

# Co-op Connect Training Cost Price Reports

Create and view Cost Price Reports

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# Co-op Connect Training – Cost Price (Cost Proposals and Cost Price Reports)

Co-op Connect's functionality includes allowing suppliers to submit cost proposals for their articles, and to view the costs that are held within Co-op's system via cost price reports.

For more information on submitting a cost price proposal, please see training guide:

- Co-op Connect – Create and View Cost Price Proposals

For more information for submitting an initial cost price as part of new article creation or new case creation, please see either of the following guides:

- Co-op Connect Create Article
- Co-op Connect Amend Article

# 1.0. New Cost Price Report

### Key points/ Top tips

- View historic and future cost prices of articles (order units) by creating individual reports and retrieving the information directly from our SAP system
- The amount of time it takes to generate a report that a user can access on Co-op Connect from the point the report is requested will depend on the amount of units and the time period that has been selected e.g. Historic data on 50 lines over a year's period will take longer to generate than 3 lines over 3 weeks.

#### High Level instructions – Generate a new cost price report

To generate a new cost price report:

- 1. Click on the 'New Cost Price Report' header option
- 2. Select the articles from the table that need to be included
- 3. Select the period of time by completing the 'Report Details' fields
- 4. Press 'Request Report'
- 5. View in the 'My cost price reports' screen



## 1.1. Homepage

(A) Click on the 'New Cost Price Report' option from the 'Cost Price' menu in the main header

# 1.2. New Cost Price Report

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	Article No. 🛊	Article Description	Unit of Measure Barcode 🌲	Unit Of Measure 🍦	Units	Price Per 💠	Select All	J)
(Δ)	70000019	Co-op Mixed Leaf Salad 100G	1234567891011	Case	6**	Case		
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	70000038	Co-op Bistro Salad Bag 150G	1234567896960	Case	6**	Case		
	70000059	Co-op Crunchy Salad Bowl 200G	1234567891011	Case	4 **	Case		
	70000060	Co-op Butterhead Salad 85G	1234567891233	Case	6**	Case		
	70000061	Co-op Shredded Iceberg 250G	1234567896960	Case	6**	Case		
	70000062	Co-op Rocket Salad 90G	1234567891011	Case	6 **	Case		
	70000076	Co-op Alfresco Salad 250G	1234567891233	Case1	4 **	Case		
	70000077	Co-op Caesar Salad 200G	1234567896960	Case1	4 **	Case		
	70000078	Cp Irresistible Italian Style Salad 105G	1234567891233	Case1	4 **	Case		
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	From*		⊷ (M)		Report Name*	)		
(O)	Request Report							

- (A) Article table the article table will be populated with all of the units that are associated to the Vendor. When the screen is first opened, the results will be automatically filtered to show the primary order units for the articles only. For more information on this, please see point K
- (B) Search (Article Number) Search for a specific article by typing an article number in to the field and clicking the search button. This will limit the table to only display articles with the specified range of numbers in their article number
- (C) Search (Article Description) Search for specific article(s) by typing keywords in to the field and clicking the search button. This will limit the table to only display articles with the specified criteria.
- (D) Article No. (Article Number) This column displays the SAP article number for each article and unit.
- (E) Article Description The article description column will show the description that we hold in SAP for the article
- (F) Unit of Measure barcode the barcode associated with the unit displayed in the 'unit of Measure' column
- (G) Unit of Measure the unit of measure that would be included in the cost price report if selected
- (H) Units The quantity of base units within the unit of measure being selected e.g. case size of 6 eachs

(I) Price Per - The Price Per column shows the unit that the cost price will be in terms of. For the majority of articles (fixed order unit cost) this will be exactly the same as the order unit.

For catchweight articles i.e. articles that we pay for by weight, this column will show 'KG'. This indicates that the cost price entered for the unit will be treated as a price per KG

- (J) Select Select the units by clicking the checkboxes for each line, or select all of the lines by clicking the 'Select All' checkbox in the header of the table
- (K) Unit of Measure filter The New Cost Price Report screen will automatically display the primary order units for the articles. By changing this filter to 'All', all units will become available in the article table. This will include:
  - All Cases all cases created will be viewed by the Co-op as a potential Order unit, and therefore will be displayed in this table.
  - All Eachs all eachs will be shown whether they have been flagged as an orderable unit or not. If the Co-op does not place orders directly on the 'each' unit, do not select it for the cost proposal.
  - All KGs for loose produce or catchweight lines, all KG units of measure will be shown but should only be selected if Co-op does not order in cases.

#### Only the units that Co-op place orders on should be selected

- (L) Report Details (From) Select the date range the cost price report will capture for the articles selected by clicking the calendar icon and selecting the 'from' date (past or future)
- (M) Report details (To) Select the date range the cost price report will capture for the articles selected by clicking the calendar icon and selecting the 'to' date (past or future)
- (N) Report Name Type in a name for the report which will be displayed in the 'My Cost Reports' screen
- (O) Request Report Once all of the articles/ units have been selected and the date range and report name fields have been completed, click 'Request Report'. This will prompt a 'Success' pop up with the change request number for the report. Use this number and the report name to find the report in the 'My Cost Price Reports' screen. Pressing 'Ok' on the pop up will automatically direct you through to the 'My Cost Price Reports' screen.

#### For more information on how to view the requested report, please see section 4.0. View Cost Price Report

# 2.0. View Cost Price Reports

## High Level instructions – View Cost price report

To view a requested cost price report:

1. Click on the 'My Cost Price Reports' header option

#### Either

**2.a.** Click on the 'CR Number' of the cost price report that you require (for available cost price reports only)

**2.b**. Download the Cost Price Report by clicking the icon in the action column (for available cost price reports only)



(A) Click on the 'My Cost Price Reports' option from the 'Cost Price' menu in the main header

# 2.1. Homepage

# 2.2. My Cost Price reports

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(A)	CR Number 🖨	Report Name 🔶	Requested By 🖨	Request Date ≑	Status 🔶	Action	
(, ,	CPR0000037	Co-op Leaf salads - 29/04/20 to 05/06/20	Zoe Jewell (RBT)	2020-05-06T12:15:17Z	Available	.↓	
	Showing 1 to 1 of 1 entrie	s					

- (A) Cost Report table this table will hold all of the requested cost price reports that have been generated as per the 'New Cost Price Reports' function
- (B) CR Number (Change request number) A CR number will be associated to every cost price report, and will be shown in this column. To view the proposal, click on the CR number
- (C) Report name The name of the report that was given by the user at the point of creation
- (D) Requested By The name of the user that requested the report
- (E) Request Date The date that the report was requested
- (F) Status This column shows the status of the report

Status	Description
Pending	The report has been requested by the Vendor and the information for the report is being pulled live from our system.
	The amount of time it takes to generate a report from being requested will depend on the amount of units and the time period that has been selected
	e.g. A report on 50 lines over 52 weeks will take longer to generate than 3 lines over 3 weeks
Available	The report is available to view by the vendor.

(G) Action – Reports in 'available' status will have the 'download' icon. The 'download' feature allows the vendor to download the cost price report into an excel format.

### 2.3. View cost price report

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Co-op Leaf salads	- 29/04/20 to 05/06/20								
(B)	(C)	(D)	(E)	(F)	(G)	(H)	(1)	(L)	(K)
Article No.	Article Description	Ordering UoM	Units	Order Unit Barcode	Туре	Value	Currency	From Date	To Date
0000000007000 0020	Co-op Babyleaf Salad 115G	Case	5	5000128652506	List Price	fff	GBP	07/08/2019	31/12/9999
0000000007000 0020	Co-op Babyleaf Salad 115G	Case	5	5000128652506	Invoice Match Price	£££	GBP	07/08/2019	31/12/9999
Showing 11 to 12 of	12 entries						Previous	1 2	Next

- (A) Report name The name of the report that was given by the user at the point of creation
- (B) Article No. (Article Number) This column displays the SAP article number for each article and unit
- (C) Article description The article descriptions of the articles that are included in the cost price report
- (D) Ordering UoM (unit of measure) The order unit that the information was requested for
- (E) Units The quantity of base units within the unit of measure being selected e.g. case size of 6 eachs
- (F) Order Unit Barcode The barcode of the unit in the 'Ordering UoM' column
- (G) Type The type of value that we are displaying for the unit. This will be one of the following, depending on what is held in Co-op's system for the unit:
  - List Price
  - MRRP (manufacturers recommended retail price)
  - Vendor discounts 1,2 &3
  - Invoice Match Price
  - Promotional Invoice Cost Price/ Promo List Price
- (H) Value The value we hold for the price type displayed
- (I) Currency The currency in which the 'value' field is in terms of
- (J) Effective Date The first date the value will be effective from
- (K) End Date The last date the value will be effective on