

Extended Item Pricing

Extended Item Pricing is an enhanced replacement for the Sage I/C Item Pricing screen. It provides you with more functionality for adding and maintaining item price, and lets you copy existing item prices to other Sage 300 company databases.

Extended Item Pricing lets you:

- Look up items quickly with the Item SmartFinder, specifying one or more words in a browser-like search field.
- Maintain full or partial sets of item prices across multiple Sage 300 companies using the Copy Item Prices functionality.
 - Specify a range of item prices from the current company using the item number, currency code and price list code.
 - Filter prices by additional criteria, cherry-pick from the results, and then copy the final set of prices to other associated Sage 300 companies.
 - Set a default price list for item pricing.
 - Select or de-select companies on an individual basis.
 - Update item price descriptions only.
 - Display a full log of updated prices.

Important Notes:

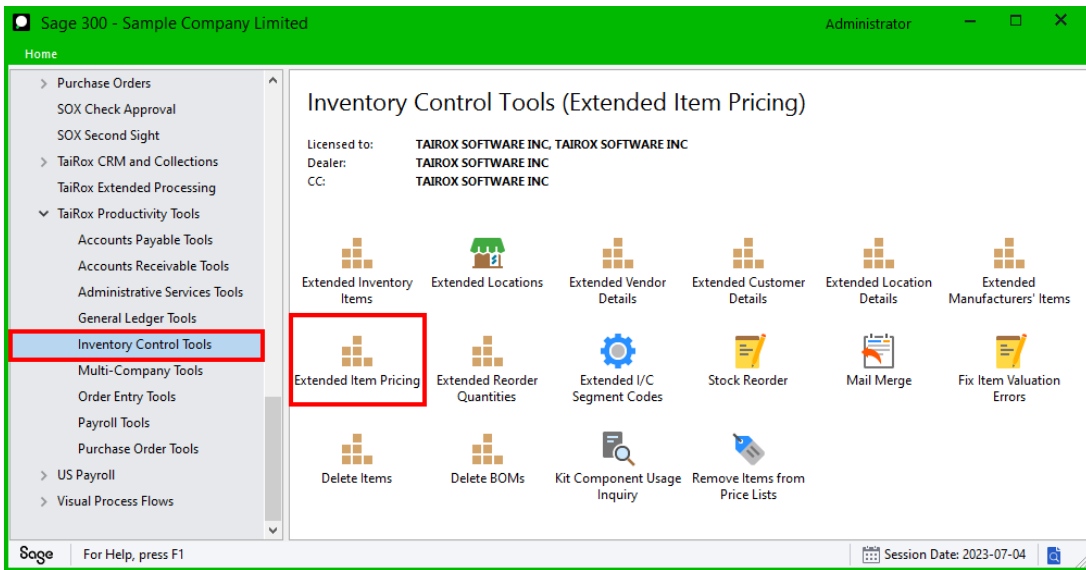
- Certain pricing fields, for example "Markup Cost" are in the functional currency of a company. Extended Item Pricing will only copy these fields if the functional currencies of the source and target companies match.
- When copying to a multicurrency target, all non-cost price information is copied.
- When copying to a single-currency target, only prices whose currency matches the functional currency of the target company are copied.

The following screens show the extra features provided by the Extended Item Pricing screen:

Sage I/C Item Pricing screen

TaiRox Extended Item Pricing screen

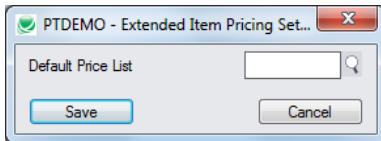
The Extended Item Pricing icon appears under **TaiRox Productivity Tools > Inventory Control Tools** on the Sage 300 desktop and can be copied to other menu locations.



Setting the Default Price List for Extended Item Pricing

You can select the default price list for the Extended Item Pricing form.

- Select **File > Settings...** from the Extended Item Pricing screen to display the default price list form.

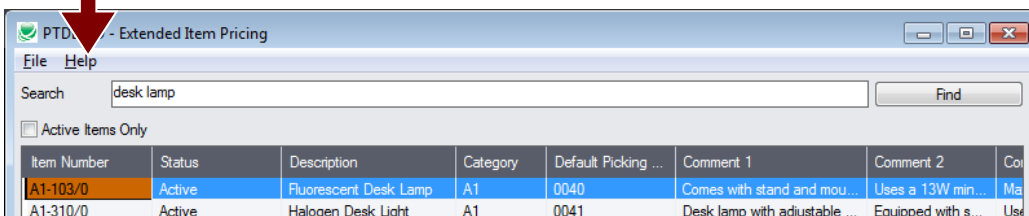
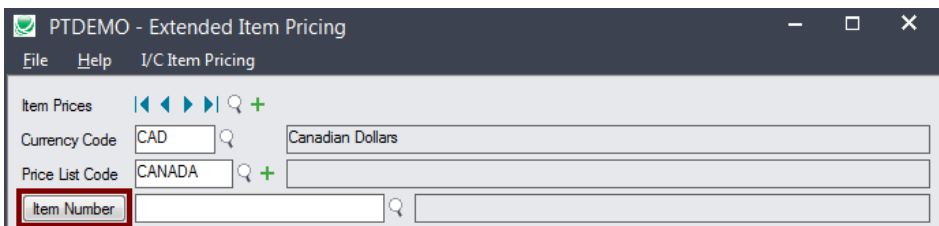


- Select the default price list from the Finder, and click Save.

The price list you specify will appear by default, but you can change it when you edit item prices.

Using the Item Number SmartFinder button

Click the Item Number button to open the SmartFinder for items.



The Item Number SmartFinder provides a Search field for entering search words and displays a selection grid with the search results.

- Enter one or more words or word fragments in the Search field to search multiple item fields.
- Click the checkbox to search for Active items only.
- Search returns items that contain the search string in any of the searched fields.

In the example above, "desk lamp" appears in the description for one item and in the comment field for the other item. Both items are displayed.

Note:

- *All of the word fragments must be present in one of the fields being searched.*
For example, if you searched for "desk lamp", you will not see an item where only "desk" is in the Description field and only "lamp" is in the Comment 1 field.
- **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

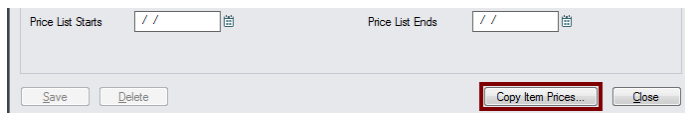
Copy Item Prices to other Sage 300 companies

IMPORTANT:

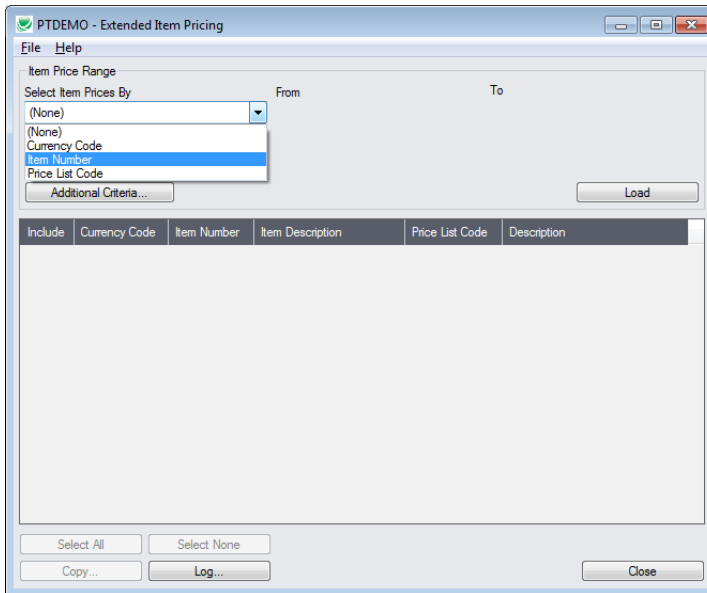
You must enter a User ID and Password to copy item pricing information. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new item prices in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the item prices that you want to copy.
 - Copy Item Prices operates from within an existing "source" company, and lets you copy item information to other Sage 300 company databases.
- Open the Extended Item Pricing form, and click the Copy Item Prices button at the bottom of the screen.



When the Copy Item Prices button is pressed, a window will pop up for selecting Item Prices in the current (source) company.



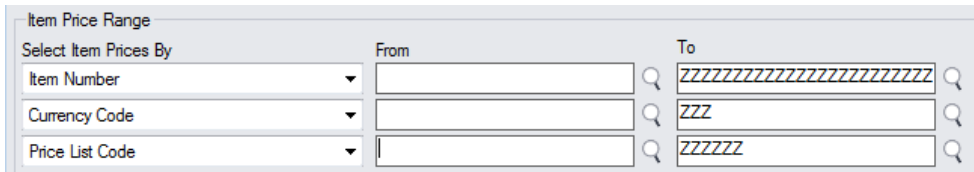
Note: By default, the grid on this form will display any new item prices that you added in this session. This allows you to copy these new prices immediately to other Sage company databases.

To copy or update any set of item prices, start at the top of the form to specify the range of prices that you want to copy or update.

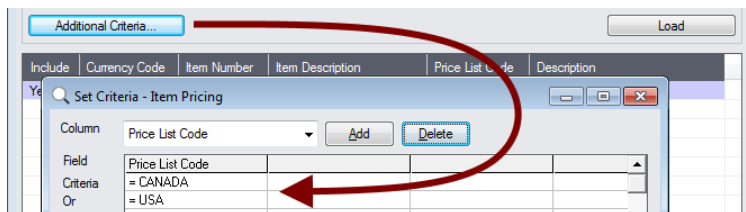
The program displays the last set of ranges and filters that were used for copying and updating item prices. Click the Load button to use the previous settings.

Specify range of Item Prices for copying:

You can specify ranges for item numbers, currency codes and price list codes for price selection.



Choose additional criteria:

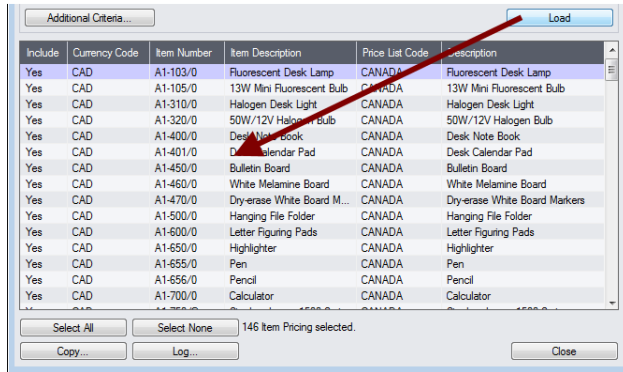


- Click the Additional Criteria button to use any item price field to filter items for copying. Click OK to save.

Load the list of Item Prices and choose which ones to copy:

- Click the Load button to display the list of Item Prices.
When the Load button is pressed, the program will display the prices in the ranges and with the additional criteria that you specified.

- o You can adjust the ranges or additional criteria if necessary, then click Load again.



- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the item prices loaded in the grid for copying.

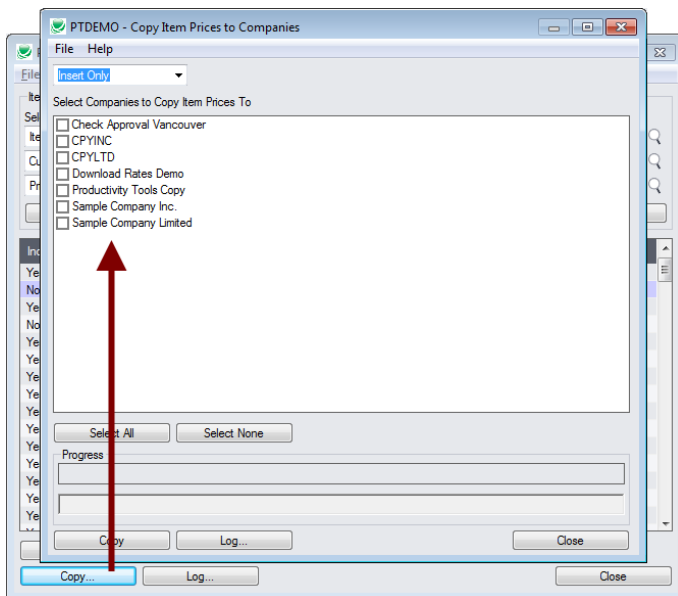


- Double-click in the Include column to “cherry-pick” prices:

Include	Currency Code	Item Number	Item Description	Price List Code	Description
Yes	CAD	A1-103/0	Fluorescent Desk Lamp	CANADA	Fluorescent Desk Lamp
No	CAD	A1-105/0	13W Mini Fluorescent Bulb	CANADA	13W Mini Fluorescent Bulb
Yes	CAD	A1-310/0	Halogen Desk Light	CANADA	Halogen Desk Light
No	CAD	A1-320/0	50W/12V Halogen Bulb	CANADA	50W/12V Halogen Bulb

Click the Copy button to display the To Companies screen:

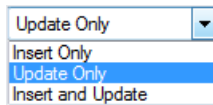
When you are happy with the set of items that you have selected, click the Copy button at the bottom of the screen.



Select whether to insert new prices or update existing ones in target companies:

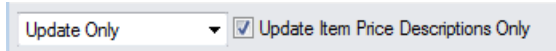
Before proceeding, you must decide whether to add or update prices in the target companies.

For example, you would choose Update Only to only update prices for items that are already sold by the target companies or if you wanted to update item price descriptions only.



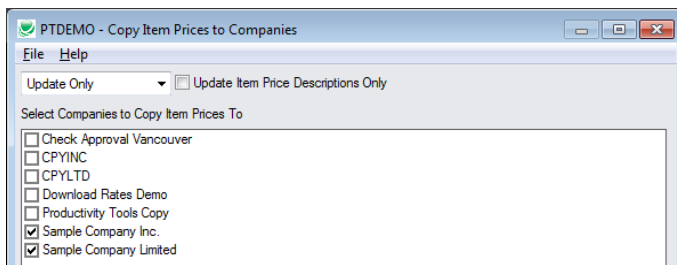
- Choose whether to insert, insert and update, or just update item prices.
 - Insert Only will add prices if they do not already exist. It will not change existing prices.
 - Update Only will only update prices that do exist – but not add new ones.
 - Insert and Update will perform both of these operations.

Update Item Price Description Only:



- Update Item Price Description Only appears for Update Only.
This checkbox will change item descriptions only – it doesn't matter whether other item properties match.
- Except for the special case of changing the description only, an update operation will attempt to change the price in the target company to be just like the price in the source company.

Select target Sage companies:

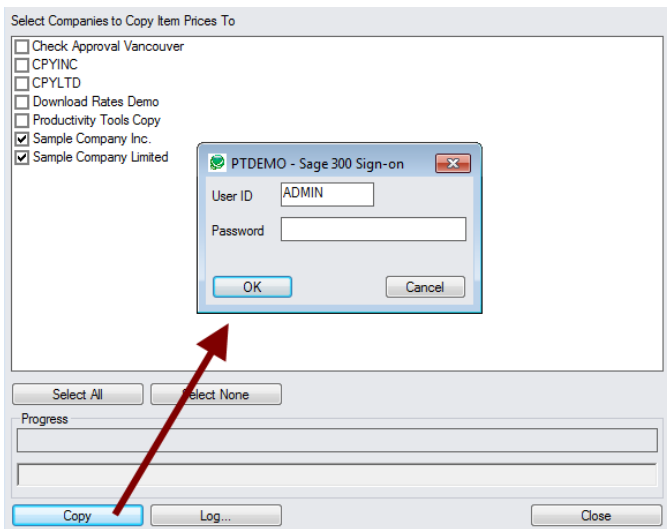


- Click the Select All and Select None buttons at the bottom of the form to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy item prices:



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

Note: You MUST have sufficient permissions to update Item Pricing in the target companies for copying to proceed.
- The program will copy the inventory item prices to the target companies.
- If no changes are required for a selected item, no update will be performed – so the audit stamp will be preserved.
- If you cancel the operation during the copying process, you must check the log to see which procedures were completed and assess how you want to continue.

Click the Log button to confirm which Item Prices were processed:

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7/25/2020 10:41:43 AM Copy Item Prices to Companies started.
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM Logged in user: ADMIN
7/25/2020 10:41:43 AM Performed by user: MORGAN
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM Update Only
7/25/2020 10:41:43 AM Update Item Price Descriptions Only: No
7/25/2020 10:41:43 AM Copy Item Prices to Companies: Sample Company Limited
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM Copying item prices from Productivity Tools Demo to Sample Company
Limited started.
7/25/2020 10:41:43 AM      Logging in to Sample Company Limited...
7/25/2020 10:41:43 AM      Item price CAD, A1-103/0, CHINA does not exist. Item price not
updated.
7/25/2020 10:41:43 AM      Updating item price CAD, A1-103/0, CANADA...
7/25/2020 10:41:43 AM      Item price updated.
7/25/2020 10:41:43 AM      Logging off of Sample Company Limited...
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM      There was 1 item price updated.
7/25/2020 10:41:43 AM      There was 1 item price not updated.
7/25/2020 10:41:43 AM Copying item prices from Productivity Tools Demo to Sample Company
Limited complete.
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM
7/25/2020 10:41:43 AM Copy Item Prices to Companies complete.
7/25/2020 10:41:43 AM
=====
    
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The Log lists:

- The user, the type of operation performed, and the range of prices.
- Each item that was processed and whether the prices were updated or inserted.