

Masterfile ecosystem enhancements v4

Overview of required changes to allow product maintenance in Australia post Epicor decommissioning

Updated to include Westpac NZ range management requirements

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1. Objectives

The required enhancements will achieve 3 main objectives:

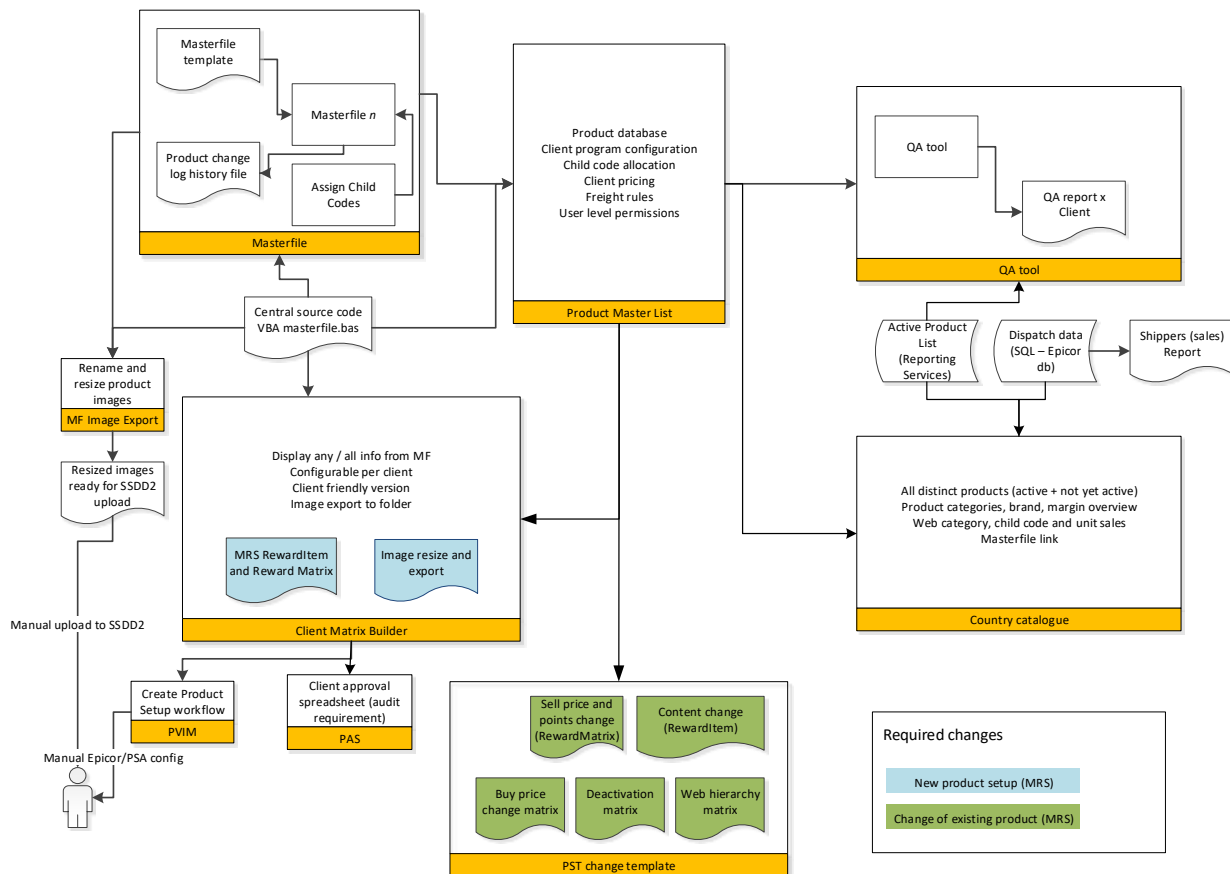
1. Enable product setup and maintenance on MRS following Epicor decommissioning.
 - a. These are the enhancements linked to Masterfile and will be **included** in MF Ecosystem – client matrix.
2. Enable product setup and maintenance on MRS for Westpac NZ Hotpoints.
 - a. The code from above will be included in Westpac NZ range management spreadsheet.
3. **If required** – the Masterfile enhancements can be used to setup all base product data on MRS as part of data migration.
 - a. The exact same code from 1) made to work outside of client matrix but still using MF Links.

Objective 1: Enhance current Masterfile functionality to allow creation of MRS bulk upload & modification spreadsheets in the format that is accepted by Customer Configuration Management (CCM) team.

This enhancement is first step in moving towards Single platform as all product information will be loaded into MRS first before being synced with AU Rewards. In order to load product pricing information into MRS, it needs to be generated in the Masterfile. The product information is then extracted into spreadsheet that CCM will process. Masterfile needs to be enhanced in order to generate the correct spreadsheets and allow for seamless transfer of product pricing / content to MRS.

The below diagram shows the MF ecosystem including the proposed enhancements.

Masterfile ecosystem with proposed enhancements (Nov '18)



Objective 2: Adjusting the code to work with Westpac NZ Range management spreadsheet. This will allow maintenance of Westpac NZ program (to be launched in September). More broadly it allows to export Westpac NZ spreadsheet to other clients / countries if required as the MRS and CCM requirements are global.

Objective 3: Data migration. Once the functionality required for Objective 1 has been developed it can be reused to assist with data migration. The user will feed it a list of Masterfile links (products to be migrated) and indicate which program these products are for. The tool will take the list and create new product setup matrices + images for all the products on the list.

2. Enhancements

To do (14/2/2019)

- Vendor fulfilment ID cannot be mapped to RewardItem until vendor's are created in MRS
- RewardItem and RewardMatrix samples to contain freight columns **(Lids/Lata)**
- Confirm all fixed values in RewardItem and RewardMatrix. **(Lids/Lata)**

2.1 New product setups

- Any code should be added to existing Masterfile.bas file to work inside MF ecosystem – Client matrix component.
- New product matrices and images will be created using 'Client matrix builder'. New button will be created ('Generate MRS matrices') that will contain the code for the creation of matrices required for new product setups.
 - This code should work independently of other MF components and will only use MF link to lookup product data in central database (PML) regardless of whether the other parts of client matrix are filled out. I.e. user should be able to copy / paste unlimited amount of MF links onto the client matrix and the code will still process them. This can help with data migration if required.

High level process steps Australia

- Account management (AM) team will browse country catalogue and choose new products, then populate client matrix using Masterfile links.
- AM team will select which program to submit these products to (column F in the matrix builder).
- AM team will raise a JIRA to the PST team requesting product setup in their program and attach the client matrix builder with the products to be setup.
- PST team will open the client matrix and click the button 'Generate MRS matrices'.
- The code will then 1) create RewardMatrix, 2) create RewardItem 3) create web hierarchy matrix and 4) convert and zip the images for all products contained in RewardMatrix.
- The code will save both matrices and zip file into a pre-defined location.
- PST team will pick up these matrices from this location and submits them to the CCM team.
- CCM team will load the products into MRS.

Process steps for New Zealand are described in New Zealand section.

Sample matrices

- RewardItem: S:\Transfer\PST\MRS Templates\New Products\INC-BGR_Bendigo_RewardItem13112018_0826.xls
- RewardMatrix: S:\Transfer\PST\MRS Templates\New Products\INC-BGR_Bendigo_RewardMatrix13112018_0826.xls
- Web Hierarchy matrix: S:\Transfer\PST\MRS Templates\New Products\CCM_Web_Hierarchy_Matrix.xlsx

Location to save the matrices has been provided for Australia under each section. For New Zealand the location is user configurable for new product & change matrices and also image location. This information will be in the Configuration tab of Hotpoints NZ Range management spreadsheet.

Prepare images

- Create a folder: \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\New Products\MMDDYYYY\Client_Code
 - If the date folder already exists then create just the client code (to allow multiple clients being processed on the same day).
- Open PML and using MF Link look up the corresponding product line (Category_lookup tab).
- Use image link in column BD to retrieve the image.
- Use Convert_Image function (existing in MF) to convert the image to 350 x 350
- Use Vendor SKU as image name (Vendor_SKU.jpg) > always convert to .jpg even if source image file is .png / .tiff
- Check that image format is:
 - .jpg
 - Name does not include double spaces
 - Name has no more than 1 dot (before the .jpg extension)
- If the image name does not comply then fix it (replace the extra dots and spaces with “_”; convert to .jpg)
- Zip all valid images and save the .zip file in previously created folder (\MMDDYYYY\Client_Code) as client_code_Images.zip

2.1.1 Create RewardItem spreadsheet and populate it with product data from Masterfile

- Create empty RewardMatrix using template with name: Client_Code_MMDDYYYY_RewardMatrix and save it in the previously created folder (during image processing step).
- Create empty RewardItem using template with name: Client_Code_MMDDYYYY_RewardItem and save it in the previously created folder (during image processing step).
- Use MF Link to look up the corresponding product line in PML (Category_lookup tab).
- Copy Source value from PML for each product and paste it into Destination column in the created MRS RewardItem.

New Zealand: use Hotpoints NZ column reference along with the NZ template. Where no value is provided use the fixed value in first column.

- **Sample:** S:\Transfer\PST\MRS Templates\Hotpoints_NZ\Hotpoints_NZ_Template_v1.xlsm

Masterfile source column (PML) reference or Fixed value	Hotpoints NZ column reference	Destination column (in RewardItem)	Column name (in RewardItem)
B	D	A	Short Description
Reporting category – is this in PML?	S	B	Category
Current fixed value: ‘Redemption’ Product to confirm		C	Redemption Type
Concatenation of long description and T&Cs plus hidden tag to indicate end of Long description <p> + BB + </p> + <!-- --> + <p> + BC + </p>	<p> + H + </p> + <!-- --> + <p> + I + </p>	D	Long Description
(empty cell)		E	Language ID#2
(empty cell)		F	Short Description #2

(empty cell)		G	Long Description #2
(empty cell)		H	Language ID #3
(empty cell)		I	Short Description #3
(empty cell)		J	Long Description #3
(empty cell)		K	Keyword
(empty cell)		L	Alias
Image name after it has been resized. The code needs to keep track of image names in case they were changed during the resizing process (eg. original name contained double dots).	V	M	Image name
Use Epicor to MRS vendor mapping table which will be in PML 'Lookup' tab. Column BN in 'Category_lookup' will be the source (Epicor vendor ID). To be added into PML.	W	N	Fulfilment Vendor ID
A	E	O	Item Spec Code
(empty cell)		P	Vendor End Date
Current fixed value: 'Y' Product to confirm		Q	Flat Rate Switch
Current fixed value: 'N' Product to confirm		R	Redemption Notification Switch
Current fixed value: 'N' Product to confirm		N	Physical Address Required Switch
Today's date		T	MasterCard Cost Begin Date
HR	F	U	MasterCard Cost Amount USD
(empty cell)		V	MasterCard Cost End Date
Current fixed value: 'AUD' Product to confirm	Fixed value: 'NZD'	W	Local Currency Code
HR	F	X	MasterCard Cost Amount Local Currency
Current fixed value: 'N' Product to confirm		Y	Personalization Prompt Switch
Current fixed value: 'N' Product to confirm		Z	Hide Help Text Switch
(empty cell)		AA	Help Text
(empty cell)		AB	Personalization Prompt Description
Current fixed value: 'N' Product to confirm		AC	Personalization Retype Switch
(empty cell)		AD	Personalization Retype Description
(empty cell)		AE	Min Length
(empty cell)		AF	Max Length

2.1.2 Create RewardMatrix spreadsheet and populate it with product data from Masterfile

- Copy Source value from PML for each product and paste it into Destination column in the created MRS RewardMatrix.

Masterfile source column (PML) reference or Fixed value	Hotpoints NZ column reference	Destination column (in RewardMatrix)	Column name (in RewardMatrix)																												
Use Epicor to MRS vendor mapping table which will be in PML 'Lookup' tab.	W	A	Fulfillment Vendor ID																												
A	E	B	Item Spec Code																												
Date of matrix creation		C	Item Begin Date																												
(empty cell)		D	Item End Date																												
Current fixed value: 'No Travel System' Product to confirm		E	Travel System																												
Current fixed value: 'No QC Center' Product to confirm		F	QC Center																												
Current fixed value: 'N' Product to confirm		G	Hide Reward Item Switch																												
Current fixed value: 'N' Product to confirm		H	Req Payment Form Switch																												
Current fixed value: 'N' Product to confirm		I	Credit Switch																												
Current fixed value: 'Credit Card' Product to confirm		J	Payment Form																												
Current fixed value: 'Fixed' Product to confirm		K	Issuer Bill Calculation																												
(empty cell)		L	Voucher Redemption Limit																												
Current fixed value: 'Points' Product to confirm		M	Payment Method																												
Points value below includes freight. Lookup points value based on which client has been selected on the client matrix (column F).	R	N	Points Value																												
<table><tr><td>Client code</td><td>Column in PML</td></tr><tr><td>ANZ</td><td>X</td></tr><tr><td>WPR</td><td>AE</td></tr><tr><td>SGB / BOM / BSA</td><td>AL</td></tr><tr><td>HBS</td><td>AQ + HQ (sum of the two values equals points inclusive of freight)</td></tr><tr><td>ABOARC</td><td>EW</td></tr><tr><td>CUSCAL</td><td>FE</td></tr><tr><td>INC-TRL</td><td>GH</td></tr><tr><td>INC-API</td><td>GF</td></tr><tr><td>INC-DLX</td><td>GA</td></tr><tr><td>INC-DNZ</td><td>GE</td></tr><tr><td>INC-LCN</td><td>GD</td></tr><tr><td>INC-LSR</td><td>GB</td></tr><tr><td>Bendigo</td><td>GY</td></tr></table>	Client code	Column in PML	ANZ	X	WPR	AE	SGB / BOM / BSA	AL	HBS	AQ + HQ (sum of the two values equals points inclusive of freight)	ABOARC	EW	CUSCAL	FE	INC-TRL	GH	INC-API	GF	INC-DLX	GA	INC-DNZ	GE	INC-LCN	GD	INC-LSR	GB	Bendigo	GY			
Client code	Column in PML																														
ANZ	X																														
WPR	AE																														
SGB / BOM / BSA	AL																														
HBS	AQ + HQ (sum of the two values equals points inclusive of freight)																														
ABOARC	EW																														
CUSCAL	FE																														
INC-TRL	GH																														
INC-API	GF																														
INC-DLX	GA																														
INC-DNZ	GE																														
INC-LCN	GD																														
INC-LSR	GB																														
Bendigo	GY																														
(empty cell)		O	Installment Amount																												
(empty cell)		P	Number of Installment																												
(empty cell)		Q	Cash Amount																												
(empty cell)		R	Redemption Minimum Quantity Threshold																												

(empty cell)		S	Apply Redemption Minimum Quantity Threshold To																												
(empty cell)		T	Customer Redemption Limit																												
Current fixed value: 'N' Product to confirm		U	Recurring Redemption																												
(empty cell)		V	PWRL Cashback Code																												
Today's date		W	Issuer Cost Begin Date																												
(empty cell)		X	Issuer Cost End Date																												
(empty cell)		Y	Item Increment Amount																												
Current client sell <u>excludes freight</u> . Lookup client sell based on which client has been selected on the client matrix (column F).	N	Z	Issuer Bill Amt Local Currency																												
<table><tr><td>Client code</td><td>Column in PML</td></tr><tr><td>ANZ</td><td>T</td></tr><tr><td>WPR</td><td>AA</td></tr><tr><td>SGB / BOM / BSA</td><td>AH</td></tr><tr><td>HBS</td><td>AO</td></tr><tr><td>ABOARC</td><td>ES</td></tr><tr><td>CUSCAL</td><td>FA</td></tr><tr><td>INC-TRL</td><td>HK</td></tr><tr><td>INC-API</td><td>HL</td></tr><tr><td>INC-DLX</td><td>HM</td></tr><tr><td>INC-DNZ</td><td>HN</td></tr><tr><td>INC-LCN</td><td>HO</td></tr><tr><td>INC-LSR</td><td>HP</td></tr><tr><td>Bendigo</td><td>GT</td></tr></table>	Client code	Column in PML	ANZ	T	WPR	AA	SGB / BOM / BSA	AH	HBS	AO	ABOARC	ES	CUSCAL	FA	INC-TRL	HK	INC-API	HL	INC-DLX	HM	INC-DNZ	HN	INC-LCN	HO	INC-LSR	HP	Bendigo	GT			
Client code	Column in PML																														
ANZ	T																														
WPR	AA																														
SGB / BOM / BSA	AH																														
HBS	AO																														
ABOARC	ES																														
CUSCAL	FA																														
INC-TRL	HK																														
INC-API	HL																														
INC-DLX	HM																														
INC-DNZ	HN																														
INC-LCN	HO																														
INC-LSR	HP																														
Bendigo	GT																														
Current fixed value: 'AUD' Product to confirm		AA	Local Currency Code																												
Same source as for column Z		AB	Issuer Bill Amount USD																												
Same source as for column Z		AC	Item Cap Amt																												
Same source as for column Z		AD	Item Cost Amt																												
(empty cell)		AE	Point Type Id 1																												
(empty cell)		AF	Point Type Id 2																												
Current fixed value: '4' Product to confirm		AG	Redemption Center Id 1																												
Current fixed value: '23' Product to confirm		AH	Redemption Center Id 2																												
(empty cell)		AI	Redemption Center Id 3																												
(empty cell)		AJ	Redemption Center Id 4																												
(empty cell)		AK	Redemption Center Id 5																												
Issuer freight field to be included in RewardMatrix	P		Issuer freight (\$)																												
<table><tr><td>Client code</td><td>Column in PML</td></tr><tr><td>ANZ</td><td>V</td></tr><tr><td>WPR</td><td>AC</td></tr><tr><td>SGB / BOM / BSA</td><td>AJ</td></tr><tr><td>HBS</td><td>AP</td></tr><tr><td>ABOARC</td><td>EU</td></tr><tr><td>CUSCAL</td><td>FC</td></tr><tr><td>INC-TRL</td><td>HK</td></tr></table>	Client code	Column in PML	ANZ	V	WPR	AC	SGB / BOM / BSA	AJ	HBS	AP	ABOARC	EU	CUSCAL	FC	INC-TRL	HK															
Client code	Column in PML																														
ANZ	V																														
WPR	AC																														
SGB / BOM / BSA	AJ																														
HBS	AP																														
ABOARC	EU																														
CUSCAL	FC																														
INC-TRL	HK																														

INC-API	HK			
INC-DLX	HK			
INC-DNZ	HK			
INC-LCN	HK			
INC-LSR	HK			
Bendigo	GV			

2.1.3 Create Web hierarchy spreadsheet and populate it with product data from Masterfile

- This section will be further updated based on what the hierarchies will look like once setup in MRS. For now we'll use the data in PML which contains hierarchy and sub-hierarchy in one cell.
- Spreadsheet template: S:\Transfer\PST\MRS Templates\New Products\CCM_Web_Hierarchy_Matrix.xlsx
- Start on Row 22

Masterfile source column (PML) reference or Fixed value	Hotpoints NZ column reference	Destination column (in Web hierarchy matrix)	Column name (in Web hierarchy matrix)																												
A	E	A	Item Spec Code																												
Lookup web hierarchy based on which client has been selected on the client matrix (column F).	T	D	Hierarchy																												
<table><tr><td>Client code</td><td>Column</td></tr><tr><td>ANZ</td><td>HC</td></tr><tr><td>WPR</td><td>HE</td></tr><tr><td>SGB / BOM / BSA</td><td>HF</td></tr><tr><td>HBS</td><td>HG</td></tr><tr><td>ABOARC</td><td>HD</td></tr><tr><td>CUSCAL</td><td>HI</td></tr><tr><td>INC-TRL</td><td>HH</td></tr><tr><td>INC-API</td><td>HH</td></tr><tr><td>INC-DLX</td><td>HH</td></tr><tr><td>INC-DNZ</td><td>HH</td></tr><tr><td>INC-LCN</td><td>HH</td></tr><tr><td>INC-LSR</td><td>HH</td></tr><tr><td>Bendigo</td><td>HJ</td></tr></table>	Client code	Column	ANZ	HC	WPR	HE	SGB / BOM / BSA	HF	HBS	HG	ABOARC	HD	CUSCAL	HI	INC-TRL	HH	INC-API	HH	INC-DLX	HH	INC-DNZ	HH	INC-LCN	HH	INC-LSR	HH	Bendigo	HJ			
Client code	Column																														
ANZ	HC																														
WPR	HE																														
SGB / BOM / BSA	HF																														
HBS	HG																														
ABOARC	HD																														
CUSCAL	HI																														
INC-TRL	HH																														
INC-API	HH																														
INC-DLX	HH																														
INC-DNZ	HH																														
INC-LCN	HH																														
INC-LSR	HH																														
Bendigo	HJ																														
PML needs to be modified to split Hierarchy & Subhierarchy. It's currently one field.	U	F	Subhierarchy																												

2.2 Change of existing products

Process overview Australia

- User (eg. Sourcing team) raises change request via JIRA using change template.
- Sourcing team updates the MF with required change, populates MF links into the change template and click 'Populate product data'.

- The code will fetch Product name, Vendor SKU and list of active child codes for each product from Country catalogue.
- Sourcing team selects which clients the change is applicable to and the type of change they wish to make by typing 'Y' into columns M – S which contain pre-defined change types.
- Sourcing team raises change request via JIRA to the PST team.
- PST Team will consolidate all the requests for the day and clicks the 'Create MRS change matrices' button.
- The macro creates matrices for each of the modification types. The logic and rules for these matrices are described in detail below.
- All matrices <\\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY> upon pressing 'Prepare MRS matrices' button.
- Change template: S:\Transfer\PST\MRS Templates\Changes\MRS_change_template_PST_v0.xlsm
- Country catalogue: \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\GPS\Customer Groups\Country catalogue\Country_catalogue_v2.2.XLSM

Process overview New Zealand

- Hotpoints NZ will use the range management spreadsheet to initiate changes.
 - **Sample:** S:\Transfer\PST\MRS Templates\Hotpoints_NZ\Hotpoints_NZ_Template_v1.xlsm
- Column B will indicate action to be taken (similar to populating 'Y' in Australian template).
- All matrices from that point on will be identical to Australia unless specifically called out.

Types of requests

There are 2 groups of requests each containing different request types.

1. Client specific: these requests are on a matrix level and require creation of Reward matrix for each client where the product is active.
 - a. Request types:
 - i. Mastercard cost, Issuer cost and points (combined request for all 3 values);
 - ii. Web category
2. Product specific: these requests are on an Item level and any change is visible across all clients.
 - a. Request types:
 - i. Mastercard cost only;
 - ii. Deactivation;
 - iii. Reactivation;
 - iv. Image;
 - v. Short Description – Product Name;
 - vi. Long Description (copy); T&Cs

Folder hierarchy

- All change matrices are to be saved here:
<\\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\>
- Level 1 – folder gets created each time change macro is run: MMDDYYYY_Changes
- Level 2: Folder for each request type ()
- Level 3: for client specific requests creates new folder for each client;
 - For non-client specific request populate matrices and saves them in Level 2 folder.
- Sample structure: S:\Transfer\PST\MRS Templates\Changes\021119_Changes

New Zealand: location where to save change matrices will be user configurable (Configuration tab). User can select location for change matrices, images and new product matrices.

Populate product data (existing code)

- Open Country catalogue and using MF Link lookup Product name, SKU and all active child codes in “All Products” sheet.
 - Product name: column C
 - Product SKU: Column A in Category_loop tab.
- Populate Product name and Product SKU for each filled row on the change template.

Create MRS change matrices

- Below is description of how each change type will be catered for by the macro.
- Client specific group of request needs to be executed separately for each of the clients (based on ‘Y’ in client column).
- Product specific group the requests can be executed based on the Vendor SKU – there is no need to validate relevancy for each client.

2.2.1 Deactivations

Treated separately in a JIRA request.

- Template to use: S:\Transfer\PST\MRS Templates\Changes\MRS_Deactivations_template.xlsx
- Determine which products need to be deactivated using column O on the change template. Eligible products will be flagged as ‘Y’.
- Data for all products flagged for deactivation should then be populated into the Deactivation matrix.

Source column (on PST Change template)	Hotpoints NZ column reference	Destination column (Deactivation matrix)	Column name (Deactivation matrix)
C	E	A	Item Spec Code
Fixed value: Deactivate	Fixed value	B	Action
Today’s date minus 1	Fixed value	C	Eff date:

- Save it as \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY \Deactivations\MMDDYYYY_HHMM_MLSAP_Deactivations.xlsx
- **New Zealand:** location where to save change matrices will be user configurable (Configuration tab).

2.2.2 Reactivations

- Template to use: S:\Transfer\PST\MRS Templates\Changes\MRS_Deactivations_template.xlsx
- Determine which products need to be reactivated using column P on the change template. Eligible products will be flagged as ‘Y’.
- Data for all products flagged for reactivation should then be populated into the Reactivation matrix.

Source column (on PST Change template)	Hotpoints NZ column reference	Destination column (Deactivation matrix)	Column name (Deactivation matrix)
C	E	A	Item Spec Code
Fixed value: Reactivate	Fixed value	B	Action
Today’s date	Fixed value	C	Eff date:

- Save it as \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY \Reactivations\MMDDYYYY_HHMM_MLSAP_Reactivations.xlsx
- **New Zealand:** location where to save change matrices will be user configurable (Configuration tab).

2.2.3 Mastercard cost (buy price) only change

This request will produce 2 matrices: Deactivation matrix and RewardItem matrix with new pricing. It needs to be saved in its own folder as it will be submitted in a separate request (despite containing deactivation matrix).

- Create standard deactivation matrix that will capture products flagged as 'Y' for buy price change.
- Create RewardItem matrix using the same process as for new products (section 2.1.1), except:
 - Column U (Mastercard Cost USD) needs to be highlighted in yellow to let the CCM team know of the change.
 - Column T (Cost begin date) needs to be 1st day of the next month.
- Save it as \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY \RewardItem_Cost_Change_Only_MMDDYYYY.xls
- [\\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY \Deactivations Cost Change Only MMDDYYYY.xlsx](#)
- **New Zealand:** location where to save change matrices will be user configurable (Configuration tab).

2.2.4 Mastercard cost + Issuer Cost + Points change

This request will produce 4 matrices for each client. The CCM team deactivates all products first and then sets them up again with new date and updated buy price / issuer price so it's clear when the price change occurred.

- Matrices created: Deactivations; RewardItem (for Mastercard cost changes); RewardMatrix (for issuer cost and points changes); Web hierarchy matrix (to assign the newly created products into web categories).
 - Column T in RewardItem (Cost begin date) needs to be 1st day of the next month.
- Deactivations and RewardItem matrix are created exactly the same way as for Mastercard cost only change.
- Web hierarchy matrix is created exactly the same way as for new product setups (refer to section 2.1.3).
- RewardMatrix is created the same way as for new products (section 2.1.2), except:
 - Columns N and Z need to be highlighted yellow.
 - Column C (Cost begin date) needs to be 1st day of the next month.
- Save the matrices into \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY\Buy_Sell_Points\Client_Code (Westpac)
 - Deactivations_Cost_Points_MMDDYYYY.xlsx
 - RewardItem_Cost_Points_MMDDYYYY.xls
 - RewardMatrix_Sell_Points_MMDDYYYY.xls
 - Hierarchy_Cost_Points_MMDDYYYY.xlsx
- **New Zealand:** location where to save change matrices will be user configurable (Configuration tab).

2.2.5 Content changes (Product name, Image name, Copy/T&Cs)

This request will produce RewardItem matrix with changed fields highlighted in yellow.

- On the RewardItem highlight in yellow:
 - Column A if Product name change was selected
 - Column D if Copy / T&Cs change was selected
 - Column M if image change was requested
- Remove values from Columns U and X (cost) to prevent inadvertent changes to Mastercard cost.
- If image change is requested the macro needs to resize the image and save it into the change folder. It will then use image name to populate the RewardItem matrix.

- Save the RewardItem matrix and zipped image file as:
\\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY\Content_Changes\RewardItem_Content_change_MMDDYYYY.xls
- \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY\Content_Changes\Content_change_images_MMDDYYYY.zip
- **New Zealand:** location where to save change matrices and images will be user configurable (Configuration tab).

2.2.6 Web category (hierarchy) change

- This request will produce one matrix per each affected client.
- The process is identical to the one described in section 2.1.2
- Save matrix as \\corp.mastercard.org\JamesCraig\Departments\Marketing\Merchandise Sales\MRS Maintenance\Changes\MMDDYYYY\Content_Changes\Web_Hierarchy\Client_Code\Web_Hierarchy_MMDDYYYY.xlsx
- **New Zealand:** location where to save change matrices will be user configurable (Configuration tab).

3. Westpac New Zealand – Hotpoints range management

Hotpoints NZ is not part of the Masterfile ecosystem. It has a standalone spreadsheet that will be used to manage range, however the output files are identical to what is described in this document. Hotpoints NZ column has been added to all matrices to indicate column reference on the [Hotpoints NZ range management spreadsheet](#).

3.1 Objective

Create range management spreadsheet which will allow Sourcing and Account management teams in New Zealand update content of Hotpoints program. This tool will store product and pricing information for all products in the program and generate matrices that can be loaded into MRS.

3.2 Process overview

3.2.1 New product setups

1. Sourcing team will fill out the Range management spreadsheet based on information provided by the supplier.
2. Account management team will review new products, selects the ones to add to program and initiate creation of MRS matrices.
3. MRS matrices will then be sent to Operations team who will test in MTF before sending it to CCM team who will load new products into PROD environment.

3.2.2 Changes

1. Sourcing / Account teams will make required changes to the existing product record. They will select the type of change from - Mastercard cost change, Deactivation, Reactivation or Content change.
2. The macro will generate required matrices based on the type of change selected.
3. Matrices will be sent to Ops team who liaise with CCM to action the changes.

3.3 Required functionality

Template: S:\Transfer\PST\MRS Templates\Hotpoints_NZ\Hotpoints_NZ_Template_v1.xlsm

3.3.1 Populate new product records

Input form will be used to populate product records. 'Add' button already exists.

All the data from below fields will be populated in the Input_Sheet tab.

Field	Field type	Value	Input_Sheet ref column	Validation (M=mandatory)
Vendor abbreviation	Dropdown	From list. Named range: Vendors	C	M
Vendor ID	Text box, non-editable	Lookup value of vendor ID based on Vendor abbrev. Named range: Vendor_ID	W	M
Vendor SKU	Text box	User entered	E	M
Product name	Text box	User entered	D	M
Long description	Text box	User entered	H	M
Terms & Conditions	Text box	User entered Include html tags and tags for each line.	I	O
Length	Text box	User entered	J	M
Height	Text box	User entered	K	M
Width	Text box	User entered	L	M
Weight	Text box	User entered	M	M
Cubic Weight	Text box, non-editable	Calculated based on formula: (Length x Height x Width)/4000	AB	

Mastercard cost	Text box	User entered	F	M
Retail price (RRP)	Text box	User entered	G	O
Issuer cost	Text box, non-editable	<p>Calculated value based on formula:</p> <p>Markup values for merchandise / gift cards are in Configuration tab, column M.</p> <p>Reporting category is used to determine type of product.</p> <p>Merchandise: =ROUNDUP(Mastercard_cost/(1-Markup_value),2)</p> <p>Gift Cards / Donations: =ROUNDUP(Mastercard_cost/(1-Markup_value),2)</p>	N	
Cost in points	Text box, non-editable	<p>Calculated value based on formula:</p> <p>Merchandise: =CEILING(ROUND(Issuer_Cost/bps_rates,0),Rounding)</p> <p>Gift cards / Donations: =CEILING(ROUND(Retail_Price/bps_rates,0),Rounding)</p> <p>Bps_rates and Rounding are in Configuration tab, columns D and E.</p>	O	
Issuer freight	Text box, non-editable	Looked up value based on Cubic Weight. Freight tiers are in Configuration tab.	P	
Freight in points	Text box, non-editable	<p>Calculated value based on formula:</p> <p>Merchandise: =CEILING(ROUND(Issuer_Freight/bps_rates,0),Rounding)</p> <p>No freight for gift cards / donations.</p>	Q	
Total points	Text box, non-editable	Calculated value: Cost in points + Freight in points	R	
Reporting Category	Dropdown	From list. Named range: Rep_Cat	S	M
Hierarchy 1	Dropdown	From list. Named range: Hierarchy1	T	M
Hierarchy 2	Dropdown	From list. Named range: Hierarchy2	U	O

Action	Dropdown	From list. Named range: Actions	B	O
Image		User selected Validation: no validation on the image in the form. The validation should be done at the processing stage so that the macro automatically fixes it.	V	M
Start Date	Text box	User entered (DD/MM/YYYY) but stored as MM/DD/YYYY	X	

All mandatory fields (column Validation) must be filled out before the record is saved.

3.3.2 Create MRS matrices based on selected action

Selected Action	What to do?
New product setup	Create MRS matrices + images as per MF enhancements specification
Deactivation	Create MRS deactivation matrix
Price change	Create MRS Mastercard cost, Issuer cost and points change matrices
Reactivation	Create MRS reactivation matrix
Name change	Create MSR Content change matrix highlighting Product name
Short description change	Create MSR Content change matrix highlighting Short desc
Long description change	Create MSR Content change matrix highlighting Long desc
Image change	Create MSR Content change matrix highlighting Image name + create new .zip file with the actual image
Web hierarchy change	

New product setup

- Matrices created using field references as per [existing requirements](#).
- When finished, update field 'Setup Date' on Input_Sheet to today's date and highlight it green.

Deactivation

- Matrices created using field references as per [existing requirements](#).

Price change

- Matrices created using field references as per [existing requirements](#).

Reactivation

- Matrices created using field references as per [existing requirements](#).

Name, Short & Long description and Image change

- Matrices created using field references as per [existing requirements](#).

Web category change

- Matrices created using field references as per [existing requirements](#).