



## TSH Tip

### Loading Global (Universal) Sale Flyer Contracts

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#### Overview of this TSH Tip

##### Who should use this TSH Tip?

Pricing managers and anyone else who needs to know how to load global sale flyer contracts into Vision™ will find this Tip helpful. Order entry operators, customer service representatives and managers, and salespeople may also want to look over this Tip for background information on what global sale flyer contracts are.

##### What will this TSH Tip help you do?

This TSH Tip will help you do several things:

- Understand the concept and benefits of global contracts in Vision.
- Check to see if a customer and/or ship to location is eligible for global contract pricing, and make changes if necessary.
- Set up global contracts in Vision.

##### Which parts of Vision are discussed?

- The Univ Cntr Elig field in Customer Master File Maintenance (menu-12.2.2.F4) and in Ship To Maintenance (menu-12.2.4.F2).
  - Customer Contract Master Maintenance (menu-12.3.6.1) and Contract Price File Maintenance (menu-12.3.6.2).
  - Pricing in Order Entry (menu-1.2).
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## Introduction

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Combined with the use of an ALPHA\_PROD, global sale flyer contracts (referred to in Vision as universal contracts) allow customers to get a sale flyer price **if, and only if**, the product number entered includes a prefix.

**Note:** This TSH Tip uses the term *global* contract; however, in Vision, global contracts are actually called *universal* contracts. A global/universal contract contains pricing that can be made available to any customer, regardless of whether that contract is included on the customer's list of contracts. This type of contract typically contains products included in a sale flyer. The product numbers in the sale flyer start with a special prefix.

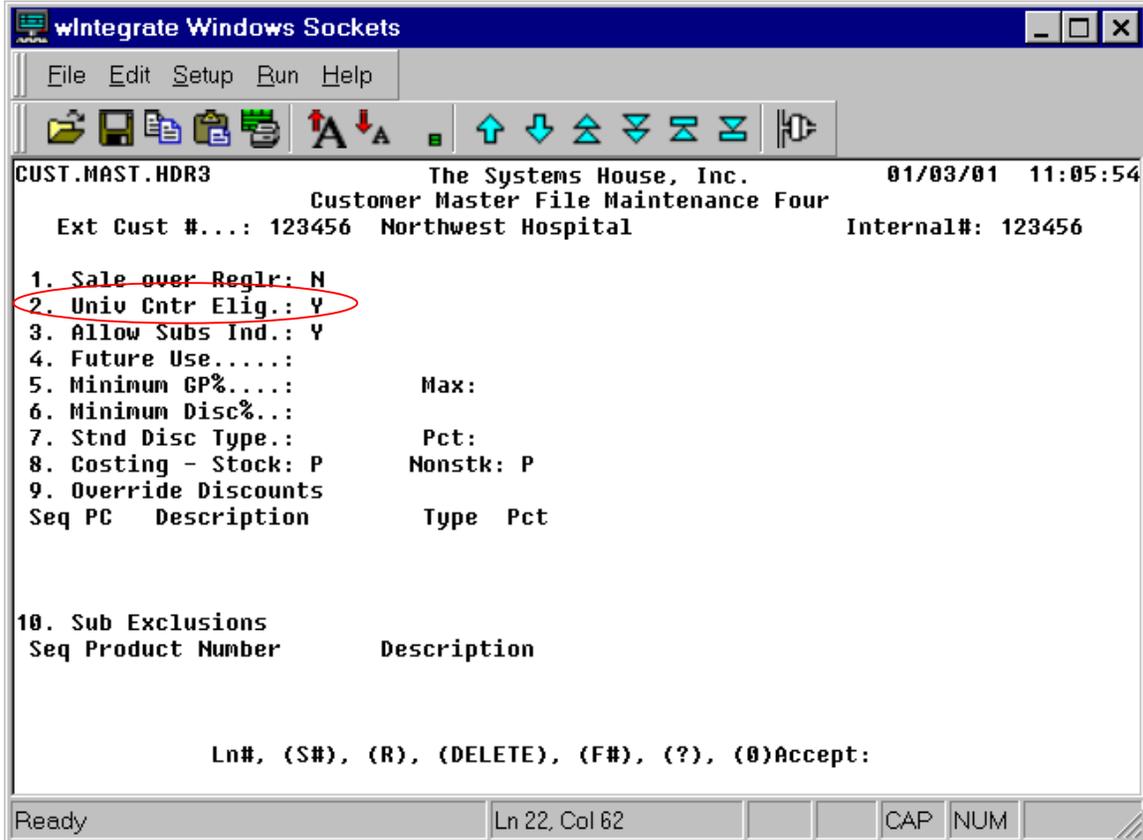
Advantages of using global contracts include the following:

- You do not have to give away margin unless the customer asks for it; if the customer does not include the prefix with the product number, the customer will not get the price advertised in the sale flyer/contract.
- You do not need to add the global contract to the customer/ship to record for every customer who might order something from a sale flyer.

## Setting up a Customer's Eligibility for Global Contracts

The Univ Cntr Elig field in Customer Master File Maintenance (menu-12.2.2.F4) and in Ship To Maintenance (menu-12.2.4.F2) determines whether the customer is eligible to be considered for the special pricing on global contracts.

### Customer Master File Maintenance (Menu-12.2.2.F4)



The screenshot shows a terminal window titled "wIntegrate Windows Sockets" with a menu bar (File, Edit, Setup, Run, Help) and a toolbar. The main display area contains the following text:

```
CUST.MAST.HDR3          The Systems House, Inc.          01/03/01  11:05:54
Customer Master File Maintenance Four
Ext Cust #...: 123456 Northwest Hospital          Internal#: 123456

1. Sale over Reglr: N
2. Univ Cntr Elig.: Y
3. Allow Subs Ind.: Y
4. Future Use.....:
5. Minimum GP%....:          Max:
6. Minimum Disc%..:
7. Stnd Disc Type.:          Pct:
8. Costing - Stock: P          Nonstk: P
9. Override Discounts
Seq PC  Description          Type  Pct

10. Sub Exclusions
Seq Product Number          Description

Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

The status bar at the bottom shows "Ready", "Ln 22, Col 62", and "CAP NUM".

**2. Univ Cntr Elig** This field determines whether a customer is eligible for global contract pricing.

Y = Yes, this customer is eligible for global contract pricing. If the customer orders a particular product on the global contract, and the customer includes the special prefix with the product number, the system will consider the pricing from the global contract.

N = No, this customer is not eligible for global contract pricing.

This field's default for new customers added to Vision is Y.



## Setting up a Global Sale Flyer Contract

Let's say that you want to set up a global sale flyer contract called CM4FLYER. The special product number prefix for the products that are on this contract is CM4. One of the products that are featured in the sale flyer is CM4AAGE1700, which is a #17 calendar base, and you need to add it to the contract. There are three major steps involved in the process of setting up such a global sale flyer contract in Vision.

1. Create a contract in Vision (Customer Contract Master Maintenance, menu-12.3.6.1). Make sure that the Pricing Type field is S for sale contract and that the Contract Type field is U for universal/global contract.

**Note:** A prefix is required for the global sale contract to take effect. The prefix is defined as the string of characters beginning after the first dot and proceeding to the next dot (if one exists) or to the end of the string of characters. The prefix in the following example is CM4.

```
CUST.CONTRACT.HDR0 The Systems House, Inc. 01/09/01 13:06:34
Customer Contract Master Maintenance
F1 - Maintenance

Contract Number: FLYER.CM4 Status: Inactive
Created: 01/04/01

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1. Name.....: FLYER.CM4
2. Description.: Save More Money

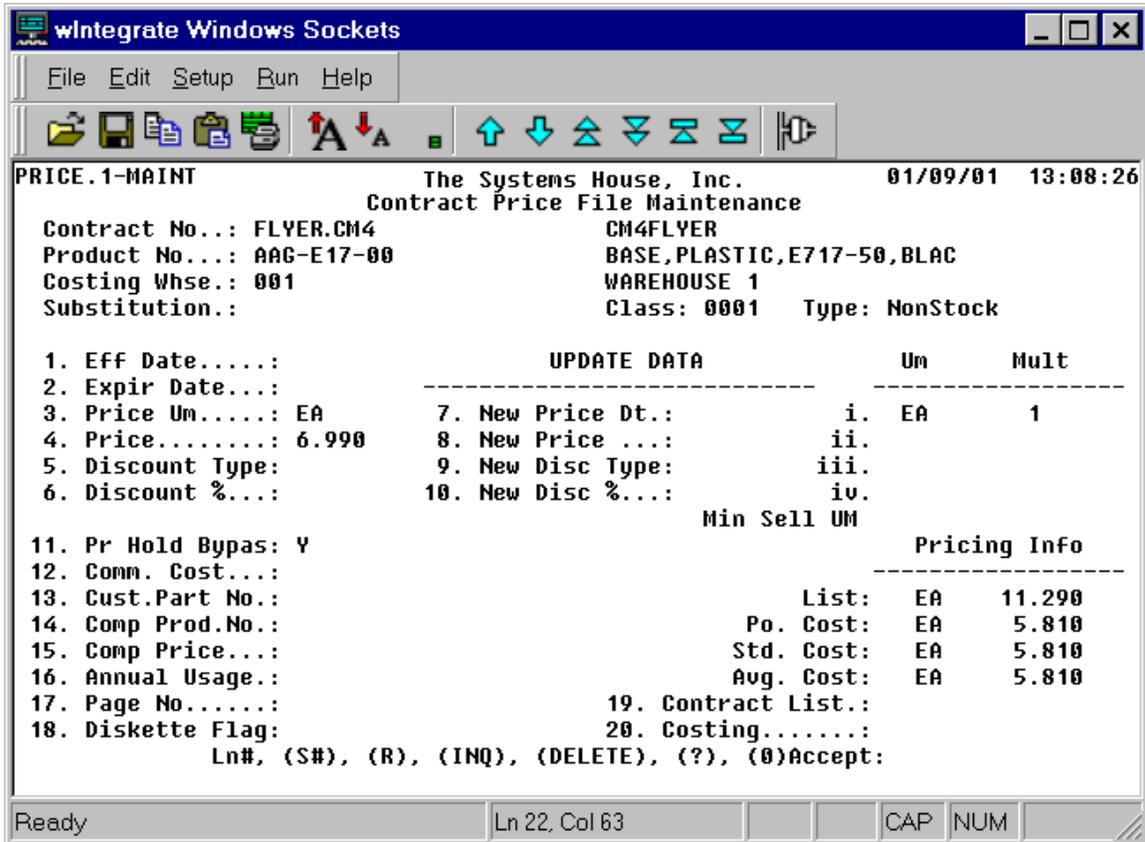
3. Global Effective Date...: 12/12/00
4. Global Expiration Date...: 01/31/01
5. Pricing Type.....: S Sale Contract
6. Contract Type.....: U Universal
7. Full Catalog Contract...: N
8. Salesrep (reporting)....: 002 Dick Grosfield
9. Auto Calculation Bypass.:

Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

- Add products to the contract via the method that you normally use (that is, add the products in Contract Price File Maintenance (menu-12.3.6.2) or add them to the PRICE\_1 file via an upload). Do not include the special flyer/contract prefix with the product numbers.

In our example, one of the products included in the sale flyer is product number CM4AAGE1700, and you need to add it the CM4FLYER global contract. When you add the product to the contract, you need to omit the CM4 prefix, and add product number AAGE1700 just as you would for any other contract.

The sample screen below shows how you would set up the product in Contract Price File Maintenance.



**Note:** The system will auto-create a cross-reference (ALPHA\_PROD) for the product number including the prefix. In the above example, the following two cross-references are created: CM4-AAG-E17-00 and CM4AGE1700. The prefix is defined by the string of the characters after the first dot.

In order for the global flyer price to be considered in pricing calculations, the user must enter the product number with the prefix.

## How Global Sale Flyer Contracts Work in Vision

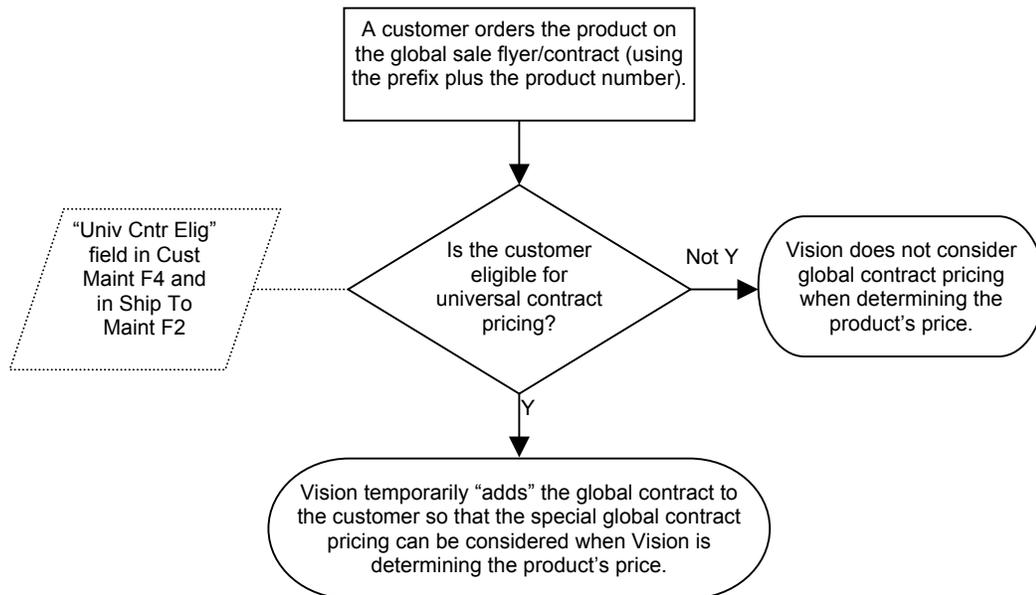
Let's say that a customer wants to order product CM4AAGE1700, which is a product featured in the sale flyer and the CM4FLYER contract.

- If the customer asks for product CM4AAGE1700, and if the customer is eligible for global contract pricing, Vision will consider the global contract price in its standard pricing logic.

**Note:** The customer may not receive the global contract price in every situation. If the customer has product AAGE1700 on a different contract that will give him or her a better price, for example, Vision will use the price from that other contract.

- If the customer asks for product AAGE1700, Vision will **not** consider the global contract price in its standard pricing logic, even if that customer is eligible for global contract pricing.

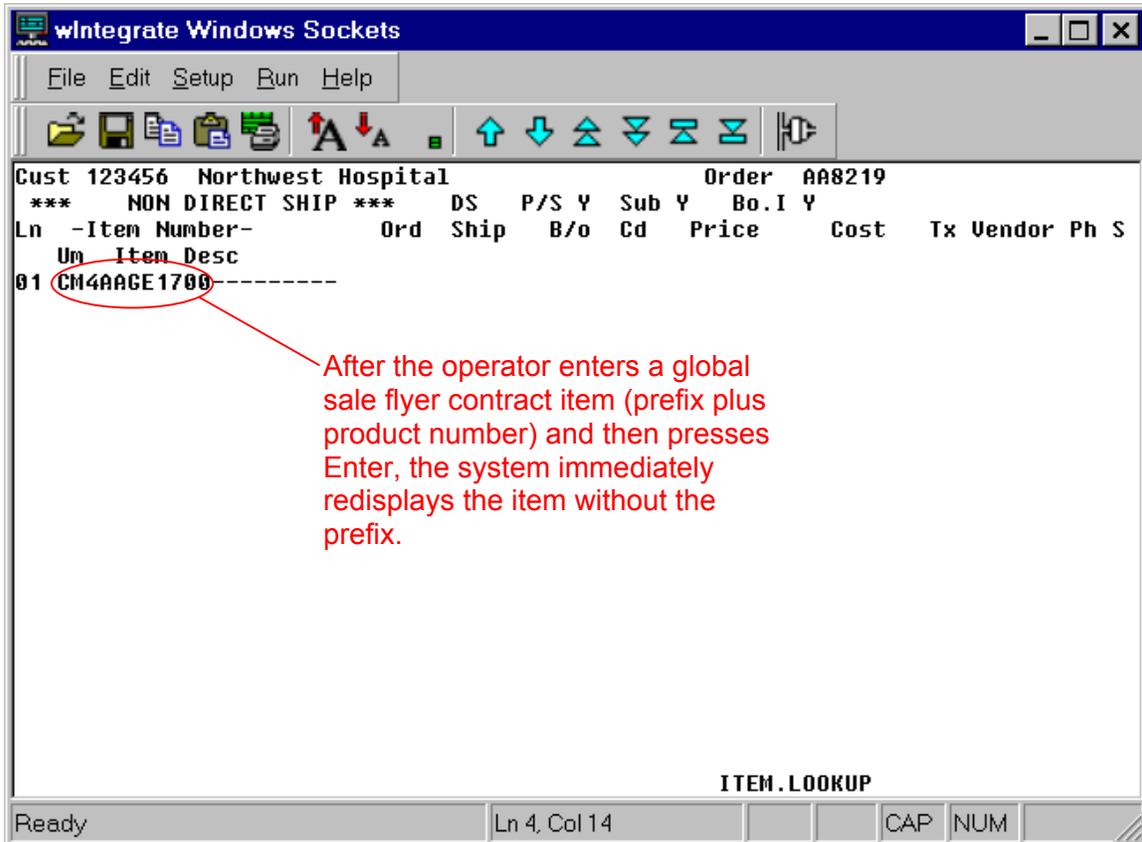
### Vision Logic for Global Contracts



## Pricing in Order Entry

Consider two different scenarios. In scenario 1, a customer orders product CM4AAGE1700, which is included in the sale flyer/contract. In scenario 2, that same customer orders AAGE1700 (the same product, but without the CM4 prefix).

In scenario 1, the order entry operator enters product CM4AAGE1700 in the line item screen of Order Entry (menu-1.2). Immediately after the operator enters CM4AAGE1700 and then presses Enter, the system redisplay the item without the prefix.



In scenario 1, since the product that the customer ordered (CM4AAGE1700) included the prefix, Vision considers the CM4FLYER contract pricing when determining the price that the customer will be charged. The customer will be charged the CM4FLYER contract price—in this case, \$6.99—as long as the customer does not have product AAGE1700 on a different contract that would give him or her a better price. Notice that the price code is S to indicate that the price came from a sale contract.

The screenshot shows a window titled "wIntegrate Windows Sockets" with a menu bar (File, Edit, Setup, Run, Help) and a toolbar. The main display area contains the following text:

```

Cust 123456 Northwest Hospital          Order AA8219
*** NON DIRECT SHIP *** DS P/S Y Sub Y Bo.I Y
Ln -Item Number- Ord Ship B/o Cd Price Cost Tx Vendor Ph S
Un Item Desc
01 AAG-E17-00 1 0 1 S 6.990 5.810 Y UNNDS N
EA BASE, PLASTIC, E717-50, BLAC ND
  
```

Red circles highlight the item number "AAG-E17-00", the price code "S", and the price "6.990". Red arrows point from these circles to the following text boxes:

- Product AAGE1700 is shown, even though product CM4AAGE1700 was originally entered.
- The price code S indicates that the price came from a sale contract.
- The price from the CM4FLYER contract is used.

At the bottom of the window, the status bar shows "Ready", "Ln 22, Col 51", and "CAP NUM".

In scenario 2, the order entry operator enters product AAGE1700 in the line item screen of Order Entry (menu-1.2) because this is the product number that the customer requests. Even though product number AAGE1700 is on global sale flyer/contract number CM4FLYER, Vision will **not** consider the CM4FLYER contract pricing when determining the price that the customer will be charged, since the customer did not include the prefix.

Cust 123456 Northwest Hospital Order AA8209  
 \*\*\* NON DIRECT SHIP \*\*\* DS P/S Y Sub Y Bo.I Y  
 Ln -Item Number- Ord Ship B/o Cd Price Cost Tx Vendor Ph S  
 Un Item Desc  
 01 AAG-E17-00 1 0 1 L 11.290 5.810 Y UNNDS N  
 EA BASE, PLASTIC, E717-50, BLAC ND

Product AAGE1700 is the product the customer requested.

The contract price for product CM4AAGE1700 is **not** used, since the customer did not include the prefix when ordering the product.

11.29  
 Ln#, (ADD), (0)Continue:  
 OE.DRIVER

Ready Ln 22, Col 51 CAP NUM