

FD - [CORE] Mass Edit OQLI

The 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

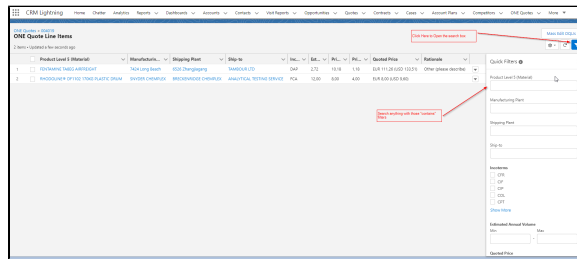
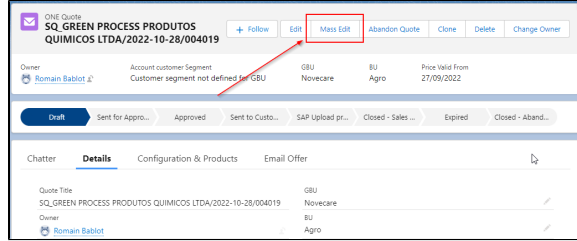
On the One Quote Page, the Account manager need to click on the "MASS EDIT" Button to access the selection of Line to update

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 some fields of the One Quote Line before selecting them :

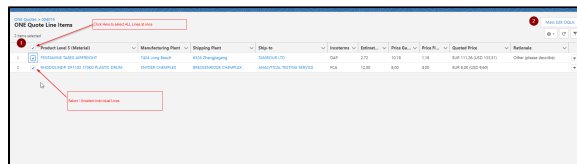
Product level 5
Manufacturing Plant
Shipping Plant
Ship To
Incoterm
Estimated Annual Volume
Price Guidance
Price Floor
Quoted Price
Rationale



Step 2 : Select and request mass Edit

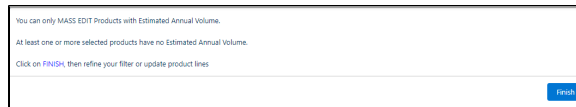
Once the Account Manager is ok on the filter he can start to Select some Lines he want to update, then click on "Mass Edit OQLI".

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 selected we display an error message.



The user is redirected to the One Quote page.

Step 3 : Setup the mass edit

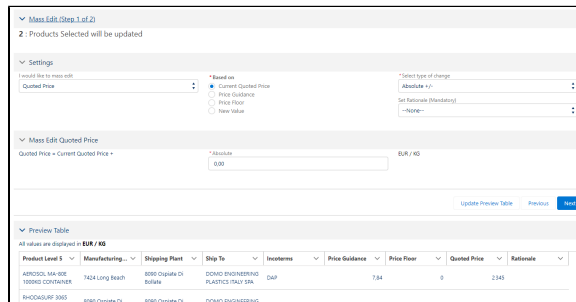
The first section always show you the number of product selected that will be updated.

All values displays will 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



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: CF

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 S...	New Incot...	Price Guid...	Price Floor	Quoted Pr...	Rationale
ARCOSOL MA- BSE 1000KG CONTAINER	7424 Long Beach	8090 Ospiate Di Bologna	DOMO ENGINEERING PLASTICS ITALY SRL	DAP	CF	7.84	0	2345	
RHODASURF SMA Long Be...	8090 Ospiate Di	8090 Ospiate Di	DOMO ENGINEERING ANALYTICAL	DAP		0.88	0.81	2345	

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: ANALYTICAL TESTING SERVICE

Mass Edit Ship To
New 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
ARCOSOL MA- BSE 1000KG CONTAINER	7424 Long Beach	8090 Ospiate Di Bologna	DOMO ENGINEERING PLASTICS ITALY SRL	ANALYTICAL TESTING SERVICE	DAP	7.84	0	2345	
RHODASURF SMA Long Be...	8090 Ospiate Di	8090 Ospiate Di	DOMO ENGINEERING ANALYTICAL	DAP		0.88	0.81	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.

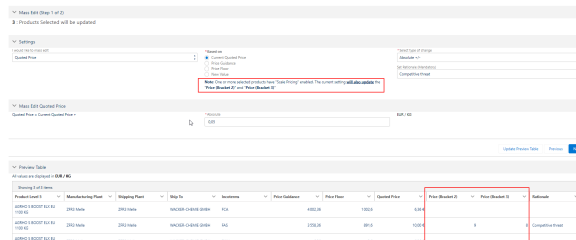
Any Account can be selected there

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.



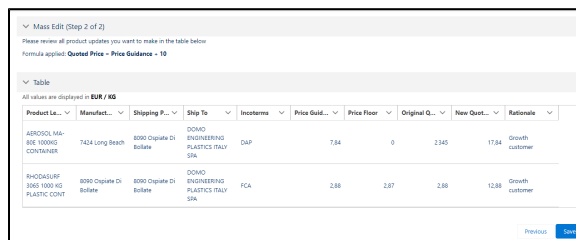
If one of the line contains scale pricing we display the price bracket 2 & 3 and also note.

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

Step 4 : Review Formula and result and save

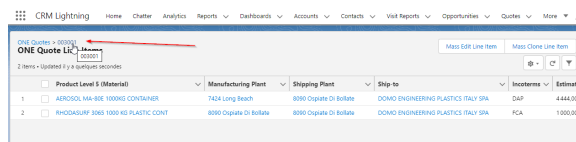
The is screen is used for the user to see exactly what will be modified.

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 mss 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