> Setup >> Omni Price >> Omni Price Setup. Select the *Install/Upgrade Omni Price* task to open the Omni Price Installation Wizard window. Then follow the normal installation procedure in Chapter 2 from Step 6 onwards.

How do I Remove Omni Price?

The instructions for removing Omni Price are now found in the Removing Omni Price section in Chapter 2.

Omni Price Index

** End of document - Omni Price Manual 8-09-07.doc - 7 January 2015 **