

Sales

Price Schedules

Prerequisite

Price Groups must be created in **Configuration > Price Group Maintenance** before making a Price Schedule.

Where are Price Schedules Located?

- **Sales > Start a Task > New Price Schedule**

OR

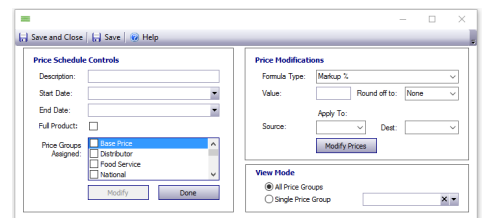
- **Sales > Find > Price Schedules (to review or change previous schedules)**

About Price Schedules

Create a new Price Schedule to set prices for specified products for specific customers.

Price Schedules set certain customers to have a variation of pricing on all products, or a selection of products. Price Schedules also can set prices for a specific period of time.

How to Make a New Price Schedule



2. Type in a description in the **Description** field.
 - Examples: Walmart Discount, Spring Apple Sale
3. Enter a **Start Date** for when the special pricing begins.
4. Enter an **End Date** for when the special pricing ends.
5. Click beside **Price Group** to select the groups you want to apply the special pricing to. (**NOTE:** Price Groups are created in Price Group Maintenance.)
6. Beside Price Modification, choose from the dropdown Markup %, Discount %, or Flat Amount.
7. Type a number in the Value field.
 - For a percentage: type 2 for 2%
 - For an amount: type 30.50 for \$30.50.
8. If you wish to round prices, click beside **Round off to** and click to select the nearest Penny, Nickel, Dime, Quarter, Half Dollar, or Dollar.
9. Click **Done**. An empty grid appears in the window.
10. Click **Save** to save your changes.

1. **Sales > Start a Task > New Price Schedule**

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Add Products to the Price Schedule

1. If you want to assign a price to every product, click the **Full Product** checkbox. If not, leave it unchecked.
2. To add specific products, or categories of products, click **New**.

The screenshot shows the 'Price Configuration' window. At the top, there's a title bar with 'Price Configuration' and standard window controls. Below the title bar is a menu bar with 'Save and Close', 'Save', and 'Help'. The main content area is divided into sections. The 'Product' section has a 'Commodity' field, a 'Stage' field, and a large text box with the placeholder 'Please select a Commodity Stage'. Below this is a 'Product' dropdown menu. The 'Element Codes' section contains two columns of dropdown menus: 'Variety', 'Grade', 'Type', 'Size', 'Pack', 'Brand', 'Misc' on the left, and 'SubVariety', 'SubGrade', 'SubType', 'SubSize', 'SubPack', 'SubBrand', 'SubMisc' on the right. The 'Trading Partners' section also has two columns of dropdown menus: 'Supplier', 'Broker', 'Customer', 'Receiver' on the left, and 'Supplier Category', 'Broker Category', 'Customer Category', 'Receiver Category' on the right. On the far right, there are partially visible labels for 'Group', 'UPC', 'Season', and 'Bin C'.

3. The **Price Configuration** window opens. You can only add products that meet the exact commodity and element values you set (unless **Full Product** is selected). This can be as specific or broad as you wish. Examples:
 - Apple Packed will give any packed apple product to the price set.
 - Apple, Packed, RD, BX, SD will give the price to any Red Delicious boxed apple that is Sun Delight brand.
4. After selecting a product, **Save and Close**. The product appears in the grid. Add as many products as desired.

Modify the Price Schedule

1. Add additional price groups by clicking **Modify**. This enables the Price Group checkboxes to be selected. A column will appear in the grid for each price group selected.
2. The empty cells below the **Price Group** column is where the original price is manually entered for each product.
3. If you want multiple versions of the same product list on different price

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schedules, save this schedule as a master.

- In **Sales > Find > Price Schedules** right click the master and click **Copy Schedule**. Rename the new schedule and continue to modify prices without compromising the master schedule.
- 4. You are able to modify the prices shown on the grid by setting up a formula and selecting the Source to apply it to. The Price Group in the Source dropdown shows which group will receive the price modification.
- 5. Click **Modify Prices** and the price modifications will adjust the prices in the bottom grid.
- 6. **Save and Close** when finished making modifications.

Unique solution ID: #1016

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Last update: 2017-05-13 01:12