



Prophet 21
WORLD WIDE USER GROUP

Sales Pricing

Presented by: Carolyn Hunt
Hunt Consulting Services



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Disclaimer

- This conference is an attempt by P21WWUG members to assist each other by demonstrating ways that we utilize the Prophet21 system and other related products.
- The P21WWUG and the individuals conducting the classes and round tables take no responsibility for potential issues that arise as a result of taking the advice given during the conference.
- The P21WWUG does not recommend using any SQL statements to update your database without having those statements first reviewed by Epicor or other experienced SQL professionals. Test any code in your Play Database!
- Using SQL statements to update your database may result in corrupting your database. Test any code in your Play Database!



Agenda

- Introduction
- Why use Libraries and Contracts?
- Pricing Libraries vs Contracts – which should you use?
- System Settings
- Customer Maintenance
- Setting up a contract
- Setting up Libraries, Books and Pages
- How to get started
- Questions



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INTRODUCTION

HUNT
CONSULTING
SERVICES

- Worked and consulted in industrial distribution industry 50+ years
 - End user of Prophet 21 systems 35+ years
 - Independent Consultant 30+ years
- Focus on streamlining operations, documentation of work instructions and maintaining financial integrity of system.
- Expertise in all phases of the system, with special emphasis on accounting, financial reporting, and inventory management/purchasing. Proficient in Crystal Report writing.
- Assist users preparing to go live with Prophet 21 and testing of updates prior to loading to the live database



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Contact Information

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Why Use Pricing Libraries and Contracts?

- Provides consistent pricing for a customer or customer category
- Allows greater flexibility than using a fixed source price/multiplier
- Avoids using the dreaded “last price paid”
- Can increase your profit margins



Libraries VS Contracts

■ CONTRACTS

- Item specific
- More limited in scope than libraries
- Can use a multiplier off of a source field or fixed pricing
- Can use price breaks
- Can be used to calculate vendor rebates
- Can be set to a maximum quantity or dollar value
- Can have multiple contracts assigned to a customer
- Is SHIP TO ID specific – not all ship to's have to have the same pricing.
- Contracts usually need a pricing library to price anything not previously negotiated that the customer may purchase. (non-contract items)





Libraries VS Contracts



■ LIBRARIES

- Customer specific; applies to all ship to ID's
- Broader range of choices – can create price pages based on items, product groups, suppliers, supplier/product group, discount groups, supplier/discount groups, customer part numbers, manufacturing classes, and price families
- Can be used to have special commission costs
- Can be used to capture vendor rebate information
- Can use a multiplier off of a source field or have fixed pricing
- Pages can be copied to multiple library books for multiple customers
- Pages can cover all pricing arrangements, eliminating the need for a contract.

System Settings

- SYSTEM SETTINGS > Order Processing > Pricing
- Check the checkboxes to determine how you want contracts and libraries to be used:
 - Allow contract pricing by price libraries?
 - Allow pages for price and cost?
 - Job contract pricing?

Clear cached pricing information after every order or sales pricing inquiry

Job Based/Contract Pricing Use Vendor Contracts

Allow Customer Contract Lines on Quotes Allow Pages for Price and Cost

Allow Contract Pricing By Customer Price Libraries

Job Based/Contract Pricing Defaults

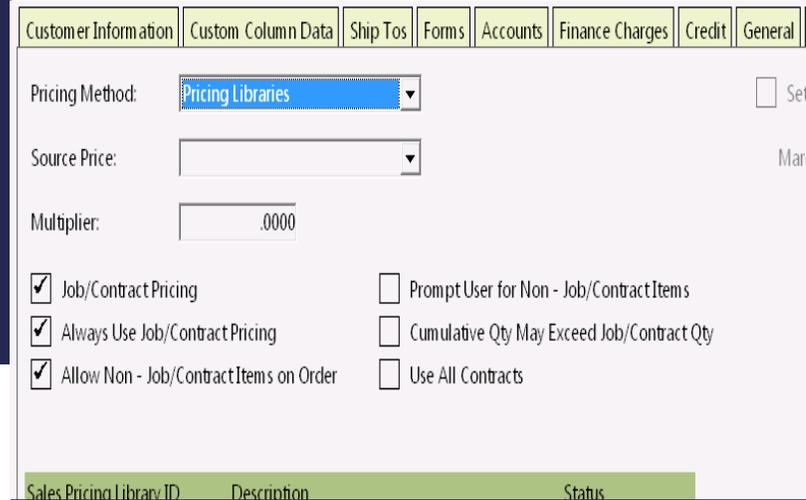
Default Pricing Method	<input type="text" value="Source"/>
Default Source	<input type="text" value="Supplier List Price"/>
Default Multiplier	<input type="text" value=".0000"/>
Default Price	<input type="text" value=".0000"/>

Update contract line expiration date to header expiration date

Update contract line start date to header start date

Customer Maintenance

- On the SALES PRICING tab of Customer Maintenance, check the checkboxes that allow you to use libraries and contracts as needed.



The screenshot shows the SALES PRICING tab of the Customer Maintenance form. The Pricing Method is set to 'Pricing Libraries'. The Source Price and Multiplier fields are empty. The following checkboxes are checked:

- Job/Contract Pricing
- Always Use Job/Contract Pricing
- Allow Non - Job/Contract Items on Order

The following checkboxes are unchecked:

- Prompt User for Non - Job/Contract Items
- Cumulative Qty May Exceed Job/Contract Qty
- Use All Contracts

Below the checkboxes is a table with columns: Sales Pricing Library ID, Description, and Status.

- Always use Job/Contract Pricing requires you to select a job contract in order entry. If only one contract exists, it automatically populates
- Allow Non-Job Contract Items On Order allows you to add other items to the order that do not have special pricing.
- Use All Contracts causes the system to automatically assign contract pricing to the customer's orders without any prompting from you, provided the item on order is covered by a contract

- Cumulative Qty May Exceed Job/Contract Qty allows you to continue to offer the contract price even if the customer goes over the pre-defined quantity on the agreement

■ Order Processing > Maintenance >
Job Contract Maintenance

Setting up a Contract

Job/Contract Maint	Foreign Currency	Customer/Ship To	Customer/Ship Info	Ship To/Item	Consignment Info	Document Links	Audit Trail	Job/Contract Notes
Record ID:					<input checked="" type="checkbox"/> Approved	Start Date:	02/12/18	
Company ID:	HCS	HUNT CONSULTING SERVICES				End Date:	00/00/00	
Corp Address ID:						Currency ID:		
Contract No:						<input type="checkbox"/> Inactive	<input type="checkbox"/> Consignment Contract	
Customer ID:						Extended Description:		
Ship To ID:								
PO:		Taker:	CAROLYN_HUNT	Carolyn Hunt				
Contact ID:								
SalesRep ID:								

- Key the CORPORATE ADDRESS ID (you may search)
- CONTRACT NUMBER is user-defined. Key the contract number and description.
- Do NOT key customer ID or ship to ID on this tab.
- If you have a customer PO# for all items on the contract, you can key it in the PO field
- Key START and END dates.
- If this is for CONSIGNMENT, check the CONSIGNMENT CONTRACT checkbox
- Click on the CUSTOMER/SHIP TO tab.



Setting up a Contract

- On the Customer/Ship To tab, key all ship-to ID's that apply to this contract. Note: If you have multiple customers all part of the same corporate ID, you can key the customer ID and ship-to ID for all that have the same price agreement.



Job/Contract Maint	Foreign Currency	Customer/Ship To	Customer/Ship Info	Ship To/Item	Consignment Info	Document Links	Audit Trail	Job/Contract Notes
Customer ID	Ship To	Shipto Name	Row Status					
10008	10008	Matthew's Reconstruction Service	Active					
10007	10007	Gina's Beauty and Fashion	Active					



Setting up a Contract

- Select the CUSTOMER/SHIP INFO tab if you want to maintain separate terms, default disposition, freight code or carrier that might be different from what is found in customer or ship to maintenance.



Job/Contract Maint	Foreign Currency	Customer/Ship To	Customer/Ship Info	Ship To/Item	Consignment Info	Document Links	Audit Trail	Job/Contract Notes
--------------------	------------------	------------------	---------------------------	--------------	------------------	----------------	-------------	--------------------

Customer Defaults		Ship-To Defaults	
Customer ID	<input type="text" value="10007"/>	Ship To ID	<input type="text" value="10007"/>
Terms ID:	<input type="text" value="Net 30"/>	Carrier ID:	<input type="text" value="UPS GROUND"/>
Acceptable Wait Time:	<input type="text"/> Days	Freight Code:	<input type="text"/>
Default Disposition:	<input type="text" value="Backorder"/>	Source Location ID:	<input type="text" value="100 HUNT CONSULTING SERVICES"/>
<input type="checkbox"/> Consolidated Invoicing		Pricing Sales Location ID:	<input type="text"/>
		Consignment Location ID:	<input type="text"/>
		Ship To PO Number:	<input type="text"/>

Contract Value Limit:



Ship To ID	10007	Contract Value Limit	.00
Carrier ID:	UPS GROUND		
Freight Code:			
Source Location ID:	100 HUNT CONSULTING SERVICES		
Pricing Sales Location ID:			

Setting up a Contract

- The location entered in the [Pricing Sales Location ID](#) field makes the contract pricing specific to that one sales location. If the customer eligible for contract pricing places an order at a different sales location, the order uses standard pricing, not the contract pricing. If all locations should apply, leave this field blank
- The [Contract Value Limit](#) field establishes an upper dollar limit for the items on the contract. If the total amount ordered on a contract exceeds this amount, the system gives an error message when you add the line item that puts you over the limit. You cannot override this limit in Order Entry; once you hit the limit you must abide by it and can add no more items to the order. Any non-contract items on the order still count toward the contract dollar limit. If there is no limit on the contract, leave this field blank.



Setting up a Contract

- In the bottom pane, key all items that make up the contract. You can import this information

Line #	Item ID	Item Desc	UOM	Pricing Method	Source Price	Multiplier	Price	ContractPart No	PO Number	Src Location ID	Max Qty	Start
1	HELL 00030	H45AL-SR-20125 END MILL 1/8 CUTT	EA	Price	Supplier Lis	.0000	72.5000					.0002/1

- Select the proper PRICING METHOD (source/price/pricing libraries/none)
- If SOURCE – use drop down to select the source field for calculating selling price. Click in the MULTIPLIER field to key the multiplier to be used
- If PRICE – key the fixed price in the PRICE field.



Setting up a Contract

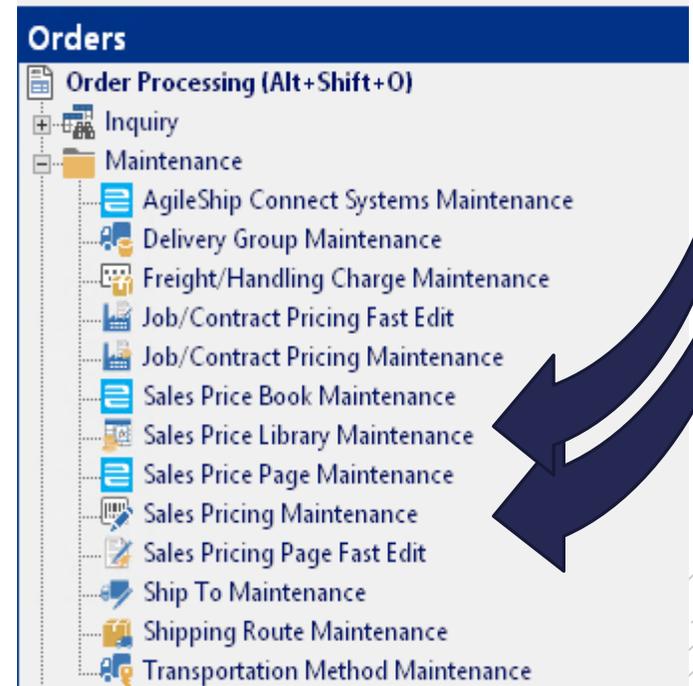
- Continue scrolling to the right of the line in the bottom pane...

Items	Costs	Bin	Values	Bins/Items	Item/Bin Notes	Ship To	Consignment Control	Consignments Issued						
Price Page	Eff Da	Price Page	Exp Da	Cost Page	Description	Price Page	Description	PO Cost	Qty Ordered	Status	Amount Committed	Pre-Commitment	Qty Invoiced	Copy Line
100	02/12/18		12/31/19					.0000	.00	Active	.0000	.0000	.0000	<input checked="" type="checkbox"/>

- You can assign specific PO costs if purchasing using the “S” or “D” dispositions.
- The line captures quantity information should you have a quantity limit on the line for the contract price.
- The COPY LINE checkbox determines if this item will be copied to new contracts when using the right mouse button to perform the copy.

Creating Your Library

- Older versions of P21
 - Libraries, Books, and Pages are set up under Order Processing > Maintenance > Sales Pricing Maintenance
- Version 2018
 - Order Processing > Maintenance > Individual programs exist for Library, Book and Page
- Once you establish a library, you must be sure it is added to the customer(s) to which it applies in CUSTOMER MAINTENANCE





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In Sales Pricing Maintenance, to create a new library, click NEW LIBRARY

Creating Your Library

Sales Pricing Maintenance

File Edit View Inquire Tools Window Help

Home Application System Status Help

Save Clear Close Customer... Sales Pric... Contact M... Item Purchase... Purchase... Orders Add to MyMenu

Actions

10007 Ginas Library

- Price Books
- Price Pages
- 10007 Ginas Library
- DEFAULT LIBRARY
- Matthew Hunt Reconstruction 10008

New library Edit library

Description	Status
10007 Ginas Library	Active
DEFAULT LIBRARY	Active
Matthew's Reconstruction Services 10008	Active



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Creating Your Library

Price Library Maintenance

Price Library

Library ID: 1 10006 4 OK

Description: 2 Madison's Fashions 10006 Cancel

Type: 3 First Of Help

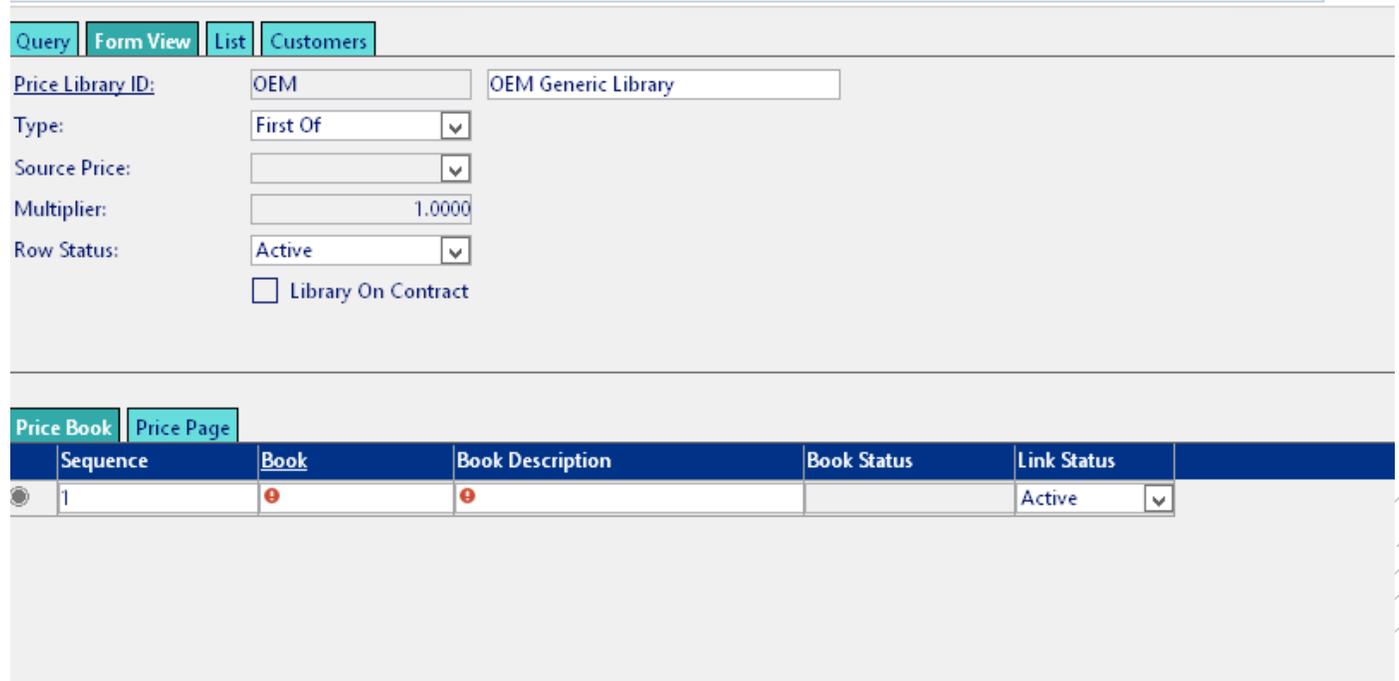
Status: Active

Strategic Pricing Library

1. Enter LIBRARY ID. If for a specific customer, it is suggested the library ID equal the customer ID
2. DESCRIPTION - If specific to one customer, key the customer's name and customer ID. Make sure your description explains the purpose of the library if generic (such as OEM Customers-Generic)
3. TYPE: If you are going to assign price pages, type will usually be set to FIRST OF.
4. Click OK

Creating Your Library

- In Sales Pricing Library Maintenance, Key your Price library ID and description.
- Use the drop down box to select TYPE
- If Library is on a contract check the checkbox for this purpose
- If you already have books established you can add books to the library now, or you can do it later once books have been created.



The screenshot shows a software interface for creating a price library. It features a top navigation bar with tabs for 'Query', 'Form View', 'List', and 'Customers'. Below this, there are several input fields and dropdown menus: 'Price Library ID' (with a text box containing 'OEM' and a search box for 'OEM Generic Library'), 'Type' (dropdown menu set to 'First Of'), 'Source Price' (dropdown menu), 'Multiplier' (text box set to '1.0000'), and 'Row Status' (dropdown menu set to 'Active'). There is also a checkbox labeled 'Library On Contract' which is currently unchecked.

Below the form, there is a table with two tabs: 'Price Book' and 'Price Page'. The 'Price Book' tab is active, showing a table with the following columns: 'Sequence', 'Book', 'Book Description', 'Book Status', and 'Link Status'. The table contains one row with the following data:

Sequence	Book	Book Description	Book Status	Link Status
1				Active



Creating Your Library

- If a customer has multiple libraries, you must tell the system how you want it to search for customer selling prices.
- The TYPE field consists of the following:
 - FIRST OF (uses the first match it finds)
 - LOWEST OF (uses lowest price)
 - HIGHEST OF (uses highest price)
 - NEWEST OF (uses page with most recent start date)
 - OLDEST OF (uses page with oldest start date)
 - MULTIPLIER (uses multiplier off of a price source)



Creating Your Library

Price Library Maintenance

Price Library

Library ID: DEFAULT

Description: Default Library Supplier List x 1.0

Type: Multiplier

Source Price: Supplier List Price

Multiplier: 1.0000

Status: Active

On Contract

Strategic Pricing Library

OK

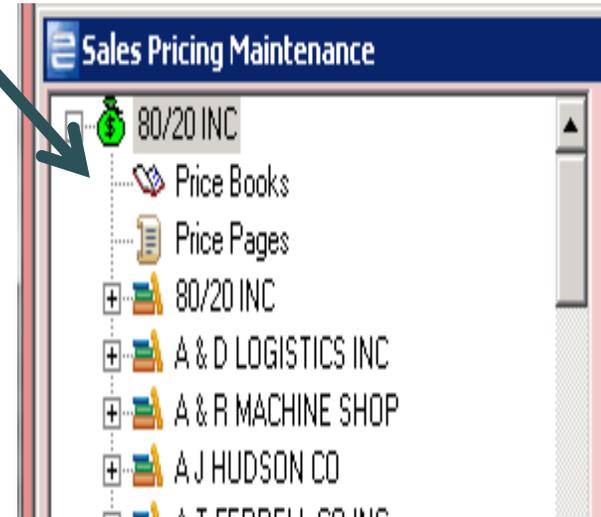
Cancel

Help

- MULTIPLIER – all items for the customer will have a fixed multiplier off of a price field in the item record.
- If you select type MULTIPLIER, you must select a SOURCE PRICE field (use drop down arrow to select) and a MULTIPLIER to be used off of the source price field. In the above example, we are using a multiplier of 1.0 times the supplier's list price. A customer with this library will have every selling price calculated as List x 1.0.

Creating Your Book

- A LIBRARY that requires price pages (any library except those with type=multiplier) will also require a BOOK. The BOOK is assigned to the library and the book may have one or more pages. You can assign multiple books to a library.
- In the SALES PRICE MAINTENANCE program, click the PRICE BOOKS option





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Create Your
Book

Click NEW BOOK

The screenshot shows a 'Book Selection' window with the following elements:

- Search criteria: 'Price Book ID' (dropdown), 'starts with' (dropdown), and an empty text input field.
- Buttons on the right: 'Find', 'Clear', and 'New book'.
- Buttons at the bottom: 'More' and 'Less'.

A large blue arrow points from the text 'Click NEW BOOK' to the 'New book' button.



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Create Your Book

Price Book Maintenance

Price Book

Price Book ID:

Description:

Row Status:

OK

Cancel

Help

- The PRICE BOOK ID should be identical to the LIBRARY ID. If you are creating more than one book for the library, use the library id plus a sequence number (example: 10006-1)
- The DESCRIPTION should be the customer name (or purpose if your library is generic)
- Click OK



Add the Book
to the Library

- In the BOOK SELECTION, enter the BOOK ID you just created in the white box.
- Click FIND

Book Selection

Price Book ID starts with 10006

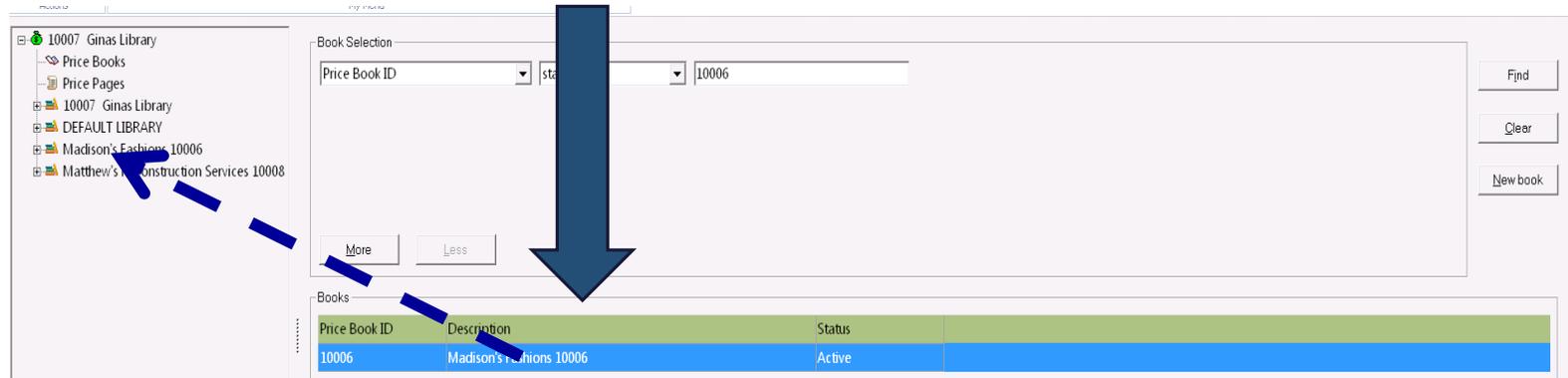
More Less

Find Clear New book

Price Book ID	Description	Status
10006	Madison's Fashions 10006	Active

The book displays in the bottom pane.
On the left, find your LIBRARY – in
our example, it is Madison's Fashions

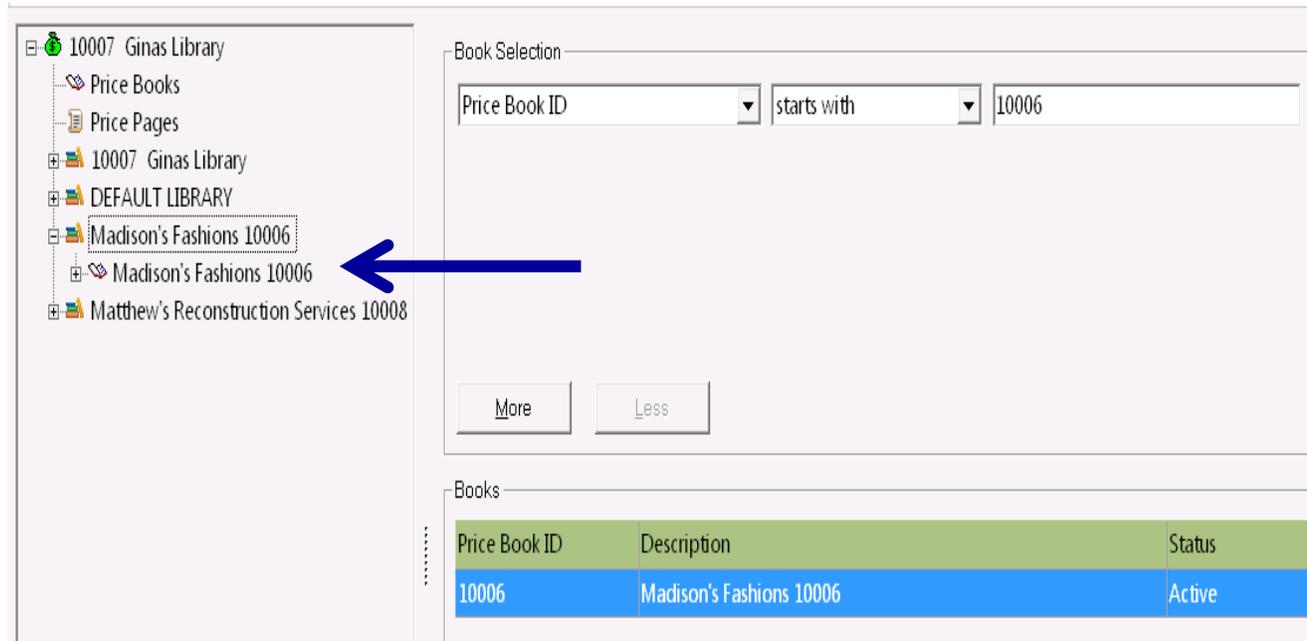
Add the Book
to the Library



Click and HOLD your mouse over the price book ID.
You will get a symbol that looks like a hand pointing to a
page. DRAG the book over to the library and release
the mouse

Add the Book to the Library

- Click the PLUS sign beside the library. You will see the book is now assigned



The screenshot shows a software interface with a tree view on the left and a 'Book Selection' panel on the right. The tree view includes the following items:

- 10007 Ginas Library
 - Price Books
 - Price Pages
 - 10007 Ginas Library
 - DEFAULT LIBRARY
 - Madison's Fashions 10006 (highlighted with a blue arrow)
 - Madison's Fashions 10006
 - Matthew's Reconstruction Services 10008

The 'Book Selection' panel contains the following fields:

- Price Book ID: [dropdown]
- starts with: [dropdown]
- 10006

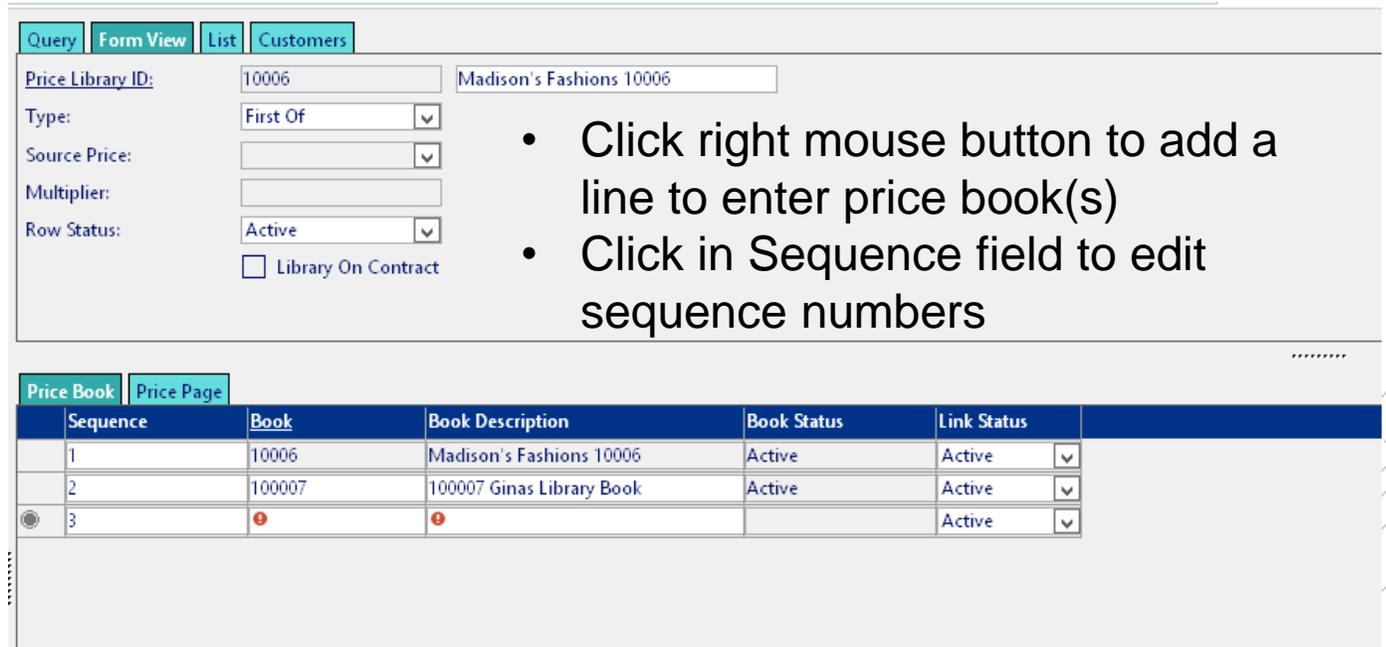
Below the fields are two buttons: 'More' and 'Less'.

The 'Books' section at the bottom displays a table with the following data:

Price Book ID	Description	Status
10006	Madison's Fashions 10006	Active

Add the Book to the Library

- If you have the new “SALES PRICE LIBRARY MAINTENANCE” option in newer releases, you do not have to drag and drop the book.
- Go to Sales Price Library Maintenance and enter the Price Library ID (or search)
- In the bottom pane, you can add your books and assign them the sequence number you want them to have. The sequence number is very important if you are using a FIRST OF library type.



The screenshot shows the 'Sales Price Library Maintenance' interface. The top pane is in 'Form View' and displays the following fields:

- Price Library ID: 10006 (with a search box containing 'Madison's Fashions 10006')
- Type: First Of (dropdown)
- Source Price: (dropdown)
- Multiplier: (text input)
- Row Status: Active (dropdown)
- Library On Contract

The bottom pane is in 'Price Book' view and displays a table with the following data:

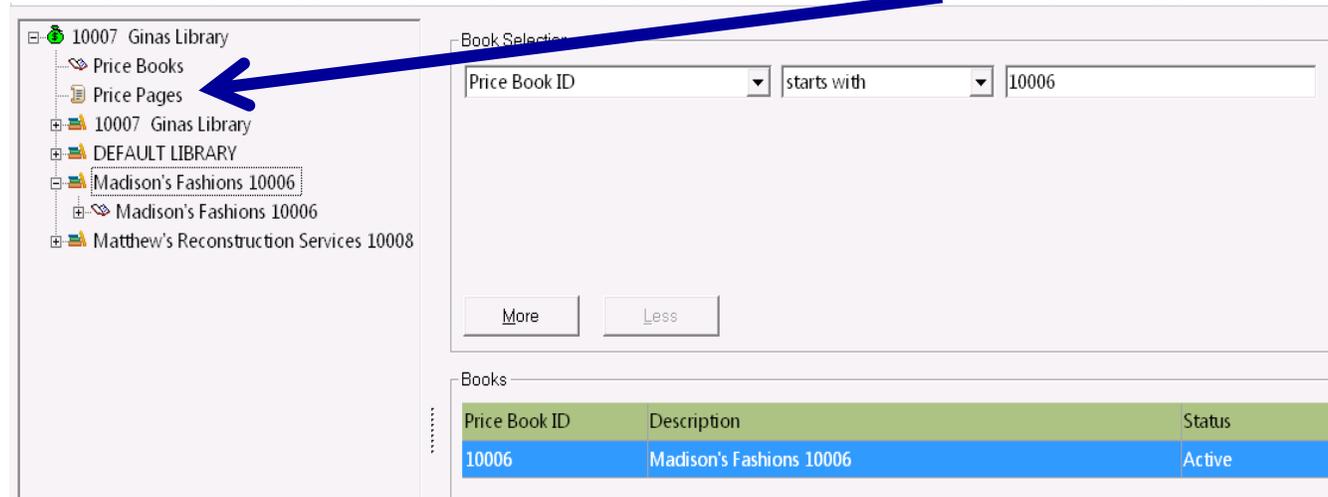
Sequence	Book	Book Description	Book Status	Link Status
1	10006	Madison's Fashions 10006	Active	Active (dropdown)
2	100007	100007 Ginas Library Book	Active	Active (dropdown)
3				Active (dropdown)

Two bullet points are overlaid on the right side of the screenshot:

- Click right mouse button to add a line to enter price book(s)
- Click in Sequence field to edit sequence numbers

In Sales Pricing Maintenance, Click PRICE PAGES

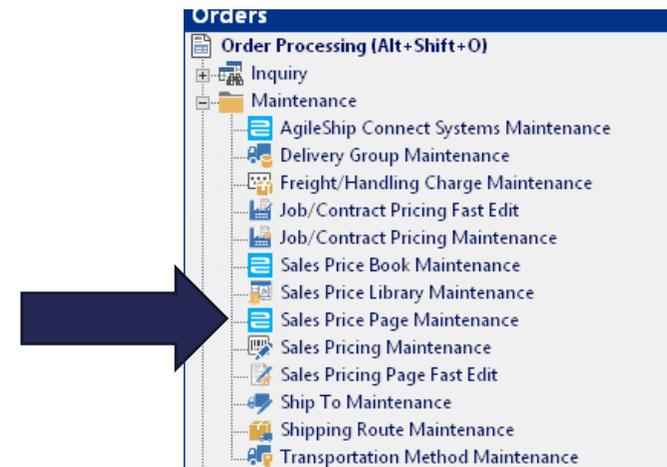
Creating Price Pages



The screenshot shows the 'Sales Pricing Maintenance' window. On the left, a tree view lists libraries: '10007 Ginas Library', '10007 Ginas Library', 'DEFAULT LIBRARY', 'Madison's Fashions 10006', 'Madison's Fashions 10006', and 'Matthew's Reconstruction Services 10008'. A blue arrow points to the 'Price Pages' folder under the first '10007 Ginas Library' entry. On the right, the 'Book Selection' section has a 'Price Book ID' dropdown set to '10006' and a 'starts with' dropdown set to '10006'. Below this is a 'Books' table with one row:

Price Book ID	Description	Status
10006	Madison's Fashions 10006	Active

In newer version of Prophet 21, you can select SALES PRICE PAGE MAINTENANCE from the Orders>Maintenance module



The screenshot shows the 'Orders' menu with the 'Maintenance' sub-menu expanded. A blue arrow points to the 'Sales Price Page Maintenance' option in the list.

- Order Processing (Alt+Shift+O)
- Inquiry
- Maintenance
 - AgileShip Connect Systems Maintenance
 - Delivery Group Maintenance
 - Freight/Handling Charge Maintenance
 - Job/Contract Pricing Fast Edit
 - Job/Contract Pricing Maintenance
 - Sales Price Book Maintenance
 - Sales Price Library Maintenance
 - Sales Price Page Maintenance
 - Sales Pricing Maintenance
 - Sales Pricing Page Fast Edit
 - Ship To Maintenance
 - Shipping Route Maintenance
 - Transportation Method Maintenance



Creating Price Pages

- First, check to make sure a price page does not already exist for your purpose. In the PAGE SELECTION of sales pricing maintenance, click in the second box and use drop down arrow to change “starts with” to “contains”.

Page Selection

Description

In the last white box, type something you are sure would be in the description. For example, if you are looking for price pages for the product group CA99, type CA99 in the last box.

Click FIND

- In Sales Price Page Maintenance, search on PRICE PAGE ID to find all pages that contain “CA99”

Creating Price Pages

Find Price Page UID

Search Text: Search all bold Columns

Include Expired Price Pages:

Drag a column here to group by this column.

Price Page ID	Description	Price Page Typ	Type Descripti	Effective Date	Expiration Date
9	PG CA99 OEM Customers List less 1...	Product Group	CA99	8/10/2018	12/31/2049
8	PG CA99 CUST 10006 Cost plus 35%	Product Group	CA99	8/10/2018	12/31/2049
7	PG CA99 Calipers List less 15%	Product Group	CA99	8/10/2018	12/31/2049

Enter text to search

If you don't find the page you need, click CANCEL and enter the information to create a new page.

Creating Price Pages

Page Selection

In Sales Pricing Maintenance, all of the pages with the description containing CA99 are shown below. NOTE: If the pages indicate they are for specific customers, you should NOT use them for a different customer – create a new one. If the page already exists for your customer, you just need to add the page to the book under the customer library.

Find

Clear

New page

Pages

Description	Item ID	Effective Date	Expiration Date	Status	Mfg Class ID	Supplier ID	Prod
PG CA99 - LG USER - PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 - RESELLER - PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 - SM OEM- PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 - SM USER - PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 - VIP OEM- PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 - VIP RESELLER - PRICE BREAKS		8/29/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 ASHLEY IND 104102 List x 0.9		9/6/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 AUTOFORM TOOL 101773 List x 0.65		9/6/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 BATESVILLE 101870 List x 0.9		9/6/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 CAMOZZI - DA HOCHSTETLER 103292 - List		9/3/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 CAMOZZI - PHOENIX DRUM DRYER 105668		9/3/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 CAMOZZI - POWER COMPONENTS 105073 -		9/3/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 CAMOZZI - SUD-CHEMIE 105619 - List x .70		9/3/2012 00:00:00	12/31/2049 00:00:00	Active			CA99
PG CA99 CAMOZZI - SUN INDUSTRIES 105343 - List x		9/3/2012 00:00:00	12/31/2049 00:00:00	Active			CA99

To create a new page, click NEW PAGE



Creating Price Pages

Note: This is the entry screen for sales price page maintenance. It is identical to the one found in sales pricing maintenance with the exception of the “Price Page ID” which is assigned by the system

- Select PRICE TYPE by using the drop down arrow or typing the first letter. In our example, we’ll set up a price page for a supplier/product group.

The screenshot shows the 'Sales Pricing' maintenance screen with the following fields and options:

- Price Page ID:** [Empty text box]
- Description:** [Empty text box]
- Price Type:** [Dropdown menu open, showing options: Item, Supplier / Discount Group, Supplier / Product Group, Supplier / Manufacturing Class, Supplier, Discount Group, Product Group, Customer Part Number, Price Family, Supplier/Price Family]
- Effective Date:** [Empty text box]
- Expiration Date:** [Empty text box]
- Contract Number:** [Empty text box]
- Pricing Method:** [Empty text box]
- Source Price:** [Empty text box]
- Price:** [Empty text box]
- Totaling Method:** [Empty text box]
- Totaling Basis:** [Empty text box]
- Major Group ID:** [Empty text box]
- Status:** [Active]
- Item:** [Empty text box]
- Multiplier Type:** [Empty dropdown menu]
- Apply to Manufacturer Rep Orders:** Yes No Only
- Applies to:** Core Non-Core
- No Charge



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Creating a Price Page

Sales Price Page Maintenance

Sales Pricing **Costs** PO Cost Multipliers Values Commission Used By Timestamp

Price Page ID:

Description:

Calculator Type:

No Charge

HUNT CONSULTING SERVICES

HELICAL ITEMS

OK

Key your page DESCRIPTION so that you know the purpose. An example would be to start each page with an identifier such as IT for Item, SU for Supplier, PG for Product group, DG for discount group, SUPG for Supplier/Product Group and so on. If the page is CUSTOMER SPECIFIC, you should also include the customer ID and name, followed by the type of discount (ex: List x .70) or FIXED PRICE if the page does not use a multiplier

If you use both price and cost pages, be sure to use the drop down arrow to select the correct "Calculate Type" Choices are Price, Cost, and Both



Creating Price Pages

- **EFFECTIVE DATE** defaults to current date. You can change this to a future date if you are setting up a price page ahead of the actual effective date. Normally, you leave this field as-is
- **EXPIRATION DATE** defaults to “end of time” which is defined in P21 as 12/31/2049. If you do not have a specific expiration date, leave as-is. However, if the price multiplier has a true expiration date, you should key the date in this field.
- **CONTRACT NUMBER** is information only. If you have a customer contract number or quote that you want to reference, key it in this field; otherwise leave blank. This does not use the CONTRACT ID in Job Contract Maintenance.

Effective Date:	<input type="text" value="02/12/18"/>	
Expiration Date:	<input type="text" value="12/31/49"/>	
Contract Number:	<input type="text"/>	



Creating Price Pages

- PRICING METHOD will be SOURCE unless you are setting up a page with a fixed selling price. If using a fixed price, the pricing method = PRICE.
- SOURCE PRICE is required if SOURCE is your pricing method. Use down arrow to pick from the price field against which your multiplier will be used to calculate the selling price. In our example, our source price is SUPPLIER LIST PRICE.

Pricing Method:	<input type="text" value="Source"/>
Source Price:	<input type="text" value="Supplier List Price"/>
Price:	<input type="text" value=".0000"/>
Totaling Method:	<input type="text" value="Item"/>
Totaling Basis:	<input type="text" value="Sales Unit"/>



Creating Price Pages

- The Totaling Basis determines what (e.g., sales units, weight, pieces, or source price) must be accumulated to achieve a discount. It defaults to Sales Unit and should be edited as appropriate.

Pricing Method:	Source
Source Price:	Supplier List Price
Price:	.0000
Totaling Method:	Item
Totaling Basis:	Sales Unit



Creating Price Pages

TOTALING METHOD options include total by item, supplier, discount group, product group, order, or major group. It defaults to ITEM

Totaling Method:	Item	
Totaling Basis:	Supplier	
Major Group ID:	Discount Group	
Status:	Product Group	
Supplier:	Order	
Company ID:	Major Group	HUNT CONSULTING SERVICES
Product Group:	HELICAL	HELICAL ITEMS

MAJOR GROUP indicates price pages that are grouped together. For example, you give an extra 5% if “X” amount of product group 123 and product group 124 are purchased on the same order. The pages are set up with the MAJOR GROUP identification so the system knows what to do on the sales order. There is no table for Major Group – you can use whatever you want.

NOTE: Epicor recommends you do not use symbols or special characters in the MAJOR GROUP field.



Creating Price Pages

- Depending on your PRICE TYPE, you will need to enter information that defines the supplier, product group, manufacturing class, discount group, or item ID. The example below shows information required for price type Supplier/Product Group. We have to supply the company ID, Supplier ID, and Product Group ID

<u>Supplier:</u>	▣	10013	
<u>Company ID:</u>	▣	HCS	HUNT CONSULTING SERVICES
<u>Product Group:</u>	▣	HELICAL	HELICAL ITEMS



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- Click the VALUES tab

Creating Price Pages

Price Page Maintenance

Sales Pricing Costs PO Cost Multipliers **Values** Timestamp

Calculation Method

Difference Multiplier Mark up Percentage Fixed Price

Off Contract

Calculation Value	Break	COM	Other Cost Value
.900000	.0000		
.000000	.0000		
.000000	.0000		
.000000	.0000		

OK
Cancel
Help

If you are multiplying off of a price field (such as supplier list), the MULTIPLIER radio button should be checked. If you are using a MARKUP off of supplier cost, the MARKUP radio button should be checked

In the CALCULATION VALUE column enter the multiplier or markup. Note: multipliers are entered as fractions (example: .90, .85, 1.25). Markups are entered as whole numbers (example: 15.00, 25.00)



Creating Price Pages

- If you have only ONE calculation value, the BREAK value will be zero. If you have multiple price breaks, as shown below, the BREAK value determines when one multiplier ends and another begins. The LAST break will always be zero – indicating any quantity higher than the break just before it will use the last calculation value in the list.

Price Page Maintenance

Sales Pricing Costs PD Cost Multipliers Values Timestamp

Calculation Method

Difference Multiplier Mark up Percentage

Calculation Value	Break	UOM
.900000	100.0000	
.850000	200.0000	
.800000	.0000	
.000000	.0000	
.000000	.0000	

BREAKS ARE *EXCLUSIVE*. This means once the quantity is equal to or greater than the break value, the system will use the next calculation value down the column. In the example, the customer gets 10% off of quantities from 1-99, 15% off of quantities 100-199, and 20% on all quantities 200 or more



- Click the COSTS tab if you are creating a price page for BOTH sell and cost or cost only

Creating Price Pages

Price Page Maintenance

Sales Pricing Costs PO Cost Multipliers Values Timestamp

Other Cost

Other Cost Calculation

Type: Order Source Value None

Value: 1.0000

Source: Standard Cost

Calculation Method: Difference Mark up Multiplier Percentage

Calculation Value: 1.0000

Apply Freight Factor

Freight Factor Source: Standard Cost

Calculation Method: Mark up Multiplier Percentage

Calculation Value: 1.0000

OTHER COST CALCULATION:
Set your OTHER COST (generally used if you are capturing rebated costs) to the Type that applies, such as SOURCE. Set a SOURCE FIELD (such as standard cost) and a multiplier



COMMISSION COST CALCULATION:

The settings can be based on order, source, or value:
Source = Field against which you wish commission to be calculated, such as STANDARD COST.
Calculation method = MULTIPLIER
Calculation value = 1.0

Creating Price Pages

The screenshot shows the 'Price Page Maintenance' dialog box with the 'Values' tab selected. The 'Off-Contract Page' section is active, showing the following settings:

- Type: Source
- Value: 1.0000
- Source: Standard Cost
- Calculation Method: Multiplier
- Calculation Value: 1.0000

Other Cost Calculation settings (for reference):

- Type: Source
- Value: 1.0000
- Source: Standard Cost
- Calculation Method: Multiplier
- Calculation Value: 1.0000
- Apply Freight Factor:
- Freight Factor Source: Standard Cost

Buttons: OK, Cancel, Help



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Creating Price Pages

Sales Price Page Maintenance

Sales Pricing Costs PO Cost Multipliers Values Commission Used By Timestamp

Price Page ID:

Description: SUPG 10013 Helical PG Helical List x .70

Price Type: Supplier / Product Group Calculator Type: Price

Effective Date: 02/12/18

Expiration Date: 12/31/45

Contract Number:

Pricing Method: Source

Source Price: Supplier List Price

Price: .0000

Totaling Method: Item

Totaling Basis: Sales Unit

Major Group ID:

Status: Active

Supplier: 10013

Company ID: HCS HUNT CONSULTING SERVICES

Product Group: HELICAL HELICAL ITEMS

Apply to Manufacturer Rep Orders: Yes No Only

Applies to: Core Non-Core

No Charge

OK
Cancel
Help

Click back on SALES PRICING TAB and review your work. When you are confident your work is correct, click OK. You can click OK on any tab if you are sure everything has been entered as you want it to be.

You can allow price pages to apply to manufacturer rep orders as well as regular orders. You can disallow the page on rep orders, or set up pages ONLY for rep orders

Drag Your Price Page to the Book

- In Sales Pricing Maintenance, if you have multiple pages to drag to the same book, you can do a FIND on the pages to select all pages at one time.

Page Selection

Description

Find

Clear

New page

More Less

Pages

Description	Item ID	Effective Date	Expiration Date	Status	Mfg Class ID	Supplier ID	Product
PG A030 CAPACITORS - LG USER - MARKUP 35%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
PG A030 CAPACITORS - RESELLER - MARKUP 25%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
PG A030 CAPACITORS - RESELLER VIP - MARKUP 25%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
PG A030 CAPACITORS - SM OEM - MARKUP 30%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
PG A030 CAPACITORS - SM USER - MARKUP 45%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
PG A030 CAPACITORS - VIP OEM - MARKUP 25%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active			A030
SUPG ABB 100849 PG A030 CAPACITORS FINISHING		10/26/2012 00:00:00	12/31/2049 00:00:00	Active		100849	A030

In the Price Page selection, use the word CONTAINS in the 2nd white box. In the 3rd white box, key the word(s) that apply to the group of pages you want to find. In our example above, we are looking for pages containing “A030”. Click the FIND button on the right.



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**Drag Your
Price Page to
the Book**

Sales Pricing Maintenance

Page Selection
Description contains a030

More Less

Pages

Description	Item ID	Effective Date	Expiration Date	Status
PG A030 CAPACITORS - LG USER - MARKUP 35%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
PG A030 CAPACITORS - RESELLER - MARKUP 25%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
PG A030 CAPACITORS - RESELLER VIP - MARKUP 25		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
PG A030 CAPACITORS - SM OEM - MARKUP 30%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
PG A030 CAPACITORS - SM USER - MARKUP 45%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
PG A030 CAPACITORS - VIP OEM - MARKUP 25%		8/18/2012 00:00:00	12/31/2049 00:00:00	Active
SUPG ABB 100849 PG A030 CAPACITORS FINISHING		10/26/2012 00:00:00	12/31/2049 00:00:00	Active

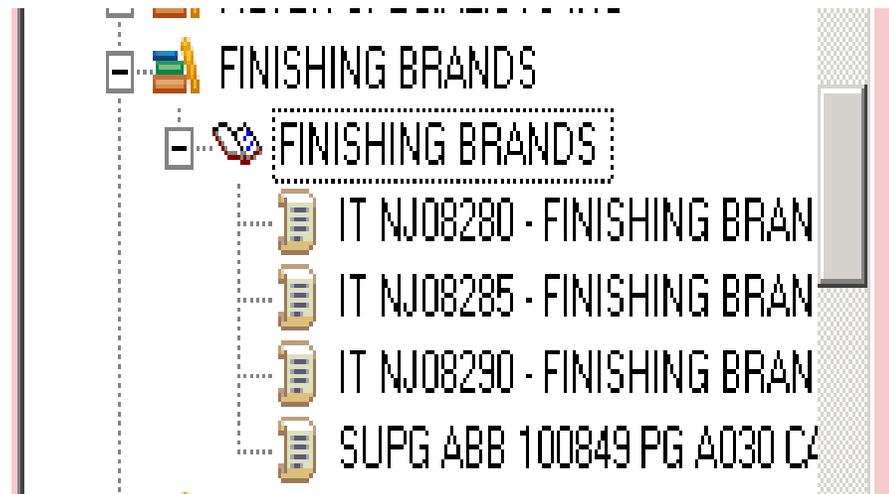
On the LEFT, find your library. Click on the PLUS sign beside the library to see the BOOK.

Highlight the price page and hold your mouse. To select multiple pages, hold the shift key down and click the pages desired. You should get a hand symbol. Drag the hand symbol to the BOOK ID and release your mouse



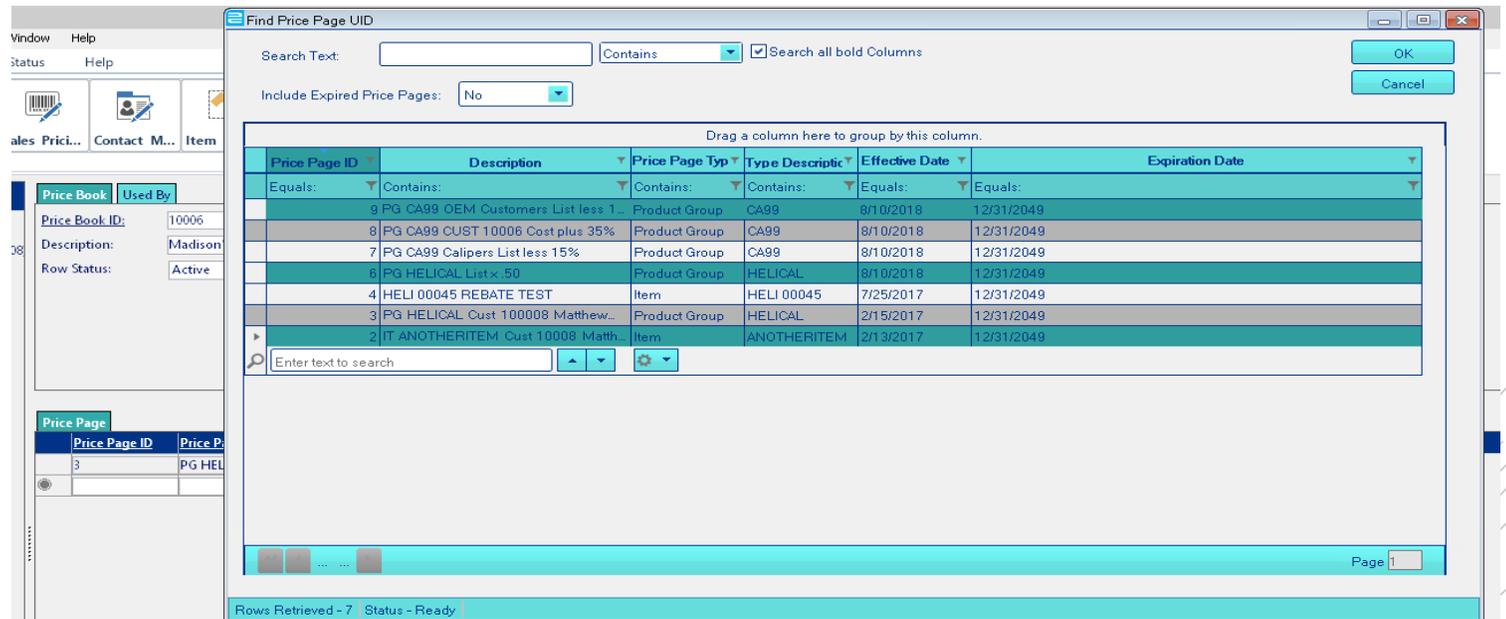
Drag Your Price Page to the Book

- Click the plus sign beside the book to view the price pages. The price pages you just added should display in alphabetical order. You should always double check to make sure the page actually moved to the book.



Add Pages in Sales Price Book Maintenance

- If you have Sales Price Book Maintenance, you can add your pages here. Enter the Price Book ID (or search)
- Click Right Mouse Button to select ADD or INSERT pages.
- Click on Price Page ID or double click in the Price Page ID box to search
- Find the page(s) you want to add. You can hold down the CONTROL key to select multiple pages at the same time. Control+Shift keys allow you to select a group of pages at the same time.
- Click OK.



Find Price Page UID

Search Text: Contains Search all bold Columns

Include Expired Price Pages: No

Drag a column here to group by this column.

Price Page ID	Description	Price Page Typ	Type Descriptio	Effective Date	Expiration Date
9	PG CA99 OEM Customers List less 1...	Product Group	CA99	8/10/2018	12/31/2049
8	PG CA99 CUST 10006 Cost plus 35%	Product Group	CA99	8/10/2018	12/31/2049
7	PG CA99 Calipers List less 15%	Product Group	CA99	8/10/2018	12/31/2049
6	PG HELICAL List x 50	Product Group	HELICAL	8/10/2018	12/31/2049
4	HELI 00045 REBATE TEST	Item	HELI 00045	7/25/2017	12/31/2049
3	PG HELICAL Cust 100008 Matthew...	Product Group	HELICAL	2/15/2017	12/31/2049
2	IT ANOTHERITEM Cust 10008 Matth...	Item	ANOTHERITEM	2/13/2017	12/31/2049

Enter text to search

Page 1

Rows Retrieved - 7 Status - Ready



Add Pages in Sales Price Book Maintenance

- The pages you selected are now added to the book. Click SAVE.

Price Book **Used By**

Price Book ID:

Description:

Row Status:

.....

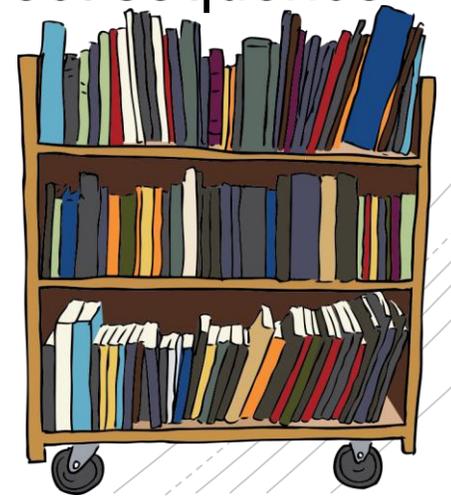
Price Page

Price Page ID	Price Page Description	Price Page Type	Type Description	Effective Date	Expiration Date	Status	Link Status
3	PG HELICAL Cust 100008 Matthew H	Product Group	HELICAL	02/15/17	12/31/49	Active	Active
9	PG CA99 OEM Customers List less 18	Product Group	CA99	08/10/18	12/31/49	Active	Active
6	PG HELICAL List x .50	Product Group	HELICAL	08/10/18	12/31/49	Active	Active
2	IT ANOTHERITEM Cust 10008 Matthe	Item	ANOTHERITEM	02/13/17	12/31/49	Active	Active
				00/00/00	00/00/00		Active



Libraries, Books, and Pages

- It sounds like a lot of work to create the libraries, books, and pages, but once done, you do not have to do a lot of maintenance unless you are using PRICE vs a source/multiplier. You can fast edit price pages, which helps make updating PRICE type pages a little easier.
- Remember, the library has to be added to the customer record in customer maintenance to take effect and must be added in the correct sequence if using a FIRST OF library type.





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How do I get started?

If you are not currently using contracts or libraries, here are a few suggestions:

1. Do you have a lot of quotes that are used repetitively? These might be good candidates for contract pricing or price pages.
2. Run a sales history report by customer, product group and supplier. Determine what your reasonable margin is for that type of item and establish price pages accordingly.
3. Look for ways to create “generic” libraries based on customer type (such as OEM, MRO, Government, Medical, etc)



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How do I get started?

4. Assume you will have 2 or more libraries for customer. A generic one for those items he may buy infrequently and one that is customer-specific for negotiated pricing.
5. Tackle the easy customers first – those that can be set up to use a few price matrixes vs those that require more “hand holding”
6. Be sure to communicate with the sales staff your intentions. Ask them to watch their pricing closely once pages/contracts are established for pricing that looks incorrect. It is one thing to edit the price, but we need to fix the root problem vs editing all orders all the time.



Best Practices

#1

- Use multipliers vs fixed pricing whenever possible
- Create portals or reports that show you when pages are about to expire (or are already expired)
- Review edited selling prices to determine if pages need to be reviewed and revised – or does someone in order entry need a good talking to
- You can create a custom field for “reason” when a price is edited for reporting purposes
- Use contract pricing when the prices negotiated do not apply to all ship-to’s and for consignment contracts



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QUESTIONS?

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THANK YOU!!!