



## Special Pricing by Warehouse For Sage 100 ERP 2014

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## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100 ERP** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

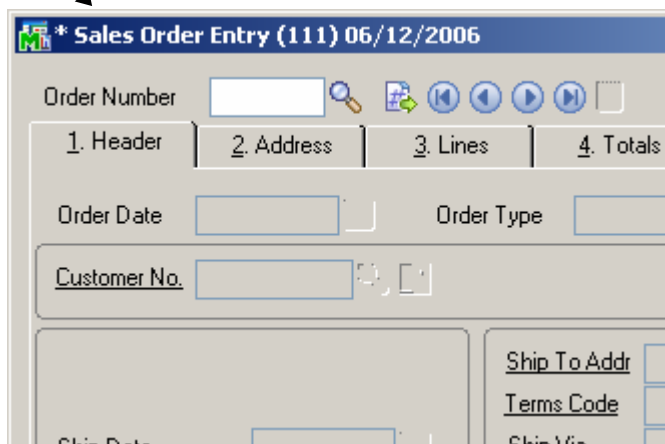
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 ERP screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customize Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100 ERP.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	5.10		AAAAAAAAAAAAAAAA	BBBBB

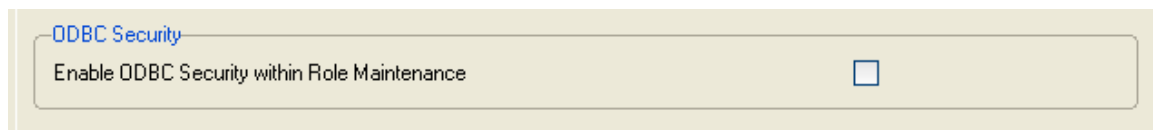
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

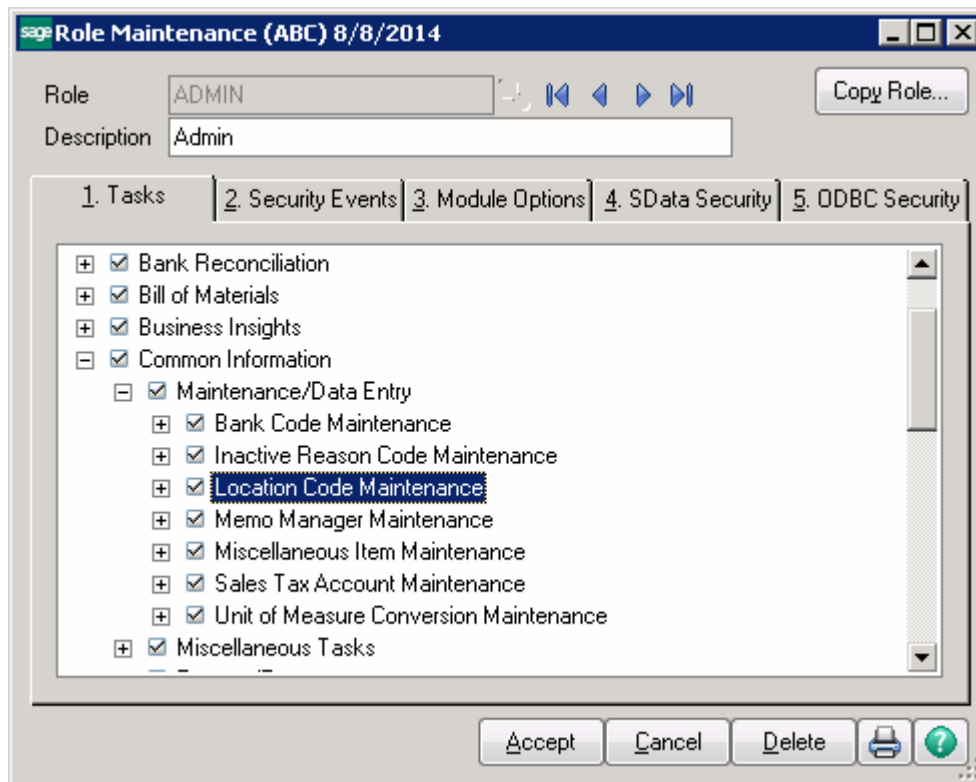
## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



## Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



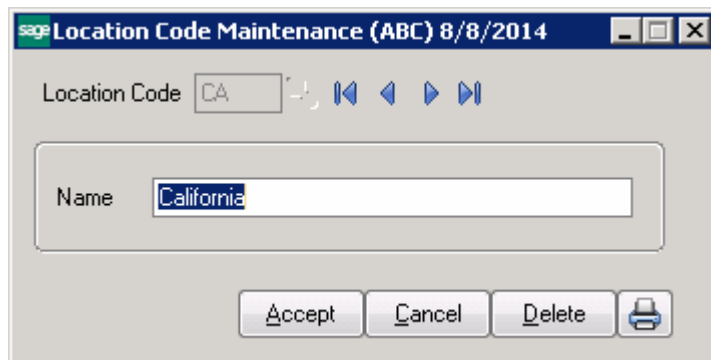
## Introduction

This enhancement provides a new Inventory Item pricing option: by Warehouse/Location Code/Customer

## Location Codes

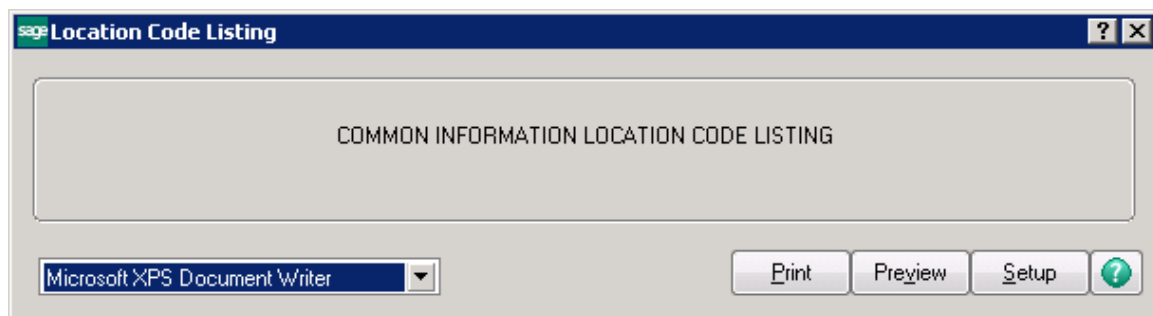
### Location Code Maintenance

**Location Codes** are set up in the **Location Code Maintenance** added under the **Common Information Main** menu.

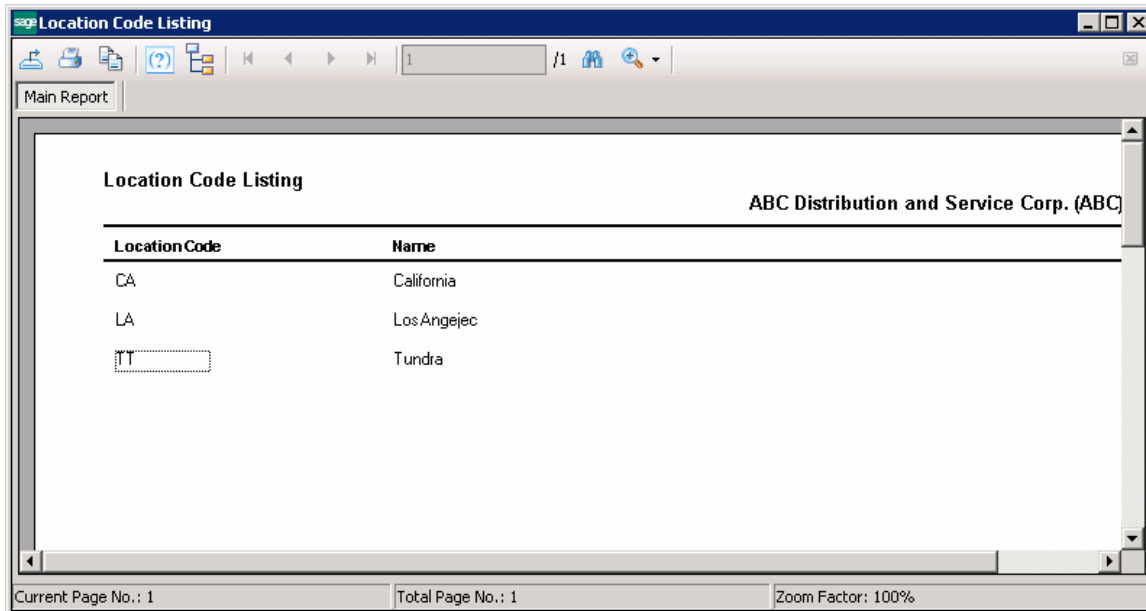


The screenshot shows a window titled "sage Location Code Maintenance (ABC) 8/8/2014". It features a "Location Code" field with the value "CA" and navigation buttons. Below is a "Name" field containing "California". At the bottom, there are buttons for "Accept", "Cancel", "Delete", and a printer icon.

The print button allows for printing a listing of all Location Codes set up in the system.

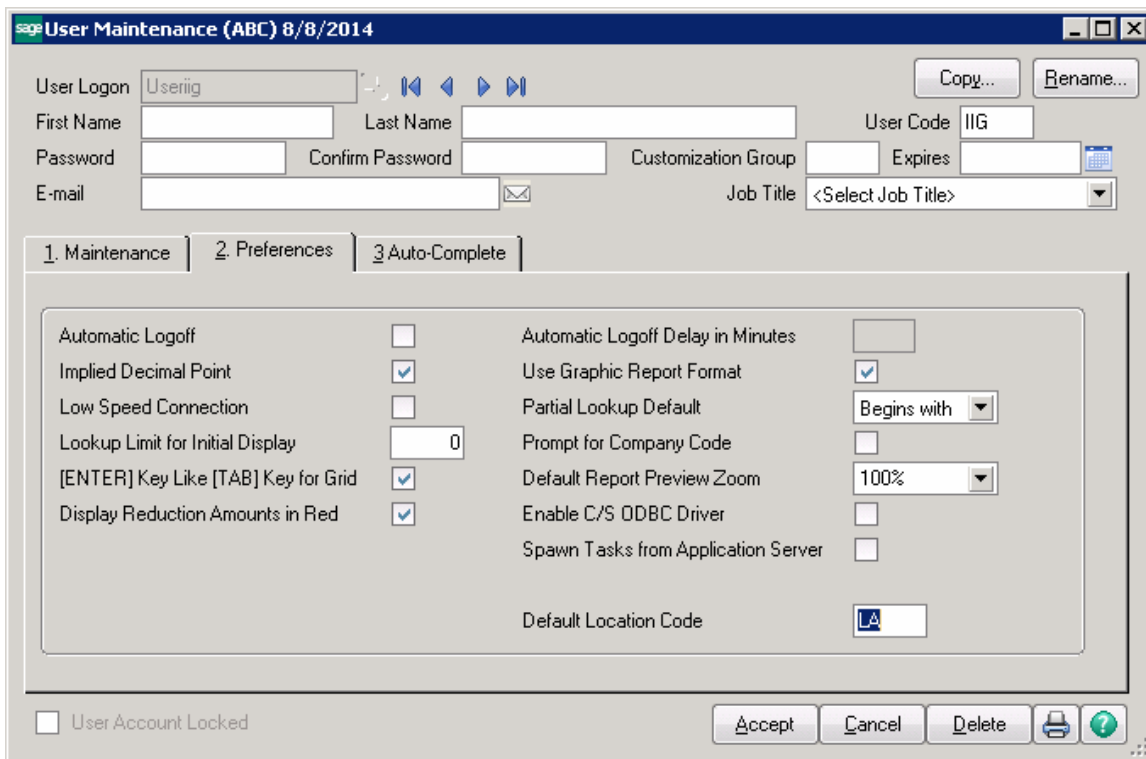


The screenshot shows a window titled "sage Location Code Listing". It contains a large text area with the heading "COMMON INFORMATION LOCATION CODE LISTING". At the bottom, there is a dropdown menu set to "Microsoft XPS Document Writer" and buttons for "Print", "Preview", "Setup", and a help icon.



## User Maintenance

The **Default Location Code** field has been added on the **Preferences** tab of the user Maintenance to allow assigning a location code to the User.





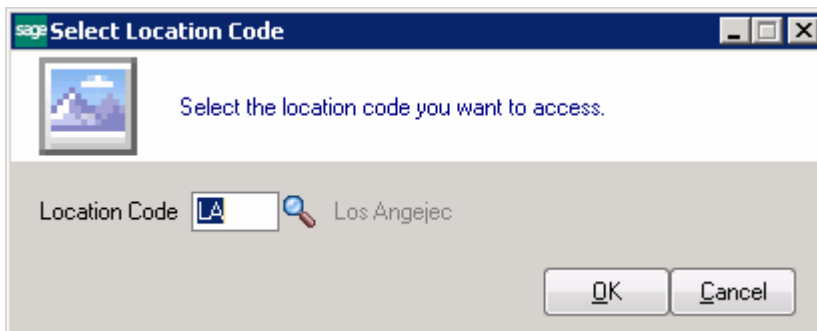
The **Default Location Code** assigned to a user is taken into account when the user is creating Sales Order, S/O Invoice, etc.

*Note: Additional functionality is available if you have TNL450 (Transaction Number by Location) enhancement installed and next transaction numbers set up for the user's Location Code.*

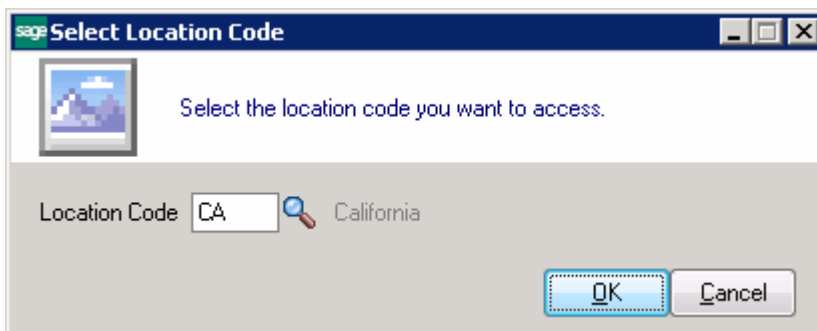
## Change Location Code

The **Change Location Code** menu added under the **Common Information Setup** allows authorized user to change the Location Code:

The **Select Location Code** screen is opened with the location Code already assigned to current user:



After selecting a new Location Code and pressing Ok the user's Location code is updated with the new one:



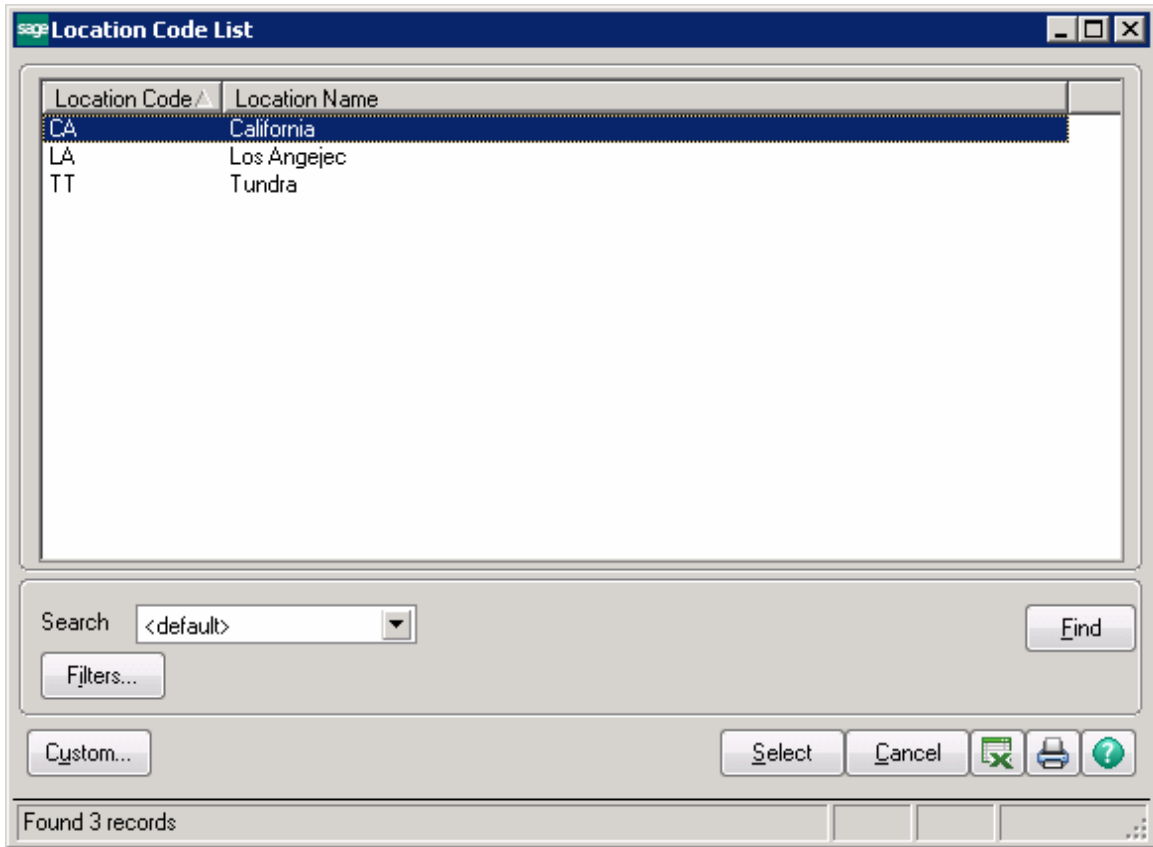
The screenshot shows the SAP User Maintenance (ABC) 8/8/2014 window. At the top, there are navigation buttons (back, forward, search) and buttons for 'Copy...' and 'Rename...'. The user details section includes fields for 'User Logon' (Useriig), 'First Name', 'Last Name', 'User Code' (IIG), 'Password', 'Confirm Password', 'Customization Group', 'Expires', 'E-mail', and 'Job Title' (<Select Job Title>). Below this is a tabbed interface with three tabs: '1. Maintenance', '2. Preferences', and '3. Auto-Complete'. The '2. Preferences' tab is active, showing a list of settings: 'Automatic Logoff' (checkbox), 'Automatic Logoff Delay in Minutes' (text box), 'Implied Decimal Point' (checkbox checked), 'Use Graphic Report Format' (checkbox checked), 'Low Speed Connection' (checkbox), 'Partial Lookup Default' (dropdown: Begins with), 'Lookup Limit for Initial Display' (text box: 0), 'Prompt for Company Code' (checkbox), '[ENTER] Key Like [TAB] Key for Grid' (checkbox checked), 'Default Report Preview Zoom' (dropdown: 100%), 'Display Reduction Amounts in Red' (checkbox checked), 'Enable C/S ODBC Driver' (checkbox), 'Spawn Tasks from Application Server' (checkbox), and 'Default Location Code' (text box: CA). At the bottom left, there is a checkbox for 'User Account Locked'. At the bottom right, there are buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

## Warehouse Code Maintenance

The **Location Code** field has been added on the **Warehouse Code Maintenance** to allow assigning Location Codes to Warehouses. Different warehouses can be assigned to the same Location.

The screenshot shows the SAP Warehouse Code Maintenance (ABC) 8/8/2014 window. The 'Warehouse Code' is 001 and the 'Description' is EAST WAREHOUSE. The 'Location Code' field is highlighted with a blue border and contains 'CA' with a magnifying glass icon and the text 'California'. Other fields include Name, Address, ZIP Code, City, State, Country, Telephone, Ext, Fax, E-mail Address, and Contact. The 'Post to Location' field is set to '01' with a magnifying glass icon and the text 'East Sales Office'. The bottom of the window has buttons for 'Accept', 'Cancel', 'Delete', a printer icon, and a help icon.

The Lookup button next to the **Location Code** field lists the Location Codes set up in the system:



## Price Codes By Location

### Location Price Code Maintenance

Use the **Location Price Code Maintenance** added under the **Inventory Management Setup** menu to set up price codes by **Location**.

Price Code: STD

Location Code: CA, California

Price Level: Standard

Pricing Method: Price Discount %

Step	Fr	y	Discount %
1	1	10	10.000%
2	11	99,999,999	20.000%
3			
4			
5			

Buttons: Accept, Cancel, Delete, Print

Price codes by Location can be assigned to any number of items in inventory

**Location Price Code Maintenance** allows you to create pricing structure for particular location. If you need to set up quantity break pricing for specific items, this information can be entered for individual items in Item Maintenance (Location Item Pricing Maintenance), or for individual customers in Customer Maintenance (Location Customer Pricing Maintenance).

You can print the Location Price Code Listing from this window:

Location Price Code Listing

Main Report

Location Price Code Listing

ABC Distribution and Service Corp. (ABC)

Price Code	Location Code	Price Level	Pricing Method	From Quantity	To Quantity	Amount/Percent Change
CAB1	CA	Standard	Cost Markup Amount	1	10	1.000
				11	And Over	2.000
LMP	CA	Standard	Cost Markup Amount	1	And Over	0.000
STD	CA	Standard	Price Discount Amount	1	10	0.000
				11	And Over	0.000
STD	CA	L	Price Discount Amount	1	10	10.000
				11	And Over	20.000

Current Page No.: 1      Total Page No.: 1      Zoom Factor: 100%

### Location Customer Price Code Maintenance

Use the **Location Customer Price Code Maintenance** added under the **Inventory Management Setup** menu to set up price codes by **Location** for individual Customer.

Customer No. 01-ABF  
Name American Business Futures

Price Code STD STANDARD QUANTITY PRICING  
Location Code CA California  
Pricing Method Price Discount %

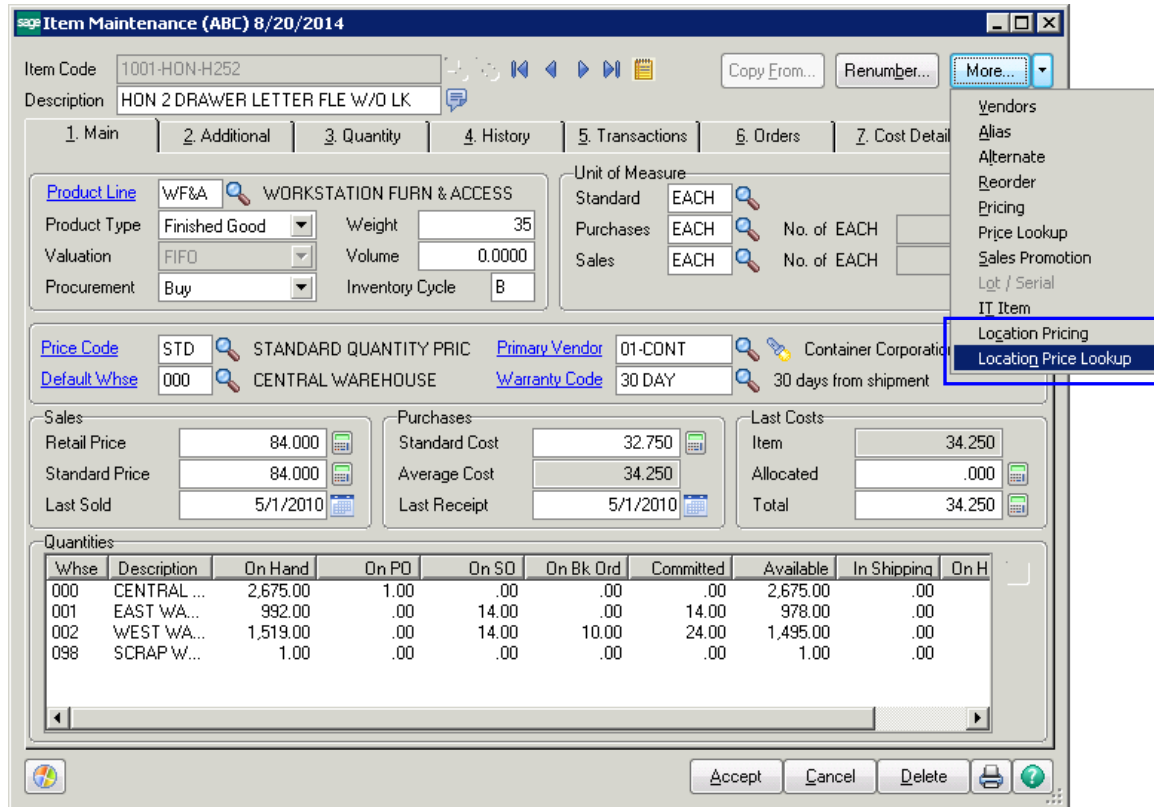
Step	From Quantity	To Quantity	Discount %
1	1	10	.000%
2	11	99,999,999	40.000%
3			
4			
5			

Accept Cancel Delete

The standard pricing methods and quantity break pricing may be applied to this special pricing by Customer/Price Code/Location Code.

**Item Maintenance**

The **Item Maintenance** program has been modified to allow for Location Pricing setup and Location Price lookup.



The **Location Pricing** button allows for opening the **Location Item Pricing Maintenance** and creating a unique price schedule for the selected item.



**SAP Location Item Pricing Maintenance**

Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FILE W/O LK

Pricing Option: Item Pricing

Location Code: CA      California

Price Level: S

Pricing Method: Price Override

Standard Price: 84.000

Standard Cost: 32.750

Step	From Quantity	To Quantity	Unit Price
1	1	10	23.000
2	11	99,999,999	26.000
3			
4			
5			

Accept      Cancel      Delete

The price schedules can be based on the selected Location Code and standard price level, or the customer price level assigned to each customer in the Accounts Receivable Customer file. You can enter price schedule information for any number of Location Codes and customer price levels. The setup procedure is similar to **Location Price Code** setup except that it is established for an individual Item.

Both Item Pricing and Contract pricing options are available when establishing special pricing schedule by Location code.

Item Code: 1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK

Pricing Option: Customer Price Schedule

Location Code: CA California

Customer No.: 01-ABF American Business Futures

Pricing Method: Price Discount Amount

Standard Price: 84.000

Standard Cost: 32.750

Step	From Quantity	To Quantity	Discount Amount	Unit Price
1	1	10	10.000	74.000
2	11	99,999,999	15.000	69.000
3				
4				
5				

Accept Cancel Delete

Use the Location Price Lookup to view all standard or custom prices for an item by customer, location and price level. The prices displayed are based on the price schedules established using **Location Customer Price Code Maintenance** and **Location Item Pricing Maintenance**. Any applicable sales promotion prices are also displayed.

**sage Location Price Lookup**

Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FLE W/O LK

Customer No.

Location Code

Price Level

---

Pricing Method

Standard Price: 84.000

Standard Cost: 32.750

Sale Starting Date: 5/15/2010

Sale Ending Date: 5/31/2010

Sale Price: 79.800

Step	From Quantity	To Quantity	Unit Price
1			
2			
3			
4			
5			

---

Order	Quantity	U/M	Unit Price	Extension
	.00	EACH	.000	.00

Upon entering a quantity, the price is calculated and displayed based on the pricing information on file for the item and/or customer and Location. If a price schedule does not exist, the price calculation is based on the standard price. If a sales promotion price is in effect on the current date, the sale price is used if it is the lower price.

**sage Location Price Lookup**

Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FLE W/O LK

Customer No. 01-ABF      American Business Futures  
 Location Code CA      California  
 Price Level       Custom Pricing - Location-Customer

Pricing Method: Price Discount Amount  
 Standard Price: 84.000  
 Standard Cost: 32.750

Sale Starting Date: 5/15/2010  
 Sale Ending Date: 5/31/2010  
 Sale Price: 79.800

Step	From Quantity	To Quantity	Discount Amount	Unit Price
1	1	10	10.000	74.000
2	11	99,999,999	15.000	69.000
3				
4				
5				

	Quantity	U/M	Unit Price	Extension
Order	20.00	EACH	69.000	1,380.00

OK

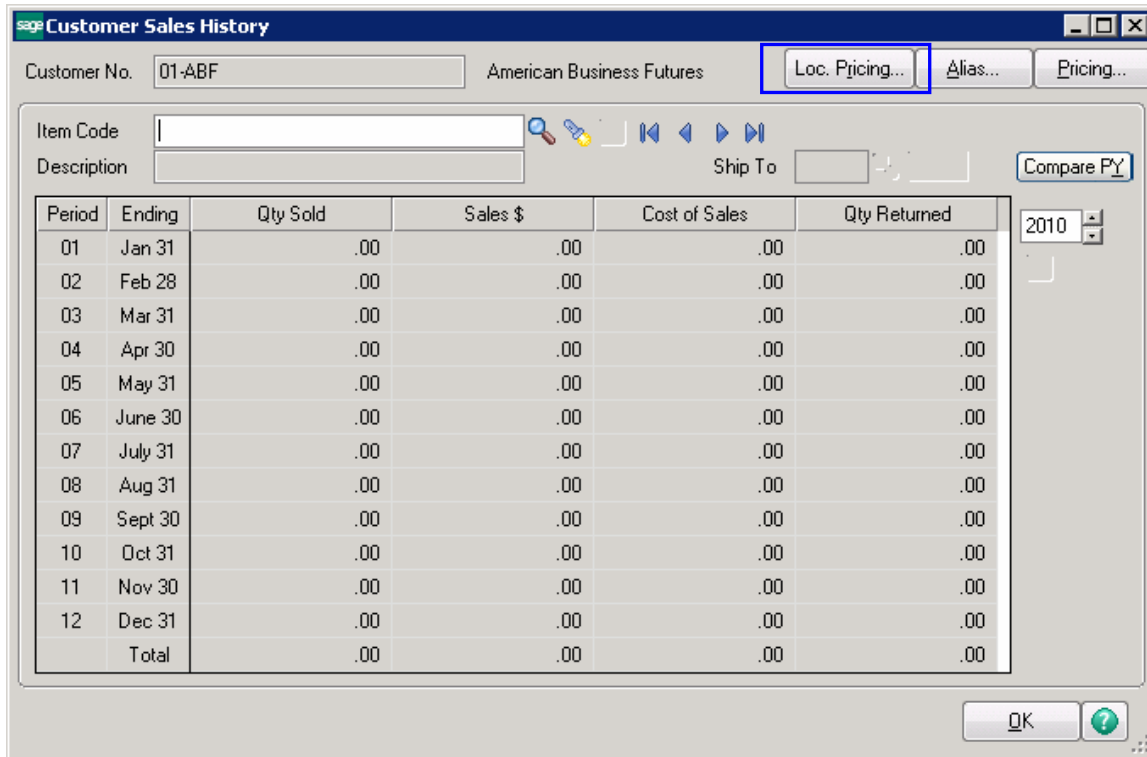
Customer Maintenance

The **Location Customer Pricing Maintenance** is accessible also from the Customer Maintenance.

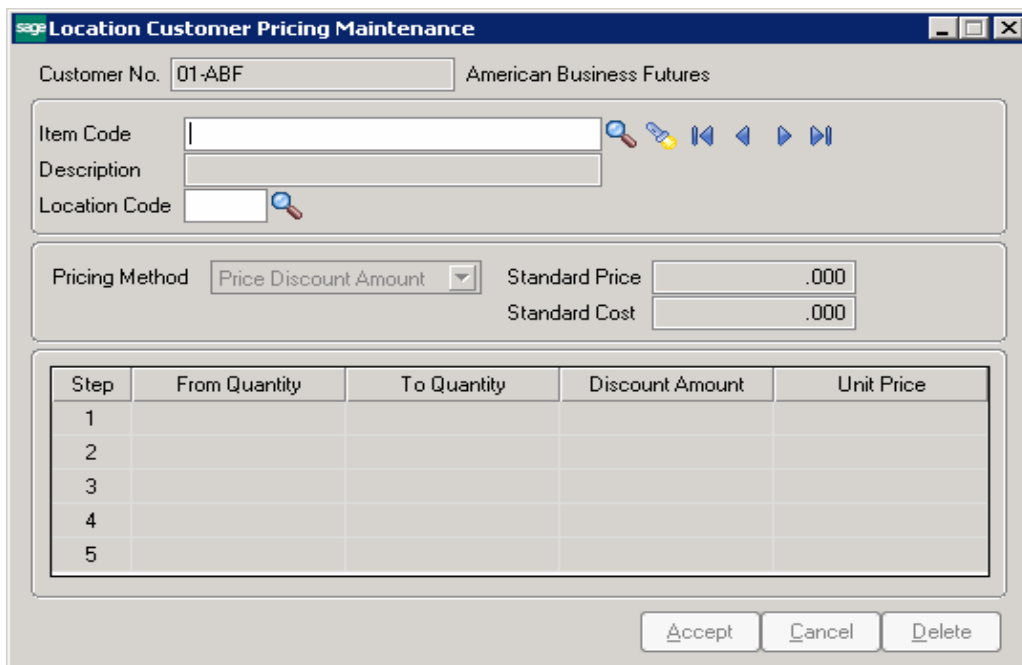
The screenshot shows the Sage Customer Maintenance window for customer '01-ABF American Business Futures' as of 8/8/2014. The interface includes a navigation bar with tabs for Main, Additional, Statistics, Summary, History, Invoices, Transactions, and S/Os. The main area is divided into several sections:

- Customer Information:** Customer No. 01-ABF, Name American Business Futures. Buttons for Copy From..., Renumber..., and More... are present.
- Comment:** Call Ed for credit approval.
- Open Item Customer:** Checked checkbox.
- Internet Enabled:** Checked checkbox.
- Customer Status:** Active (dropdown menu).
- Inactive Reason:** Empty text field.
- Data Entry:**
  - Price Level: 1
  - Dflt Pymt Type: NONE (dropdown)
  - Discount Rate: .000%
  - Fin Charge Rate: 1.500%
  - Item Code: WIDGET (with description '8" x 10" Widgets')
- Printing:**
  - Sort: AMER
  - Customer Type: A2
  - Statement Cycle: M
  - Print Dun Message: Checked checkbox
  - Batch Fax: Unchecked checkbox
  - Use Sage Data Cloud for Invoice Printing: Unchecked checkbox
- Primary Credit Card Information:**
  - Card ID: Empty field with search icon
  - Payment Type: Empty field
  - Cardholder Name: Empty field
  - Last Four Digits: Empty field
  - Expiration Date: Empty field
  - Button: Credit Cards...

At the bottom of the window are buttons for Accept, Cancel, Delete, a printer icon, and a help icon.



Upon pressing **Loc. Pricing** button the **Location Customer Pricing** screen is opened allowing the user to set up quantity price breaks for individual items that can be applied automatically in Sales Order Entry.



The Lookup button lists all Items. The flashlight button lists all the Items in the Customer Price Scheduling list.

Customer No. 01-ABF American Business Futures

Item Code 1001-HON-H252

Description HON 2 DRAWER LETTER FLE W/O LK

Location Code CA California

Pricing Method Price Discount Amount

Standard Price 84.000

Standard Cost 32.750

Step	From Quantity	To Quantity	Discount Amount	Unit Price
1	1	10	10.000	74.000
2	11	99,999,999	15.000	69.000
3				
4				
5				

Accept Cancel Delete

This task is similar to **Location Customer Price Code Maintenance**, allowing the setup of price schedules by Location Code. Use this task to set up item quantity price breaks and/or pricing methods that are specific for the selected Customer, Item and Location Code.

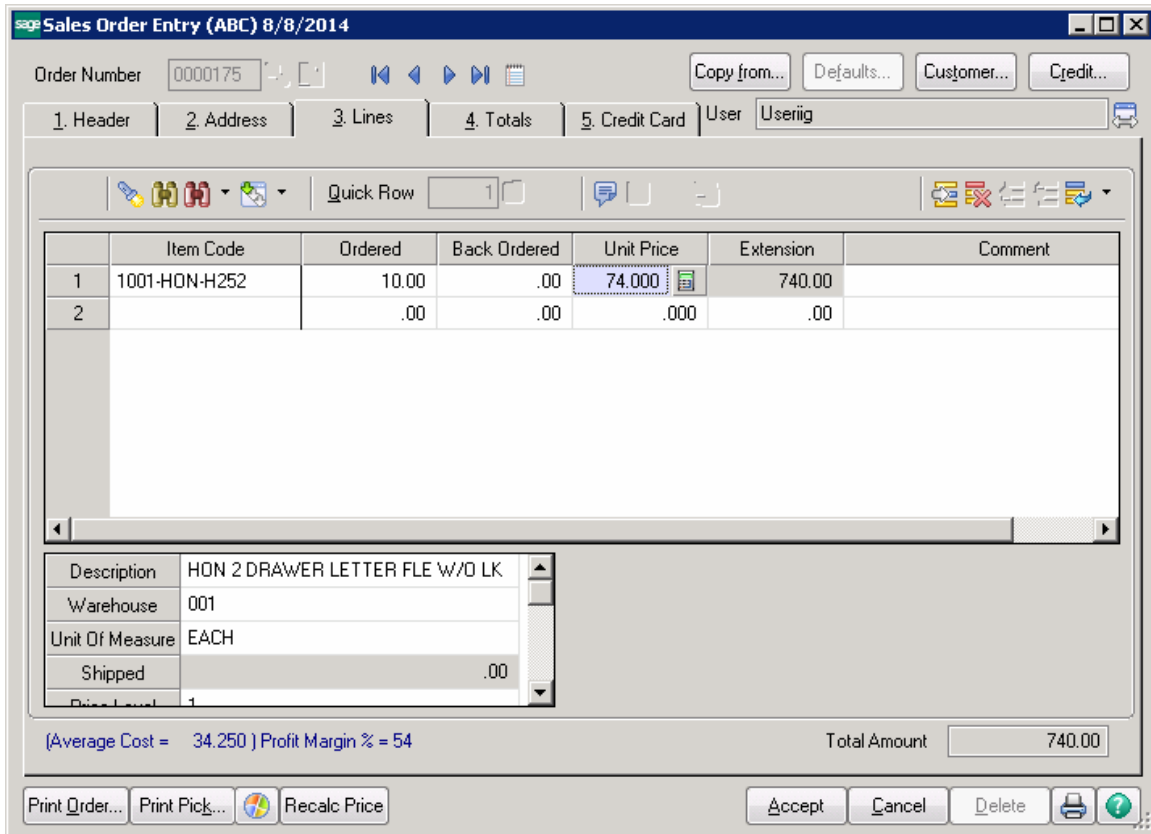
## Sales Order Entry

Here is an example of how the Item pricing by Location is applied in the Sales Order:

The screenshot displays the SAP Sales Order Entry (ABC) 8/8/2014 window. The interface includes a header section with navigation tabs (1. Header, 2. Address, 3. Lines, 4. Totals, 5. Credit Card) and a user field (User: Useriig). The Order Number is 0000175. The Order Date is 8/8/2014, and the Order Type is Standard Order. The Customer No. is 01-ABF, and the Customer Name is American Business Futures. The Ship Date is 8/8/2014. The Status is New, and the Reason is empty. The Warehouse (Whse) is 001, EAST WAREHOUSE. The Sales Tax Schedule is WI. The Ship To Addr is 2, American Business Futures. The Terms Code is 01, Net 30 Days. The Ship Via is UPS BLUE, FOB. The Confirm To is John Quinn. The E-mail is artie@sage.sample.com. The Salesperson is 0100, Jim Kentley. The Split Comm. is No. The window also features buttons for Print Order, Print Pick Sheets, Recalc Price, Accept, Cancel, and Delete.

Upon entering a line in the Sales Order, the program looks for Item pricing setup for the Location Code assigned to the line Warehouse and loads that price if found:





In our example the Location for Warehouse 001 is “CA”:

The screenshot shows a software window titled "Warehouse Code Maintenance (ABC) 8/8/2014". The window contains the following fields and controls:

- Warehouse Code: 001
- Description: EAST WAREHOUSE
- Name: [Empty text box]
- Address: [Empty text box]
- ZIP Code: [Empty text box]
- City: [Empty text box] State: [Empty text box]
- Country: [Empty text box]
- Telephone: [Empty text box] Ext: [Empty text box]
- Fax: [Empty text box]
- E-mail Address: [Empty text box]
- Contact: [Empty text box]
- Location Code: [Dropdown menu showing California]
- Post to Location: 01 [Dropdown menu showing East Sales Office]

At the bottom of the window, there are five buttons: "Accept", "Cancel", "Delete", "Print", and "Help".

As there is a Price schedule created for current line Item by Customer and the Warehouse Location Code, respective price is loaded in the Sales Order.

**sage Location Price Lookup**

Item Code: 1001-HON-H252      HON 2 DRAWER LETTER FLE W/O LK

Customer No. 01-ABF      American Business Futures

Location Code CA      California

Price Level       Custom Pricing - Location-Customer

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Pricing Method: Price Discount Amount

Standard Price: 84.000

Standard Cost: 32.750

Sale Starting Date: 5/15/2010

Sale Ending Date: 5/31/2010

Sale Price: 79.800

Step	From Quantity	To Quantity	Discount Amount	Unit Price
1	1	10	10.000	74.000
2	11	99,999,999	15.000	69.000
3				
4				
5				

---

Order	Quantity	U/M	Unit Price	Extension
	10.00	EACH	74.000	740.00

OK

If no location is assigned to the line warehouse, the program looks for the Location Code assigned to the user creating the Order.

Here is the priority by which Item Pricing is applied in Sales Order Entry:

1. Special Pricing by Location Customer set up in Customer Maintenance or Item Maintenance
2. Special Pricing by Location Customer Price Code set up in Location Customer Price Code Maintenance
3. If there is Price Level on the line the Item price is loaded from Location Item Pricing Maintenance as setup in the Item Maintenance.
4. If the Price Level is blank for the Order line the pricing setup in Location Price Code Maintenance is applied