

FD - [CORE] Mass Edit OQLI

he Mass Edit OQLI will help Account Manager to mass update their quote line on the following fields :

- Quoted Price
- Incoterms
- Ship to

Step 1 Access the mass Edit and Filter

Step 1 : Access the mass Edit and Filter

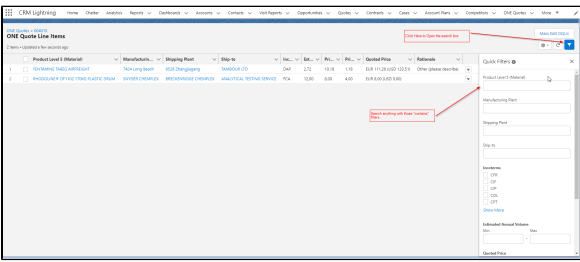
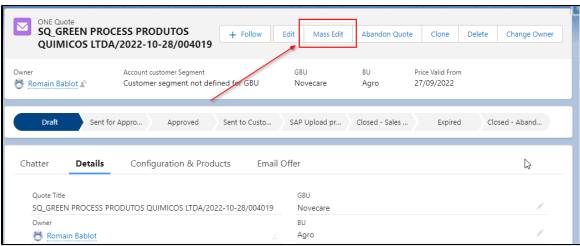
On the One Quote Page, the Account manager need to click on the "MASS EDIT" Button to access the selection of Line to update

This button is only displayed if :

- The One Quote status is DRAFT
- He is the Owner of the Quote

Then the user access a Page where he can easily Filter on som fields of the One Quote Line before selecting them :

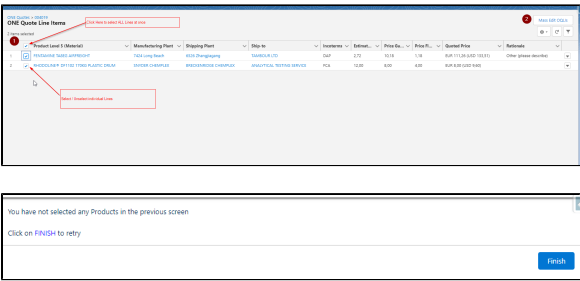
Product level 5
Manufacturing Plant
Shipping Plant
Ship To
Incoterm
Estimated Annual Volume
Price Guidance
Price Floor
Quoted Price
Rationale



Step 2 : Select and request mass Edit

Once the Account Manager is ok on the filter he can start to Select some Lines he want to update, then click on "Mass Edit OQLI".

Only OQLI with estimated annual volume must be selected



After clicking on "Mass Edit OQLI" :

- If NO lines have been selected, there is an error message displayed.
- If a Line without estimated annual volume is select we display an error message.

You can only MASS EDIT Products with Estimated Annual Volume.

At least one or more selected products have no Estimated Annual Volume.

Click on [FINISH](#), then refine your filter or update product lines

[Finish](#)

The user is redirected to the One Quote page.

Step 3 : Setup the mass edit

The first section always show you the number of product selected that will be updated.

All values displays wil always be in UOM & Currency of the quote.

3.1 / Mass Edit Quoted Price

In the "Setting section" choose "Quoted Price" the you can select on which price ou will set the value :

- Current Quoted Price
- Price Guidance
- Price Floor
- New Value
 - you will be able to set one value for ALL Lines

Mass Edit (Step 3 of 3)

2 : Products Selected will be updated

Settings

Based on (to mass edit):

Quoted Price

Based on:

☒ Current Quoted Price

☐ Price Guidance

☐ Price Floor

☐ New Value

Select type of change:

Absolute +/-

Set Rationale (Mandatory):

--None--

Mass Edit Quoted Price

Quoted Price = Current Quoted Price +

Absolute

EUR / KG

0.00

[Update Preview Table](#) [Previous](#) [Next](#)

Preview Table

All values are displayed in EUR / KG

Product Level 5	Manufacturing...	Shipping Plant	Ship To	Incoterms	Price Guidance	Price Floor	Quoted Price	Rationale
ABRCDOL MA 000	TAZU Long Beach	BORG Quoted-CL	BORG	DDP	7.84	0	2345	
1000000 CONSUMER								
RHODAGURP 3000	BORG Quoted-CL	BORG Quoted-CL	DDP	DDP				

Then Select the type of change :

- Absolute +/-
 - You can add a number to the "Based on" field
 - Formula applied will be :
 - Quoted Price = "Based on Field" + Value
 - You can use "-" when you set the value to decrease the value
- Percentage +/-
 - You can add a percentage to the "based on" field
 - Formula applied will be :
 - Quoted Price = "Based on Field" + "Based on Field" * Percentage

- Percentage has to be set between 0 and 100
- You can use "-" when you set the percentage to decrease the value

Then the field "Rationale" is mandatory to be set. The value will be applied to all Lines.

Mass Edit (Step 1 of 2)

2 Products Selected will be updated

Settings

I would like to mass edit Incoterms

Mass Edit Incoterms

Select Incoterms

CF

Update Preview Table Previous Next

Preview Table

All values are displayed in EUR / KG

Product Le...	Manufact...	Shipping P...	Ship To	Original In...	New Incot...	Price Guid...	Price Floor	Quoted Pr...	Rationale
ARCOLO MA- BIE 1000KG CONTAINER	7424 Long Beach	8090 Ogatea Di Bullara	DOMO ENGINEERING PLASTICS ITALY SPA	DAP	CF	7.84	0	2345	
RHODASURF SMP 1000 KG			DOMO						

Default values selected when you open the mass edit is always :

I would like to mass edit "Quoted Price", Based on "Current Quoted Price" and change type is "Absolute +/-"

The Preview table shows initially :

- Product Level 5
- Manufacturing Plant
- Shipping Plant
- Ship To
- Incoterm
- price Guidance
- Price Floor
- Quoted Price
- Rationale

Mass Edit (Step 1 of 2)

2 Products Selected will be updated

Settings

I would like to mass edit Ship To

Mass Edit Ship To

Show Ship To

ANALYTICAL TESTING SERVICE

Update Preview Table Previous Next

Preview Table

All values are displayed in EUR / KG

Product Le...	Manufact...	Shipping P...	Original S...	New Ship To	Incoterms	Price Guid...	Price Floor	Quoted Pr...	Rationale
ARCOLO MA- BIE 1000KG CONTAINER	7424 Long Beach	8090 Ogatea Di Bullara	DOMO ENGINEERING PLASTICS ITALY SPA	ANALYTICAL TESTING SERVICE	DAP	7.84	0	2345	
RHODASURF SMP 1000 KG	8090 Ogatea Di	8090 Ogatea Di	DOMO ENGINEERING	ANALYTICAL	CF	7.84	0	2345	

The User can click on "Update Preview table". On the same page it will refresh the table and displays :

- The "Based on" value
 - Current Quoted Price OR
 - Price Guidance OR
 - Price Floor
- New Committed price
- Original Committed Price

3.2 / Mass Edit Incoterms

In the "Setting section" choose "Incoterms"

Then Select the incoterm you want.

The User can click on "Update Preview table". On the same page it will refresh the table and displays :

- Original Incoterm
- New Incoterm

3.3 / Mass Edit Ship To

In the "Setting section" choose ""

Then Select the Ship to you want.

Any Account can be selected there

The User can click on "Update Preview table". On the same page it will refresh the table and displays :

- Original Ship To
- New Ship To

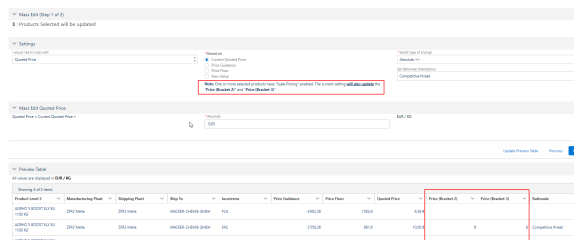
3.4 / Mass edit with scale Pricing



Unable to locate Jira server for this macro. It may be due to Application Link configuration.

If one of the line contains scale pricing we display the price bracket 2 & 3 and also note.

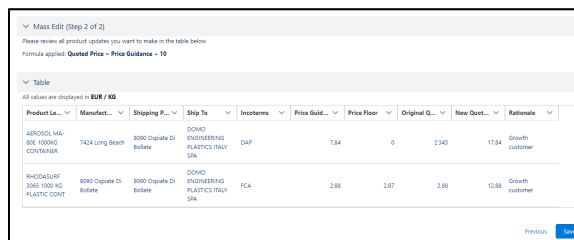
When the value will be set it will be set for all scale pricing



Step 4 : Review Formula and result and save

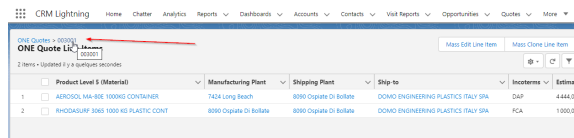
The is screen is used for the user to see exactly what will be modified.

We show the Formula that will be applied and the list of Product Line that will be updated



The following columns are displayed :

- Product Level 5
- Manufacturing Plant
- Shipping Plant
- Ship To
 - + New Ship To Column if mss update Ship To
- Incoterm
 - + New Incoterm Column if mass update incoterm
- Price Guidance
- Price Floor
- Quoted Price



- + New Quoted price if mass update quoted price
- Bracket 2 & 3 are also displayed if at least one line contains scale pricing



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- Rationale

From there, the user can either go to the previous screen to change the formula or save the Committed price

Once the Save is done, the user is redirected to the One Quote Line related list.

If he wants to go back to the Quote he can click on the top left, Quote Name