Assigning and Updating Prices

Release 8.6.5 (Eterm)

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Pricing Overview

Eclipse Pricing Management helps you maintain consistent costing and pricing information. From updating price sheets to reporting on sales outcomes and commissions earned, Pricing Management provides a reliable and accurate way of costing and pricing merchandise.

Price Updates

Vendors supply their price information to you through price sheets or price update files. You can then update your pricing information manually or automatically. The system can also automatically add product records for new products during a price update.

Price Lines

When new products are added to the product file they are assigned to price lines. Price lines are groups of products used for sales performance reporting, unit of measure descriptors, and commission groups. Price lines provide default information for the products within a price line.

Price Sheet Entry

Vendors provide basis names associated with a dollar amount on the vendor's price sheet. Each vendor may use different basis names to define their pricing, so cross-reference vendor basis names with Eclipse basis names to create a standard pricing scheme for each price line.

Pricing Matrix

The system prices items using a pricing matrix. A sell matrix defines the pricing rules for your sales, branch transfers, and adjustments. A buy matrix defines pricing rules involving the costs for products on purchase orders.

Within each matrix cell, a formula and a basis name calculation defines the cost or price on an order. You can include the following price- or cost-determining factors in matrix cells:

- Buy and sell groups that share the same pricing rules.
- Quantity break pricing that offer discounts for buying quantity.
- Combination groups that offer quantity break discounts on the combined total of items.
- Rebate pricing that offers customers discounts directly from your vendors.

Commissions

Set up your salespeople with commission plans that regulate how the system calculates commissions for each salesperson. Set up commission plans to calculate commissions based on one of the following:

- Gross profit dollars.
- Sales dollars.

- Net sales dollars.
- Items sold as members of a product commission group.

Quotes

Use Quote Maintenance to offer special pricing to customers during limited periods.

Product Pricing Overview

Whether you create a product record in Product Maintenance, or create a product through an automatic price update, the system uses the following criteria to determine the correct price or cost for the product:

- **Buy and sell groups** – Classify buying and selling criteria into groups of products.
- **Discount classes** – Assign each formula a price sheet discount class when price sheets have different pricing formulas for different items.
- **Commission groups** – Assign products to commission groups if you calculate commissions on products.
- **Package quantities** – Assign a sell package quantity for a product at each branch.
- **Freight charges and freight factors** – Assign a freight charge to be added to a sales order each time a product is ordered from a branch.
- **Quantity breaks** – Assign quantity breaks at the product level to encourage increased sales for some products.

Assigning Pricing Criteria to Products

Define pricing criteria for products in the product record to ensure that the product maintains these pricing criteria regardless of what group or branches are placed on an order.

Set the following criteria for products in the product record:

- Product-level quantity breaks
- Buy and Sell Groups
- Discount classes
- Commission groups
- Serial number tracking

To assign pricing criteria to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter a product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
5. In the **Price As** field, enter the product ID whose pricing will be copied. Use this option for one of the following reasons:
   - To assign to this product the same price sheet that is assigned to another product. These price sheets use corresponding effective dates and prices.
   - When the product is a substitute for another product. This eliminates the need to populate the product's pricing information on the Product Price Sheet Maintenance screen (**Files** > **Product** > **Prices** > **PriceSheet** hot key).
6. In the **Matrix Type** field, enter the product matrix type to override the customer price class used to price this product. This field is required only if the **Valid Product Matrix Types** control maintenance record is populated.

   Without a matrix type defined, when pricing a product, the system determines the ship-to customer’s price class from either a branch-specific price class override or from the default price class override.

   With a matrix type defined, the system looks at the ship-to customer’s price class/product matrix type pairings to determine a price after looking at the branch-specific override, and before using the default price class. If the product has no matrix type, or if the customer has no price class/product matrix type pairing, then the system uses the default price class to determine a price.

7. In the **Ser #** field, do one of the following:
   - Press **F10** and select a code to determine the tracking type to use for the product in each branch. Set this option when the product is subject to serial number tracking.
   - Enter **N** (none) if the product has no serial number tracking.
8. In the **Comm Group** field, enter the appropriate commission group, if required.
9. In the **Sell Pkg Qty** field, enter a number to allow only order quantities evenly divisible by this number. For example, if you enter 10 here, it means that packages must be sold in quantities of 10, 20, 30, and so forth.

   The unit of measure associated with the sell package quantity is the base unit of measure listed in Product Maintenance.

   Users assigned SOE.PACKAGE.QTY authorization key can override this restriction in Sales Order Entry.
10. In the **Price Sheet** field, enter a name of a price sheet to maintain different price sheets for different branches.
11. In the **Discount Class** field, assign price sheet discount classes to products in defined branches.
12. Use the hot keys described in the following table as needed.

Hot Key	Description
PriceSheet	Create a new effective date for a price sheet for a product, and then assign values to its cost and price bases. If you enter a product in the **Price As** field on the Product Price Maintenance screen, pricing information is copied from that product.
Ranks	Displays the branch ranking information the last time the ranking process was run for a product.
Qty Break	Assign product-level quantity breaks to use for a product-specific pricing matrix cell that is assigned the P (product) matrix type.
Branch Costs	Shows average cost, last cost, landed average cost, and landed cost for the product in the branches to which you have access.
Find	Enter the branch you want to find on this screen. The cursor displays on that branch.
Groups	Assign a product to buy or sell groups.
Additional	Assign the following settings for products on the Additional Price Maintenance screen: • Freight factor • Freight charges • Pass-along discounts • Label printing specifications

13. Press **Esc** to save the changes and exit the screen.

Assigning Products to Buy or Sell Groups

Buy groups and sell groups are subsets of the product file that group products with common pricing. Buy groups and sell groups are assigned to products by branch, so a product can be in a different group at a different branch.

Set up sell and buy groups as follows:

- Containing products from the same price line. For example, in the Delta price line, you buy and sell faucets priced in three different groups: CHROME, BRASS, and GOLD.
- Containing the same type of product from different price lines. For example, you buy copper fittings from both the NEER and RACO price lines. Because the pricing is the same regardless of which price line you use, set up the group COPPER to include products from both price lines.
- Containing products that you want to group together for any selling purpose.

Define sell groups and buy groups before assigning products to groups.

To assign a product to sell or buy groups:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter the product ID to display the product record.
3. Use the **Price** hot key to display the Product Price Maintenance screen.
4. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
5. Use the **Groups** hot key to display the Price Group Maintenance screen.
6. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
7. In the **Sell Group** and **Buy Group** fields, enter the sell group or buy group for each branch, up to 20 characters, to which this product belongs.

   Use the **Multi** hot key to assign multiple buy or sell groups in each field. When a customer orders a product with multiple sell groups, the system checks the matrix cells for the sell groups in the list from top to bottom in search of a match. When it finds a match:

   - And **Best Price Check** is activated, it continues searching through the group matrix cells for the best price.
   - And **Best Price Check** is not activated, it stops searching regardless of whether the matrix cell for a group lower in the list has a better price.

To rearrange the order in which the system searches the group matrix cells, rearrange the group order.

8. Press **Esc** to exit the screen and save the settings.

Assigning Products to Commission Groups

Commission groups organize products into categories used to determine commissions on sales. These groups help you customize the commission plans for your products and salespeople. For example, you may want to encourage your salespeople to push a certain set of products, so you set up a commission group that pays higher commissions on those products. You may want to pay commission on only selected products, so you set up commission groups only for those products; all other products do not contribute to a commission plan.

Set up commission groups in the **Valid Product Commission Groups** control maintenance record.

For more information, see Product Commission Group Details.

To assign a product to a commission group:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter a product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
5. In the **Comm Group** field for the first branch, press **F10** to select a commission group.

   If this field is blank for a branch, the system uses DEFAULT as its commission group. Therefore, if a commission plan is set up to calculate the sales commission on the sales order total, or if a product that is not assigned a commission group is sold, the system calculates commission using the default commission group.
6. Repeat step 5 as needed for the other branches.
7. Press **Esc** to exit the screen and return to the Product Maintenance screen.

Assigning Price Sheet Discount Classes to Products

A discount class is a category set up for a product within a price line and is used to group products for pricing purposes. For example, within a price line, a vendor sells one group of items at LIST less 30, while selling another group at LIST less 40. When a price sheet has different pricing formulas for different items, classify the items by formula within that price sheet, and assign each formula a price sheet discount class.

The vendor may give you the name of the discount classes to which some products belong, or the vendor's price sheets may display only the products and their discounts. In which case, you can define the appropriate number of discount classes within the price line. Then, manually assign each product to the correct discount class.

A product cannot have different classes assigned to branches with the same price sheet assignments. For example, if branches 1, 2, 3, and 4 all use the same price sheet and a product in branch 1 is assigned to discount class A, the product must also be assigned to discount class A in branches 2, 3, and 4.

To assign a price sheet discount class to a product:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter the product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
5. In the **Discount Class** field, do one of the following:
   - Press **F10** to select a discount class.
   - Create a discount class by entering an alphanumeric name, up to 10 characters. Then enter different formulas for each discount class in Price Sheet Entry. Set up any discount classes you plan to use before entering price sheet information.

     Name the discount class in relation to the discount being offered. For example, define discount classes as **18**, **20**, **22**, and **Net** for 18 percent, 20 percent, and 22 percent discounts, and for Net price, respectively.

   Note: When items in a price line are separated into discount classes, update the prices by discount class. In Price Sheet Entry use the **Copy DC** hot key to copy the prices from one discount class to another if many of the prices are the same. Then, make any necessary changes to the prices in the target discount class.
6. Press **Esc** to save the changes and return to the Product Maintenance screen.

Assigning Pricing Values to Product Price Sheets

Create a new effective date, assign values to the cost and price bases, and adjust quantities on the product price sheet to assign pricing criteria to a product.

Apply the following guidelines to maintaining price sheets for products:

- Use one price sheet for a price line if your company has one branch, or multiple branches that all use the same costs or prices. The system identifies that price sheet by one of the following:
    - The name of the price line followed by a tilde (~), which is called the null price sheet.
    - The name of the price line followed by a tilde followed by the same user-defined suffix that was assigned to all of the branches.
- Use the name the system assigns as the null price sheet name when a price line has only one price sheet.
- Use multiple price sheets when costs and prices for a product are not the same in all branches.

A product might have more than one price sheet if your company has geographically widespread branches that cause different branches to obtain the same products from different vendors. Typically, a company does not use multiple price sheets because costs and prices are the same in all branches.

The **Number Of Days After Which Users Can Edit Old Prices** control maintenance record and the PRICE.SHEET.MAINT authorization key work together to allow viewing and editing of information on the Product Price Sheet Maintenance screen.

When you display the Product Price Sheet Maintenance screen:

- If the product is new, the screen displays the cost and price basis names and the price sheet assigned by the system, but does not display prices in the columns below the effective dates.
- If you entered a product in the **Price As** field on the Product Price Maintenance screen, you can assign values to the cost and price basis names, and you can edit the values, if necessary.
- If this product has one price sheet assigned to the price line, the screen displays basis values for as many as five effective dates for the price line.
- If this product has different price sheets assigned to the price line, the screen displays a list of all the price sheets assigned to the product's price line. Select the price sheet for the branch whose prices you want to view or edit. The screen then displays basis values for as many as five effective dates for the price line.

To assign pricing values to a product price sheet:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen, and enter the **Product ID** for which you want to assign a discount class.
2. Use the **Prices** hot key to display the Product Price Maintenance screen.
3. Use the **Price Sheet** hot key to display the Product Price Sheet Maintenance screen.

Note: A message displays if there is no price sheet data for the product. Press **Enter** to display the Effective Dates screen, to choose an existing effective date, or to add a new effective date for this price line.

The following field descriptions apply to the Product Price Sheet Maintenance screen:

Field	Description
Desc	The product description from the Product Maintenance screen.
Price Sheet	One of the following occurs: • If the product's price line has only one price sheet the product's price sheet displays. Having only a null price sheet, implies that the product's costs and prices are the same in all branches of the company. • If the price line has multiple price sheets that contain data on this product select a price sheet from the list of existing price sheets.
Per UM	The unit of measure used to price the product. For example, per *each*, per *box*, per *case*, per *c* (hundred), per *m* (thousand), and so forth. **Determining the Price Per** The unit of measure is normally determined by how the product is priced on the price sheet from the vendor. The values in the Per Up and **Per Qty** fields and the value in the **Basis** field corresponding to the pricing matrix cell for the customer work together to determine the selling price for one unit of the product, referred to as the *price per*. **Example:** the LIST price of a product (defined on the Product Price Maintenance screen) is $20.00 per box (Per UM), with 4 units per box (Per Qty). A customer, who pays LIST * 1 (defined in Sell Matrix Maintenance) for the product, buys 2 of the product. The system divides $20.00 by 4 to determine the unit price of $5.00, and then multiplies that by 2 for a selling price of $10.00. **Note:** There is no connection between the value assigned in the **Per UM** field and any of the values defined as units of measure in the **UM** field on the Product Maintenance screen. UM value on this screen is used is to calculate the unit cost of a product. The only other place it is displayed is in order entry's "View Pricing" view in the UM column to inform the salesperson how the unit price was determined.

Field	Description
Per Qty	The number of units contained in the unit of measure entered in the **Per UM** field. For example, if the Per UM is box, the Per Qty might be four per box. **Determining the Price Per** The unit of measure is normally determined by how the product is priced on the price sheet from the vendor. The values in the Per Up and **Per Qty** fields and the value in the **Basis** field corresponding to the pricing matrix cell for the customer work together to determine the selling price for one unit of the product, referred to as the *price per*. **Example:** the LIST price of a product (defined on the Product Price Maintenance screen) is $20.00 per box (Per UM), with 4 units per box (Per Qty). A customer, who pays LIST * 1 (defined in Sell Matrix Maintenance) for the product, buys 2 of the product. The system divides $20.00 by 4 to determine the unit price of $5.00, and then multiplies that by 2 for a selling price of $10.00. **Note:** There is no connection between the value assigned in the **Per UM** field and any of the values defined as units of measure in the **UM** field on the Product Maintenance screen. UM value on this screen is used is to calculate the unit cost of a product. The only other place it is displayed is in order entry's "View Pricing" view in the UM column to inform the salesperson how the unit price was determined.
Basis	The local basis assigned in the **Basis Names** column on the Price Line Maintenance screen for the product's price line are supplied by the system after you enter all the information necessary to select the price sheet. This column may contain as many as 20 basis names. This field is read-only.
Currency	Any foreign currency assigned to the basis in Price Line Maintenance. This field is read-only. • If a foreign currency displays in this field, the cost or price you enter in an effective date column for a basis is calculated in this foreign currency. • If this field is blank, the cost or price you enter in an effective date column for a basis is calculated in your company’s base currency.
Price sheet effective dates	The cost or price for the product for each basis under each date. If you change the quantity in a price sheet effective date field, the system prompts to ask if you want to recalculate prices for this price sheet to reflect the change.

4. Press **Esc** to exit the screen and save your changes.

More Options

The following are some common options you might use while Assigning Pricing Values to Product Price Sheets:

Use the hot key...	To...
Recall	return the screen to its settings before you started making changes.
Show (toggles with **Eff Dates** hot key)	display all effective dates for a specific price sheet. This includes effective dates with no pricing data, which display as blank columns. Use the **Shift Prices** (left or right caret < >) hot keys to scroll through the columns. The system remembers which setting, **Show** or **Eff Dates**, was last selected and displays that setting after the user exits and re-enters the Product Price Maintenance screen.
Eff Dates (toggles with **Show** hot key)	select a specific effective date for the price sheet. The system remembers which setting, **Show** or **Eff Dates**, was last selected and displays that setting after the user exits and re-enters the Product Price Maintenance screen.
Shift Prices (left or right caret < >)	scroll through the columns.
Maint Log	display a record of all pricing-related changes to the product on the price sheet, and any corresponding user-supplied reason for change. See Viewing Maintenance Logs for more information.

Assigning Product-Level Quantity Breaks

Assign product-level quantity breaks to be used for a product-specific pricing matrix cell. You must assign these matrix cells the P matrix type. You can list up to five quantity breaks on a matrix cell.

To assign a product-level quantity break:

1. From the Files menu, select **Product** to display the Product Maintenance screen, then enter the **Product ID** to display the product record.
2. Use the **Prices** hot key to display the Product Price Maintenance screen.
3. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
4. Use the **Qty Break** hot key to display the Quantity Breaks screen.
5. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.

   The **Ovr** field shows an asterisk if a quantity break has been overridden at the branch level.
6. In the **Break1** through **Break5** fields, enter the quantity for each price break. Example:

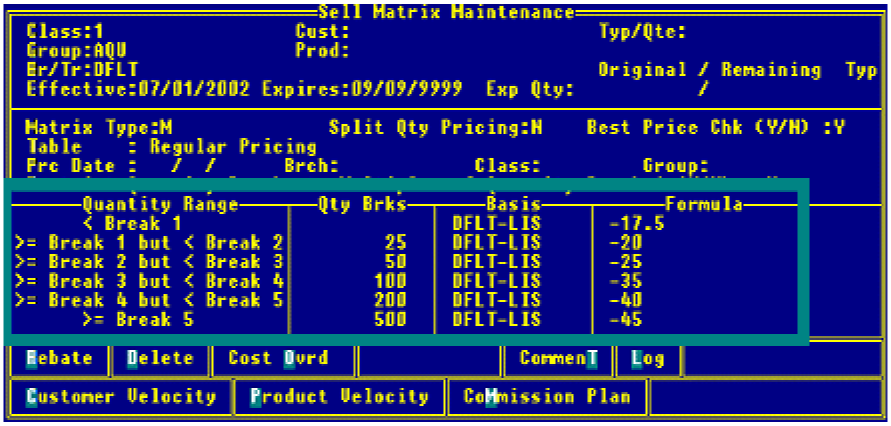
   For example, price breaks for a steel bolt with units of measure defined as ***ea*** and ***bx*** that comes 100 to a box could be defined as follows:

   - Break1 – 25ea
   - Break2 – 50ea
   - Break3 – 1bx
   - Break4 – 5bx
   - Break5 – 10bx

   The default unit of measure is flagged as the default sell unit of measure on the Product Maintenance screen. You can also create breaks with any unit of measure defined for the product, or use a weight or dollar amount. For more information, see Quantity Break Guide Lines.
7. Press **Esc** to save the changes and exit the screen.

Quantity Break Guidelines

Offering your customers quantity breaks encourages them to buy more product at a lower cost to them. For each point increase in quantity, the cost of items decreases, as shown below.



For example, a customer who buys 25 to 50 of an item priced with this matrix cell receives a 20 percent discount, and a customer who buys 500 or more receives a 45 percent discount.

This screen shows the quantity break set up as follows:

- Five quantity breaks in the **Quantity Range** field.
- Quantity breaks start at 25 pieces. The first quantity break range is 25 to 49 pieces. The second quantity break range is 50 to 99 pieces.
- The basis and formula for each quantity break determine the price for those package quantities.

  Note: When pricing items, the system looks to the product unit of measure first, and then to the price line unit of measure.

You can price quantity on the following pricing factors:

- Pieces
- Weight (#)
- Dollars ($)
- Load Factor (L) (for sell matrix only)

Pieces

When using pieces as units, define the breaks using the lowest defined unit of measure for the product or products in the price line. The following table describes where the system finds unit of measure information.

For the matrix type...	The system...
C (combination)	defines the unit of measure and quantity breaks on the Combination Group Maintenance screen.
G (group)	displays the unit of measure for the sell group in the **Grp Prc UoM** field on the Buy/Sell Group Maintenance screen.
M (matrix)	validates the entry against the lowest unit of measure defined for the product or price line.
P (product)	uses the unit of measure defined on the Product Maintenance screen for the quantity breaks for the product.

Weight

Weight is the value assigned to a product in the **LBS/** field on the Product Maintenance screen. To use weight to define quantity breaks, enter the pound sign (#) after the number in the **Qty Brks** field on the Sell Matrix Maintenance screen.

Dollars

To use dollars to define quantity breaks, enter the dollar sign ($) after the number in the **Qty Brks** field on the Sell Matrix Maintenance screen. If you buy products by quantity break costing on a dollar amount, on the buy matrix, use LIST as the local basis, and assign it to the global basis PURC-BREAK in the price line record associated with the product. The system uses this setup to determine if the break point has been reached.

> **Note:** To provide a discount to a customer who purchases large dollar amounts from you, use the global basis SELL-BREAK for sales orders.

Load Factor

Load factor applies only to the sell matrix. Load factor is the cubic dimensions of a product or the point value of a product (as expressed on a vendor specification sheet). A load factor is assigned to a product in the **Load/** field on the Product Maintenance screen. To use load factor to define quantity breaks, enter **L** after the number in the **Qty Brks** field on the Sell Matrix Maintenance screen.

Requirements for Setting Up Quantity Breaks

In Price Line Maintenance:

- For the sell matrix, cross-reference the local basis name for customer price breaks to the SELL-BREAK global basis.
- For the buy matrix, cross-reference the local basis name for your price breaks from vendors to the PURC-BREAK global basis. For more information, see Creating a Price Line.

To set up quantity breaks from your vendors use Buy Matrix Maintenance, and to set up quantity breaks for your customers use Sell Matrix Maintenance.

The following control maintenance records work with quantity break pricing:

- **Quantity Break Display Percentage –** Determines how close an order quantity must be to the next quantity break before the system informs you on the purchase order of how much more you need to buy to receive the next quantity break.
- **Display All Quantity Breaks –** Works with the Quantity Break Display Percentage control maintenance record, to determine if the system displays all quantity breaks for a customer or vendor who has quantity break prices defined for a product.

Viewing and Editing Price Sheets in Product Pricing

All the products in a price line typically experience price changes as a group. Maintain a record of the old prices and retain the prices on previous dates by creating a new effective date for the price sheet, instead of overwriting and losing the old prices.

Each price sheet can have any number of effective dates. For example the price sheet DEL~ has three price sheets on file, one each for effective dates 01/01/01, 01/01/02, and 01/01/03. On each effective date the system starts to use the price sheet with that date's cost and prices. You can retain price sheets with expired effective dates for up to 999 days.

You must have the NONSTOCK authorization key to access the Product Price Sheet Maintenance screen for a nonstock.

To create a new effective date or edit an existing effective date on a price sheet:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter a product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Price Sheet** hot key to display the Product Price Sheet Maintenance screen.

   Note: A message displays if there is no price sheet data for the product. Press **Enter** to display the Effective Dates screen, to choose an existing effective date, or to add a new effective date for this price line.

5. Use the **Eff Dates** hot key and do one of the following:
   - To create a new effective date for this price sheet, move the cursor to the bottom of the **Effective** field, and enter the new date.

     In the **Purge Age (days)** field on the Price Sheet Days screen, enter the number of days to retain the effective date list before it is purged (up to 999 days). The default is 365 days.
   - To edit an existing effective date, move the cursor to the date you want to change, and enter the new date. Click > to scroll to the right, and click < to scroll to the left.

   Additional Information:

Product Price Sheet Effective Dates

The columns to the right of the **Currency** column on the Product Price Sheet screen are used to assign and display the values for the cost or price bases for the product that go into effect on the displayed date.

Since replacement cost is typically the cost assigned by the system to a product on a purchase order, every time there is a price change by a vendor, update the replacement cost so that the next time you purchase the product, the correct cost displays on the purchase order.

- If you have entered prices in advance of the actual effective date, the system uses the costs and prices associated with the current effective date, unless overridden, until the date with the new costs and prices arrives.
- If a cost or price is missing from the current effective date, the system uses the values on the previous effective date.
- If you make a change to information on this screen, the system displays a Reason for Change prompt where you can enter why you made the change. If you supply a reason, it will follow the Eclipse supplied log comment on the Maintenance Log Viewing screen.

  Note: To delete old price sheet formulas in the Eclipse Product File use the Rebuild Price Sheet/Discount Class Cache Utility. For example, if a vendor gives you disks with new price sheets and discount classes, run this utility to delete the old price sheets and discount classes in your Eclipse Product File.

6. Press **Esc** to exit the screen and save the changes.

Changing Product Ranking

Product ranking is a means of categorizing products by quantity sold over time. Checking the results of the last time the Product Ranking program was run for a product's price line helps you maintain accurate product pricing. The system calculates ranks, but you can manually change product ranking for any of your branches when necessary.

For example, a customer purchased a large volume of a D-ranked product in one day, turning the product into an A-ranked product. You can manually change the rank back to D to reflect the product's true sales volume.

To change product ranking:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter a product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Ranks** hot key to display the Product Rank Maint screen.
5. In the **Br/Tr/All** field, press **F10** to select a branch or enter **All** to view results for all accessible branches.

   The **Rank #1** through **Rank #5** fields show the product's current rank and the ranking method assigned to this rank number when the Product Ranking program for this product's price line was last run.
6. To change a rank, move the cursor to the **Rank #** field for the branch you want to change, and enter the new rank.

   Note: Access the Ranking screen for the products in a price line from the Price Line Maintenance screen using the **Ranking** hot key. If a product's rank is not what you expected, rerun the price line ranking to update the report. That last-run ranking date displays on the Ranking screen.
7. Press **Esc** to exit the screen and save the changes.

Viewing and Editing Branch Costs

Compare the average cost, last cost, landed average cost, and landed cost for products in your branches. These costs are maintained at the branch level because buying patterns may differ from branch to branch.

Each branch may pay a different price for the same product. For example, branch 1 buys a product every week, while branch 2 buys the same product once every three weeks. Also, the prices at the time of purchase may be different between branches because of the date that vendor price changes go into effect.

Average cost and last cost are maintained by the costs entered on purchase, transfer, and inventory adjustment orders. The landed cost and landed average cost include freight charges. Freight charges may vary from branch to branch due to location.

You must be assigned the PRODUCT.MAINT authorization key to view or edit data on the Branch Costs screen.

To view or edit branch costs:

1. From the Files menu, select **Product** to display the Product Maintenance screen, and enter the **Product ID** to display the product record.
2. Use the **Prices** hot key to display the Product Price Maintenance screen.
3. Use the **Branch Costs** hot key to display the Branch Costs screen.
4. In the **Br/Tr/All** field, enter the branch or territory ID, or enter **All** to view all branches available to the user.

   The remaining fields display the following information:

The field...	Displays...
Per UM	the unit of measure from the Product Price Sheet Maintenance screen.
Qty	the quantity from the Product Price Sheet Maintenance screen.
Avg Cost	displays the average cost, which is defined as follows: (Current On-hand Quantity x Current Average Cost) + (Incoming Quantity x Incoming Cost) Current On-hand Quantity + Incoming Quantity
Last Cost	the last incoming cost for the product. For child branches, this is the last transfer cost.
Landed Avg	the landed average cost, which is the average of landed cost, based on quantity.
Landed Cost	displays the landed cost, which is the cost on the purchase order plus freight.

5. Use the hot keys described in the following table as needed:

Hot Key	Description
Freight Factor	A freight factor is an estimated freight charge for a product, applied as a percentage of the purchase price. The system uses the freight factor to estimate freight charges on the purchase order if the actual freight charge is not known.
Maint Log	Displays the Maintenance Log Viewing screen, which shows a history of comments made regarding changes to Branch Costs screen.
Actv Log	Displays the history of all changes made to the Branch Costs screen and who made them. To view branch cost activity, you must be assigned the BR.COST.ACTIVITY.VIEW authorization key.
Find Br	Enter the ID for the branch you want to find.
Cost Inq	Displays the Branch Costs Inquiry screen that displays all branch cost updates and related cost and quantity data for the branch and selected product.

6. Press **Esc** to clear the Branch Costs screen.
7. Press **Esc** to return to the Product Price Maintenance screen.

Inquiring About Branch Costs

You can view branch cost updates and related cost and quantity data for a product within a branch. You can determine how average cost or landed average cost changed over time. Transactions that can affect average or landed average cost include the following:

- Returns, if the **Should Credit Sales Order Update Avg/Last Cost** control maintenance record is set to **Yes**.
- Received transfers.
- Purchase orders.
- Manual changes in Product Maintenance.
- Inventory adjustments.

You must have the BR.COST.ACTIVITY.VIEW authorization key assigned to you to access the Branch Cost Inquiry screen.

To inquire about branch costs:

1. Access the Branch Costs Inquiry screen in one of the following ways:
   - From the **Orders** > **Inquiries** menu, select **Branch Cost Inquiry**. The **Branch** field defaults to your home branch, and the cursor displays in the **Reference** column.
   - From the **Files** > **Product Maintenance** screen, select the **Prices** hot key, then the **Branch Costs** hot key to display the Branch Costs screen. Then use the **Cost Inq** hot key. The **Branch** field defaults to the branch you selected on the Branch Cost Inquiry screen.
2. View the following fields:

Field	Description
Branch	Your home branch, by default, or if accessing this screen from Product Pricing, the branch selected on the previous screen. Depending on your authorization level, you can use the **Branch** hot key to access this field.
Product Desc	If accessing from order inquiry, enter the description of the product whose costs are displayed, otherwise the screen displays the description of the product you accessed in Product Maintenance screen. Depending on your authorization level, you can use the **Branch** hot key to access this field. The list sorts in either ascending or descending order. You can change the sort order by using the **Change View** hot key if accessing the screen from order inquiry.
Reference	The order transaction number that affected the average cost.
Date	Date of the change to average cost.
Prev OH	Quantity on hand before change.
Prev Cost	Average cost before change.

Field	Description
Qty	The quantity of the item on the order that the system factored into the new average cost calculation.
Cost	The actual cost on order.
On Hand	Quantity of the product on hand after change.
OH Cost	Average cost of product after change.
Cust/Vend	The customer or vendor associated with the sales or purchase order. Use the **Change View** hot key and select **Cust/Vend View** to display this field.

3. Use the following hot keys, as needed:

Hot Key	Description
View	Displays the order for the selected transaction in view-only mode.
Inventory History Ledger	Displays all transactions for the product and branch if you are fully authorized.
Future Ledger	Displays information about future commitments for the product and branch if you are fully authorized.
Product Maint	Displays the product record for the selected product.
Cost Type	Toggles between the landed average cost and average cost in the Order Cost and New Cost columns. The currently displayed cost type displays in the top-right of the screen. The selected cost type and settings displays the next time you access the screen.
Inventory Inquiry	Displays a product's availability and inventory information.
Print	Prints the information on the screen to your Hold file.
Change View	Change between the following screen views: • **Basic View** – Displays all columns except the **Cust/Vend** column. • **Cust/Vend View** – Excludes the **Prev OH** and **Prev Cost** columns and adds the **Cust/Vend** column. The selected view and settings display the next time you access the screen.
Log	Displays the Product Activity Log Viewing screen for the product and branch.
Date	Displays a prompt where you can change the as-of date for the product.
Branch	Moves the cursor to the **Branch** field, so you can change the branch and product as needed. If you are authorized for more than one branch, you can use this hot key.
Sort	Sorts the transaction list by ascending or descending.

4. Press **Esc** to return to the previous screen.

Defining Additional Product Pricing Criteria

Add features to a product's pricing criteria, including, pass-along discounts, freight pricing, and label printing. Each feature on the Additional Price Maintenance screen is optional, so apply only the steps you need from these instructions.

To define additional product pricing criteria:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter a product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Additional** hot key to display the Additional Price Maintenance screen. The name of the product displays at the top of the screen.
5. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in territory priority order. For more information, see Branch Hierarchy Details.
6. In the **Freight Chg** field, to each branch, assign a static freight charge that is added to a sales order each time this product is ordered.
7. In the **Pass Disc** field, enter the percentage discount to offer on this product. This amount is subtracted from the sale price of the product when purchased. A pass-along discount is a percentage discount from the vendor that you can pass-along to your customers. You can also assign pass-along discounts at the price line level.

   Note: Terms codes may affect the system's ability to apply a pass-along discount to a product.

8. In the **Print One Label Per** field, enter the number of this product needed on an order before a product label prints, for example, one label per every 100 items.
9. In the **Freight Factor** field, enter an estimated freight charge for the product for this branch, as a percentage of the purchase price. The system uses this charge when the freight charge is not known at the time of purchase.
10. In the **Price Sheets Print** field, enter one of the following:
    - **Y** – Includes the product on the price sheet for the branch when selected by the Print Price Sheets program.
    - **N** – Does not include the product on the price sheet for the branch when selected by the Print Price Sheets program.

This field works with the entry in the **Respect Print Flag (Y/N)** field on the Print Price Sheets screen. The following table describes the results of entries in this field:

If the entry in the Print Price Sheets (Y/N) field is...	and the entry in the Respect Print Flag (Y/N) field is...	the product...
Y (default)	**Y**	is not included on price sheets for the branch.
N	**Y or N**	is included on price sheets for the branch.

11. In the **Restrict Prc Change in OE** field, Enter **Y** to restrict users without the SOE.OVRD.NO.PRC.CHANGE authorization key from making changes to the price of this item in Sales Order Entry.
12. Press **Esc** to exit the screen and save the settings.

Pass-Along Discount Details

Pass-along discounts are maintained at the product and price line level. To apply pass-along discounts for the products you place on an order, you need to set the terms code for sales orders to include a **P** prefix to indicate to the system that it should look for discounts set at the product an price line level. Setting a terms code with a P prefix uses the product's pass-along discount in place of the discount percentage assigned to the terms code.

> **Note:** A terms code with a pass-along discount is only valid on terms codes flagged for sales. You cannot use a terms code using a pass-along discount as a purchasing terms code.

When you add products to an order, the system checks the terms code for the pricing branch on the order for a discount with the **P** prefix. If the terms code contains the **P** prefix, the system first checks the pass-along discount set up for the product in the **Pass Disc** field in the Additional Price Maintenance screen (accessed using the **Price** and then the **Additional** hot keys from Product Maintenance). If there is a pass-along discount set here, that is the discount assigned to the product in lieu of the percentage assigned in the terms code. If a pass-along discount is not found for the product, the system then checks the price line to which the product belongs for any pass-along discounts.

If the system finds a pass-along discount percentage for the price line, it uses that discount for the product in lieu of the percentage set in the terms code. If a pass-along discount is not assigned to the product or the price line, the discount for an order paid by the discount date is the percentage discount set in the **Percent** field for the terms code for the pricing branch of the order, regardless of whether or not the **P** prefix exists.

If the terms code discount percentage assigned to an order does not contain the **P** prefix, the system ignores any pass-along discount set at the product level or price line level.

Inquiring About Product Pricing

Display sell matrix data for a product from Inventory Inquiry to view the basic pricing setup for the matrix cells. This helps determine how the system prices the product. This information is view-only.

You can view product pricing from a variety of places in the system. The pricing information is displayed for the branch where the order is being written when viewed from **Sales Order Entry (Orders** > **Sales Order Entry** > **Inq** hot key > **Inventory Inq** hot key > **Pricing** hot key). When viewed at other places in the system, pricing information is displayed for the branch indicated on the Inventory Inquiry screen.

From the Inventory Inquiry screen, use the **Pricing** hot key to display the Product Pricing screen.

You can scroll through the list of price classes to view corresponding sell matrix information.

The following table describes the view-only information in each field:

Field	Description of read-only information
Branch	The branch where the inquiry is taking place. Either the branch where the order is being taken, or the branch displayed on the Inventory Inquiry screen.
Group	The product sell group. This provides the y axis for the matrix cell information displayed. The **Class** column displays the x axis.
Price Sheet	The product price sheet currently in effect for the product.
Desc	The product description carried over from the Inventory Inquiry screen.
Class	The customer price classes displayed in order from lowest to highest price class level according to the price class level assigned to you and the OE.PRICE.CLASS.LEVEL authorization key. The customer class is the x axis for the matrix cell information displayed. The **Group** column displays the y axis.

Field	Description of read-only information
Price/ea	The price for the item as determined by the sell matrix. **How the System Displays Product Pricing** The system looks at the following to determine what price to display on the Product Pricing screen. • Your OE.PRICE.VIEW.LEVEL authorization key accessibility level. • The view level assigned to the local basis name on the Price Line Maintenance screen. For the basis name you are permitted to view, the system displays the price or cost from the Product Price Sheet Maintenance screen, followed by the calculated prices or costs for the class/group matrix cell determined by your price class accessibility and the OE.PRICE.CLASS.LEVEL authorization key.
Basis	The first three basis names listed display the first three basis names from the price line. The remaining basis names correspond to the matrix cells most likely to be used, based on the pricing hierarchy, and depending on your view level.
Formula	The formula corresponding to the basis name most likely to be used to determine the price depending on the pricing hierarchy, and depending on your view level.

Press **Esc** to exit the screen and return to the Inventory Inquiry screen.

Auto Price Updating Overview

Use Auto Price Updating to update product pricing using vendor-supplied information downloaded from the Internet or copied from a diskette or CD-ROM.

You can format the update file in comma-delimited (variable) format with a .csv extension, fixed-field (blocked) format with a .txt extension, or in Excel spreadsheet format.

Set the update to verify that product prices are updated correctly, or update quickly without verifying. You can also add new products to the product file by entering default product information that the system uses to create product records during the update.

To ensure a successful update have a unique identifier for each product, so the system makes a correct match between the products in your product file and the products in the update file.

The process for automatically updating products involves the following tasks:

- Importing a price update file into the system.
- Changing the screen format to match the update file.
- Setting up the price update template.
- Defining default product information for new products on the update file.
- Scanning the update file to verify formulas and effective dates.
- Updating a few records to test for accuracy.
- Adding new products from the update file.

Importing Price Update Files into Eclipse

Import a price update file into Eclipse from a folder on your workstation or directly from a diskette or CD. If the file is in Excel format or is a text file and you did not get a record layout sheet from the vendor, do not upload it directly from the diskette or CD drive. Copy it to a folder on your workstation, save it in .csv (comma delimited) format, and then upload it from the folder.

Once you have uploaded the price update into the system, view the contents of the file to validate that the upload was successful and that the data is correct.

This page contains the following procedures:

- Importing a price update file.
- Viewing the price update file.

To import price update files:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Use the **Upload** hot key to display the Select file window.
3. Browse the file structure and select the price update file.
4. In the **Enter Spooler Title** field, enter a title for the uploaded file and press **Enter** to display the Spooler Control screen.

   A running count of the bytes of data being uploaded displays in the message bar at the bottom of the screen. When finished, the total number of bytes uploaded displays.

   Note: The messages, 0 bytes Transferred to Host and Upload Impossible, display in the message bar when you have entered the path name incorrectly.

5. Press **Enter** to complete the upload.

The file name you uploaded displays at the top of the list on the Spooler Control screen.

To view the uploaded file:

1. On the Spooler Control screen, scroll to the file name and use the **View** hot key to display the file in the Hold Entry Pre-View screen.
2. Identify the columns in the file, so you can fill out the User Defined Auto Price Updating screen.
   - If the file is in .csv (variable) format, the data runs together and is separated by commas (or another delimiter).
   - If the file is in fixed-width (blocked) format, the data displays in distinct columns. Fixed-width data files are normally accompanied by a vendor specification sheet that identifies the column descriptions and widths. Use this sheet to set the update parameters in the system.

3. Verify that the data is correct and press **Esc** to redisplay the Spooler Control screen.
4. Set update parameters and run the update.

   Note: If you do not want to process the file immediately, it remains in your Hold file for the number of days defined in the **Minimum Days Before Report Purge** control maintenance record.

Changing the Auto Price Update Format

Vendors send price updates in a variety of formats, such as CD-ROM, text file, or Excel spreadsheet. Determine the file format and prepare the system to receive that format.

To change the auto price update format:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating**.
4. Use the **Begin** hot key to display the User Defined Auto Price Updating screen.
5. In the **Work ID** field, enter the work ID for this update.

   A work ID can determine a format-specific template for processing a spreadsheet. It does not have to be vendor-specific. You can use the same work ID for different vendors if several vendors send their data in an identical format.
6. Use the **Rec Layout** hot key to display the Auto Price Updating Record Layout screen.
7. In the **Record Type** field, enter one of the following formats for the update file:
   - **Blocked** – fixed-length.
   - **Variable** – comma-delimited.

   Note: A delimiter may also separate data elements in a blocked record.
8. In the **Record Length** field, enter one of the following:
   - Enter the number of characters necessary if the vendor specifies a record length.
   - Leave the field blank if the vendor does not specify a record length.

   Note: This field is accessible only for blocked-type records.
9. In the **Delimiter Char** field, enter the character that is used between each field as a delimiter. This field is active only for variable record type files.
10. In the **ASCII Value** field, if applicable, enter the ASCII value for the non printable delimiter. For example, the ASCII value for a comma is 044.
11. In the **Delete Chars** field, enter any characters you do not want read as data, such as quotation marks or the dollar sign.

    The system does not recognize the dollar sign ($) as a numeric value, so enter a dollar sign in this field if the vendor puts a dollar sign in front of prices.
12. Press **Esc** to save the information and return to the User Defined Auto Price Updating screen.

Defining Auto Price Update Parameters

The information entered in the User Defined Auto Price Update screen determines how the system reads and processes pricing information from a vendor.

You can create a vendor-specific price update template that can be used each time you update prices from that vendor.

To define auto update parameters:

An asterisk (*) identifies the necessary fields for updating prices.

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, do one of the following:
   - Leave the field blank – Does not save the template after this update.
   - Enter a name that identifies the vendor who sent the file or the price line being updated – Creates a new template for use with future updates.
   - Press **F10** and select an ID – Uses an existing template.
5. In the **Desc*** field, enter a complete description for the update.
6. In the **Br/Tr/ALL** field, enter the branch or territory whose prices you want to update. Enter **ALL** to include all branches and territories.

   If your company uses multiple price sheets for a price line, use this option to select the price sheet by branch.
7. In the **Prc Upd Index*** field, press **F10** to select a criteria for the product file for searches in the vendor update file. This entry matches the product in the system to the product in the update file.

Price Update Index Search

You can search by the product's UPC number or by the data specified in the **User Defined #1**, **User Defined #2**, **User Defined #3**, or **User Defined #4** field on the Price Updating ID Maint screen in Product Maintenance.

For example, Instead of using UPC numbers to identify its products, a vendor might use its own part numbers. One of those fields would contain that user-defined part number. Point to that field by selecting **User Defined #1**, **User Defined #2**, **User Defined #3**, or

User Defined #4. If you point to one of those fields and it does not contain any data, the update will not work because there is nothing to match.

Note: For the bulk of your products, an entry in any of these fields will typically have been loaded during the initial Eclipse data conversion, through Mass Load/Update, or by creating products using a vendor supplied diskette and this program.

8. In the **Upd ID Prefix** field, if you have assigned a vendor prefix to the part number in the **User Defined** fields in the **Data Format** column, enter that prefix.

   For example, in the electrical industry, instead of using a UPC number, multiple vendors might use a manufacturer's catalog number that is the same for each vendor. Assigning a vendor prefix, such as MEC for Macon Electric Co., makes these items unique to each vendor.

9. In the **Upd UPC with Prefix (Y/N)** field, enter one of the following:
   - **Y –** Uses a prefix to index products and stores the prefix with the part number.
   - **N –** Does not use a prefix with the part number. The default is **N**.

10. In the **New Items Mode** field, enter one of the following:
    - **Prompt –** Selectively adds new products to the file. The Auto Price Updating Product Matching screen displays every time the system encounters a new product. This update may take several minutes if the update file contains many new products.
    - **Ignore –** Updates existing products without adding new products. Unless the update contains a new line of products only, use Ignore mode the first time you run the update. Run it a second time for existing products that were missed by the update, after correcting the records.
    - **Add –** Updates existing products and adds any new products in the update file. Run the update in Add mode only after you have updated the products. If the file contains a new line of products only, you can use Add the first time you run the update.

    Note: We recommend running the update in Ignore mode the first time you run it.

11. In the **Start** or **Elmt#** field of the **Data Format** section of the screen, scroll down the list to find the data format to match in the update file.

    For blocked records:
    - **Start –** Enter the number provided by the vendor for the data format you want to match.
    - **Lngth –** Enter the corresponding length of the field.

    For variable records:
    - **Elmt# –** Enter the column number from the update file for the data format you want to match.
    - **Lngth –** Leave blank.

Data Format	Description of column information from update file
Prc Upd ID#*	Price update ID. This is a required field.
Description	Description of products.
Price Basis #1* to #5	Basis name you are updating. **Price Basis #1*** is a required field.
Weight	Weight of each product.
Load Factor	Cubic dimensions or the point value of each product.
User Dfnd ID #1-#10	User-defined data as defined in Product Maintenance on the Price Updating ID Maint screen (Files / Product / **PU IDs** hot key).
UPC #	UPC code of each product.
Pricing U/M	Unit of measure at which you sell the product.
Price Line ID#	Price line of the products.
Buy Line ID#	Buy line of the products.
Commodity Code	Commodity code assigned to the products.
Buy Package	Unit of measure at which you buy the product.
Desc - Line #2 to # 6	Additional descriptive information that appends to the product description in the product record.
Discount Class	Discount class assigned to the products.
Matrix Sell Group	Sell group for the products.
Keywords	Extra words added to the update file that you may want to use to match products during the update.
Prod Matrix Type	Product matrix type in Product Maintenance that overrides the customer price class used to price a product. This field is required only if the **Valid Product Matrix Types** control maintenance record is populated.
Prod Base U/M	Unit of measure represented in the **UM** field in Product Maintenance. If left blank, the system uses the unit of measure from the price line.

12. In the **Dec#** field, enter one of the following for numeric data:
    - The appropriate number of decimal places if the decimal point is not embedded, but the numeric data contains a defined number of decimal places.
    - A zero if the decimal point is embedded.
13. Use the following hot keys listed, as needed. An asterisk (*) identifies the hot keys required for updating prices.

Hot Key	Description
Begin	Begins processing the upload file. Ensure the update criteria are set properly before using this hot key.
New Profile*	Defines the data for an initial product record for each new product the system encounters during the update.
Rec Layout*	Identifies the User Defined Auto Price Updating format of blocked or variable for the file you are importing.

Hot Key	Description
Del	Deletes the current work ID. You are prompted for confirmation of the deletion.
UM Table*	Defines unit of measure codes and assigns the corresponding quantity to the code.
Add'l Data	Transfers information from the update file to notes in the product record during a price update.
Scan	Ensures the price update runs as expected by checking the displayed information.

14. Press **Esc** to exit the screen. If you created a work ID the system saves the data as a template.

Deleting Price Update Templates

A price update template is used to update pricing information from a vendor. You create price update templates to use repeatedly when updating vendor pricing information. If you no longer need a template, you can delete it as described in the following procedure.

To delete a price update template:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the work ID that identifies the template to delete.
5. Use the **Del** hot key to display the delete prompt.
6. In the **Type DELETE to Confirm** field, type **delete**.

   The system deletes the update template.
7. Press **Esc** to return to the User Defined Auto Price Updating screen.

Creating Price Sheets in Auto Price Update

Maintain a history of pricing information by giving each price sheet a new effective date. When you receive new pricing information from a vendor, use the most recent price sheet, but change the effective date to the date you ran the latest update. This creates a new price sheet that maintains the old sheet's pricing information.

To create a price sheet in Auto Price Update:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file. For more information, see Setting Auto Price Update Parameters.
5. Use the **Scan** hot key to display the Price Update Scan screen.
6. Use the **Edit Last Eff Dt** hot key to display the Eff Date screen.
7. Select **New** and press **Enter** to display the following fields on the Price Sheet Days screen.
   - **ID –** Displays the name of the new price sheet.
   - **Purge Age (days) –** Displays the number of days the data for the new sheet is saved.
8. In the **Effective** field, scroll to the first available space and enter the new price sheet effective date.
9. Press **Esc** to return to the Eff Date screen.

   The new effective date is highlighted on the screen.
10. Press **Enter** to select the date and return to the Price Update Scan screen.

    The last effective date and the new effective date display.

    Note: To delete old price sheet formulas in the Eclipse Product File use the Rebuild Price Sheet/Discount Class Cache Utility. For example, if a vendor gives you disks with new price sheets and discount classes, run this utility to delete the old price sheets and discount classes in your Eclipse Product File.
11. Press **Esc** to return to the User Defined Auto Price Updating screen.

Assigning Formulas to Price Sheets

The first time you receive a price update for a price line, set up a price sheet for that price line. The basis names and formulas entered on the price sheet determine product prices from the update information.

To assign a formula to a price sheet:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file. For more information, see Setting Auto Price Update Parameters.
5. Use the **Scan** hot key to display the Price Update Scan screen.
6. Use the **Edit Formulas** hot key to display the Price Sheet Entry (Auto Updates) screen.
   - All entries in the **CalcBase*** field initially display NO UPDATE.
   - All formulas are *1.
   - The **Rnd** field displays a default entry for rounding digits.
   - The **Prc Bas** field is blank.
7. For any basis you are updating, change NO UPDATE to AUTO. The system reads the basis from the update file when you begin the update.
8. In the **Rnd** column, enter the number of characters for which you want to round the price. This field is used with the formula provided.

   For example, the **Rnd** column displays 3, so when you run the price update, prices display three characters beyond the decimal point.
   - The vendor's update diskette shows a LIST price of 10.00.
   - The formula for REP-COST is *.4873.
   - The updated REP-COST is 4.873.
9. In the **Prc Bas** field, enter the number (1-5) that corresponds to the **Update Basis #** field on the User Defined Auto Price Updating screen that points to the price data in the update file.

10. In the **CalcBase*** and **Formula** fields, enter the basis name and formula to use to calculate the price. For example, REP-COST is LIST less 40 percent, so enter **LIST** in the **CalcBase*** field and ***.40** in the **Formula** field.

    Note: You receive an error message if you point the basis name to itself in the calculated field. For example, entering LIST next to the basis name LIST.

11. Press **Esc** to save your changes and return to the Price Update Scan screen.

Creating Default Product Profiles

A product default profile is basic product information set up for the automatic creation of product records during a price update. Set up the product default profile before running the update, so that product records are created when the system encounters new products during the update. When you do this, new products in the update file do not slow the update process, and you can review and edit the new product records as needed during the update.

To create a default product profile:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file.
5. In the **New Items Mode** field, type **Add**.
6. Use the **New Profile** hot key to display the New Item Default Profile screen.
7. In the **Prd Status** field, press **F10** to select a product status.

   The default product status is **Review** so you can review new product records before the products are sold. After verifying that records are correct, you can use Mass Load to set the statuses to either **Stock** or **Nonstock**.
8. In the **Price Line** field, enter the price line for the new products.
9. In the **Buy Line** field, enter the buy line for the new products.
10. In the **Proc Group** field, enter the procure group for the new products. Leave this field blank if a procure group has been determined in the buy line record.
11. In the **Comm Code** field, enter the commodity code from the product record, if required, to assign to each new product.
12. In the **Sales Type** field, enter the G/L product sales type for the new products.
13. In the **Index Type** field, enter one of the following index types:
    - **Primary –** Stock items currently held in inventory. This is the default.
    - **Catalog –** Nonstock items available for order from the vendor catalog.

14. In the **Desc Prefx** field, add a description prefix, up to 25 characters, to the first character of the description for new products. Enter a prefix as follows:
    - A vendor name or initial as a prefix – Displays a space between the prefix and the first character of the description.
    - A prefix followed by a tilde (~) – No space displays between the prefix and the first character of the description.
15. In the **Word Wrap Desc to 35 Chars (Y/N)** field, enter one of the following:
    - **Y –** Wraps product description exceeding 35 characters to the next line after the last whole word.
    - **N –** Does not wrap product descriptions exceeding 35 characters.
16. Press **Esc** to save the data and return to the User Defined Auto Price Updating screen.

Defining Unit of Measure Codes for Price Updates

A unit of measure code tells the system which units of measure and corresponding quantities are included in a price update. If you sell a product at a different unit of measure than that for which you buy it, the system uses the unit of measure code to calculate the update price according to the selling unit of measure on the product record.

For example, you sell widgets in units of each (ea = 1). The vendor sells widgets to you in units of C (100). You enter the unit of measure codes of ea = 1 and C = 100 to maintain the correct widget pricing for the price update.

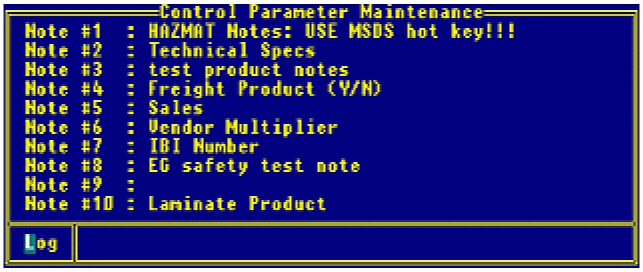
To define unit of measure codes for price updates:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file.
5. Use the **UM Table** hot key to display the U/M Code / Qty screen.
6. In the **U/M Code** field, enter all units of measure for products in this update, including units of measure you buy from the vendor and units of measure you sell. List units of measure from smallest to largest.
7. In the **Qty** field, enter the quantity for each unit of measure.
8. Press **Esc** to save the data and exit the screen.

Transferring Price Update Data to Product Notes

You can transfer updated product information to user-defined notes in the product record. Notes help keep product records up to date on pricing information.

Define as many as 20 product note categories in the **User Defined Product Notes** control maintenance record. Notes are listed in numeric order in the control maintenance record, as shown below.



Using the same numeric order in auto price updating, you determine which notes receive update information.

Important: When creating notes in this way, existing notes in the product record could be overwritten.

To transfer update data to a product note:

1. From the **System** > **Printers** menu, select **Your Hold Entries**, to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating**, and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file.
5. Use the **Add'l Data** hot key to display the Additional Data screen.

   Either **Start** or **Elmt#** display as headings in the first active field, depending on the update file's format.
6. Scroll to the note number listed in the **Data Format** field. The system will transfer the data to this location. Enter the following, depending on the format:
   - For blocked records, in the **Start** field, enter the number provided by the vendor for the data format you want to match.
   - For variable records, in the **Elmt#** field, enter the column number from the update file for the data format you want to match.

7. In the **Dec#** column, enter one of the following for numeric data:
   - If the decimal point is not embedded, but the numeric data contains a defined number of decimal places, enter the appropriate number of decimal places.
   - If the decimal point is embedded, enter a zero.
8. Press **Esc** to save the data and exit the screen.

   The notes display when accessing the specified screens after the next price update.

Scanning Price Update Files

To ensure that the system will update pricing information properly before running the update, view a summary of your update criteria from the Price Update Scan screen. You can verify the price sheet setup and make any changes necessary for an accurate update.

To scan a price update file:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file.
5. Use the **Scan** hot key to display the Price Update Scan screen.

   Use the following hot keys, as needed, to perform each task:

To...	Use this hot key...	To...
verify that each price sheet is set up correctly	**Edit Formulas**	display the Price Sheet Entry (Auto Updates) screen.
change the effective date for listed price sheets to the same date	**Set All New Eff Dts**	enter the new date in the **New Eff Dt** field.
create a price sheet	**Edit Last Eff Dt**	display the Eff Date screen.
assign formulas to a price sheet	**Edit Formulas**	display the Effective Dates screen.

6. Press **Enter** at any time to stop the process.
7. Press **Esc** to return to the User Defined Auto Price Updating screen.

Verifying Data on Price Sheets

Verify the information on the price sheet before running the update to ensure all information is in place to accurately update your product pricing information.

To verify data on a price sheet:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the appropriate work ID for the update file.
5. Use the **Scan** hot key to display the Price Update Scan screen.
6. Use the **Edit Formulas** hot key to display the Price Sheet Entry (Auto Update) screen.

   Verify the values defined for the last effective date that display in the **CalcBase*** and **Formula** fields:

   - If the formulas are correct, they carry over to the new effective date.
   - If new formulas are necessary, use the **Edit Eff Dates** hot key on the Price Update Scan screen to create a new price sheet.

   For basis names you are updating from the file, verify that the **CalcBase*** field displays AUTO and the **Formula** field displays *1. If not, change the values.
7. In the **Prc Bas** field verify that the number (1-5) corresponds to the correct number of the **Price Basis #** field in the **Data Format** column on the User Defined Auto Price Updating screen.

   For example, if you are updating LIST and you used **Price Basis #1** on the User Defined Auto Price Updating screen to point to a new list price in the update file, enter **1** in the **PrcBas** field for LIST price on the Price Sheet Entry (Auto Update) screen.

   For basis names with a value calculated using another basis name, enter the basis name and the formula. For example, if REP-COST is LIST less 40 percent, enter **LIST** in the **CalcBase*** field and ***.40** in the **Formula** field. If LIST equals $40.00, this creates the formula $40.00 x .40 = $16.00, therefore the price for REP-COST is $40.00 - $16.00 = $24.00.

   If the basis name used to calculate another value is updated from the file, enter that number (1-5) in the **Prc Bas** field.
8. Repeat the verification process for each price sheet being updated.
9. Press **Esc** to return to the Price Update Scan screen.

Matching Products During Price Updates

The system prompts to match products during an update when the **New Items Mode** in Auto Price Updating is set to **Prompt**, and the system encounters a product in the update file that is not in the Eclipse product file. You can create a new record, edit the existing record, or skip the record, as needed.

To match products during a price update:

1. The Auto Price Updating Product Matching screen displays when the system detects a product on the update file that is not in the system during the price update or during setup when accessing the Scan screen (**User Defined Auto Price Updating** > **Scan** hot key).

   Note: The **New Items Mode** in Auto Price Updating is set to **Prompt** for this screen to display.

   The **Upd Desc** field displays the product description from the vendor update file.

   The **Xref** field displays the cross-reference value assigned to the vendor product to match against the corresponding value in the product file.

   The **Prd Desc** field is blank, but is updated after you match the product.

2. Use the following hot keys as needed to match products in the update file:

Hot Keys	Description
Create	Create a product record for the new product in Product Maintenance.
Edit Prd	Edit a product record. This hot key is active only when the **Prd Desc** field is populated, then is inactive again after you edit the product record.
Update Desc	Update the product description as follows: If you use the **Find Prd** hot key to select a product, the product description displays in the **Prd Desc** field. Then, use the **Update Desc** hot key to change the product description to match the product description in the **Upd Desc** field.
Skip	Determines whether to skip the product during the update. Enter one of the following at the prompt: • **A number of steps** – Skips this number of products before prompting. • **Continue** – Continues the update without stopping. • **Edit** – Displays the Product Maintenance screen, so you can edit the product record.
Find Prd	Search for a product using the system search routines. The product displays in the **Prd Desc** field, when found.

Auto Updating Product Pricing Information

Use User Defined Auto Price Updating to update pricing information for products already in your inventory. Before you run the update you must complete the following:

- Import the vendor's update file.
- Set up auto price update parameters.

To ensure that the products update correctly, we recommend that you run the update program only for products already in your inventory.

During the first run of an update file, view each product record to ensure that the information is updating correctly. After you verify the accuracy of the data, you can include the new products and run the update a second time without interruption.

To update product information:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the work ID for this update.
5. In the **New Items Mode** field, enter **Ignore**.

   Products processed in the **Ignore** mode are listed in the background, tagged as follows:

   - *Skipped* – New items and products that were not updated because the price sheet was incomplete.
   - *Updated* – Items that have successfully updated. When the system encounters a product with a new price line or price sheet discount class, it displays the Price Sheet Entry screen so you can make corrections, if needed.
6. Use the **Begin** hot key and select an effective date.
7. At the **Ignored Items** prompt, enter one of the following:
   - **Y** – Creates and sends the Ignored Items report to your Hold file. This report lists new products and existing products that were not updated.
   - **N** – Runs the update without creating a report.
8. At the **##of Steps/Continue/Edit update** prompt, enter **E** (edit product) to display the Product Maintenance screen for the last product displayed in the list in the background.
9. View the first updated product record to verify that information was entered correctly.

10. Use the **Prices** hot key and the **PriceSheet** hot key to verify that the price you are updating for the new effective date is correct.
11. Press **Esc** when finished to exit the product record screens and redisplay the **##of Steps/Continue/Edit update** prompt.
12. Enter one of the following to determine how the update should proceed:

Value	Description
[A number] **## of Steps**	Enter the number of products from this file that you want to update before prompting. For example, if you enter **1**, the prompt returns after each product is updated; if you enter **25** the prompt returns after 25 products have been updated. If you enter a large number and the update is incorrect, you must manually correct that many records. **Note:** We recommend entering 1 in this field, so you can verify the accuracy of each product record and make any corrections before continuing.
Continue	Enter **C** to process the items without prompting. Exception: The system prompts you if it encounters a new product and the New Items Mode is set to Prompt, or if it encounters an incomplete price sheet. If the system encounters a new price sheet for which a formula has not been entered, it displays the Price Sheet Entry screen. Once you enter a formula, the system continues updating products. **Note:** Use this value only if your verified products are updating correctly.

13. When you finish updating records, press **Esc** until you return to the Spooler Control screen.

    If items that are part of your product file appear in the Ignored Items report, the UPC number or the user-defined product number may be missing from the product record for those items. If so, use the **Edit Detail** hot key on the Hold Entry Preview screen to display the product record. Correct those product records and re-run the Ignore mode. If the product number still appears on the report, contact Eclipse Support.

Adding New Products While Updating Prices

Use User Defined Auto Price Updating to add new products to inventory while running a price update. Before running the price update for new products, complete the following:

- Import the vendor's price update file.
- Define default information for new products.

  This default product information allows the system to create a product record for each product on the update file not found in your inventory.
- Run the update on any products already in your inventory.

After the update, you can access the new product records and add more detailed information if necessary.

To add new products while updating prices:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
4. In the **Work ID** field, enter the work ID for this update.
5. Set the **New Items Mode** field to one of the following to create new product records during a price update:
   - **Prompt –** Selectively adds new products to the file. The Auto Price Updating Product Matching screen displays every time the system encounters a new product. This update may take several minutes if the update file contains many new products.
   - **Add –** Updates the products and adds any new products in the update file. Run the update in Add mode only after you have updated the products. If the file contains a new line of products only, you can use Add the first time you run the update.
6. Use the **New Profile** hot key to create a default profile for new products.
7. Press **Esc** to save the new product data and return to the User Defined Auto Price Updating screen.
8. Verify all necessary information for the price update is included on the User Defined Auto Price Updating screen before running the update.

   After running the update, the User Defined Auto Price Updating screen displays, and an update report is sent to your Hold file showing the products that were added. The updated value on the report is the new product's price, the **Prev List** column shows 0.00, and the gross profit percent change column shows 100.0% since the product is new.

9. Review the new product records to ensure they have been assigned necessary information before changing the product status from Review to Stock or Nonstock.

Preparing Vendor Update Files for the Matrix Upload Utility

To run the Matrix Update Utility for customer-specific price and cost updates, you must first save the vendor update file in a format that the system understands. The system uses this file to create sell matrix cells at the time of the update, so that customers can receive discounts directly from the vendor.

Take the data element from the vendor's file, and complete the following list of tasks in a spreadsheet.

To prepare the vendor update file for matrix upload:

1. Rearrange each data element into its proper sequence by arranging it under a column name on a spread sheet.
2. Rename all vendor discount codes or group codes into valid sell groups or buy groups.
3. Rename all cost basis names into system-defined price or cost basis names:
   - From the price lines if you are loading group price/costs.
   - From products if you are loading item price/costs.
4. Modify formula fields to match system standards for pricing formulas, including units of measure.

   The first row of your spread sheet must contain headings, not data. Use the column names listed in the table below, as an example of how to build your spreadsheet columns.

Spreadsheet Column Name	Description
UPC	Enter only for items not using group pricing.
Price Group Code	Is a UPC number provided? • **Yes** – The system validates it against the price line or local basis name. • **No** – The system validates it against the global basis name.
Cost Basis for Sell Price	Is a UPC number provided? • **Yes** – The system validates it against the price line or local basis name. • **No** – The system validates it against the global basis name.
Sell Formula	Map formulas to system format, based on matrix rules. Net price must be preceded by a dollar sign ($). See Pricing Formulas Overview for more information.
Cost (COGS) Basis for Cost	Is a UPC number provided? • **Yes** – The system validates it against the price line basis name. • **No** – The system validates it against the global basis name.
Cost Formula	Map formulas to system format, based on matrix rules. Net cost must be preceded by a dollar sign ($). See Pricing Formulas Overview for more information.

Spreadsheet Column Name	Description
Cost Eff Date Override	Populates the price sheet override date on individual matrix cells. For rebates and contracts, this date is loaded into the price sheet effective date for the rebate.
Quote#	Use this column for rebate or contract numbers. All matrix cells have the expiration date of the matrix cell loaded into the **Expiration Date** field on the Matrix Cell Rebate Maintenance screen.

Price Per Qty	Has the vendor provided unit of measure information that affects the pricing or costing formulas?
	• **Yes –** Enter the quantity for each unit of measure listed in the **Price Per Qty** column on the spreadsheet. For example, the vendor's units of measure are:
	  • e = 1
	  • c = 100
	  • m = 1000
	Use the spreadsheet's find and replace feature to search for *e* in the **Price Per Qty** column, and replace it with *1*. Then search for *c* and *m* and replace them with *100* and *1000* respectively.
	This entry affects only items, not groups, that have a dollar amount in the sell or cost formula.
	• **No –** The system default lists all quantities as 1 if no vendor information is provided in this column. The system then uses the product pricing information to calculate the correct price or cost. For example, a quantity of *1* is entered on the spreadsheet for an item you sell in packs of 6. The system uses its product pricing information, and multiplies 6 times 1 to calculate the price.

The following examples show spreadsheets with vendor information saved in .csv format. Example 1 shows a vendor update file in an Excel spreadsheet. Example 2 shows the .csv in text format.

Example 1 – .txt File Opened in Microsoft Excel

The following spreadsheet contains vendor information that has been imported into an Excel spreadsheet, and is ready to be saved in .csv format and imported into the system. See Importing a Price Update File into Eclipse for more information.

	A	B	C	D	E	F	G	H	I
1	UPC	Price Group Code	Cost Basis	Sell Formula	Cost Basis	Cost Formula	COST EFF	QUOTE #	Price per Qty
2	04613510038	FL	LIST	$0.59	LIST	$0.44		53768740	1
3		SYLA	LIST	*.85	LIST	*.85	7/1/2000	53768740	1
4	04613510018	B	REP-COST	$0.77	LIST	$0.66		53768740	1
5	04613510019	C	LIST	$0.89	LIST	$0.65	7/1/2000	53768740	1
6	04613510028	C	LIST	$1.78	LIST	$1.50		53768740	1
7	04613511502	C	DISTCOST	-14	DISTCOST	-34		53768740	1
8	04613510031	C	LIST	$1.61	LIST	$1.30		53768740	1
9	04613510015	FL	LIST	$0.58	LIST	$0.44	7/1/2000	53768740	1
10	04613510644	FL	DISTCOST	-30	REP-COST	-50	7/1/2000	53768740	1
11	04613510645	FL	LIST	$0.64	LIST	$0.80	7/1/2000	53768740	1
12		SYLB	LIST	*.68	DISTCOST	$10.00		53768740	1
13									

Example 2 – .csv File opened in a Text Editor

The following text was saved in .csv format and is ready to import into the system.

```
UPC,Price Group Code,Cost Basis for Sell Price,Sell Formula,Cost Basis for Cost,Cost Formula,COST EFF DATE ,QUOTE #
04613510038,FL,LIST,$0.59 ,LIST,$0.44 ,,53768740
,SYLA,LIST,*.85,LIST,*.85,7/1/2000,53768740
04613510018,B,REP-COST,$0.77 ,LIST,$0.66 ,,53768740
04613510019,C,LIST,$0.89 ,LIST,$0.65 ,7/1/2000,53768740
04613510028,C,LIST,$1.78 ,LIST,$1.50 ,,53768740
04613511502,C,DISTCOST,-14,DISTCOST,-34,,53768740
04613510031,C,LIST,$1.61 ,LIST,$1.30 ,,53768740
04613510015,FL,LIST,$0.58 ,LIST,$0.44 ,7/1/2000,53768740
04613510644,FL,DISTCOST,-30,REP-COST,-50,7/1/2000,53768740
04613510645,FL,LIST,$0.64 ,LIST,$0.80 ,7/1/2000,53768740
,SYLB,LIST,*.68,DISTCOST,$10.00,,53768740
```


Defining the File Format for Price Updates

Vendors send price updates in a variety of formats. Determine the file format for the user-defined matrix upload before importing the file, and prepare the system to receive the correct format.

To define the file format for price updates:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. In the **Processing Type** field, enter **Matrix Upload User Defined**.
4. Use the **Begin** hot key to display the User Defined Matrix Entry screen.
5. Complete the following fields, as needed:
6. In the **Work ID** field, enter the work ID for this update.

   A work ID can determine a format-specific template for processing a spreadsheet, and does not need to be vendor-specific. You can use the same work ID for different vendors if several vendors send their data in an identical format.
7. Complete the remainder of the fields.
8. Use the **File Format** hot key to display the Upload File Format screen.
9. Complete the following fields, as needed:

Field	Description
Record Type	Enter one of the following formats for the update file: • **Blocked** – fixed-length • **Variable** – comma-delimited **Note:** You can also separate data elements in a blocked record by a delimiter.
Record Length	Do one of the following: This field is accessible only for blocked-type records. • Enter the number of characters necessary if the vendor specifies a record length. • Leave the field blank if no length is specified.
Delimiter Char	Enter the character used between each field as a delimiter. This field is accessible only for variable-type files.
Delete Chars	Enter any characters that you do not want read as data, such as quotation marks or the dollar sign. The system does not recognize the dollar sign as a numeric value, so if the vendor puts a dollar sign in front of the prices enter **$** in this field.

10. Press **Esc** to save the information and return to the User Defined Matrix Entry screen.

Creating User-Defined Matrix Cells During Price Updates

Use the User-Defined Matrix Upload Utility to create buy or sell matrix cells directly from a vendor's price update file. You can set up the matrix cells to be branch-specific and for a variety of data, depending on the data included in the update file. You can also define your own layout for uploading data to the matrix cells.

You must have the UD.MATRIX.UPLOAD authorization key to access the User Defined Matrix Upload screen.

Important: Uploading user-defined matrix cells does not check to see if identical matrices exist. Running this function multiple times creates a duplicate matrix.

Complete the following tasks before running the update:

- Download the customer-specific price update file from the vendor.
- Identify the columns on the vendor's update file. You can create a spreadsheet or use the information sheet included with your update file.
- Ensure the file is in an understandable format for the system: comma deliminated (.csv), text (.txt), or Excel (.xls).
- Import the file into your Hold file in the system.
- Define the file format for the system, blocked or variable.

After running the update, verify that the matrix cells were created correctly by viewing them in Quick Sell or Quick Buy Matrix Maintenance.

Note: If there is only a cost in the upload, and no price, the created matrices are **O** types. If a price is included in the upload, the matrices are **N** types.

To create buy or sell matrix cells during price updates:

1. Complete the required tasks described above.
2. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
3. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
4. In the **Processing Type** field, enter **User Defined Matrix Upload** and use the **Begin** hot key to display the User Defined Matrix Entry screen.

5. Complete the following fields, as needed:

Field	Description
Work ID	Enter one of the following: • Leave the field blank – Does not save the template after this update. • A name that identifies to the vendor who sent the file – Creates a new template. • The name of the price line being updated – Creates a new template. • Press **F10** and select a work ID – Uses an existing template.
Desc	Enter a complete description for the update, using up to 25 characters.
Br/TR/ALL	Do one of the following: • **Enter a branch ID** – Creates branch-specific matrix cells for a single branch or territory. • **Enter ALL** – The DFLT (default) branch option is used for the matrix cells created. • **Press F10 and select Multiple Branches** – Displays the Multiple Br/Tr Selection screen, where you enter branches to include in the matrix cells created, as follows: 1. In the **Br/Terr** column, press **F10** and select the branches to include in the matrix cells. 2. Press **Esc** to save your list of branches and to return to the User Defined Matrix Upload screen.
Matrix Type	Enter one of the following: • **Sell** – Creates sell matrix cells containing the entries on this screen. This is the default. • **Buy** – Creates buy matrix cells containing the entries on this screen. The **Data Format** column below displays different items depending on which matrix type you select.
Effective Date	Enter the date the system can begin to .
Expiration Date	Enter the date the system can no longer use the matrix cells for pricing product.
Comment Type	Press **F10** to select from the comment type selection screen. This is the same as when you use the **Comment** hot key on the Matrix Maintenance screens. This selection attaches a comment to the matrix cells. This field is required if you enter a **Comment** data point, below.
Write Info to Customer Rebate Screen	Enter one of the following: • **Y –** Copies rebate information to the Customer Rebate Maintenance screen. You can display this screen from Customer Maintenance by pressing the **Rebate** hot key. • **N** – Does not copy information to the Customer Rebate Maintenance screen. This is the default.

6. Use the **File Format** hot key to define the formatting style of the import file.
7. In the **Data Format** section of the screen, the heading of the columns on the right toggle depending on which format you select when using the **File Format** hot key. For either format, you point to the location of data in the update file, as follows:

- For blocked records:
  - **Start –** Enter the starting position character number that begins the section of data.
  - **Lngth –** Enter the corresponding length of the field.
- For variable records:
  - **Elmt# –** Enter the element number sequence as it appears in the record.

The items in the **Data Format** column represent the fields on the sell or buy matrix cell to which you are uploading.

Data Formats for matrix cells:

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matr4ix Cells	Description
Class	✓		Price class for the matrix cell. Class, customer, or vendor data are required.
Customer	✓		Customer specified on the matrix cells. If you entered *Sell* in the **Matrix Type** field, above, Customer displays here. Class or customer data are required. If left blank, class is used.
Product Group	✓	✓	Product group specified on the matrix cells. Either a product group or a product is required. If both are entered, the system uses the product first.
Product	✓	✓	Product specified on the matrix cells. Either a product group or a product is required. If both are entered, the system uses the product first. The product information can be either the Eclipse ID or the primary UPC.
Basis	✓	✓	Price basis specified on the matrix cells. The basis used in the update file must be represented in Price Line Maintenance.
Formula	✓	✓	Formula to apply to the basis.
Matrix Effective Date	✓	✓	Effective date specified for the matrix cells. This setting overrides the setting in the **Effective Date** field, above.
Matrix Expiration Date	✓	✓	Expiration date specified for the matrix cells. This setting overrides the setting in the **Expiration Date** field, above.
COGS Override Basis	✓		Basis applied to COGS override. The basis used in the update file must be represented in Price Line Maintenance.
COGS Override Formula	✓		Formula to apply to the COGS override basis.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matr4ix Cells	Description
COGS Override Code	✓		Cost override code for COGS override.
COGS Override Effective Date	✓		COGS price effective date override.
Comm-Cost Override Basis	✓		Basis for Comm-Cost override basis. The basis used in the update file must be represented in Price Line Maintenance.
Comm-Cost Override Formula	✓		Formula to apply to the Comm-Cost override basis.
Comm-Cost Override Code	✓		Cost override code for Comm-Cost overrides.
Comm-Cost Override Effective Date	✓		Comm-Cost price effective date override.
Rebate Contract	✓		Contract number to use for rebate.
Rebate Vendor	✓		Vendor to which the rebate applies.
Rebate Effective Date	✓		Price effective date to use for rebates.
Rebate Expire Date	✓		Date the rebate expires.
Comment	✓	✓	Adds a matrix comment to the matrix cells. You must populate the **Comment Type** field in the body of the screen.
Price Per Qty	✓		Price per for net pricing. If this quantity is assigned, the system converts the price using the current pricing unit of measure in the system. This setting affects products, not groups, which use net pricing. The default value is 1.
Price UOM	✓		Pricing unit of measure for net pricing.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matr4ix Cells	Description
Price Sheet Date	✓		Overrides the **Prc Date** field on the matrix cells.
Direct COGS Override Basis	✓		Basis applied to direct COGS override. The basis used in the update file must be represented in Price Line Maintenance. The basis used in the update file must be represented in Price Line Maintenance.
Direct COGS Override Formula	✓		Formula to apply to the direct COGS override basis.
Direct COGS Override Code	✓		Cost override code for direct COGS override.
Direct COGS Override Effective Date	✓		Direct COGS price effective date override.
Direct Comm-Cost Override Basis	✓		Basis for direct Comm-Cost override basis. The basis used in the update file must be represented in Price Line Maintenance.
Direct Comm-Cost Override Formula	✓		Formula to apply to the direct Comm-Cost override basis.
Direct Comm-Cost Override Code	✓		Direct cost override code for Comm-Cost overrides.
Direct Comm-Cost Override Eff Date	✓		Direct Comm-Cost price effective date override.
Direct Rebate Contract	✓		Contract number to use for direct rebate.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matr4ix Cells	Description
Direct Rebate Vendor	✓		Vendor to which the direct rebate applies.
Direct Rebate Effective Date	✓		Price effective date to use for direct rebates.
Direct Rebate Expire Date	✓		Date the direct rebate expires.

8. Use the **Begin** hot key to run the update.
9. Use the **Delete** hot key to delete the template, if necessary. The system prompts to confirm the deletion.
10. Press **Esc** to return to a blank User Defined Matrix Upload screen.

Updating Trade Service Prices

Trade Service is an industry name that includes companies who manage your vendor's prices. These companies provide price lists and product information on diskette, CD-ROM, or via FTP that you upload, then run the update utility, which applies the changes to your product and pricing records.

A special file is sent to your weekly FTP directory that allows you to automate the process of retrieving, downloading, and processing your weekly update from Trade Service. You may need to contact your Eclipse PDW support team so that the feature can be configured for your use.

This page includes the following procedures:

- Processing a Cd, diskette, or FTP.
- Importing Trade Service data.
- Loading Trade Service prices.

To process a CD-ROM, diskette, or FTP:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

   Note: FTP files must be saved to your hard drive before uploading to the Spooler Control screen.

2. Use the **Upload** hot key, and select the TRADE.DAT file to upload. For example, for a CD-ROM, the path is CD drive/TRADE.DAT.
3. In the **Enter Spooler Title** field, enter a title for the file, such as TradeService_042004.

   The system displays how many bytes were transferred to the destination.

4. Press **Esc** to return to the Spooler Control screen.
5. Continue with the following instructions.

To import Trade Service data diskette, CD-ROM, or FTP:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Select the Trade Service update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
3. Select **Trade Service Diskette Import**, and use the **Begin** hot key. If a Trade Service file has been used on the system, the Clear Previous Data and Load Type (Y/N) prompt displays. Do one of the following:
   - If you uploaded a data from CD-ROM, FTP, or diskette, enter **Y**. This action clears the previous pricing information and imports the new data. The system displays the

number of records updated. The Downloading screen displays. Select **The data only on one line - No Conversion** when the Downloading screen displays.

- If your data originated from a 4mm data tape, import the data as described in the To load Trade Service prices procedure.

4. Press **Enter** to return to the Spooler Control screen.
5. Continue with the following instructions.

To load Trade Service prices:

1. From the **Other > Prc Upd** menu, select **Trade Service Automatic Price Updates** to display the **Clear Previous Data and Load Tape** prompt.
2. Enter one of the following:
   - **Y –** Clears the current update information and displays a blank Automated Price Update Preview screen. Use this method if getting updates via 4mm tape.
   - **N –** Displays the Automated Price Update Preview screen containing details about each item on the Trade Service update file. Use this if you imported the data via the spooler screen.
3. In the **Price Line** field, enter a price line ID to change the price line or to add a price line.
4. If the Automated Price Update Preview screen displays, press **Tab** to select a product to update, and do one of the following:
   - In the **Eff Date** column, enter the new effective date.
   - Use the **Eff Dates** hot key, scroll to the first available space, and enter a new effective date.
5. Use the following hot keys, as needed.

Hot Key	Description
Formulas	Displays the Price Sheet Entry (Auto Updates) screen where you can assign formulas to change product prices on the update.
Eff Dates	Displays the Price Sheet Days screen.
Buy Line	Displays the Enter Buy Line for Vendor # prompt. Press **F10** and select a buy line for each product.
Edit Data	Displays the Price Update Data Edit screen with each product's data displayed.
UPC	Displays the UPC Selection screen, where you select the following for matching data on the update file: • **Primary UPC** – Uses only the primary UPC for matching. Primary and secondary are the default. • **Secondary UPC –** Uses only the secondary UPC for matching. Primary and secondary are the default. • **Up to 10 user-defined UPCs** – Uses user-defined UPCs numbered 1 through 10 for matching. • **Multiple UPCs –** Uses only the first match for updating.

<table>
<tr><th>Hot Key</th><th>Description</th></tr>
<tr><td>Updates</td><td>Displays a view-only screen showing detailed update information on this product.

The Update Details screen displays the following view-only information:

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Vendor</td><td>The vendor number for the products.</td></tr>
<tr><td>Price Line</td><td>The price line ID for the products.</td></tr>
<tr><td>Price Sheet</td><td>The price sheet for the products.</td></tr>
<tr><td>Discount Class</td><td>The discount class for the products.</td></tr>
<tr><td>Effective Date</td><td>The effective date for the prices of the products.</td></tr>
<tr><td>Price Updates</td><td>The number of items that contain pricing updates.</td></tr>
<tr><td>Revisions</td><td>The number of revisions or changes.</td></tr>
<tr><td>Additions</td><td>The number of new items on the update file.</td></tr>
<tr><td>Deletes</td><td>The number of items set to a status of delete.</td></tr>
<tr><td>UPC Changes (EPD)</td><td>The number of UPC changes.</td></tr>
<tr><td>No Updates</td><td>Number of items that are not being updated.</td></tr>
</table>
</td></tr>
<tr><td>Replace</td><td>Displays the Replace Existing Products screen.</td></tr>
</table>

6. Press **Esc**.
7. At the Ready to load Automatic Price Updates prompt, enter one of the following:
   - **Y –** Loads the update file with the information you have defined.
   - **N –** Exits without loading the update file.
8. Press **Enter** to return to the Prc Upd menu.

Defining Product Information for Trade Service Updates

You can select which details you want to replace during a Trade Service update. For example, if product names have changed, but you want to maintain the current pricing information, specify that you want to replace only product descriptions.

To define product information for update:

1. From the **Other > Prc Upd** menu, select **Trade Service Automatic Price Updates**, and enter **N** at the prompt to display the Automated Price Update Preview screen.
2. In the **Replace existing Commodity Code?** field, indicate if you want to replace the commodity code in the product records.
3. In the **Replace existing Description?** field, indicate if you want to replace the product descriptions in the product files.
4. In the **Replace existing Pricing?** field, indicate if you want to replace the product pricing information.
5. Press **Esc** to save the changes and return to the Automated Price Update Preview screen.

Price Sheet Entry Overview

Vendors and pricing agencies, such as Trade Service, provide product price information through price sheets. These price sheets correspond to your price lines, and if authorized, you can manually enter prices on the price sheets. Set up the price line and Price Sheet Entry screen to find the products that need updating. Then, manually enter new vendor prices.

In Price Sheet Entry you can change the following:

- All pricing within a price line
- Pricing for a subset of the items
- Pricing for a single product
- Maintain different price sheets for the same product. For example, two different branches may use different price sheets. If you use different vendors for the same product, create a price sheet for each in Product Maintenance. In addition, when a promotional price sheet is set up for a branch, the branch maintains a price sheet for the original price and for promotional prices.

Complete the following to manually update prices in a price line:

1. Organize the products in the price line you are updating.
2. Create a new effective date for the price sheet you are updating.
3. Select criteria to limit the list of items on the price sheet to those you want to update.
4. Print a worksheet.
5. Transfer the vendor's price sheet information to the worksheet manually.
6. Determine the basis names you want to update.
7. Enter the updated prices.

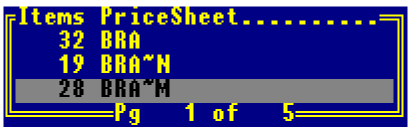
Selecting Price Sheets

You can enter or maintain a product's costing information at the line item level on a price sheet. Price sheet changes usually occur because of price changes at the manufacturer. Each branch can maintain its own price sheets.

To select a price sheet:

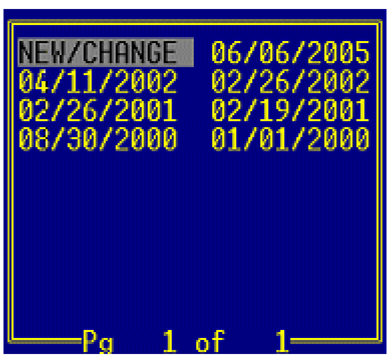
1. Access the Price Sheet Entry screen in one of the following ways:
   - From the **Files** > **Price Maintenance** menu, select **Price Sheet Entry**.
   - From the **Other** > **Prc Upd** menu, select **Price Sheet Entry**.
2. In the **Line** field, enter the price line ID of the price sheet you want to view.

   The following screen displays, listing the price lines and the number of items in each price line. The default price sheet is always the first in the list.

3. Select the price sheet.

   The following screen displays, listing this price sheet's effective dates. You must be assigned the PRICE.SHEET.ENTRY authorization key at level 2 or greater to create or change a price sheet date.

4. Select the effective date of the price sheet you want to view, and press **Enter**. The price sheet displays unless the price sheet includes a discount class.

   Note: To create a new price sheet, select NEW/CHANGE, and press **Enter**.

   If the price sheet includes a discount class, the following screen displays and lists the default price sheet first, shown as a ~ (tilde), followed by the price sheets with assigned discount classes.

5. Select a discount class to display the price sheet.

   If the price sheet has multiple discount classes, you are prompted to enter one of the following to define what discount classes are displayed in the Price Sheet Entry/Update screen when you manually enter prices:

   - **Y –** The system limits the discount class to the one displayed in the top right of the screen.
   - **N –** The system uses all discount classes associated with the price line.

Changing Price Sheet Effective Dates

Create a different price sheet for a price line by changing the effective date on the price sheet. This way you maintain the pricing rules set up for the price line, while changing only the necessary details.

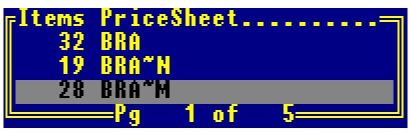
Maintain different price sheets for the same product for the following reasons:

- Different branches use different price sheets to arrive at their pricing.
- Different vendors provide the same product at different branches.
- Promotional price sheets are set up for branches.

To change a price sheet effective date:

1. Display the Price Sheet Entry screen in one of the following ways:
   - From the **Files** > **Price Maintenance** menu, select **Price Sheet Entry**.
   - From the **Other** > **Prc Upd** menu, select **Price Sheet Entry**.
2. In the **Line** field, enter the price line ID.

   A list of the price lines and the number of items in each price line displays. The default price sheet is the first in the list.

3. Select the price sheet containing pricing rules closest to those you want to create in a new price sheet.

   An effective date list displays with all of the effective dates for that price sheet and the New/Change option.
4. Select **New/Change** to display the Price Sheet Days screen.

   Note: You must be assigned the PRICE.SHEET.ENTRY authorization key at level 2 or greater to create or change a price sheet date.
5. In the **Purge Age (days)** field, enter the number of days to keep this price sheet active. The default is 365.
6. In the **Effective** field, scroll to the first empty date line, enter the new effective date, and press **Esc**.

   The effective date list re-displays with the effective date you just created.
7. Select the new effective date from the list.
8. If discount classes exist for this price line, select the sheet you want to view from the Discount Classes screen. The price sheet displayed contains the new effective date, and the other screen information is identical to the existing price sheet.

9. Enter any new pricing criteria for this price sheet.
10. Press **Esc** to save the changes and exit the screen.

Viewing Price Sheets by Discount Class

Different products within the same price line can have different discount classes. A price sheet set up with a discount class contains only the products categorized by that discount class.

Classify products by discount class on the product record and assign each discount class its own formula on the price sheet. This way you apply pricing rules to that category of products only.

Select price sheets by discount class to navigate from one price sheet to the next when updating prices.

To view price sheets by discount class:

1. From the **Files > Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line that contains the sheets you want to view. The following prompts display:
   - From the Price Sheet list, select the price sheet, and press **Enter**.
   - Form the Discount Class list, select the discount class, and press **Enter**.
   - Select whether to display only selected discount class?.
     - **Y –** The price displayed is based only on the selected discount class.
     - **N –** The price displayed is based on the null entry for a discount class.
3. Make the necessary changes to this price sheet.
4. Use the **Disc Cls** hot key to select a price sheet with a different discount class.
5. Continue using the **Disc Cls** hot key until you complete making changes within this price sheet.

Limiting the Product List in Price Sheet Entry

Limit the product list that displays on the update screen in Price Sheet Entry. By default, the Price Sheet Entry/Update screen displays all products in a price line. We recommend limiting the list for easy processing.

Use the following criteria to limit the product list:

- Select Discount Class
- Null Basis Only
- Sheet Sort By
- Product Index Type
- Maximum Lines of Description
- Entity

To limit the product list in Price Sheet Entry:

1. From the **Files** > **Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line that contains the price sheets you want to update.
3. Select the effective date and discount class as necessary.
4. Use the **Inc Dels/Exc Dels** hot key to include products on the Price Sheet Entry/Update screen that have a Delete status. This status is assigned to products on the product record.

   The **Inc Dels/Exc Dels** hot key toggles between **Inc Dels** (include deletes) and **Exc Dels** (exclude deletes).
5. Use the **Itm Slct** hot key to display the Item Select screen.
6. Enter selection criteria in the fields described in the table below to determine which products to list on the Price Sheet Entry/Update screen.

Selection Criteria	Description
Select Discount Class	Enter one or multiple discount classes separated by commas. Leaving the field blank selects all discount classes. Use the **Multi** hot key to add multiple discount classes. Assign discount classes to products in Product Maintenance.
Null Basis Only	Press **F10** and select one of the following: • **Yes** – Lists the *null* basis products – products in the price line that have a blank **Basis** field in Price Sheet Entry. These products did not get updated. Run this selection after running an update to get a list of products in the price line that did not get updated. • **No** – Lists all products in the price line.

Selection Criteria	Description
Sheet Sort By	Press **F10** and select one of the following to determine the default status of the product list on the Price Sheet Entry/Update screen: • **Sort Code** – Lists products by sort code, determined in the product record. • **Product ID** – Lists products by product ID, determined in the product record. • **Status** – Lists products by status, determined in the product record. • **Description** – Lists products according to the first line of the description in the product record. • **Prod Sequence** – Lists products as they are listed in the price line record used for this price sheet.
Product Index Type	Press **F10** and select one of the following: • **Primary** – Includes stock items only. • Catalog – Includes nonstock items only. • Both – Includes stock and nonstock items. This is the default. Product index types are assigned in the product record as Catalog or Primary.
Maximum Lines of Desc	Determine how many lines of description are necessary to distinguish between products on the Price Sheet Entry/Update screen. Enter the maximum number of lines needed.
Entity	Press **F10** and select one of the following for this price update: • **Customer** • Vendor The part number displays on the Price Sheet Entry/Update screen for any products that have customer or vendor specific part numbers under the product's description . In addition, the customer or vendor name displays at the bottom of the screen next to the **Entity** indicator.

7. Press **Esc** to activate the changes to this screen and return to the Price Sheet Entry screen.
8. Use the **Enter Prices** hot key on the Price Sheet Entry screen to view the list of products on the Price Sheet Entry/Update screen.

Printing Price Worksheets for Manual Updates

Use a printed price worksheet to aid entering prices manually. The worksheet prints the current price for products with spaces for writing in the new prices. Write the new vender prices on your worksheet and then enter the new prices into the system.

To print price worksheets for manual updates:

1. From the **Files > Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. Complete the information on the Price Sheet Entry screen for all bases that affect pricing for the price line.

   If you type ENTER in the **CalcBasis*** column for any of the bases, the worksheet displays a column of old prices followed by a column of blank lines where you enter the new prices. If the **CalcBase** column does not contain ENTER, no worksheet prints. See Manually Updating Prices for more information.
3. Do the following to organize the product list before printing the worksheet:
   - Rearrange the product list in the price line for easy product location.
   - Sort the products on the price sheet to organize products or limit the list on the worksheet.
   - Determine if you should include or exclude products in the worksheet assigned a Delete status on the Product Maintenance screen. Use the **Inc Dels/Exc Dels** hot key. This hot key toggles between **Inc Dels** (include deletes) and **Exc Dels** (exclude deletes).
4. Use the **Print Worksheet** hot key.

   A printer selection screen displays.
5. Select a printer and press **Enter**. The worksheet prints to your Hold file and the Phantom messages you when the worksheet is available.
6. Transfer the data from the vendor's price sheet onto your worksheet by hand.
7. Use the **Enter Prices** hot key to display the Price Sheet Entry/Update screen. The items on the screen should match the items on the worksheet. For more information, see Manually Updating Prices.

   Note: You must have the PRICE.SHEET.UPDATE authorization key to use the **Enter Prices** hot key.

Manually Updating Prices

Each time you receive new pricing data for a price line, assign a new effective date to the price sheet to create a new price sheet to store with previous price sheets for the price line.

Use a calculation basis and a formula to calculate the prices or costs for a basis on a price sheet. Then, manually enter prices into the system.

To verify that calculation bases, formulas, and prices are calculating the end prices correctly, view the new price sheet in the product file.

This page contains the following procedures:

- Entering bases and formulas to determine the calculation for final costs and prices.
- Entering prices manually on the update screen.
- Viewing price sheets for products.

To set up a price sheet for update:

1. From the **Files** > **Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line ID and select the price sheet and discount class. Press **F10** to select from a list.
3. Select one of the following:
   - **New/Change** – To enter the new effective date.
   - **An existing effective date –** To display a price sheet.
4. In the **CalcBasis*** (calculation basis) field, enter the action for each basis name listed:

Options	Descriptions
ENTER	Displays this basis name as a column heading on the Price Sheet Entry/Update screen, where you manually assign a new value to the basis name. Use the **Enter Prices** hot key on the Price Sheet Entry screen to display the update screen. 1. In the **CalcBasis*** field for LIST, type **enter**. 2. Use the **Enter Prices** hot key to display the Price Sheet Entry/Update screen. 3. In the **LIST** column, update the prices as listed on the vendor's price sheet. **Note:** You are not required to enter a formula for basis names with a calculation basis of ENTER, because you manually enter prices for these basis names.
PREVIOUS	Checks each of the price sheet's effective dates beginning with the most recent, and applies the formula and the basis name for the most recent price sheet that contains a value.
NO UPDATE	The formula and the basis name for the new effective date remain the same as on the previous effective date. If the previous price sheet contains a null entry, when a price search is in process for a product, the system checks the price sheets beginning with the most recent effective date, and applies the price from the most recent effective date that contains a value.

Options	Descriptions
Basis name	Enter one of the following: • A basis name that is different from that entered in the **Basis Names** column, but is associated with this price line. This entry includes the added basis name's formula in the value. For example, a price sheet from a vendor shows that all REP-COSTS are increasing, and lists the individual price changes. Calculate your LIST price from the vendor's REP-COST for the products in this price line. • The same basis name as the basis name in the **Basis Names** column. This entry takes the basis name times 1 (*1).

5. In the **Formula** field, enter the formula you want the system to use with the entry in the **CalcBasis*** field to calculate the selling price.
6. In the **Rnd** field, enter the number of decimal places for rounding cents. Valid entries are 0 to 3; 0 does not round cents, 1 rounds to a hundredth, 2 rounds to whole cents, 3 rounds to the tenth of a cent.
7. In the **Dsp** field enter one of the following:

   This field is active only for lines with PREVIOUS, NO UPDATE and basis name entries in the **CalcBase*** field.

   - **Y** – A basis name other than ENTER in the **CalcBase*** field displays on the Price Sheet Entry/Update screen.
   - **N** – Values for basis name, PREVIOUS, or NO UPDATE entries in the **CalcBase*** field are calculated but do not display on the update screen.
8. Press **Esc** to save the settings and exit the screen, or use the **Enter Prices** hot key to display the Price Sheet Entry/Update screen.

To enter prices on the update screen:

1. Use the **Edit Prices** hot key on the Price Sheet Entry screen to display the Price Sheet Entry Update screen.

   Note: You must be assigned the PRICE.SHEET.UPDATE authorization key to use the **Enter Prices** hot key.

   The screen displays the product's status and the product's unit of measure in the view-only **S** and **UM** columns.

   The basis name column headings on the right side of the screen are determined by the entries in the **CalcBasis*** and **Dsp** fields, described above, on the Price Sheet Entry screen. Press **Tab** or **Right Arrow** key to scroll the columns to the right.

   The **Sort by** field in the upper right of the screen displays the order in which the products display. Use the **Sort Order** hot key to select a different sort order.
2. In each basis name column (for example, LIST and REP-COST), enter the vendor's price for each product.
3. Press **Esc** when you finish entering prices to return to the Price Sheet Entry screen.

To view price sheets for products:

1. From the **Files** menu select **Product** to display the Product Maintenance screen.
2. Use the **Prices** hot key, then the **Price Sheet** hot key to display the Product Price Sheet Maintenance screen.

   Price sheets display in the columns in consecutive order starting with the most recent. For more information, see Assigning Pricing Values to a Product Price Sheet.
3. Press **Esc** to save your changes and exit the screen.

Copying Price Sheets

This page shows how to copy the information from one price sheet to another. You can segment price sheets by discount class, and copy a discount class to another discount class. Copying allows you to maintain most information on a price sheet while changing only the information necessary.

Copy price sheet information for the following reasons:

- You want to maintain the same pricing information from one price sheet to another, but change the effective date.
- You want to offer promotional prices for a time, then return to charging the previous prices.
- You want to copy pricing information from one discount classes to another.

This page includes the following procedures:

- Copying all the information from one price sheet to another.
- Copying a discount class to another price sheet.

To copy all price sheet information from one price sheet to another:

1. From the **Files** > **Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line that contains the price sheet you want to copy.
3. Use the **Copy Pricesheet** hot key, and select the price sheet to which you want to apply the copied information by selecting one of the following:
   - The **effective date** to which information is copied. The system prompts you to enter the number of price or cost bases to copy.
   - **New/Change** – To copy the information to a new effective date. Enter the **Purge Age (days)** in the field provided, then enter the new effective date on the first available line.
4. Press **Esc** to copy the information and return to the Price Sheet Entry screen.

To copy the discount class from one price sheet to another:

1. From the **Files** > **Price Maintenance** menu select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line that contains the price sheet from which you want to copy the discount class.
3. Use the **Copy DC** hot key to display a list of discount classes applied to the price sheet.
4. Select the discount class to copy, and press **Enter**.

The system copies the discount class you entered in step 3 to the price sheet containing the discount class you select.

5. Make changes as necessary to any of the Price Sheet Entry fields. For more information, see Manually Updating Prices.
6. Press **Esc** to save changes and return to the Price Sheet Entry screen.

Defining Percentage Change Parameters

Set percent variances to help catch data entry errors during manual price updates. Setting percentages limits outside the normal expected range of a percentage price change alerts you to possible errors when the costs or prices entered fall outside the limits.

To define percent change parameters:

1. From the **Files > Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry screen.
2. In the **Line** field, enter the price line for the desired price sheet, and fill in the necessary fields to complete the price sheet. For more information, see Manually Updating Prices.
3. Use the **Variance %'s** hot key to display the Price Change Variance Checking screen.
4. Enter the percentage limits for the high and low end for this price sheet in the fields provided.

   For example, a vendor's prices are increasing 5 percent. To help avoid making errors, set the Variance % low end to **0%** and the high end to **6%**. When entering prices with these settings in the Price Sheet Entry/Update screen, you accidentally enter a price 7 percent higher than the previous price. The system warns that you have exceeded the variance allowed. At that point you can double check the price you entered, or you can press any key to accept the price and continue.
5. Press **Esc** to save your changes and return to the Price Sheet Entry screen.

Maintaining Price Sheets for Different Branches

This topic describes how to maintain price sheets for products in different branches.

Maintain multiple price sheets for the following reasons:

- Your branches obtain the same products from different vendors.
- Products cost more to ship or store at one branch than at another branch.
- The promotions you run at one branch differ from those at your other branches.

A price line can have any number of price sheets associated with it. Carefully check the following if a product has multiple price sheets in use at the same branch:

- The costing and pricing are correct.
- You are using the correct price sheet for the vendor's product.

This page includes the following procedures:

- Creating branch-specific product price sheets.
- Entering prices on branch-specific product price sheets.

To create a branch-specific product price sheet:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen, and enter a product ID in the **Product ID** field.
2. Use the **Prices** hot key to display the Product Price Maintenance screen.
3. Use the **Hierarchy** hot key to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Br/Terr** column below the branch, and in the order of the territory priority. For more information, see Branch Hierarchy Details.
4. In the **Price Sheet** field, do the following:

If...	then...
for the same price sheet, all branches use the same costs and/or prices for the products in the price line	leave the field blank. The system uses the price line name as the price sheet name, followed by a tilde (~). This sheet is called the null price sheet. For example, the null price sheet for the SYL price line is named SYL~.
any branch uses costs or prices that are different from those at the other branches	enter a name for the price sheet, such as Branch1, to create a separate price sheet for that branch. The system attaches the price line name and tilde (~) as a suffix. For this example, the new price sheet name for the SYL price line is SYL~Branch1. Repeat step 3 above, and this part of step 4 to create price sheets for as many branches as necessary.

5. To display the Price Sheet selection screen, use the **Price Sheet** hot key and select the new price sheet.

The Price Sheet Days screen displays.

6. In the **Purge Age (days)** field, do one of the following:
   - Press **Enter**. The system enters **365** as the default.
   - Enter the number of days you want this price sheet to remain on record after the expiration date.
7. In the **Effective** field, enter the effective date for this price sheet.

   Note: The Price Sheet Days screen displays for each branch-specific price sheet you entered in the **Price Sheet** field on the Product Price Maintenance screen.
8. Press **Esc** to save your changes and exit screen.

To enter prices for a branch-specific product price sheet:

1. From the **Files** menu, select **Product** to display the Product Maintenance screen.
2. In the **Product ID** field, enter the product ID to display the product record.
3. Use the **Prices** hot key to display the Product Price Maintenance screen.
4. Use the **Price Sheet** to display the Price Sheet Maintenance screen.
5. Select or create an effective date for the price sheet.
6. In the price sheet effective date column, enter the prices for each basis name, as needed.
7. Press **Esc** to return to the Price Sheets selection screen.
8. Do one of the following:
   - Select another price sheet for editing.
   - Press **Esc** to save your changes and return to the Product Price Maintenance screen.

Generating Price Sheets

Price sheets are lists of products and their prices. Generate price sheets for all or part of your product file for customers, sales representatives at the counter or in the field, and branches.

To generate a price sheet:

1. From the **Other** > **Prc Upd** menu, select **Print Price Sheets** to display the Print Price Sheets screen.
2. Complete the following fields, as needed:

Field	Description
Price Sheet ID	Do one of the following: • To create a new template, enter up to 10 alphanumeric characters as a name for the template. • To edit an existing template, press **F10** and select the template.
As of Date	Enter the date for the pricing data on the price sheet. The field defaults to the current date. This field accepts variable dates. Use the **Future Date** field to print future-dated pricing data in addition to the as of date pricing data. For example, you may want to compare today's pricing data with next month's pricing data, so enter the date one month from the current date.
Only Custs w/Assigned Lines	Enter one of the following: • **N** – Prints the price sheet with the information entered on this screen. • **Y** – Prints the price sheet for only those customers who have price lines assigned in Customer Maintenance, and includes only the products in those price lines. When you enter **Y**, you cannot populate the **Select** field. **Note:** This entry overrides any entry made using the **Price Lines** hot key on this screen.
Select	Enter one of the following. Use the **Multi** hot key to select multiple entities: • **Customer/Vendor** – Prints price sheets for selected customers or vendors. • **Out Salesperson** – Prints price sheets for selected salespeople. **Note:** The selection in this field determines the name of the next field.

Customer/ Vendor/ Out Salesperson	Enter one of the following:
	• **Customer ID** – Prints price sheets specific to that customer.
	• **Vendor ID** – Prints price sheets that show what you pay this vendor for the products in the price lines.
	• **Out Salesperson** – do one of the following:
	  • **Enter a salesperson's ID** – Prints a list of all of this salesperson's customers.
	  • **Leave this field blank**, and enter price classes using the **CLASS#** selection in the **Data Source** field to create a generic price book.
	Note: If you enter **Y** in the **Only Custs w/Assigned Lines** field, you cannot populate the **Select** field.

Field	Description
Branch	Enter the branch to use for pricing the items on the price sheet.
Future Date	Enter a date to print future-dated pricing data in addition to the as of date pricing data. For example, you may want to compare today's pricing data with next month's pricing data.
Use Saved List	Leave this field blank unless you want to enter a saved list. If you using a saved list, first set the following fields to **N** . The system ignores, or does not allow entry in these fields when using a saved list: • **Only Custs w/Assigned Lines** • Only Cust Specific PNs • Select from Reorder Pad • Sort by Line/Part# Next, Enter the name of a saved list in this field. **Note:** If no saved list exists, and if you understand how to use TCL (True Command Language), you can build your own editable saved list. Alternately, you can contract with Eclipse to create a saved list that gives you the information you want.
Sort by Line/Part#	Select one of the following sort options: • **Price line** – Sorts by price line. • **Part number** – Sorts by customer part number.
Last Activity Date	Enter a date to include only the products purchased from a vendor or sold to a customer on or after that date.
Respect Print Flag	This field is dependent upon the entry in the **PrcSheet Print** field on the Additional Price Maintenance screen (**Files > Product Maintenance > Prices** hot key > **Additional** hot key). The **PrcSheet Print** field flags a product on a branch-by-branch basis to include or exclude from a price sheet. Enter one of the following in the **Respect Print Flag** field: • **Y** – Checks each product in the price line for the **PrcSheet Print** flag, and includes products flagged. This is the default. • **N** – Overrides the **PrcSheet Print** flag and prints all selected products on the price sheet.
Print Quantity Breaks	For products subject to quantity break pricing, enter one of the following: • **None** – Does not display the product's quantity breaks on the price sheet. The setting in the **Extend Quantity Brks** field displays **N**. • **Row** – Prints the product's quantity breaks in rows below the product. • **Column** – Prints the product's quantity breaks in columns to the right of the price column.
Extend Quantity Breaks	Enter one of the following: • **Y** – Displays the extended dollar amount that the customer has to spend to reach each break point. If you set the **Print Quantity Breaks** field to **Row** or **Column**, enter **Y** in the **Extend Quantity Breaks** field. • **N** – Does not display the extended dollar amount.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Page Break on</td><td>Enter one of the following page break preferences:
• Price Line – Breaks at each price line.
• Customer – Breaks at each customer.
• Nothing – Breaks where the page margin dictates.
• Customer/Price Line – Breaks at each customer and each price line.
• Salesperson – Breaks at each outside salesperson.</td></tr>
<tr><td>Report Break</td><td>Enter one of the following:
• Y – Starts a new report on each new item in the Page Break on field. For example, if you set the Page Break on field to Customer, a new report begins on each customer.
• N – Continues the list without page breaks. A blank row is inserted between each item.

Note: This field activates only when the Page Break On field is set to Customer.</td></tr>
<tr><td>Select from Reorder Pad</td><td>Enter one of the following:
• Y – Prints a price sheet for only those products on the customer's Reorder Pad.
• N – Selects all products for the price lines specified.</td></tr>
<tr><td>Inventory "Stk" Status</td><td>Enter one of the following:
• Stock – Includes the product if the Stk field on the Primary Inventory Maintenance screen contains Y or a hyphen (-) and meets the minimum number of hits to consider the product a stock product.
• Nonstock – Includes the product if the Stk field on the Primary Inventory Maintenance screen contains N or a hyphen (-) and does not meet the minimum number of hits to consider the product a stock product.
• Leave the field blank – Includes both stock and nonstock items.

Note: This field works with the Stk field on the Primary Inventory Maintenance screen for all products in the branch.

For more information, see Enabling Stock/Nonstock Determination for a Product.</td></tr>
<tr><td>Only Cust Specific PNs</td><td>enter one of the following:
• Y – Selects only products that have a customer-specific part number, and creates a price sheet using those products.
• N – Includes all products in the selected price lines.

Note: This field is active only if a saved list displays in the Use Save List field.</td></tr>
<tr><td>Only Cust Specific Overrides</td><td>Enter one of the following:
• Y – Includes for each customer's price sheet, only those products whose prices come from a customer-specific sell matrix.
• N – Includes all products on the report regardless of sell matrix.</td></tr>
<tr><td>Data Source</td><td>Enter a data source for each column to include on this report.
You must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet. For more information, see Defining Data Sources and Columns for Price Sheets.</td></tr>
</table>

Field	Description
Select Reorder Pad and Override	Enter **Y** only if both the **Select from Reorder Pad** field and **Only Cust Specific Overrides** fields are set to **Y**. If this field is set to **Y**, the system checks to see if an item is in the Reorder Pad, or has a customer specific override, and includes it if either is true. If this field is not flagged, and the **Select from Reorder Pad** field and **Only Cust Specific Overrides** fields are flagged, the system first checks the Reorder Pad, and then it checks the customer part number. If it exists in the Reorder Pad and the **Only Customer Specific Overrides** field it is included in the list
Only Price Changes	Enter **Y** to include products who's dollar amounts change between the As of Date and the Future Date. Price changes ca be further filtered by using combinations of the following fields: • **Respect Print Flag** • Select from Reorder Pad • Only Customer Specific PNs • Select Reorder Pad and Override This field is dependant upon the inclusion of at least one of the following data sources: • CUS SPEC • BASIS# • COGS • CUST COMM • DLFT COST • DFLT LIST • LIST GP% • CUST GP% • COST OVRD For more information about data sources, see Defining Data Sources and Columns for Price Sheets.

3. Use the following hot keys, as needed:

Hot Key	Description
Print	Runs the report and sends it to the printer and the Hold file.
Hold	Runs the report and sends it to the Hold file to await further action.
Opts	Select one of the following: • **Scheduling** – Schedule the running of the report. • **Faxing** –Fax a copy of this report. • **User Defined Heading** – Use the Heading prompt to assign your own heading to the report. • **Forwarding** – Forward a copy of this report to other users. • **Windows Direct** – Send the report to a shared UNIX folder. • **Reporting Server** – Displays a list of the servers on which the report can be run. This option requires the Hot Standby companion product.

Hot Key	Description
PrcL	Assign price lines to include on the price sheets. You can save the lists for future use. If you leave this blank, the system includes all price lines assigned to the customer. For more information, see Creating a Price Line List for Reports. The system ignores settings on this screen if **Only Custs w/Assigned Lines** is set to **Y**, price lines specified on this screen are ignored.
Addl	Complete the following fields to set additional price sheet parameters: • **Only Fixed Pricing** – Enter **Y** to limit the price sheet to select only customers that have fixed pricing (price formulas that start with $). • **GP Range From and GP Range To** – Enter a gross profit range to include only customers with a gross profit that falls into that range. Using these fields allows you to print the price sheet for only customers with margins less than or more than what you specify.
Delete	Deletes the price sheet template for the work ID. The system prompts to confirm the deletion.
Download	Reformats the price sheet report parameters in text-based format for downloading to a PC or floppy disk for exporting to another program. For example, reformat an Excel spreadsheet to give to a customer, so the customer can provide price lists to his/her customers.
Status	Limit the list of products on the price sheets to only those assigned a certain status, for example, stock, nonstock, or miscellaneous charges on the product record.
Sell Grp	Limits the products in the price sheets to those assigned to the sell groups defined.
Multi	Select multiple customers or sales people while in those fields.

Note: To delete old price sheet formulas in the Eclipse Product File use the Rebuild Price Sheet/Discount Class Cache Utility. For example, if a vendor gives you disks with new price sheets and discount classes, run this utility to delete the old price sheets and discount classes in your Eclipse Product File.

4. Press **Esc** to save your changes and exit the screen.

Defining Data Sources and Columns for Price Sheets

Determine the data sources that displays on a printed price sheet. The system predefines data sources, and you must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet.

To define data sources and columns for a price sheet:

1. From the **Other > Prc Upd** menu, select **Print Price Sheets** to display the Print Price Sheets screen.
2. Enter the necessary criteria for Generating Price Sheets.
3. In the **Data Source** field, enter a data source for each column to include on this report. Data Sources Available:

Data Source	Description
LINEBREAK	Inserts a line break and starts printing the following columns of information on a new line. The columns after the *LINEBREAK* print on the next line down.
3M SQTY	Prints the quantity sold in the last three months to the customer entered on the price sheet.
ATTB#	Prints the value in the product file assigned to the attribute number that you enter. You must know the dictionary layout of the product file to know what value you are pulling. Enter the attribute number next to the number sign (#), before moving to the next field. See Dictionary Overview for more information.
AVG COST	Prints the current system-calculated average cost for the product in inventory at the branch.
BASIS#	Prints the price that corresponds to the local basis name in the line provided, counting down from the top. Enter the basis number next to the number sign (#), before moving to the next field.
CLS#	Enter the class price for the products to include on the price sheets. This class prices the items as if the customer were assigned to that price class. Enter the class number next to the number sign (#) before moving to the next field.
COGS COST	Prints the price assigned on the Product Price Sheet Maintenance screen to the local basis name that is assigned to the COGS COST global basis name for the product's price line.
COMM CODE	Prints the commodity code assigned to the product on the Product Maintenance screen.
COST OVRD	Prints any cost override associated with the product. The column is blank if there is no override cost.
CUST COGS	Prints overridden cost of goods sold cost from the matrix cell for the customer. If an override does not exist on the matrix cell for this customer, the report displays the value found in the basis that is pointing to the global basis COGS-COST in Price Line Maintenance. Use this option only for internal reporting.

Data Source	Description
CUST COMM	Prints overridden commission cost from the matrix cell for the customer. If an override does not exist on the matrix cell for this customer, the report displays the value found in the basis that is pointing to the global basis COMM-COST in Price Line Maintenance. Use this option only for internal reporting.
CUST GP%	Prints gross profit percent that is found based upon the matrix for the customer. The system uses the cost of goods sold cost when calculating the GP%. Use this option only for internal reporting.
CUST ID	Prints the customer's internal ID number, which identifies the customer to the system.
CUST PN	Prints the customer-specific part number if one has been assigned to an item that is included on the price sheet.
CUST SPEC	Prints the customer-specific price, which is the customer's normal price for the as-of date of the report.
DESC2-6	Prints lines two through six of the product description.
DESC LINE 1	Prints the first line of the product description, unless DESC.WORD.1 comes before DESC1. Then DESC1 prints everything after the first word in the first line of the product description.
DESC LINE 2	Prints the second line of the product description. If that line is blank, the column contains a blank line.
DESC LINE 3	Prints the third line of the product description. If that line is blank, the column contains a blank line.
DESC MULTI	Prints all lines of the product description.
DESC WORD 1	Prints the first word in the first line of the product description. If DESC WORD 1 comes before DESC LINE 1, DESC LINE 1 prints everything after the first word in the first line of the product description.
DFLT COST	Prints the price assigned on the Product Price Sheet Maintenance screen to the local basis name that is assigned to the DFLT COST global basis for the product's price line.
DFLT LIST	Prints the price assigned on the Product Price Sheet Maintenance screen to the local basis name that is assigned to the DFLT LIST global basis for the product's price line.
DISC CLASS	Prints the discount class assigned to the product on the Product Price Maintenance screen.
EXPIRE DATE	Prints the expiration date of the corresponding pricing matrix cell that is currently in effect for the product.
HEADING	Prints the heading as a column value in the report. For example, if the heading were 10 underlines, it prints the underlined area to be used as a place to write something, such as, DATE__________
ID	Prints the system's internal product number.
KEYWORD 1	Prints the first word, delimited by a space, that is in the **Additional Key Words** field in the product record. If that line is blank, the column contains a blank line.
KEYWORD 2	Prints the second word, delimited by spaces, that is in the Additional Key Words field in the product record. If that line is blank, the column contains a blank line.

Data Source	Description
LAST COST	Prints the last amount, purchase price, or COGS COST, paid for the product at the branch.
AVG COST	Prints the current system-calculated average cost for the product in inventory at the branch.
LAST SALE DT	Prints the date the product was last sold to the customer entered on the price sheet.
LAST SALE PRC	Prints the price the product was last sold to the customer entered on the price sheet.
LIST DISC	Prints the difference between the price the customer is being charged and the LIST PRICE.
LIST GP%	Prints the gross profit percent found using the LIST price of the product to the cost of goods sold cost for the product. Use this option only for internal reporting.
PRC LINE	Prints the name of the product's price line.
QTY SOLD	Reports the quantity sold for a specified date range. You can include the QTY SOLD data source only if you set the **Select from Reorder Pad** field to **Y**.
SELL GROUP	Prints the name of the sell group, from the Price Group Maintenance screen, in the product's branch.
SORT CODE	Prints the sort code assigned to the product on the Product Maintenance screen.
SPACE	Inserts a blank column of the defined width.
U/M DESC	Prints the descriptive unit of measure defined in the **Per UM** field on the Product Price Sheet Maintenance screen, which describes the unit of measure. For example, box or each.
U/M QTY	Prints the quantity defined in the **Per Qty** field on the Product Price Sheet Maintenance screen that is assigned to the unit of measure entered in the **Per UM** field on the same screen. For example, if the **Per UM** were box, the **Per Qty** might be 12 per box.
UPC	Prints the number in the **Primary UPC** field on the UPC Codes Maintenance screen that is accessed by using the **UPCs** hot key on the Product Maintenance screen.
WEIGHT	Prints the weight assigned to the product on the Product Maintenance screen.
YTD QTY	Prints the total quantity, in the lowest unit of measure, of the item that has been sold out of the branch from the beginning of the fiscal year through the as of date.

4. Press **Enter** after selecting a data source.
5. Complete the following fields as needed:

Field	Description
Heading	Enter the name of the heading to display for each data source. The heading is user-defined up to the width of the column. If you enter a heading that exceeds the width of the column, the system truncates it to fit the column width.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Jus</td><td>Enter the justification you want for the column:
• L (left) – Starts printing the entry at the left side of the column. Use this setting if the data is alphabetic.
• R (right) – Starts printing the entry at the right side of the column. Use this setting if the data is numeric.

Note: If you enter L in this field and move the cursor to the Pad field, an entry is required in the Pad field before exiting that field to ensure blank spaces display appropriately.</td></tr>
<tr><td>Wdth</td><td>Enter the number of characters for displaying data in each column. The width of the column depends on the remaining number of character spaces available. Total number of characters available in portrait mode is 80. Total number of characters available in landscape mode is 100.</td></tr>
<tr><td>Pad</td><td>Enter one of the following:
• Y (periods) – Fills the blank spaces in a column with periods before or after the data, depending on the justification selected.
• Z (zeros) – Fills the blank spaces in a numeric field with zeroes.
• N (blank spaces) – Leaves the blank spaces in a column blank.</td></tr>
<tr><td>Decm</td><td>Enter the number of decimal places for a numeric entry. You cannot access this field if the Jus field is set to L.</td></tr>
<tr><td>Comma</td><td>Enter one of the following
• Y – Inserts a comma in numeric entries greater than 999.
• N – Does not insert commas in numeric entries.
You cannot access this field if the Jus field is set to L.</td></tr>
<tr><td>0 Sup</td><td>Enter one of the following:
• Y – Leaves a numeric field blank if the entry is zero.
• N – Prints a numeric entry of zero.
You cannot access the 0 Sup field if the Jus field is set to L.</td></tr>
</table>

6. Press **Esc** to save your changes and exit the screen, or for information about running the utility, see Generating Price Sheets.

Buy and Sell Group Overview

Although you can price products individually, most products are more easily priced when arranged in groups. Define buy and sell groups, then assign products to the groups. Use these groups when you create buy and sell matrix cells.

You assign buy groups and sell groups to products by branch. When a branch level transaction occurs, the branch-specific group is used to determine the correct price.

Use buy and sell groups to identify groups of products that share the same pricing rules. This grouping can reflect vendor classifications of products for costing purposes, and in such cases sell groups can be the same as discount classes. You can also group products according to the sales velocity or ranking of the item, which means you would group your A items together, your B items together, and your C items together. Use this approach when the selling price is associated with its relative velocity pricing. Assign a different multiplier to slow-moving items to ensure a greater profit from those items.

Use buy groups to identify a group of products that share the same costing rules. Group products into buy groups when you have multiple primary vendors for a group of products, or when complex pricing relationships exist between your primary vendors and the product groups that you purchase from them, such as quantity breaks.

Pricing Group Guidelines for Matrix Cells

The system provides ways of grouping customers and products for your organization. Use these groups to determine costs and prices when buying and selling products. Anyone in your organization who buys, sells, or does accounting needs an understanding of the following group concepts for pricing:

- Customer Price Classes
- Product Groups
- Buy Groups and the Matrix Cell
- Sell Groups and the Matrix Cell

Customer Price Classes

Customers are categorized by price class and customer type. Set up these categories in the **Valid Customer Price Classes** and **Default Customer Price Class** control maintenance records. Grouping customers by price class lets you give your best customers your best prices.

Designate customer types to give promotional pricing to a specific type of customer, such as plumbers. Define the customer type and default price class from the customer record. For example, you might define customer types as large contractor, small contractor, electrical, industrial, and retail. You can give all electrical customers a discount this month on certain products.

Product Groups

Categorize products by product buy and sell groups to apply similar pricing to similar products. These product groups can include all or part of the products in a price line. For example, In the Sylvania price line, miniature lamps could be in one sell group, and fluorescent lamps another. Product groups are defined in Price Group Maintenance.

You can also group products according to the sales velocity, or ranking, of an item. For example, group your A items, your B items, and your C items. Use this approach when the selling price of the item is based on its relative velocity. Slower moving items have a different multiplier than the multiplier for faster-moving items.

Buy Groups and the Buy Matrix

Create matrix cells in Quick Buy Matrix and Buy Matrix Maintenance using buy groups and a formula to help determine the costs of products from your vendors.

For example, you can purchase lamps from more than one vendor. The following table shows matrix set up for four vendors, listed across the top, and three buy groups, listed on the left. Each table cell represents one buy matrix cell. When you purchase lamps from the FLU-LMP group from Phillips Manufacturing, the system selects the matrix cell assigned to that vendor and group. In this example, the formula for the florescent lamps is TRADE -23%.

Manufacturers: **Buy Groups:**	**Sylvania Mfg.**	**Phillips Mfg.**	**General Electric**	**Seagull Lighting**
MIN-LMP Miniature Lamps	TRADE -20	TRADE -21	TRADE -20/2	TRADE -20
FLU-LMP Fluorescent Lamps	TRADE -25	TRADE -23	COL3 -20	LIST-50/10
MISC-LMP All Other Lamps	TRADE - 25	TRADE -26	TRADE -26/5	TRADE -25.6

The system requires buy groups for the following reasons:

- To maintain multiple pricing arrangements from multiple vendors on the same group of products.
- To have multiple pricing arrangements from a single vendor on the same group of products, such as quantity breaks.

When you have a single primary vendor you can maintain costing through the price sheet and price sheet discount classes instead of a buy matrix cell.

Sell Groups and the Sell Matrix

Create matrix cells in Quick Sell Matrix and Sell Matrix Maintenance using sell groups and formulas to help determine the prices of products for your customers.

For example, lamp prices vary for different customer price classes. The following table shows matrix cells set up for four customer price classes, listed across the top, and three sell groups, listed on the left. Each table cell represents one sell matrix cell. A row intersects with a column at a matrix cell, which contains the formula the system uses to price the product. When you sell lamps from the SYL-FLR group to a customer assigned price class 2, the system selects the matrix cell assigned to that customer price class and group. In this example, the formula for the florescent lamps is REP-COST *1.8 (replacement cost plus 8%).

Sell Group	Customer Price Class 1	Customer Price Class 2	Customer Price Class 3	Customer Price Class 4
SYL-MIN Miniature Lamps	REP-COST x 1.8	REP-COST x 1.7	REP-COST x 1.6	REP-COST x 1.5
SYL-FLR Fluorescent Lamps	REP-COST x 1.9	REP-COST x 1.8	REP-COST x 1.7	REP-COST x 1.6
SYL-COOL Cool White Lamps	REP-COST x 2	REP-COST x 1.9	REP-COST x 1.8	REP-COST x 1.7

Assigning Group IDs to Buy or Sell Groups

Buy group can be a subset of a price line used with the buy or sell matrix, or can exist independently from a price line. Define buy and sell group IDs in Buy / Sell Group Maintenance and assign the groups to products in Product Maintenance.

A sell group is a set of products that share a common pricing scheme. Use a sell group ID to group items together when you want to use the same pricing formula to calculate the selling price assigned in the sell matrix.

A buy group is a set of products that share a common costing scheme. Use a buy group ID to group items together when you want to use the same pricing formula to calculate the buying price assigned in the buy matrix.

Naming Groups

When you assign a buy or sell group to products or to matrix cells, the group ID indicates what the group contains. Give meaning to a group ID by starting the name with the price line or buy line ID followed by characters that define the subset.

For example, if you have multiple sell or buy groups associated with a price line, avoid a pattern of group names that starts with the price line ID by itself, then is followed by groups that use that price line ID as a prefix, as shown in the following table:

Use this naming method	Do not use this method
SYL-GEN	SYL
SYL-LMP	SYL-LMP
SYL-WHT	SYL-WHT
SYL-MISC	SYL-MISC

With the second naming pattern, if you enter **SYL** as a group ID, SYL displays in the field, instead of giving you a choice of all the SYL groups. With the first pattern, if you enter **SYL**, all the SYL groups display, so you can choose from the complete SYL group.

Creating Buy and Sell Groups

A product group is a set of products that share a common pricing scheme.

Create price lines and buy lines before defining buy groups and sell groups. If you try to define a buy group or sell group before defining your price lines, the system prompts you to create a price line on the fly. After creating price lines and buy lines, work out lists of the buy and sell groups on paper that will be part of each buy line and price line. Refer to the list when creating buy and sell group IDs in Buy/Sell Group Maintenance.

To create a buy or a sell group:

1. From the **Files > Price Maintenance** menu, select **Buy / Sell Group** to display the Buy/Sell Group Maintenance screen.
2. In the **Group ID** field, do one of the following:
   - Press **F10**, select **New**, and enter the new group ID, up to 20 characters long. For more information, see Assigning a Group ID to a Buy or Sell Group.
   - Press **F10** and select from a list of existing buy or sell groups.
3. In the **Description** field, enter a description, up to 25 characters long, of the buy or sell group. For example, the type of products and the price line they come from.
4. In the **Price Line** field, enter the price line in which to categorize this buy or sell group.
5. In the **Rep Product** field, enter the representative product for each sell group if necessary.
6. In the **Grp Prc UoM** field, enter the unit of measure to use when setting up a matrix cell with quantity breaks for this sell or buy group when you assign the G (Group Quantity Break) matrix type in Sell or Buy Matrix Maintenance.
7. In the **Group Type** field, press **F10** and assign a category for which you might run reports on this buy or sell group, for example, Plumbing. Group types are defined in the **Valid Buy/Sell Group Types** control maintenance record.
8. In the **Combo Group** field, enter the name of the combination group if this buy or sell group is part of a combination group.
9. In the **Combo Contributor** field, enter one of the following if items in this group are part of a combination group:
   - **Yes, add group's qtys into total Combo break and use Combo pricing** – Adds the group's quantities to the total Combo break, and uses Combination (type C matrix cell) pricing.
   - No, do NOT add group's qtys into total Combo break but use Combo pricing – Does not add the group's quantities to the total Combo break, but uses Combination (type C matrix cell) pricing.

- Qtys are to be added to total Combo break but do not use Combo pricing – Adds quantities to the total Combo break, and does not use Combination (type C matrix cell) pricing.

For example, you have a customer who gets quantity break pricing for all copper products, except on small copper pipe hangers, which cost very little. The quantity break level is 600, and the customer orders 500 elbows and 1000 copper hangers. Enter **No, do NOT**... in this field to keep those 1000 hangers from contributing to the quantity that determines the break level. This entry ensures that the customer does not earn a quantity break for a lot of inexpensive items.

10. Use the following hot keys, as needed:

Hot Key	Description
Delete	Deletes the buy/sell group. The system prompts you for confirmation.
Rebate	Apply rebates to products in a sell group.

11. Press **Esc** to save changes and return to the Price Sheet Entry screen.

Changing Buy and Sell Group IDs

Use the Change Buy/Sell Group ID utility to replace an existing buy or sell group name with a new group name everywhere that group is used throughout the system. This change affects all effective matrix cells using the old group name, the product file of items associated with that group name, and any items on open orders that are priced using the old group name.

By running this utility, you create a new buy and/or sell group. The system creates a maintenance log record in the product file documenting the change. Any group matrix cell currently being used with the old sell and/or buy group name expires and the system creates a new matrix cell with the new sell and/or buy group name.

In addition, the system changes the effective date of the new matrix cell to the current day. The expire date of the old matrix cells are the day before the existing expire date. The expire date of the new matrix cell remains the same as the old matrix cell. The old matrix cell's expiration date becomes the date before the day the utility was run last. For example, if you run the utility today, the old matrix cell's expiration date becomes yesterday's date. The system creates a maintenance log record for the old matrix cell. Any line item on existing open orders using the old matrix cell are updated with the new matrix cell.

Important: The system does not remove the old buy or sell group from the price group file in the system. The old group remains along with any matrix cell that was using the sell group, but the sell matrix is expired. If you want to remove a group, you must delete it off each product.

To change a buy or sell group ID:

1. From the **Files** > **Price Maintenance** menu, select **Change Buy/Sell Group ID** to display the Change Buy/Sell Group ID screen.
2. In the **Current Group ID** field, enter the group name you want to change.
3. In the **New Group ID** field, enter the new group name.
4. Use the **Begin** hot key to change the group ID throughout the system.

See Also:

Assigning Group IDs to a Buy or Sell Groups

Combination Group Pricing Details

Combination groups offer quantity break discounts on the combined total of items bought from all sell groups included in the combination group.

For example, when a customer places an order, the system determines if any of the items are in sell groups that belong to a combination group. Combination group items are added together and the system determines if the total quantity qualifies for quantity break pricing. If the quantity meets a break point, on the matrix cell, the system looks at the matrix type to determine which items qualify for quantity breaks.

The examples in this section explain how the system determines quantity breaks for the following:

- Combination group matrix cells that all have the matrix type C – combination quantity break.
- Combination group matrix cells that do not all have the matrix type C – combination quantity break.

When Combination Group Matrix Cells are All Type C

The table below shows the combination group DELTA, which contains sell groups DELTA1, DELTA2, and DELTA3. All the sell groups are combined with customer price class 1 in sell matrix cells. These matrix cells are all C-type (combination quantity break). The combination group has quantity breaks defined at 10 ea (each), 20 ea, and 30 ea, with pricing formulas for the matrix cells defined.

Customer Price Class 1 Sell Group DELTA1 - Type C		**Customer Price Class 1 Sell Group DELTA2 - Type C**		**Customer Price Class 1 Sell Group DELTA3 - Type C**	
Qty Brk	**Formula**	**Qty Brk**	**Formula**	**Qty Brk**	**Formula**
<10	LIST x 1.0	<10	LIST x 1.0	<10	LIST x 1.0
10	LIST x .90	10	LIST x .85	10	LIST x .75
20	LIST x .80	20	LIST x .75	20	LIST x .65
30	LIST x .70	30	LIST x .65	30	LIST x .55

A class 1 customer places an order for the following:

- Four items from DELTA1
- Five items from DELTA2
- Two items from DELTA3

Though the customer does not reach the first quantity break (10), the total number of items ordered (11) exceeds the quantity break for the combination group.

The system calculates the formula in the class/group matrix cells at the quantity break level (10), shown shaded in the table above, and determines the price for the items in each group, itemized as follows:

- Sell group DELTA1 – Price = 4 at LIST x .90
- Sell group DELTA2 – Price = 5 at LIST x .85
- Sell Group DELTA3 – Price = 2 at LIST x .75

When Combination Group Matrix Cells are not All Type C

The table below shows the combination group DELTA, which contains sell groups DELTA1, DELTA2, and DELTA3. All the sell groups are combined with customer price class 1 in sell matrix cells:

- Class 1/sell group DELTA1 and class 1/sell group DELTA2 are C-type (combination quantity break) matrix cells.
- Class 1/sell group DELTA3 is an N-type (no quantity break) matrix cell.

The combination group has quantity breaks defined at 10 ea (each), 20 ea, and 30 ea, with pricing formulas for the matrix cells defined.

Customer Price Class 1 Group DELTA1 - Type C		Customer Price Class 1 Group DELTA2 - Type C		Customer Price Class 1 Group DELTA3 - Type N	
Qty Brk	**Formula**	**Qty Brk**	**Formula**	**Qty Brk**	**Formula**
<10	LIST x 1.0	<10	LIST x 1.0	<10	LIST x 1.0
10	LIST x .90	10	LIST x .85	10	
20	LIST x .80	20	LIST x .75	20	
30	LIST x .70	30	LIST x .65	30	

A class 1 customer places an order for:

- Four items from DELTA.
- Five items from DELTA2.
- Two items from DELTA3.

The total number of items ordered (11) in this combination group exceeds the first quantity break, but eligibility of items receiving quantity break pricing works as follows:

- For the nine items in sell groups DELTA1 and DELTA2 the matrix cell is a type C, so these products receive quantity break pricing.
- For the two items ordered in sell group DELTA3 the matrix cell is type N, so these items do not receive quantity break pricing.

The system then calculates the formula in the class/group matrix cells at the quantity break level (10), shown shaded in the table above, and determines the price for the items in each group, itemized as follows:

- Group DELTA1 – Price = 4 at LIST x .90
- Group DELTA2 – Price = 5 at LIST x .85
- Group DELTA3 – Price = 2 at LIST x 1.0

Combining Sell Groups for Quantity Break Pricing

Sell groups in a combination group must reference the same price line in Buy/Sell Group Maintenance. This reference ensures that the price basis assigned to a price line is the same for all of the combination group's sell groups.

For example, when you create a C-type (combination quantity break) matrix cell for each sell group in the combination group, the system references the price basis and pricing formulas assigned to the matrix cell and calculates the price for items in the group.

Create combination groups and assign sell groups to the combination groups in one of the following ways:

- While creating buy groups and sell groups in Buy/Sell Group Maintenance, access Combination Group Maintenance by entering a name for a new combination group to create the combination group on the fly.
- Create all of your buy and sell groups in Buy/Sell Group Maintenance, then go to Combination Group Maintenance and create the combination groups. Return to Buy/Sell Group Maintenance to assign the sell groups to the combination group.

To combine sell groups for quantity break pricing:

1. Create buy and a sell groups as described in Creating Buy and Sell Groups.
2. Depending on your location in the system, do one of the following to display the Combination Group Maintenance screen:
   - From the **Files > Price > Buy/Sell Group** menu, select **Buy/Sell Group**. On the Buy/Sell Group Maintenance screen, enter the necessary information to create the buy or sell group. Then enter a combination group ID in the **Combo Group** field.
   - From the **Files > Price Maintenance** menu, select **Combination Group**.
3. Complete the following fields, as needed:

Field	Description
Line	Enter the price line ID that contains the sell groups for the combination group. Press **F10** to select from a list. • If you enter a new price line ID, the system displays the Price Line Maintenance screen, allowing you to set up the price line. • If you enter an existing price line ID, the system displays that ID in the **Combo** field. Use this ID as a prefix for the combination group ID. This prefix ensures an association between the combination group and the price line.
Combo	Enter the name of the combination group, up to nine characters long.
Description	Enter a description, up to 25 characters long, for the contents of the combination group.

Field	Description
Split Qty Pricing	Enter one of the following: • **Y** – Activates split quantity pricing for the combination group. • **N** – Does not activate split quantity pricing for the combination group.
Grp UM	Enter a common unit of measure for defining quantity breaks for the items sold as part of the combination group. Sell groups in a combination group can have different units of measure for pricing, but they must have a common combination group unit of measure. Use one of the units of measure defined for the price line, # (weight), or $ (dollars). **Note:** The combination group unit of measure overrides the sell groups unit of measure.
QB1-QB5	Set up your definitions for quantity breaks. When you enter a number, the system appends the combination group unit of measure to the number. When you create a C-type matrix cell for each sell group in the combination group, the system displays the quantity breaks and unit of measure defined on the Sell Matrix Maintenance screen.

3. Use the following hot keys, as needed:

Hot Key	Description
Recall	Preserves the entries in the **Line** and **Combo** fields and changes the remaining fields back to their original settings.
Delete	Deletes the combination group. The system prompts you for confirmation.

Quote Pricing Overview

Use Quote Maintenance to define a quote for price groups or products. The quote is selectable during order entry on the Pricing Override screen, and overrides other pricing rules.

Quotes can be any or all of the following:

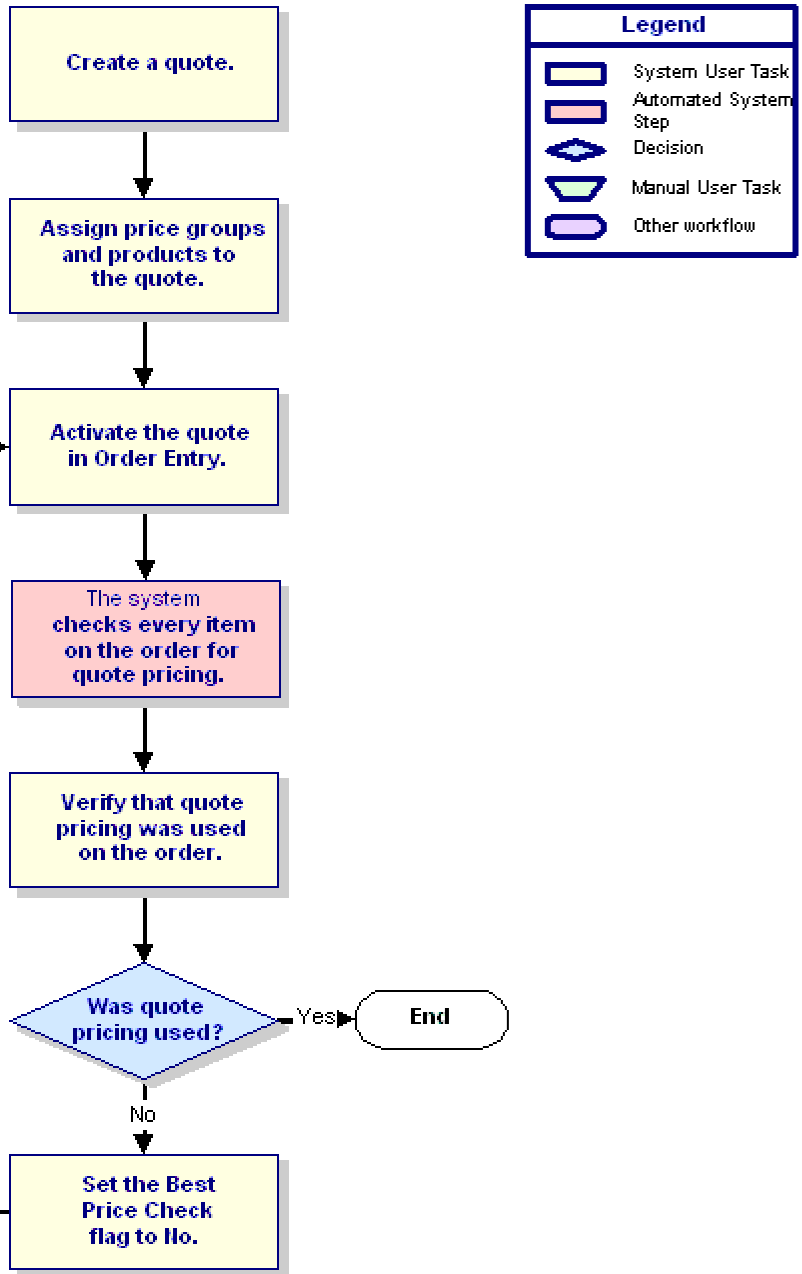
- Assigned to any customer. Notify customers of a special price quote and instruct them to relay the quote name or number to the order taker.
- Assigned an effective date and an expiration date. Once the expiration date is reached, the quote is not offered during order entry.
- Assigned an original quantity and a remaining quantity for each product assigned to the quote. The amount can be in units, pounds, load factor, or dollars worth of product. When the remaining quantity reaches zero, the quote pricing expires. If a customer orders more than the remaining quantity of a product on a quote, normal pricing goes into effect for the number of items over the remaining quantity.

The Quote Process

1. Create a quote.
2. Assign price groups and products to the quote.
3. Activate the quote pricing for the customer during order entry.

   The system checks the quote for pricing for every item entered on the order. The quoted price for a price group or product overrides all other matrix cells in the pricing matrix hierarchy as long as the best price check is not active.
4. Verify that quote pricing was used on the order.

Quote Pricing Workflow



Creating Quote Pricing

Use Quote Maintenance to offer limited time, special pricing to customers.

When you create a quote, inform customers of the special pricing. The customer relays the quote name or number to the order writer, who selects the quote during order entry.

The quoted price for a price group or product overrides all other matrix cells in the pricing matrix hierarchy as long as the best price check option is inactive. Normal pricing goes into effect if a quote matrix cell for the product is not found.

To create a quote in pricing:

1. From the **Files > Price Maintenance** menu, select **Quote Maintenance** to display the Quote Maintenance screen.
2. In the **Quote#/New** field, do one of the following:
   - **Give the quote a name ID –** Enter a name for the quote, press **Enter**, and then select **New**.
   - **Give the quote a number ID –** Type **new**. The system enters the next available number preceded by "Q" to identify the quote.

   Note: To display an existing quote, enter the quote ID, or press **F10** to select a quote.
3. In the **Expire Date** field, enter the date the quote expires. You cannot select this quote from order entry after the expiration date. This expire date can differ from the expiration date in the matrix cells for the products or groups.

   A quote might expire earlier than this date if you have activated expire quantity on the matrix cell, and the quantity reaches zero.
4. In the **Description** field, enter a description of the quote, such as "Sanyo Air Conditioner Special," or customers who benefit from the quote, such as "Plumber Special."

   You can use as many as 99 lines of 30 characters each to describe the quote. This description displays with the quote ID when you press **F10** from the **Quote#/New** field.
5. Do one of the following:
   - Press **Esc** – Makes the quote pricing available to all customers.
   - Use the **Cust/Vend** hot key – Restricts the quote pricing to the customers listed. Enter the name of each customer to benefit from the quote, and press **Enter** after each entry. Press **Esc** to save the list.
6. To delete a quote use the **Delete** hot key. At the prompt, enter **Delete** to verify the request.
7. Press **Esc** to return to a blank Quote Maintenance screen.

Assigning Price Groups and Products to Quotes

Use Sell Matrix Maintenance to assign price groups or products to a quote. By setting up a quote matrix cell for products or groups, with best price check inactive, the system selects the quote pricing without checking further in the pricing matrix hierarchy. This set up ensures that the price offered in the quote is used on the order.

To assign quotes to multiple matrix cells see Creating Matrix Cells in Quick Sell Matrix Maintenance.

To assign price groups or products to a group:

1. On the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. In the **Typ/Qte** field, enter the quote ID, or press **F10** to select from a list of IDs.
3. Enter a value in one of the following fields:
   - **Group –** Enter a sell group ID for matrix cells that are not product specific. Enter **All** to include all sell groups in the matrix cell.

   Note: If you use **All**, you can use only global basis names in the **Basis** field because All is not a sell group in a price line to which local basis names have been assigned.

   - **Prod –** Enter a product ID to create a product-specific sell matrix cell.
4. In the **Br/Tr** field, enter one of the following:
   - **A branch ID –** Includes that branch in the matrix cell.
   - **DFLT** (default) **–** Includes all branches in the matrix cell.
5. Select **NEW** at the prompt.
6. In the **Effective** field, enter the date the matrix cell becomes effective.

   Note: To display an existing matrix cell, enter the effective date for that cell.
7. In the **Expires** field, enter the date the matrix cell expires.
   - If the matrix cell is in effect for a quantity, the cell expires if the quantity of the item reaches zero before the expire date arrives.
   - If a matrix cell expires and there is not a new one to take its place, the system searches the pricing matrix hierarchy until it finds the cell to use when pricing a product.
8. In the **Exp Qty: Original** field, enter the product quantity available at the quote price.

   The system populates the **Exp Qty: Remaining** field with the same quantity. As this item is purchased at the quoted price, the amount displayed in the **Remaining** field reduces.

The quote pricing for the product expires either when the remaining amount reaches zero, or on the quote matrix expire date.

9. In the **Typ** field enter the quantity type. Quantity can be a dollar amount, the product's unit of measure, weight, or load factor.
10. In the **Matrix Type** field, enter a matrix type. Press **F10** and select from the following:
    - **C -** Combo Qty Break
    - **D –** Different Matrix
    - **G –** Group Qty Break
    - **M –** Matrix Qty Break
    - **N –** No Qty Break
    - **O –** Override Cost Only
    - **P –** Product Level Quantity Break
11. In the **Best Price Chk** field, enter **N**. When the system checks a price, it looks only at normal pricing, where quote pricing is at the top of the pricing matrix hierarchy.
12. In the **Basis** field, enter the basis name for this quote.
13. In the **Formula** field, enter the quote pricing formula.
14. Use the **Comment** hot key to add a comment to the quote for easy identification.
15. Press **Esc** to save the quote and return to a blank Sell Matrix Maintenance screen.

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