

The Retail Controller Ver 7 Bulletin 0010

July 7, 2006

Customer Pricing

Overview

Customer Pricing can be used to manage pricing for an individual customer by any combination of general, department, line, or individual item/UOM discounting.

Customer Pricing from Customer Setup Screen

Customer Pricing will only take effect if the customer's 'Use Special Pricing' flag in the Customer Setup / Maintenance screen is set to 'Y'.

BIBB		Customer Setup / Maintenance		7.3.20.008	
Customer Number: [ALLHER]					
Page 1 of 6					
Customer Contact Information:					
1. Name 1	[Customer Flags for ALLHER]				
2. Name 2	PO Required?	(Y/N)	[N]		
3. Street Address	Use Customer Pricing?	(Y/N)	[Y]		
	Customer Statements	(Y/N/F/E)	[Y]		
4. City	Use Reference?	(Y/N/R)	[Y]		
6. Province	GST exempt?	(Y/N)	[N]		
8. Country	PST exempt?	(Y/N)	[N]	Code [V2P 155]	
9. Main Phone	Job Name/Location?	(Y/N/R)	[N]	Hereward	
10. Alternate	Get Shipping Address?	(Y/N)	[N]		
11. Fax	Update QOH On Held Inv?	(Y/N)	[N]		
12. E-mail Address	[]				
13. E-mail Contact	[]				
Modify field []					
Enter 'Y'es for PO required for this customer, 'N'o otherwise...					
F1	F2	F3	F4	F5	F6
Backup					
					F10
					Process

Viewing of the Customer Pricing screen from the Customer Master file is controlled by the setting of the Pricing flag noted above. While Page 4 of the Customer Master program still allows the user to set a default price level and UOM, sF5 SetPric will be then available from all pages of the Customer Master screen.

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The screenshot shows a terminal window with the following content:

```
BIBB Customer Setup / Maintenance 7.3.20.008
Customer Number: [ALLHER ] Hereward Alex
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Customer Sales:
Last Sale Date [09/30/2005] Monthly Average [ 853.95]
Last Sale Amount [ 54.89] Months for Avg [12]
MTD Purchases [ 0.00]
COGS [ 0.00] Last Year Sales [ 820.51]
YTD Purchases [ 9575.61] Total Purchases [ 10396.12]
COGS [ 1118.68]
Customer Pricing:
1. Default Price Level [4L]
Price Level 4, Largest Unit of Measure
Miscellaneous Information:
2. Sales Rep [01] JOHN 3. Commission Rate [ ] %
Modify field [ ]
Select a field, <PageUp>/<PageDown> to change screens, <ENTER> to Save, ...
ShipAdd LoadCust SetPric ClkAcces Utils
F1 F2 F3 F4 F5 F6 F7 F8 F9 F10
Clear Flags Delete Ref Reports Memo File
```

Two arrows point to the 'Customer Pricing' section and the 'SetPric' field in the function key row.

Customer Pricing Screen

Customer Pricing features are grouped on menu plate BDIE, (also accessible by typing SPECIAL or CPRICE).

The screenshot shows a terminal window with the following content:

```
THE CONTROLLER SERIES SOFTWARE by Mainframe Associates (800) 845-5445
BDIE Customer Price Menu GENERAL 1.5.26
F1 a Exit
F2 b Customer Pricing
F3 c Customer Pricing Report
F4 d Reset Expiry Date by Cust.
F5 e Purge Expired Dates by Cust
F6 f Customer Contract Expiry Rpt
Please select an option: [ ]
Version 7.3 licensed to MAINFRAME ASSOCIATES for 24 users
```

Option F2, plate BDIEB, is the Customer Pricing screen. You may set up pricing in this screen that will apply to a specific customer.

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BDIEB		Customer Pricing				7.3.9.002				
Customer number		[ALLHER]				Hereward Alex				
Classification		[CONTB]				Default Price Level - Price Level 4, Largest Unit of Measure				
Description: Fir 2x4x8										
Type	Dept/Line/Item	UOM	Price	Dsc	N	Quote	EPD	Min Qty	St Date	Exp Date
D	2			C5	N			0		
G				3	Y			0		
I	248F	MBFM	799.999		N			0	10/18/05	

Enter the discount type: 'I'tem, 'L'ine, 'D'ept, 'G'eneral,...

F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Cancel									Save

Any of the pricing types can be specified as a price level (P2 - P4), a discount off the P1 price, or as a percentage markup over cost.

Multiple pricing may apply to a given item (i.e., customer price levels, quantity price breaks, sales, customer pricing).

At Point-of-Sale, the lowest of all calculated prices for any item always applies.

Instructions For Use

In the Type column, specify whether the special pricing will be general, by department, by line, or by item by entering the letter 'G', 'D', 'L', or 'I' respectively. General pricing will apply to all items. Department pricing will apply to all items in the department. Line pricing will apply to all items in the line. Item pricing will apply to the specified item only.

In the Item/Dept/Line column, specify the department, line, or item for which you wish to specify pricing.

If specifying Item pricing, select the unit of measure for which the price will apply. Then you may enter the price for that unit of measure, or you may leave the price column blank and enter a discount in the next column.

If you are not specifying Item pricing, enter the price level to apply, the discount from P1, or the percentage to add to cost in the 'Dsc' column.

- To enter a price level, type in P2, P3, or P4.
- To enter a discount from P1, simply enter digits representing a positive whole number percentage discount.
- To enter cost-plus pricing, simply enter the letter C followed by one or two digits representing the markup to apply on cost. Markup is limited to a maximum of 99%, and

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will be applied to landed cost. (Landed cost is freight together with either last cost, average cost, or standard cost, depending upon your configuration.)

A UOM must be selected for all multiple UOM items. Should an item be sold in multiple UOMs , a selection list will appear, else the primary UOM will default automatically.

The 'Apply to Net Price' option asks if this special price will apply to items that are set up as Net Price items – i.e., items that are not eligible for discounting at Point-of-Sale. This is the only method of overriding prices for a net price item.

The EPD column can be used to specify whether the pricing programmed for the line is eligible for early payment discounting when the customer is set up for EPD.

'Min Qty' can be used to specify the minimum quantity that must be entered on a single line at Point-of-Sale in order for that line to qualify for a price. If 'Min Qty' is left at 0, no restriction based on quantity will be used to determine if the pricing should apply.

'St Date' (start date) specifies when the pricing will come into effect. 'Exp Date' (expiry date) specifies when the pricing will stop. Note that each time prices for a customer are loaded on the pricing screen, entries are sorted by expiry date. The expiry date defaults to the system expiry number of days stored in Flag 126 (F126 on the menu). You may over-ride this any time or use one of the options to change it. If you leave the start date blank, then there is no date restriction for this discount.