

Product Creation & Product Process Guide

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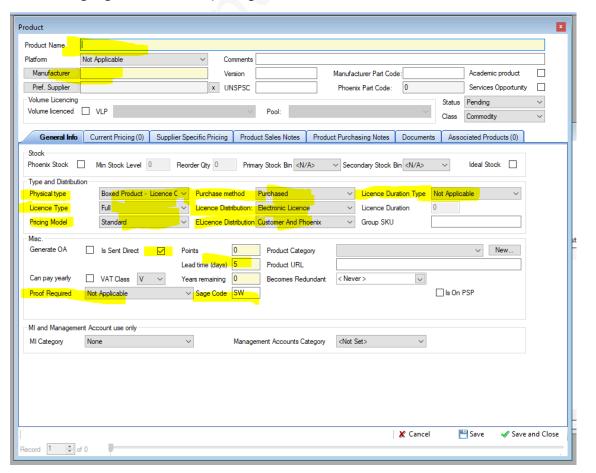
There are two ways of creating a product, a member of the Sales or Operations Teams can do this within Oasis.

Creating A Brand-New Product

1. Click "new"



2. All fields highlighted need completing, then save and close



A member of the Sales team can only set the status of a product to Pending. This means that this product can only be used on the specific quote they created the product for, while at Pending Status. To enable this product to be used again, a member of the Operations Team would need to correctly format the product and change the status to Current.

The Operations Team can change the status to either Current, Pending, Redundant or Rejected. Rejected would be used if the product is a duplicate of an already active product. The Oasis



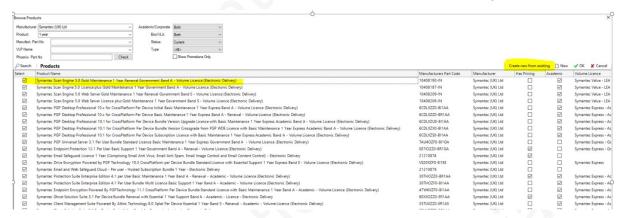
System automatically changes the status of a product to Redundant if this product hasn't been priced for 12 consecutive months. This can however be changed back to Pending or Current when it is next required.

Creating A New Product From An Existing Product



Having already searched for the product you require, and it is not in showing in "Browse Products" but you can see a similar product as per the below example – you just require 2 Years not 1 Year:

1. Click on this product line as above and then click "Create new from existing" action button



- 2. The user can then amend the product description or product attributes. The manufacturer code is validated to see if it should stay the same. The system automatically creates a new unique Phoenix Product Code.
- 3. The product will automatically be set in the status of Pending, to enable this for pricing, please change the Status to Current and click Save.

Entering The Pricing For The Product

1. When you have finished setting up the product details, choose the Current Pricing tab and click new price.

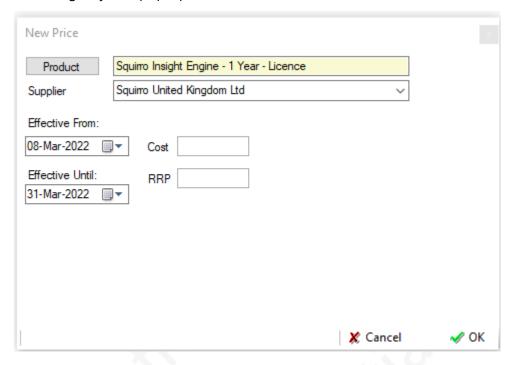


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2. This will give you a pop-up box like the below screenshot.



- 3. From the pre-populated supplier drop down list, choose which supplier is providing the goods.
- 4. Enter the cost of the product in the cost box and enter the expiration date of the quote/pricing in the Effective Until box by clicking the calendar.
- 5. Once you are happy with the data click Save and Close.

If a member of Sales set up the product, they can add a temporary price so they can quote their customer using the Oasis Quote functionality. If customer decides to order then the quote will be moved onto a status of Held Order and will then appear on "held orders" list in the Oasis Operations module for Operations to review the populated fields and pricing. Operations, check the quote is from the correct supplier and all the information matches the quote. Once Operations have completed this they will release the order to Shopping list for purchase.

Pricing A Product

The Sales Team can request Operations to price up a product via the Fresh Desk ticketing system. Sales request to make the product "live" this means the product already exists as a Current Product, but it hasn't been priced for the last 12 months. Or the product has been moved to the status of Redundant which does allow Sales to add a temporary price to it. In this instance Operations research to identify the product should be changed from Redundant to Current status.

Sales will make requests for product changes using the Phoenix Code or give the Manufacturer SKU.

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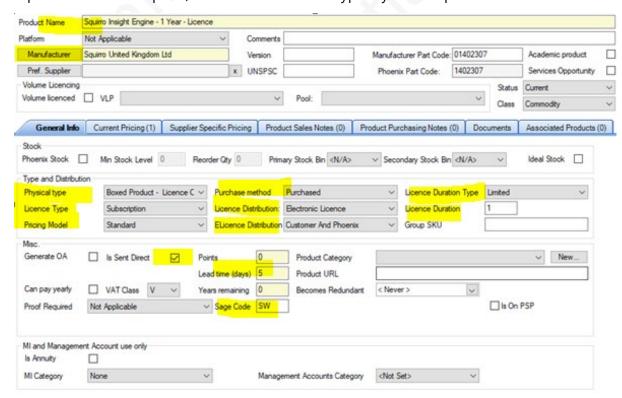


1. When pricing via the Phoenix Code, choose the Products tab on the top line of Operations Oasis module.



- 2. Enter the Phoenix code in the bottom box and click the "Check" button which will take you straight to the product itself.
- 3. If the product is at a Pending status, then you will need to check if this product is a duplicate of one which is already set up. To do this, take the Manufacturer SKU and enter it in the Manufacturer Part code box and click the Search button.
- 4. When validating product attributes (as per the screen shot below) there are different variations for each licence offered.

If the product is a subscription/renewal then it would typically be set up like this:



- Physical Type is Boxed Product Licence Only
- Licence Type would either be subscription or renewal
- Pricing Model ALWAYS remains as Standard for Boxed Product Licence Only
- Purchase Method is ALWAYS purchased (this never changes)
- Licence Distribution will highly likely be Electronic
- ELicence Distribution is usually Customer and Phoenix but need to validate from the supplier

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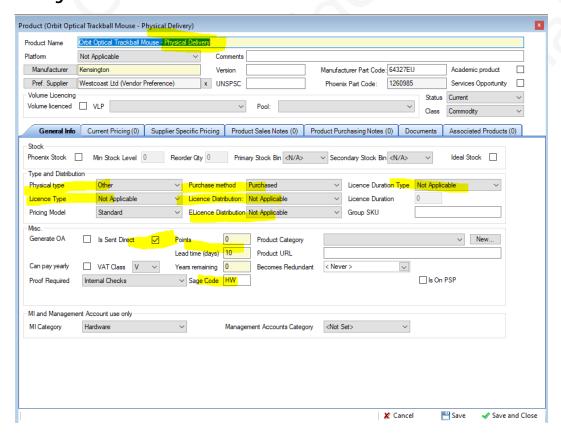
- Licence Duration Type is Limited for 1 year based on the product description. This can be changed accordingly by using Limited or Limited Months = 12
- When pricing up a product which is perpetual, you would change **Licence Type** to Full and **Licence Duration Type** to Perpetual

Always make sure the product is being sent direct by ticking the box in the Misc. section. Software Lead time (days) needs to reflect the specific timeline from the supplier. If this cannot be obtained, the default is 5 days, and the Sage Code is 'SW' for Software.

When Pricing Up A Hardware Product

When setting up a hardware product there are a couple of things to do differently. Instead of Licence on the end of the description you would change this to 'Physical Delivery'.

- Physical Type would be Other
- Licence Type / Licence Distribution / ELicence Distribution / Licence Duration Type would all be 'Not Applicable'
- Is Sent Direct is ticked as we endeavour to ensure products are delivered direct from the supplier to our customer and not to the Phoenix offices
- Lead Time (days) would reflect the specific timeline from the supplier. If this cannot be obtained, the default is 10 days for hardware
- Sage Code would be 'HW' for Hardware



The product pricing process is followed as above.



In order to ensure we have a clear structure on how products are set up, the following matrix provides guidance, please ensure that this is followed.

Manufacturer As per Oasis Product Name Endings of products should be ei Licence Physical delivery Family	Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Product Name Endings of products should be ei Licence Physical delivery	identical name Product name, version, platform, type of licence, users, media e.g. Backup Exec 9.1 for NetWare Licence 25-Users e.g. Norman Anti-Virus 5.5 for Windows with 1 Year Updates on CD ither: Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Endings of products should be ei Licence Physical delivery	Product name, version, platform, type of licence, users, media e.g. Backup Exec 9.1 for NetWare Licence 25-Users e.g. Norman Anti-Virus 5.5 for Windows with 1 Year Updates on CD other: Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Licence Physical delivery	e.g. Backup Exec 9.1 for NetWare Licence 25-Users e.g. Norman Anti-Virus 5.5 for Windows with 1 Year Updates on CD ither: Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Licence Physical delivery	e.g. Norman Anti-Virus 5.5 for Windows with 1 Year Updates on CD ither: Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Licence Physical delivery	Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Licence Physical delivery	Electronic delivery, emailed copy certificate Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
Physical delivery	Something physical will be delivered - i.e. hardware family Can be left blank or stated if applicable (e.g. Select)	
	family Can be left blank or stated if applicable (e.g. Select)	
<u>Family</u>	Can be left blank or stated if applicable (e.g. Select)	
Years Remaining	yearsRemaining	
0	All products except Select Licence and Software Assurance or Software Assurance Only should be 0	
1	Select Licence and Software Assurance or Software Assurance Only 1 Year Remaining licences	
2	Select Licence and Software Assurance or Software Assurance Only 2 Year Remaining licences	
3	Select Licence and Software Assurance or Software Assurance Only 3 Year Remaining licences	
Product Type	productType	
BoxedProduct	Also known as FPP, supplied as fully packaged product	
BoxedProduct_LicenceOnly	Also known as FPP, supplied either as ElectronicLicence or PaperLicence	
Media	CDs/DVDs/3½ Floppy Disks	
VolumeLicensingLicence	Licences supplied under a Volume Licensing Programme (VLP) or Transactional Volume Licensing Programme (TVLP)	
Other	Hardware or services	
Licence Type	licenceType	
Full	A licence which doesn't have a renewal element (e.g. Microsoft Licence Only or Backup Exec 9.1 for NetWare)	
FullAndRenewal	A licence in which an element of it will renew (e.g. Microsoft Licence and Software Assurance or Norman Anti-Virus with 1 Year Updates)	
Renewal	The renewal product the customer buys to renew their original purchase (e.g. Microsoft Software Assurance or Norman AntiVirus 2nd Year Updates)	
Upgrade	A licence which is an upgrade from a previous version and doesn't have a renewal element (e.g. Acrobat 6.0 Upgrade from 5.0)	
UpgradeAndRenewal	A licence which is an upgrade from a previous version and does have a renewal element (e.g. BackupExec 9.1 for NetWare Upgrade from Any Previous Version with 1 Year Extended Support)	
Subscription	A subscription product that has a renewal element	
NotApplicable	Only use for manuals/media/hardware/services where no licence is included	

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Pricing Model	PricingModel		
Automated Subscription	A subscription product with automatic renewal		
Standard	A standard product that is perpetual or has a specific duration		
Monthly	A product that can be purchased for a varied number of months		
-	For accounts use with products that are system generated for invoicing		
System Generated purposes			
Licence Duration Type	LicenceDurationType		
Perpetual	Licences which don't expire (can be used with Full or Upgrade)		
ExpiresWithMasterAgreement	Licences which expire at the end of the agreement regardless of when purchased (can be used with FullAndRenewal, UpgradeAndRenewal or Renewal)		
Limited	Licences which expire on the anniversary of their purchase (can be used with FullAndRenewal, UpgradeAndRenewal or Renewal)		
Limited Months	Licences which expire on the anniversary of their purchase (can be used with FullAndRenewal, UpgradeAndRenewal or Renewal)		
NotApplicable	Only use for manuals/media/hardware/services where no licence is included		
<u>Licence Duration</u>	LicenceDuration		
0	Perpetual/NotApplicable/ExpiresWithMasterAgreement should all be set to 0		
1	Limited which expires 1 year after date of purchase		
2	Limited which expires 2 years after date of purchase		
3	Limited which expires 3 years after date of purchase		
Licence Distribution Method	licenceDistributionMethod		
Licence Distribution Method NotApplicable	licenceDistributionMethod Only use for manuals/media/hardware/services where no licence is included		
	Only use for manuals/media/hardware/services where no licence is		
NotApplicable	Only use for manuals/media/hardware/services where no licence is included		
NotApplicable ElectronicLicence	Only use for manuals/media/hardware/services where no licence is included Licence sent by email		
NotApplicable ElectronicLicence PaperLicence	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web		
NotApplicable ElectronicLicence PaperLicence Download	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence)		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer)		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased Reported	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence howPurchased		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased Reported Volume Licensing Product	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence howPurchased isVolumeLicenceProduct		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased Reported Volume Licensing Product TRUE	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence howPurchased isVolumeLicenceProduct If a VLP or TVLP product		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased Reported Volume Licensing Product TRUE FALSE	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence howPurchased isVolumeLicenceProduct If a VLP or TVLP product If not		
NotApplicable ElectronicLicence PaperLicence Download Electronic Licence Recipient Customer Phoenix CustomerAndPhoenix NotApplicable Purchasing Method Purchased Reported Volume Licensing Product TRUE FALSE Pool	Only use for manuals/media/hardware/services where no licence is included Licence sent by email Order Acknowledgement product or paper licence Licences which are downloaded at time of purchase from vendor's Web site (if link sent to customer by email then select ElectronicLicence) electronicLicenceDistributionRecipient Only sent to customer Only sent to Phoenix (we forward to customer) Sent to both customer and Phoenix Only use where item is not ElectronicLicence howPurchased isVolumeLicenceProduct If a VLP or TVLP product If not pool		

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	le
N	If corporate version/pricing
<u>Points</u>	points
0	If a product doesn't have a point value, enter 0
>0	Enter point value (can take decimal places e.g. 1.25)
Vendor Part Code	manufacturersProductCode
	Typed exactly with correct case
Product URL	manufacturersProductURL
www.microsoft.com/products	Specific link to the vendor's products area or actual product area, if not known then vendor's Web site
<u>Usual Lead Time</u>	leadTime
0	If Order Acknowledgement
5	Standard ETA applied on all products (licences)
10	Standard ETA applied on all products (hardware)
Can Pay Yearly	canBePaidForYearly
TRUE	Select Licence and Software Assurance or Software Assurance Only Years Remaining products
FALSE	All products except Select Licence and Software Assurance or Software Assurance Only should be FALSE
Proof Required	requiredProof
NotApplicable	nothing to hold the order
Agreement form	Agreement required before order can be released
EA Number	EA Number required (Vmware)
Eligibility Proof	Eligibility Proof
Enterprise Order Check	EA checks to be done before order can be released (Enterprise)
Internal Checks	Internal checks carried out - usually consultancy or S+ Subs orders
Margin Builder	Symantec orders check Margin Builder has been carried out
VAT Class	VATClass
V	Standard VAT rate
Z	Zero rate (e.g. manuals)
1	Composite rate (e.g. manuals with sufficient CD content - always presume Z unless told otherwise)
Supplier	Supplier
As per Oasis	The supplier must already exist in Oasis and the name must be identical
Volume Licensing Programme	VLPName
As per Oasis	The VLP or TVLP must already exist in Oasis and the name must be identical
Level	level
As per Oasis	The level must exist for the pool in the VLP or TVLP in Oasis and must be identical.
Start Date	effectiveFrom
01/01/2005	Must be in this format.
End Date	effectiveTo
31/01/2005	Must be in this format.
Cost	cost
_	

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0	Can be 0.00 or higher	
RRP	RRP	
	Must be 0 or, if a value, cannot be less than cost.	
<u>Stock</u>	stock	
0	If stock unknown, default to 0.	
Sage Nominal Ledger Code	sageNLCode	
SW	All software	
HW	All hardware	
CO	Consultancy services	
HD	Help Desk services	
SA	Software Asset Management services	
SD	Software Development services	
Product Category	Enables us to group as a family. i.e. Antivirus, Cloud, Security	
MI & Management Account use only	leave blank as Accounts set these up	
Management Account Category	SAM Managed Service	
	SAM Managed Service Cloud	
	SAM Project	
	SAM Licence	
	SAM ASP	
	Managed Service	
	Managed Service Cloud	

Another way to import products in a bulk format is to use the Product Import Tool. The Tool provides the ability to link a supplier's electronic price list in Excel format and map it to a template created using a set of pre-determined rules that are created within the Operations Team. The products are imported as Pending. They are reviewed and validated and moved to the status of Current en masse within the Operations Oasis module.

To format pricelists for import, see the VLP Template Formatting document - P:\Operations\Price Lists\Oasis Price List Templates

To Create A New Price List Template

Archived Templates	17/09/2013 18:14	File folder	
B2B Templates	17/09/2013 18:14	File folder	
FBP Templates	03/03/2014 09:53	File folder	
Pricelist Preparation Macros	17/09/2013 18:14	File folder	
VLP Templates	30/04/2014 13:17	File folder	
5BF16211.tmp	03/06/2013 11:16	TMP File	905 KB
B2B - Price List Import Preparation	18/09/2006 11:05	Microsoft Excel 97	29 KB
Copy of VLP - Price List Import Preparation	13/08/2013 14:50	Microsoft Excel 97	425 KB
FBP - Price List Import Preparation	05/06/2014 10:24	Microsoft Excel 97	906 KB
Generic III Excel Template	07/07/2005 16:10	Microsoft Excel 97	14 KB
VLP - Price List Import Preparation	09/06/2014 13:56	Microsoft Excel 97	463 KB

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On a daily basis:

- 1. Open Price Import Tool, Click Template, Click New, Click Next
- 2. Enter information as below:

Template and Source Details.

Enter the Template Name \ location and select the Source Data. Enter the Template Name: Select the Template file Location. P:\Operations\Price Lists\Oasis Price List Templates\VLP Templates Which WorkBook do you want to use? Which WorkSheet do you want to use?

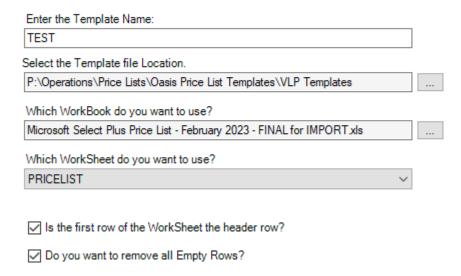
3. See below example:

Template and Source Details.

Please treat this information as private and confidential.

Do you want to remove all Empty Rows?

Enter the Template Name \ location and select the Source Data.



4. Map the columns to your pricelist you wish to import, click on each section below and map as appropriate

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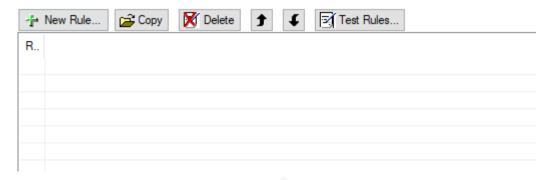
43 Columns to be Mapped.
anBePaidForYearly maps to 'Specify Column'
cost maps to 'Specify Column'
effectiveFrom maps to 'Specify Column'
effectiveUntil maps to 'Specify Column'
electronic Licence Distribution Recipient maps to 'Specify
generatesOrderAcks maps to 'Specify Column'
howPurchased maps to 'Specify Column'
isAcademic maps to 'Specify Column'
☐ IsOnCatalogue maps to 'Specify Column'
☐ IsOnInsidePhoenix maps to 'Specify Column'
☐ IsPromo maps to 'Specify Column'
isSendDirect maps to 'Specify Column'
isVolumeLicenceProduct maps to 'Specify Column'
lead Time maps to 'Specify Column'
level maps to 'Specify Column'
licenceDistributionMethod maps to 'Specify Column'
LicenceDuration maps to 'Specify Column'
LicenceDurationType maps to 'Specify Column'
licenceType maps to 'Specify Column'
manufacturer maps to 'Specify Column'
manufacturersProductCode maps to 'Specify Column'
manufacturersProductURL maps to 'Specify Column'
name maps to 'Specify Column'
Platform maps to 'Specify Column'
points maps to 'Specify Column'
pool maps to 'Specify Column'
PricingModel maps to 'Specify Column'
ProdClass maps to 'Specify Column'
product Type maps to 'Specify Column'
PromoEndDate maps to 'Specify Column'
PromoStart Date maps to 'Specify Column'
purchasingNote maps to 'Specify Column'
requiredProof maps to 'Specify Column'
RRP maps to 'Specify Column'
sageNLCode maps to 'Specify Column'
salesNote maps to 'Specify Column'
stock maps to 'Specify Column'
supplier maps to 'Specify Column'
UNSPSC maps to 'Specify Column'
VATClass maps to 'Specify Column'
☐ Version maps to 'Specify Column'
☐ VLPName maps to 'Specify Column'
yearsRemaining maps to 'Specify Column'

5. Click Save and Next

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6. Create Rules to format the pricelist for Oasis View – Click New Rule



7. Options when Click New Rule

Rules	
•	Replace existing text with new text in column name.
0	If <u>column</u> contents <u>equals</u> <u>condition text</u> , replace <u>existing text</u> with <u>new text</u> in <u>column name</u> .
0	Insert find text before replace text in column name.
0	Remove specific text from column name.
0	Delete Row if <u>column name</u> contents <u>equals</u> <u>specific text</u> .
0	Delete Row if <u>column name</u> is Blank.
0	Delete Row if column name and another column are Blank.
0	Merge text from column name and another column name into results column.
0	Copy text from <u>column name</u> into <u>results column</u> .
0	add percentage value% to column name.
0	add percentage value% to column name where another column equals in specific text.

8. Once formatted click Save

To Validate A Pricelist Using A Current Template

1. Open Price Import Tool, Click Template, click Open,

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- 2. Select your existing pricelist template from the template file location then click Next and enter workbook you wish to import as per below example
- Template Wizard

Template and Source Details.

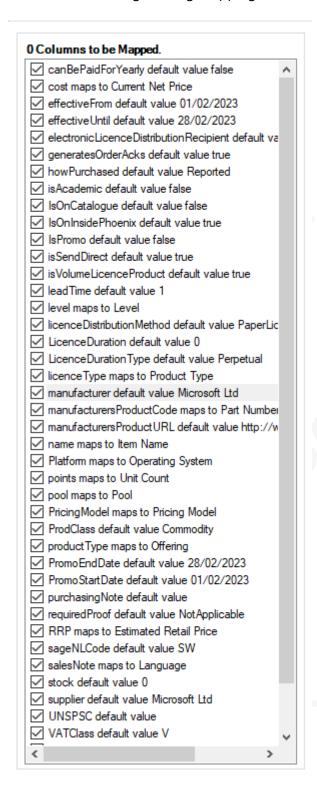
Enter the Template Name \ location and select the Source Data.

Enter the Template Name:	
Microsoft Select Plus NEW - Supplier Microsoft	
Select the Template file Location.	
P:\Operations\Price Lists\Oasis Price List Templates\VLP Templates	
Which WorkBook do you want to use?	
Microsoft Select Plus Price List - February 2023 - FINAL for IMPORT xls	
Which WorkSheet do you want to use?	
PRICELIST ~	
☑ Is the first row of the WorkSheet the header row?	
☑ Do you want to remove all Empty Rows?	

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3. Click Next and using existing mappings and amend any dates, click next



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4. Use existing Rules already created and click Test Rules



Rules description (click an underlined value to edit):

If productType contents contains Student, replace Academic with Microsoft Select Plus Student in VLPName.

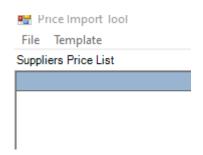
5. Validate the data produced and click Save and close – move to Next and Finish.

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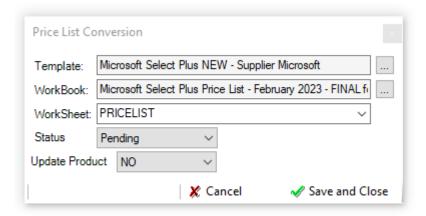


To Import Pricing Into Oasis (Once Template Created And/Or Pricelist Validated)

1. Click File, Open



2. Select Template, workbook and worksheet as per example below, click save and close



3. Click Import

Daily Product Validation Checks

In the Operations PowerBI Dashboard, under the Operations Information section a report named Products displays all SKUs that have been added to the system from within the chosen date selection. From here we can spot any mistakes and rectify them quickly.

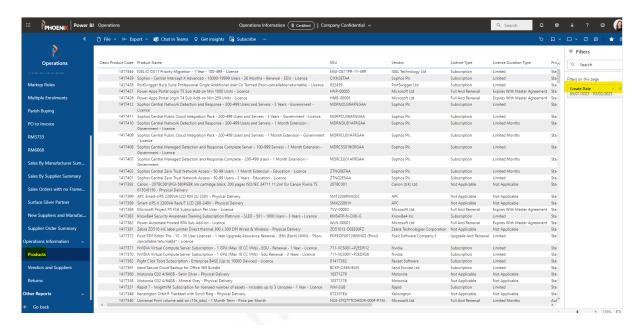
Members of the Operations Team review the report on a daily basis to ensure all the products are set up correctly with all the correct attributes in it based on the product Matrix shown above

The screen shot below identifies where the data can be obtained and where to enter the data parameters.

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A particular focus on these metrics is to ensure that the annuity product reporting across the business is correct. The source data for this reporting originates from the product attributes set up within Oasis. Therefore, as the importance of data grows the importance of getting this data right increases.

The Operations Team is the key to the accuracy of this data. The complexity of the data continues to grow.

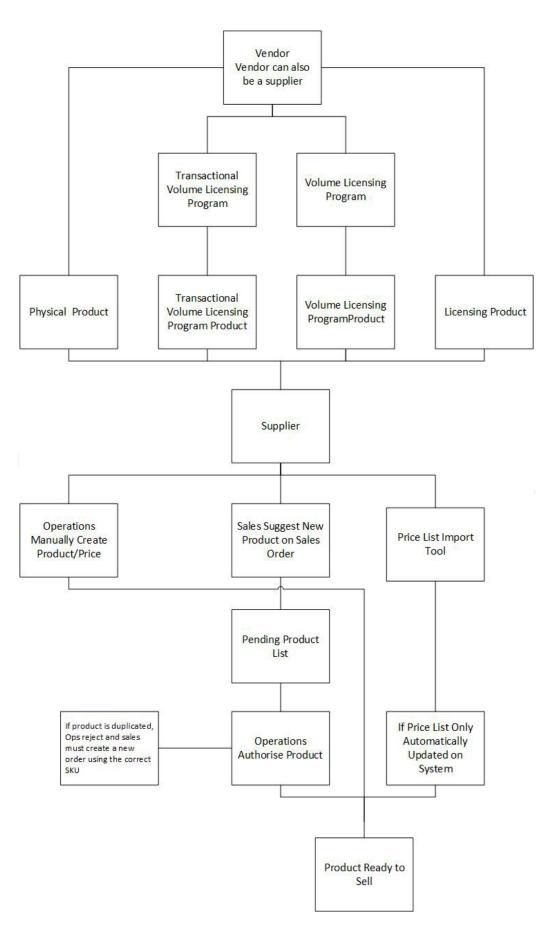
Every time a new product is added, or edited an existing one, Operations review the product attributes at the set up and check is the data is accurate. If we are unsure, we check with the vendor or the distributor that the attributes entered are correct.

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Version Control

<u>Author</u>	<u>Version</u>	<u>Date</u>	<u>Description</u>
QMS	1.0	01/05/2016	Original Document
QMS	1.0	30/12/2017	Annual review – no changes
QMS	1.0	30/12/2018	Annual review – no changes
QMS	1.0	05/12/2019	Annual review – no changes
QMS	1.0	11/11/2020	Annual review – no changes
Fay Mercer	2.0	15/11/2021	Updated Flowchart
Fay Mercer	2.0	15/11/2022	Annual review – no changes
Jayne Goddard	3.0	15/02/2023	Updated to include further process

Document Approval

<u>Name</u>	<u>Version</u>	<u>Date</u>	<u>Position</u>
Sam Mudd	1.0	01/05/2016	Managing Director
Sam Mudd	1.0	30/12/2017	Managing Director
Sam Mudd	1.0	30/12/2018	Managing Director
Sam Mudd	1.0	05/12/2019	Managing Director
Sam Mudd	1.0	11/11/2020	Managing Director
Sam Mudd	2.0	15/11/2021	Managing Director
Clare Metcalfe	2.0	15/11/2022	Operations Director
Clare Metcalfe	3.0	15/02/2023	Operations Director

Signed: Clare Metcalfs Clare Metcalfe, Operations Director

Dated: 15/02/2023

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