Using Price Lines and Matrix Cells

Release 8.6.3 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.3 (Eterm) Online Help System

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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.

See Also:

Assigning Products to Buy or Sell Groups

Pricing Basis Fundamentals

Pricing Matrix Hierarchy Details

Buy and Sell Group Overview

Price Line Overview

All products in your product file must have a price line association. Price lines group products for selling, buying, and reporting purposes. Price lines are usually groups of items whose prices are updated at the same time, such as, products in a vendor line, products in a major segment within a vendor line, or products with a unique unit of measure.

Vendors supply you with their own *local basis names*. Local basis names vary from one vendor to the next, depending on location, vendor pricing, and price update information. Map local basis names to the Eclipse *global basis names*. The system refers to the global basis names to maintain standard pricing.

Set up product variables for each price line at the branch or territory level, such as product discounts and monitoring functions.

Determining default units of measure for each price line makes special orders easier to manage for order writers. You can override unit of measure settings at the product level.

Assigning authorization levels to each price basis in a price line restricts user access to pricing parameters as needed for security purposes at your organization. First, assign view levels to each user in your company, then assign a view level to each price basis in the price line.

You can set up rewards for customers who purchase a target dollar amount of selected products in a price line. Assign a points-per-dollar multiplier or percentage at the price line level. The customer is thereby encouraged to buy more products from this price line.

Define a default minimum gross profit percentage for the products in a price line to ensure your profits do not fall below that percentage for any product in the price line.

Define product zones for price lines to restrict bill-to customers from buying products within certain geographic zones. This approves the sale of certain products only in those zones.

You can sort items within a price line alphabetically, numerically, or by like products. Arrange the product list by priority according to how you work with the products.

See Also:

Setup Requirements for Price Lines

Creating Price Lines

Units of Measure Guidelines in Pricing

Creating Price Lines

Create price lines for your products before setting up your product file. Generally, a price line is a group of items whose prices are updated at the same time when the vendor distributes a new price sheet. For example, you can define price lines by:

- Vendor lines.
- Major segments within vendor lines.
- Major commodity lines.
- Sales performance reporting or product ranking.
- Products with unique sets of units of measure.

Within each price line you must determine which local basis names to associate with the price line. The local basis names are then cross-referenced with global basis names.

Before creating price lines, set the following control maintenance records:

- Global Buy/Sell Basis Names – Define global basis names for standard pricing.
- COGS Basis Name – Assign a basis name to your cost of goods sold (COGS).

To create a price line:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. In the **ID** field, enter a price line ID to display that price line, or enter **New** when prompted, and then enter the new price line ID.

   Note: You cannot define a price line ID that has the same name as the ID assigned to an existing product family. This restriction prevents conflict when using the price line or product family search.

3. In the **Description** field, enter a name for the price line describing the type of products in the line and the product's manufacturer or vendor. You can use as many as 35 characters for this entry.
4. Enter the following unit of measure information as needed:

Field	Description
UoM Desc	Enter the abbreviation for the default physical unit of measure (UOM) represented in this price line, such as **ea** (each). Then, on subsequent lines, enter additional default units of measure that pertain to products in this price line, such as "bx" for box, and "ct" for carton, if necessary. **Note:** You can further define the unit of measure on the product record, which overrides those in the price line.

Field	Description
S, P, T, A, and I	Enter an asterisk for each transaction type (**S**, **P**, **T**, **A**, and **I**) used for each unit of measure description: * **S** – Sales Orders * **P** – Purchase Orders * **T** – Transfer Orders * **A** – Inventory Adjustments * **I** – Inquiry/Inventory For example, if you buy and sell in box (bx) units, enter an asterisk in both **S** and **P** columns for the bx UOM description. Units of measure set in Product Maintenance override these settings. For more information, press Esc to exit this description, and then press F11 to display the screen-level help.

5. In the **Basis Names** field, enter the local basis names for this price line.
6. In the **UoM** (unit of measure) field, enter the default unit of measure for the price per unit of measure (UM) for this basis name. This entry is the default for the **Per UM** field in the product record of products in this price line. You can change the per unit of measure at the product level, if necessary.
7. In the **Curr** field, do one of the following to define the base currency used to price products in this price line:
   - **Leave the field blank** – Uses the base currency defined in the Base Currency For Exchange Rates control maintenance record. You can maintain costs and prices for a price line in the base currency, a foreign currency, or a mixture of both.
   - **Press F10 and select a foreign currency** – Displays the currency next to the corresponding basis name on the Product Price Sheet Maintenance screen where values are assigned to basis names. Currencies are defined in the **Valid Foreign Currencies** control maintenance record.
8. In the **VLvl** (view level) field, enter the user view level (0-9) according to how restrictive you require access to the price or cost associated with this basis name.

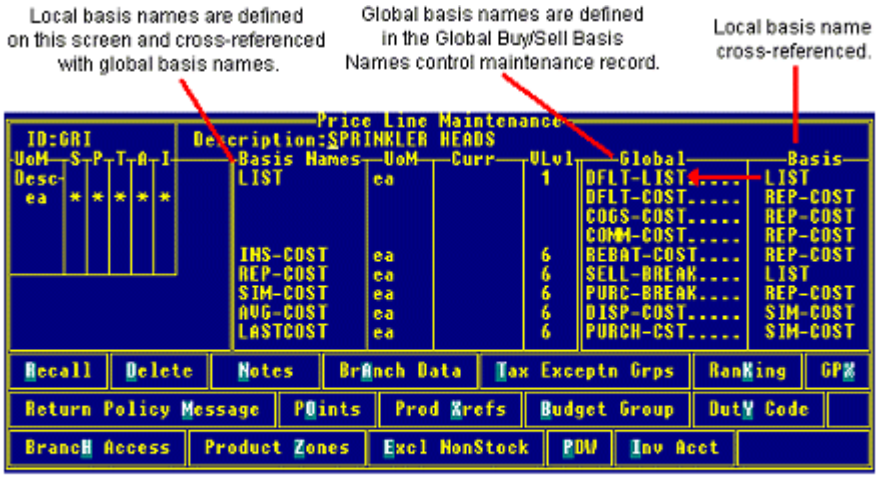
   This field works with the OE.PRICE.VIEW.LEVEL authorization key assigned to a user. The higher the number, the more restrictive the access. The highest level for a selling price is typically 5, with levels 6-9 assigned to costs.

   You are allowed to edit a basis field whose view level is lower than the level assigned to the authorization key. For example, if you have an authorization of 9 entered for the OE.PRICE.VIEW.LEVEL authorization key, you can edit all cost and price basis fields. If you have an authorization of 5 entered for the authorization key, you can edit only those basis fields that have a view level of 5 or lower.

   Note: If a view level of zero (0) is assigned to a local cost basis name for a price line, users who have not been assigned the OE.PRICE.VIEW.LEVEL authorization key can view that cost basis and corresponding cost for any product assigned to the price line.

For more information, see Restricting User Access to Pricing Information.

9. In the **Basis** field, assign the local basis names to global basis names as shown below.



10. Use the following hot keys as needed.

Hot Key	Description
Recall	Erases all the changes you made to the screen without exiting the screen.
Delete	Deletes the price line, as long as there are no product records assigned to the price line. The system prompts you for confirmation.
Notes	Displays the Edit Note screen where you can store miscellaneous notes about the price line.
Branch Data	Displays data applicable to the branch entered in this field.
Tax Exceptn Grps	Displays the Product Tax Exception Groups screen where you can override the global tax exception groups.
Ranking	Displays the ranking method assigned to the five ranks in each branch for this price line, the date and time of the last ranking, and ID of the user who ran the ranking assignment. Ranks are applied to price lines in the Product Ranking program in Purchasing..
Points	Used to set up the points program, which rewards customers for purchasing a target dollar amount of selected products.
GP%	Applies a minimum gross profit percentage (GP%) to the price line to ensure that profits exceed that amount.
Return Policy Message	Used to write a return policy message for products in this price line. The system displays this message when a user enters a negative order quantity in Sales Order Entry for an item in this price line.
Prod Xrefs	Used to link to a vendor's web site for more information about products in this price line.

Hot Key	Description
Excl Nonstocks	Excludes nonstock items from this price line. If you activate this hot key, "Nonstock Excluded" displays on the screen, and the hot key changes to **Incl Nonstocks**. Assign the OE.NSTK.UM.EDIT authorization key to allow access to change the product unit of measure in the **UM** column on the NonStock Entry screen.
Budget Group	Assigns a default budget group to the price line. Press **F10** to display a list of budget groups. • If a product is not assigned to a budget group in Product Maintenance, the system looks to the associated price line for a budget group. • If a budget group is not assigned to the price line, the product does not belong to a budget group.
Duty Code	Used to assign a duty harmonizing code to the products in this price line.
Product Zones	Used to restrict bill-to customers from buying products within certain geographic zones.
PDW	Used to define a default template for importing product data into the PDW. CATALOG.
Inv Acct	Enter the Inventory Account Override prompt where you assign a G/L override account to the price line. This overrides a normal G/L posting for the products in the price line. Press **F10** for a list of G/L accounts. An account assigned at this prompt displays in the **Inventory Acct Ovrd** column on the Order Entry screen. You can override this entry in Product Maintenance.

11. Press **Esc** to save the price line information and display a blank Price Line Maintenance screen.

See Also:

Units of Measure Guidelines in Pricing

Restricting User Access to Pricing Information

Restricting User Access to Pricing Information

By assigning an authorization level to a basis name, you can restrict user access to pricing information as needed for your organization. Users who have been given authorization can view and change the cost or price associated with those basis names.

For example, one of your vendors gives you a double discount for certain items. You do not want your salespeople to see this discount or to pass it on to the customer, so you do not give them access to view replacement cost.

Assign view levels to each user in your company, then assign a view level to each basis name on the price line.

This page contains the following instructions:

- Assigning a view level to a user
- Assign a view level to a basis name

To restrict user access to pricing information:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. Enter the ID of the user in the **User ID** field.
3. Use the **Auth Keys** hot key to display the Authorization Key / Template Maintenance screen.
4. Scroll to the OE.PRICE.VIEW.LEVEL authorization key.
5. Use the **Assign** hot key to move the authorization key to the **Assigned Keys** column.
6. Press **Tab** to move the cursor to the **Auth Level** column.
7. Assign the user a view level of 1 through 9.

   The higher the number assigned, the more restrictive the access. The highest level for users to edit a selling price is typically 5, with levels 6-9 assigned to users allowed to edit costs.

To restrict user view levels to basis names:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. In the **ID** field, enter the price line name.
3. In the **UOM Desc** field, enter the units of measure for this price line.
4. In the **Basis Names** field, enter the local basis names for the price line.
5. In the **VLvl** field, assign a view level of 1 through 9 to each price basis.

   The higher the number assigned, the more restrictive the access. The highest level for users to access a selling price is typically 5, with levels 6-9 assigned to users allowed to

edit costs. The system assigns the same view level to Landed Avg and Landed Cost (displayed on the Branch Costs screen), which is assigned to AVG-COST.

You can edit a basis field whose view level is lower than the level assigned to the authorization key. For example, if you have an authorization of 9 entered for the OE.PRICE.VIEW.LEVEL authorization key, you can edit all cost and price basis fields. If you have an authorization of 5 entered for the authorization key, you can edit only those basis fields that have a view level of 5 or lower.

Note: If a view level of zero (0) is assigned to a local cost basis name for a price line, users who have not been assigned the OE.PRICE.VIEW.LEVEL authorization key can view that cost basis and corresponding cost for any product assigned to the price line.

See Also:

Pricing Basis Fundamentals

Creating Price Lines

Creating User Records

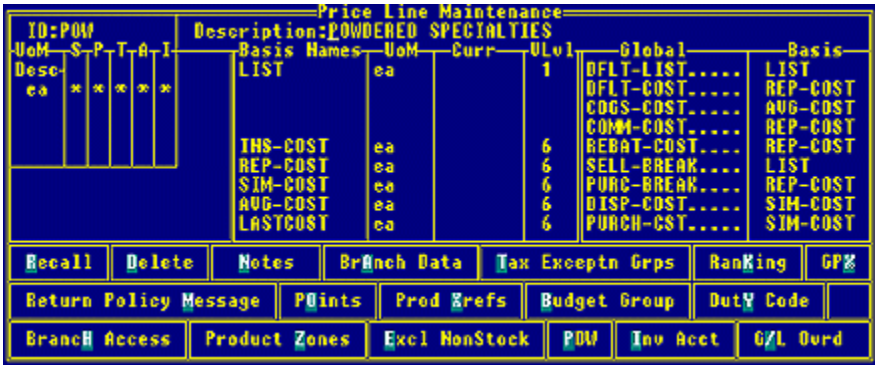
Entering Price Line Branch Data

You can set the following price line criteria specific to each branch:

- **Product tracking** for tracking products in a price line at the branch or territory level, such as one of the following:
  - Individually or by group with lot numbers. For example, spools of wire are sold by the foot. You can track of the remnants of the spool using this feature.
  - For quality by using Detail Lot. For example, a government contract manufacturer buys heat-treated bolts used in aircraft production. These bolts must be tracked for quality and safety requirements.
- **Check product availability** while creating an order for price lines at a branch.
- **Assign a pass-along discount**, a percentage discount from the vendor that you can extend to your customers, takes a percentage off the purchase price of all products in a price line. The system subtracts the discount amount from the price at the time of purchase.
- **Exclude products in a price line from your cycle counts** to make the counting process more efficient for the warehouse employee doing the counting.

To enter price line branch data:

1. From the **Files > Price Maintenance** menu select **Price Line** to display the Price Line Maintenance screen.



2. In the **Price Line** field, enter a price line ID to display the price line.
3. Use the **Branch Data** hot key to display the Price Line Branch Data 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.

   Note: Use the **Find** hot key as necessary to locate a branch that may be in the list, but not in the viewable area.

5. In the **Control Type** column, enter one of the following to define how the system tracks products:
   - **None** – Products are interchangeable and do not need to be individually identified.
   - **Lot** – Products must be tracked individually or by group. When received, record a lot number, so when the item is shipped, it can be identified with that lot number. Lots can have any quantity from zero to the total on-hand amount for the branch. Products with no on-hand amounts do not require a lot number for a location without inventory.
   - **Detail Lot** – Products have been set up for Detail Lot Maintenance, so you can monitor manufacturing quality of inventory at the lot level. Along with manufacturing information, use Detail Lot Maintenance to track the original cost of a product, value of any enhancements, and the current appraised value.

   Note: You can override these settings at the product level.

6. In the **Check Avail** column, enter one of the following for the product:
   - **Y** – Allows users to check product availability in this price line at the branch from order entry. For example, when a requested product or full product quantity is unavailable, the system checks for the due-in date of the next purchase order, or calculates a plenty date.
   - **N** – Does not allow users to check product availability in this price line at the branch from order entry.
7. In the **Pass Disc** column, enter the percentage discount to offer on all the products in this price line. A pass-along discount is a percentage discount from the vendor that you can pass-along to your customers. Pass-along discounts at the product level override 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. For more information, see Creating or Editing a Terms Code.

8. In the **Excl Cycle** field, enter **Y** to exclude the products in this price line from cycle counts; otherwise enter **N**.

   For example, if your warehouse locations are divided by price lines, excluding all but a few price lines from the count provides a reasonable number of items for the employee to count in a day. Another example might be to divide counting price lines between employees.
9. In the **Allow Incr Qty in RF Picking** column, enter one of the following to determine when increases in picking quantity can occur:
   - **No** – Does not allow increases in quantity during picking for products in the price line.
   - **Transfers** – Allows increases to picking quantity for transfers.

- **Sales Orders** – Allows increases in picking quantity for sales orders.
- **All** – Allows increases to picking quantity for all transactions.

Note: You must be assigned the RF.PICK.QTY.INCREASE authorization key at level 3 or higher to increase the quantity for customers that are flagged to allow quantity increases.

10. In the Notify on COGS Chg column, enter Y or N to indicate if you want notification to be sent to users when the COGS changes on an order. The default is No.

    Note: Use the Notify User When COGS Is Updated control maintenance record to indicate which users get notified, such as the order writer or the inside salesperson by branch.

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

See Also:

Price Line Overview

Assigning Points Programs to Products in Price Lines

Use the points program as an incentive for customers to purchase a target dollar amount of selected products. If you have price lines that you offer in multiple points programs, you can assign points programs to these price lines to keep points allocations consistent among the different points programs. For example, encourage customers to qualify for a chance to earn a reward when they accrue 1000 points from buying products in your ABC price line. You can set the system to calculate one point for each dollar spent in that price line. At this rate, a customer must spend $1000 on products in the ABC price line to accrue 1000 points.

To offer a points program to your customers, first define customer points programs in the **Valid Customer Points Programs** control maintenance record, and then assign the CUST.POINTS authorization key to users who will access and edit the Customer Points Maintenance screen and run the Customer Points Report. Then, set up the points programs for each customer who can participate in the program on the Customer Points Maintenance screen. You are not required to assign a points program to price lines or products to use the customer points program.

Points program criteria set at the product level, if any, override any set at the price line and customer levels. Points program criteria set at the price line level override those set at the customer level, unless you set an override on the Customer Point Maintenance screen. In this case, the system uses the points criteria set at the customer level, regardless of any points criteria set at the product or price line level.

To create a points program for a price line:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. In the **ID** field, enter the price line ID to display the price line record.
3. Use the **Points** hot key to display the Points Program screen.
4. In the **Program** field, do one of the following:
   - Press **F10** and select the points program to assign or edit.
   - Leave the field blank to use the points program that was in existence before the multiple points program functionality was added.
5. In the **Calc Method** field, press **F10** and select one of the following to define how the system calculates this point's program's customer points for stock and direct sale items for products sold at the specified branch:
   - **Multiplier** – Multiplies the number in the **Stock** and **Direct** fields by a product's dollar amount to determine the number of points earned for that purchase. For example, if a customer buys two of the same stock product at $10.00 each, and the **Stock** field displays 1, the customer earns 20 points.

     You can enter decimal points in the **Stock** and **Direct** fields if you select this option. For example, enter .5 so that the customer earns half a point for each dollar spent. So, for a $10 purchase, the customer earns 5 points.

- **Percentage** – Multiplies the number in the **Stock** and **Direct** fields as a percentage of a product's dollar amount to determine the number of points earned for that purchase. For example, for an entry of 20 in the **Stock** field, the system multiplies 0.2 times the dollar value, so that the customer earns four points after purchasing $20.00 worth of product.

Note: A points program override set on the Customer Point Maintenance screen overrides points criteria set at the product or price line levels.

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.

   Note: Use the **Find** hot key, as needed, to locate a branch that may be in the list, but not in the viewable area.

7. In the **Stock** field, enter the value to multiply by the dollar amount of stock products purchased from the points program. When a customer buys a stock product, the system multiplies this number or percentage by the dollar amount to calculate the number of points the customer earns.
8. In the **Direct** field, enter the value to multiply by the dollar amount of direct sales products purchased from the points program. When a customer buys a direct sale product, the system multiplies this number or percentage by the dollar amount to calculate the number of points the customer earns.
9. Press **Esc** to save your changes and display a blank Points Program screen.

   You must exit the Price Line Maintenance screen for changes to take affect.

See Also:

Creating Price Lines

Customer Points Overview

Defining the Minimum Gross Profit Percent for Price Lines

Set a minimum gross profit percentage (GP%) for a price line to ensure that your profits do not fall below that amount.

You can assign a minimum required GP% at the following levels:

- Order
- Product
- Price Line
- User

When the user makes a change that affects the GP% for an item in sales order entry, the system looks for a specified minimum, in the sequence listed above. The system stops checking once it finds one setting for minimum GP%, and does not check subsequent settings. If the new GP% falls below the first detected minimum, the system displays a warning that identifies the parameter (product, price line, user) affected by the change and what the minimum GP% for that level is. To override the warning, the user must be assigned the SOE.MIN.GP authorization key.

The **Base Minimum GP% Price Check Off COMM-COST** control maintenance record determines whether you base the minimum GP% price check off COMM-COST or COGS cost.

To define the minimum GP% for a price line:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. In the **ID** field, enter a price line ID to display the price line record.
3. Use the **GP%** hot key to display the Price Line Minimum GP% screen.

   The system populates the ID and the price line description from the price line record.
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.

   Note: Use the **Find** hot key as necessary to locate a branch that may be in the list, but not in the viewable area.
5. In the optional **Order Stock GP%** field, enter a minimum gross profit percent for a stock sale of products in this price line. An asterisk in this field indicates an override for that branch or territory.

   The **Report Stock GP%** field populates with the amount entered in the **Order Stock GP%** field. If you want the Detailed Invoice GP% report to display a different value, change the amount in the **Report Stock GP%** field. For example, you might want the report to show GP stock percentages that fall outside the norm for the price line.

6. In the optional **Order Direct GP%** field, enter a minimum gross profit percent for a direct sale of products in this price line. An asterisk in this field indicates an override for that branch or territory.

   The **Report Direct GP%** field populates with the amount entered in the **Order Direct GP%** field. If you want the Detailed Invoice GP% report to display a different value, change the amount in the **Report Direct GP%** field. For example, you might want the report to show GP stock percentages that fall outside the norm for the price line.

7. Press **Esc** to save the changes and return to the Price Line Maintenance screen.

See Also:

Creating Price Lines

Selling Price Line Specific Products from Branches

Determine if a branch can sell all products in a price line. For example, you may store large pipe at branch 1, but all other products are ordered and on display at branch 2.

If you assign no branches to a price line, all products in that price line are available for sale at your branches. Branch assignments at the product level override branch assignments at the price line level.

If the **Enable Branch Specific Products For** control maintenance record is set to Disabled, the **Branch Access** hot key on the Price Line Maintenance screen is not active.

To sell a price line specific product at a branch:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. In the ID field, enter a price line ID to display the price line record.
3. Use the **Branch Access** hot key to display the Accessible Branches screen.

   The price line description displays in the **Desc** field.
4. Do one of the following:
   - Press **F10** in the **Branches** field and select a branch or territory. Repeat this step until you have added all of the branches where products in this price line are available for sale.
   - Leave this field blank if all branches can sell all products in this price line.
5. Press **Esc** to return to the Price Line Maintenance screen.

   You must exit Price Line Maintenance for changes to take effect.

Assigning Product Zones to Price Lines

Set up product zones to restrict certain customers from purchasing products that are not in their zone. Customers with product zones are limited to purchase only from price lines in their zones. All products are available to customers who have not been assigned product zones.

For example, you have branches in Florida and Texas that stock the same products. Allow Florida customers to purchase products only from price lines defined for sale in Florida. This saves money on shipping and simplifies sales tax regulations.

Before using product zones, complete the following tasks:

1. Define product zones in the **Valid Product Zones** control maintenance record. Otherwise, all products are available for customer sales.
2. Set the **Display Products Within A Customer's Product Zones** control maintenance record to determine whether all products are displayed in Sales Order Entry.
3. Assign the PRD.ZONE authorization key to users who need to view products outside the customer's product zone.
4. Assign product zones to customers.
5. Assign product zones to price lines.
6. Assign product zones to products, if necessary.

Product zone assignments at the product level override assignments set at the price line level.

To assign a product zone to a price line:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line Maintenance screen.
2. Use the **Product Zones** hot key to display the Product Zones entry screen.
3. Press **F10** and select a product zone. Continue this step to assign more than one product zone.
4. Press **Esc** to save the information and return to the Price Line Maintenance screen.

   You must exit Price Line Maintenance for these changes to take effect.

See Also:

Creating Price Lines

Sorting Products in Price Lines

Rearrange the sort sequence of the products in a price line to customize the list for the way you work. Products are initially sequenced within a price line according to the order in which they are created. The sequence you create affects the lists in the product primary index, Price Sheet Entry, and in some system printing functions. You might sort products in a price line to accomplish the following:

- Set a product order in the product primary search index.
- Set the product order in the reorder pad. If order takers use the product primary index for adding products to an order, move the most frequently ordered products to the top of the list.
- Have the products in a price line display in the same order as in the price sheet.
- Set the order for a price book.

You can search for a single item in the price line product list and reorganize just that item, or resort the entire list by renumbering or resorting items.

To display a product list within a price line:

1. From the **Files > Price Maintenance** menu, select **Resequence Price Line** to display the blank Resequence Price Line screen.
2. In the **Resequence Price Line** field, enter the name of the price line that contains the list of products you want to view.

   If you press **Enter** instead of entering a price line, a list of products that have not been assigned to a price line displays. From this list you can edit your product file to assign each of those products to a price line.

   Note: Place the cursor on any product in the list, and then use the **Prod Maint** hot key to display the product record for that product.

   Modify the list of products as described in the following instructions:

   - Search for a product.
   - Reposition a product.
   - Sort products.
   - Renumber products.
   - Clear the product list.
3. Press **Esc** to save the list and exit the screen.

To search for a product in the price line:

1. From the displayed list on the Resequence Price Line screen, use the **Find** hot key, and enter one of the following:

- A product ID.
- A product name.
- Part of a product name.

A list of products, including all matching descriptions, displays. This list may include products from other price lines. Select an item from the list.

2. Press **Enter**.

   The cursor displays on that item.

3. Modify the list as needed to further sort items.
4. Press **Esc** to save the list and exit the screen.

To reposition a product within the price line:

1. From the displayed list on the Resequence Price Line screen, position the cursor on the product to be moved.
2. Use the **Move** hot key.

   The product is placed on a clipboard and removed from the screen. At the bottom of the screen "Insert" and the product name display, verifying your activity.

3. Position the cursor on the item that you want the product inserted above.
4. Press **Enter**.

   The product is inserted above the cursor.

5. Repeat as many times as needed.
6. Modify the list as needed to further sort items.
7. Press **Esc** to save the list and exit the screen.

Sorting Products

You can sort top-selling products first in the price line, so they display first in the reorder list for order takers. Enter a keyword, such as "1" for your top-selling items on the product record. Then sort the price line by Keyword #1. By default, the system lists all the products in the price line in numeric, followed by alphabetic order. The products that have "1" as the first keyword sort at the top.

To sort products in a price line:

1. From the displayed list on the Resequence Price Line screen, use the **Sort** hot key to display a list of sort options.
2. Select from the following:

Sort Option	Description
Sort Code	Sorts by the entry in the **Sort Code** field in Product Maintenance.

Sort Option	Description
Alpha	Displays the product names with symbols preceding numbers, numbers preceding letters, and upper-case letters preceding lower-case letters. This is the default.
Numeric	Displays the product names with numbers preceding symbols, symbols preceding letters, and upper-case letters preceding lower-case letters. Numerically sort products only when the description of every product in the line is limited to the first line and then is limited to a manufacturer's part number.
'Like' Products	Displays products according to similar product descriptions.
Keyword #1	Displays products by the first keyword listed in the **Additional Keywords** field on the Product Maintenance screen. Products not assigned keywords precede those with assigned keywords.
Keyword #2	Displays products by the second keyword listed in the **Additional Keywords** field on the Product Maintenance screen. Products not assigned keywords precede those with assigned keywords.

3. Modify the list as needed to further sort items.
4. Press **Esc** to save the list and exit the screen.

Renumbering Products

Organize products in a list, then apply numbers to the entire price line. This procedure adds a number to the **Sort Code** field in the product record of each product in the price line.

You can separate each product in a price line by any number of spaces, allowing the insertion of additional products in the price line in the future. For example, if products in a price line are sorted and assigned sort codes of 1, 2, 3, and 4, and you renumber the products in increments of 10, the corresponding sort codes change to 10, 20, 30, and 40.

We recommend you sort and organize the price line before renumbering. This avoids the need to rearrange numbered items.

To renumber products in a price line:

1. From the displayed list on the Resequence Price Line screen, use the **Renumber** hot key to display the Enter Increment Qty prompt.
2. Enter the increments you want between each number.
3. Enter **Y** at the prompt to confirm the setting.
4. Press **Esc** to save the changes and exit the screen.
5. Modify the list as needed to further sort items.
6. Press **Esc** to save the list and exit the screen.

To clear the list of products from the price line list:

1. From the displayed list on the Resequence Price Line screen, use the **Clear** hot key to clear the list of products from the screen.

2. At the prompt, enter one of the following:
   - **Y** – Clears the list of products from the price line list. If you resequence the products in a price line and then use the **Clear** hot key before pressing **Esc** to save the change, the list reverts to the product order before you resequenced the items.
   - **N** – Does not clear the list and returns you to the Resequence Price Line screen.
3. Press **Esc** to save the changes and exit the screen.

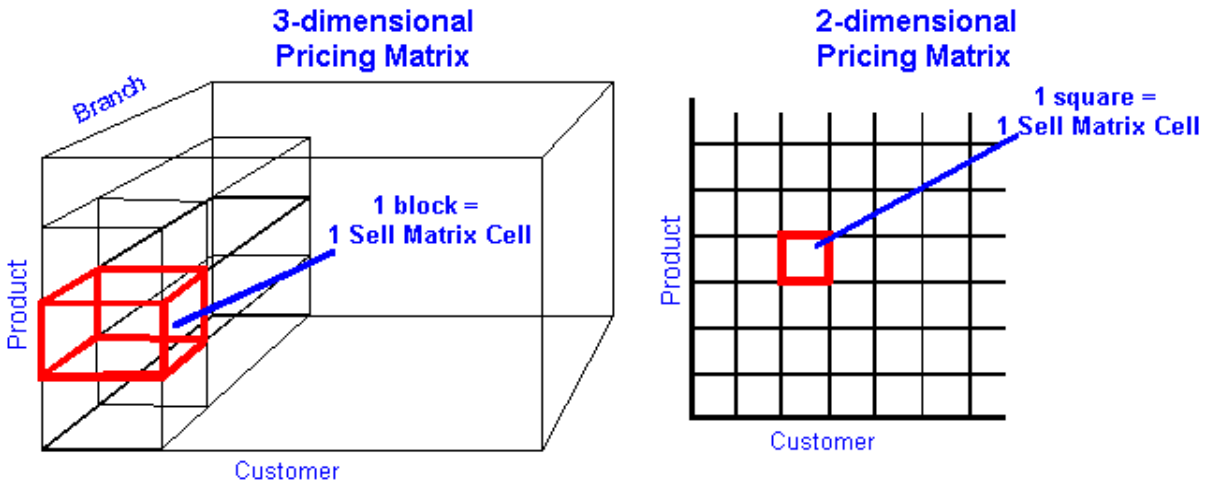
See Also:

Creating Price Lines

Price Line Overview

Pricing Matrix Overview

The purpose of a matrix cell is to define parameters that determine how your products are priced. A matrix cell can be set up as a two- or three-dimensional matrix, as shown below.



Two-dimensional matrix cells contain an x and a y axis, where x represents customer or vendor information, and y represents product information. Three-dimensional matrix cells contain an x, y, and z axis, where x and y represent the customer/vendor and product information, and the z axis represents branch or territory information.

Each cell in the matrix contains pricing information for buying or selling products. Buy matrix cells are vendor specific and are active when your company purchases products, and sell matrix cells are customer specific and are active when you sell products.

For general pricing, create matrix cells in Quick Buy or Quick Sell Matrix Maintenance. If you include the following pricing or costing rules, create matrix cells in Buy or Sell Matrix Maintenance:

To...	Use...
give customers extra discounts for buying quantity	quantity breaks
split pricing for items when a customer orders enough to qualify for one quantity break, but not enough to reach the next quantity break	split quantity pricing
use customer or product ranking to determine pricing	velocity pricing
include a commission plan in a matrix cell	commission plans
create matrix cells for rebate pricing to maintain accurate dates for sales and ensure payment of vendor rebates	rebates
check the matrix hierarchy for the best possible price	Best price checking
override the current price sheet effective date with that of another price sheet	price date

When a customer orders a product, the system checks a matrix hierarchy to determine which matrix cell to use to determine a price for the transaction. The system checks matrix cells in a fixed process starting with standard matrix cells, then checks promotional matrix cells, and finally checks the default matrix cell. The standard hierarchy is dependent upon the **Best Price Check** flag for promotional items, and on the **Best Price Check Through Matrix Cell** and **Stop Best Check At First Valid Sell Group** control maintenance records.

See Also:

Pricing Matrix Hierarchy Details

Setup Requirements for Buy and Sell Matrix Maintenance

Pricing Matrix Hierarchy Details

Use the pricing matrix hierarchy to define the pricing rules the system uses for determining product prices for buying and selling products.

The Eclipse pricing hierarchy checks the matrix beginning with the standard matrix cells. If the system encounters a contract matrix cell while searching the standard matrix cells, the sequence is temporarily interrupted while it checks the list of contract customers for the correct matrix cell. The system then checks the promotional matrix cells, and finally the default matrix cell. This standard hierarchy is affected by whether your organization uses the Best Price Check functionality, including the Best Price Check Through Matrix Cell control maintenance record and the Stop Best Price Check At First Valid Sell Group control maintenance record.

> **Note:** The system requires you set up both sell and buy All/All matrix cells to avoid pricing and costing errors.

The following table shows the sequence the system follows when determining the price to use when a product is entered on a transaction.

If your pricing varies by branch or territory, the system also checks the matrix cells for each branch or territory, and then the branch/territory default before moving on to the next matrix cell.

Seq	X-Axis	Y-Axis	Z-Axis	Notes
Standard Branch-specific matrix cells				
0	Quote	Product	Branch/Territory/Default	Quote is not a regular step in the hierarchy, but is entered as an override in sales order entry.
0	Quote	Group	Branch/Territory/Default	
1	Ship-To Customer	Product	Branch/Territory/Default	
2	Ship-To Customer	Group	Branch/Territory/Default	
3	Ship-To Customer Contract	Product	Branch/Territory/Default	The system checks the ship-to customer for contract customers.
3	Ship-To Customer Contract	Group	Branch/Territory/Default	
4	Bill-To Customer	Product	Branch/Territory/Default	
5	Bill-To Customer	Group	Branch/Territory/Default	
6	Bill-To Customer Contracts	Product	Branch/Territory/Default	The system checks the ship-to customer for contract customers.

Seq	X-Axis	Y-Axis	Z-Axis	Notes
6	Bill-To Customer Contracts	Group	Branch/Territory/Default	
7	Ship-To Customer Last Price Pricing		Branch/Territory/Default	The system finds the last order for this product sold to this ship-to customer, and uses the price on that order for the current order if Use Last Price is activated for that customer.
8	Class	Group	Branch/Territory/Default	
9	Ship-To Customer	Group ALL	Branch/Territory/Default	
10	Bill-To Customer	Group ALL	Branch/Territory/Default	
11	Class ALL	Group	Branch/Territory/Default	
12	Class	Group ALL	Branch/Territory/Default	
Promotional – the system stops when it finds a matrix cell				
13	Web Order Entry	Product	Branch/Territory/Default	
13	Customer Type	Product	Branch/Territory/Default	
14	Class	Product	Branch/Territory/Default	
15	Class All	Product	Branch/Territory/Default	
16	Customer Type	Group	Branch/Territory/Default	
17	Class All	Group (Promo)	Branch/Territory/Default	
18	Best Price Check		Branch/Territory/Default	

See Also:

Quote Pricing Overview

Assigning Pricing Hierarchy to Branches

Creating Matrix Cells in Quick Matrix Maintenance

Creating Individual Matrix Cells

Creating Matrix Cells in Quick Matrix Maintenance

The matrix cell defines parameters that determine how your products are priced. Matrix cells contain an *x* and a *y* axis, where *x* represents customer or vendor information, and *y* represents product information. Matrix cells can also be three-dimensional and contain an additional *z* axis that represents branch or territory information.

Use Quick Sell Matrix Maintenance and Quick Buy Matrix Maintenance when no special pricing arrangements are required, such as quantity breaks, or fixed sale price quantities. The Quick Sell Matrix Maintenance screen allows you to create several simple matrix cells in one sitting, or displays a list of matrix cells that you can edit at the same time.

Use the Sell Matrix Maintenance and Buy Matrix Maintenance screens to display one matrix cell at a time, so you can apply special pricing rules or edit the matrix cell's details.

You must be assigned the SMATRIX.MAINT and SMATRIX.MAINT.CUS.CLASS authorization keys to view or edit the Quick Matrix Maintenance screens.

> **Note:** In Sales Order Entry Inquiry, you can run a report on a line item that verifies how the system determined the selling price of that item.

To create matrix cells in Quick Matrix Maintenance:

1. From the **Files > Price Maintenance** menu, select one of the following:
   - **Quick Buy Matrix** – Displays the Quick Buy Matrix Maintenance screen.
   - **Quick Sell Matrix** – Display the Quick Sell Matrix Maintenance screen.
2. Enter a value in either a customer or vendor field, or a product or group field, as follows to determine the type of matrix cells to display.

   Customer/Vendor:

   - **Vendor** – A vendor's name to set up pricing rules and discounts you negotiate with this vendor.
   - **Cust** – A customer's name to assign pricing rules to this customer. Define customers in Customer Maintenance.
   - **Class** – A customer price class to assign pricing rules to a class of customers. Generally, Class/Group matrix cells are used for most pricing combinations. Define customer price classes in the **Valid Customer Price Classes** control maintenance record, and enter a customer price class in the Customer Maintenance pricing options.
   - **Typ/Qte** – A customer type or quotation to assign pricing rules to promotional or quotation pricing. The customer type is similar to the customer price class in that it also represents a column in the pricing matrix, but it is generally used for promotional pricing.

     The customer type is defined in the **Valid Customer Type** control maintenance record, and assigned to each customer on the Customer Pricing/Printing screen.

Product/Group:

- **Product** – A product's name or ID to create a product-specific sell matrix cell. Define products in Product Maintenance.
- **Group** – A sell or buy group ID for matrix cells that are not product specific. Enter **All** to include all sell groups in the matrix cell. Buy and sell groups identify groups of products that share the same pricing rules. Define buy and sell groups in Buy/Sell Group Maintenance.

Note: The system requires that products have a sell or buy group assigned to them in Price Group Maintenance in the product record.

Note: You can create a *Group = All* matrix cell in Matrix Maintenance only, not in Quick Matrix Maintenance.

If matrix cells exist for the above criteria, the system displays those matrix cells as described in the following table:

When creating a matrix cell for...	The Defined Cells column lists...
A customer price class	sell matrix cells for sell groups followed by product-specific matrix cells, both in alphabetical order.
A customer	Classes sort first by size, listing those with the smallest number of characters first, and then alphabetically by length, or number of characters. For example, classes B, E display first, followed by AC, BC, and then followed by BBC, BCC, and DCR. In other words the system sorts these items B-E-AC-BC-BBC-BCC-DCR.
Promotional pricing for a customer	
Promotional pricing for a quote	sell matrix cells for sell groups, in alphabetical order, followed by products, first sorted by sell group and then listed in order by sort code assigned to the product within the price line.
A vendor	buy groups followed by product-specific buy matrix cells, both in alphabetical order.
A group	matrix cells for vendor (buy matrix) or customer price classes in numeric order, followed by cells for customer types and quotes, both listed with the prefix of *Type* in alphabetical order, followed by cells for customers, in order by customer number.
A product	

3. Complete the following fields, as needed:

Field	Description
Br/Tr	Enter one of the following to determine whether to list branch-specific or system-wide matrix cells: • **A branch ID** – Creates a branch-specific matrix cell. • **DFLT** – Creates matrix cells where all branches use the same pricing. • **A territory ID** – Creates matrix cells for branches in that territory. For a customer/vendor and product, the system looks for a branch-specific matrix cell, if it does not find one, it looks for a matrix cell for the territory that includes the branch. If it does not find one, it uses DFLT as the **Br/Tr** entry.

Field	Description
Effective	Enter the date the system can begin using the matrix cells. The default entry is the current date. Press **F10** to use the Eclipse calendar.
Expires	Do one of the following to determine which matrix cells display: • **Enter the date that the system stops using the matrix cell** – Displays only the date range of matrix cells that fall between the effective and expiration dates entered. • **Leave the field blank** – Displays all matrix cells with the effective date entered in the **Effective** field.

4. Use the **Search** hot key to view a matrix cell in the list.
5. Use the **Select** hot key to list the matrix cells according to selected criteria.
6. Complete the following fields as needed:

Field	Description
Defined Cells	Do one of the following to enter a new matrix cell: • If the screen displays a list of matrix cells, move the cursor to the first blank line at the bottom of the list to enter a new matrix cell. • If you entered a vendor, or a customer, class, or type in step 2, the system prompts you to enter a group or product. • If you entered a group or product in step 2, the system prompts you to enter a vendor, or a customer, class, or type.
T	Enter one of the following matrix types to define how the system prices items according to quantity breaks: • C – Combo Qty Break • D – Different Matrix • G – Group Qty Break • M – Matrix Qty Break • N – No Qty Break • O – Override Cost Only (sell matrix only) • P – Product Level Quantity Break
PrBasis (price basis)	Enter a basis name for the matrix cell. This entry works with the entry in the **Price Formula** field to determine the selling price for products referring to the matrix cell. If this field is blank for a group matrix cell, no price line exists for that group.
Price Formula	Enter a formula to work with the entry in the **PrBasis** field to determine a price. These entries work with the value assigned to the price basis on the Price Line Maintenance screen. The system uses this value to determine the selling price for a product referring to the matrix cell.
Effect and **Expire**	Displays the dates the matrix cells become effective and the dates the matrix cells expire. You can change the dates in these columns if necessary.
PQty	The quantity assigned to the product unit of measure for sales orders, as defined in the product record. This field is view-only. **Note**: For matrix cells that are not product-specific, the **PQty** field displays two asterisks (**).

Field	Description
UM	The product unit of measure for sales orders, as defined on the Product Maintenance screen. This field is view-only. **Note**: For matrix cells that are not product-specific, the **UM** field displays two asterisks (**). For more information, see Units of Measure Guidelines for Pricing.

7. Press **Esc** to exit the pricing matrix and return to a blank Quick Matrix Maintenance screen.

More Options for Creating Matrix Cells in Quick Matrix Maintenance

The following are some common options you might use while creating matrix cells in Quick Matrix maintenance:

To...	Use this hot key...
display the Sell Matrix Maintenance or Buy Matrix Maintenance screen for the selected matrix cell	**Matrix Maint**

To...	Use this hot key...
display different views to enter additional matrix information	**View** (Quick Sell only) This option contains the following views: • **Prices** – Price formulas and price basis names. • **Costs** – Cost formulas and cost basis names. • **Direct Costs** – Cost formulas and cost basis names for direct orders. • **Rebates** – Contract numbers and vendor names. • **Direct Rebates** – Contract numbers and vendor names for direct orders. • **Prices/Cost** – Price and cost formulas and basis names. • **Gross Profit** – Gross profit dollar amount and gross profit percent. • **Price/Qty** – Expire quantity, expire type, and split quantity. The following three views display the **Ovrd Date** hot key, allowing you to change the override date of selected matrix cells: • **Sell Price Override** – Price information and the sell price override date. • **Cost Override Date** – Cost information and the cost override date. Select between Cost and COGS. This option is used primarily for handling vendor rebates. • **Direct Cost Override** – Direct cost information and the direct cost override date. Select between Cost and COGS. "Direct" displays in the upper-right corner of the screen. This option is used primarily for handling vendor rebates.
copy matrix cells to a different branch, customer, vendor, product, or group	**Copy**
select criteria for reducing the number of matrix cells listed on the Quick Buy Matrix or Quick Sell Matrix screen	**Select**
search for a specific matrix cell in the list of matrix cells	**Search**
change the effective date of multiple matrix cells	**Effective**
change the expiration date of multiple matrix cells	**Expire**
set up rebate information for matrix cells, such as vendor-assigned contract number, contract effective period, and vendor name	**Rebate** (Quick Sell only)

To...	Use this hot key...
display a prompt, where you enter the price line for the product groups or products to use for creating customer, class, or type matrix cells	**Include Line** This hot key is not active for product or group matrix cells, and is available for only Quick Sell.
add groups or products to the matrix cell from a price line	**Prod Maint**
change the formulas in the **Price Formula** field by adjusting multipliers and values	**Adjust Formula** This option works like a mass load to make a change to formulas across multiple matrix cells.
apply a cost override to matrix cells. This option is used primarily for vendor rebates, often referred to as "ship and debit" rebates.	**Cost Ovrd**
display a list of contract customers linked to the customer, or to enter contract customers	**Contracts** Used only for customer Quick Sell matrix cells.
view a record of changes to the matrix cells	**Log**
edit several fields for multiple matrix cells at once.	**Edit** (Quick Sell only)

See Also:

Searching for Matrix Cells

Adjusting Formulas in Quick Matrix

Quick Matrix Overview

Creating Individual Matrix Cells

The matrix cell defines parameters that determine how your products are priced. Matrix cells contain an *x* and a *y* axis, where *x* represents customer or vendor information, and *y* represents product information. Matrix cells can also be three-dimensional and contain an additional *z* axis that represents branch or territory information.

When you want detailed pricing setups, such as quantity breaks, fixed sale price quantities, and rebate pricing, use Sell Matrix Maintenance or Buy Matrix Maintenance to create individual matrix cells. Use Sell Matrix Maintenance to create pricing rules and discounts for your customers, and use Buy Matrix Maintenance to define the discounts and purchase prices you have negotiated with your vendors. The Sell Matrix Maintenance and Buy Matrix Maintenance screens display one matrix cell at a time, so you can apply special pricing rules, or edit individual matrix cell details.

When no special pricing arrangements are required, use Quick Sell Matrix Maintenance or Quick Buy Matrix Maintenance to quickly create a list of simple matrix cells, or to display a list of matrix cells that you can edit at the same time.

The system requires you set up a Class All / Group All sell matrix cell to avoid pricing errors. This matrix cell acts as a default for pricing items with no specific pricing criteria. Typically the formula in the All/All matrix cell is *List Price * 1*.

You must be assigned the SMATRIX.MAINT and SMATRIX.MAINT.CUS.CLASS authorization keys to view or edit the Matrix Maintenance screens.

Note: In Sales Order Entry Inquiry, you can run the Sell Price/Cost Overrides Report on a line item to verify how the system determined the selling price of that item.

To create an individual matrix cell:

1. From the **Files > Price Maintenance** menu, select one of the following:
   - Select **Sell Matrix** to display the Sell Matrix Maintenance screen.
   - Select **Buy Matrix** to display the Buy Matrix Maintenance screen.
2. Enter a value in one of the following customer/vendor fields:

In the field...	An entry...
Class	assigns pricing rules to customers in a class defined in the Valid Customer Price Classes control maintenance record. Generally, Class/Group matrix cells are used for most pricing combinations.
Vendor	records pricing rules and discounts you negotiate with this vendor.
Cust	assigns pricing rules to this customer.

In the field...	An entry...
Typ/Qte	assigns pricing rules to promotional or quotation pricing. The customer type is similar to the customer price class in that it also represents a column in the pricing matrix, but it is generally used for promotional pricing. The customer type is defined in the Valid Customer Type control maintenance record, and assigned to each customer on the Customer Pricing/Printing screen.

3. Enter a value in one of the following product-related fields:

Field	Description
Group	Enter a sell or buy group ID for matrix cells that are not product specific. Enter **All** to include all buy or sell groups in the matrix cell. You cannot create a *Group = All* matrix cell in Quick Matrix Maintenance. Buy and sell groups identify groups of products that share the same pricing rules. Create buy and sell groups in Buy/Sell Group Maintenance. **Note:** If you enter **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 or name to create a product-specific sell matrix cell.

4. Complete the following fields, as needed:

Field	Description
Br/Tr	Enter one of the following to define which pricing branches and territories the matrix includes: • **A branch ID** – Assigns costing or pricing rules specific to this branch or territory. • **DFLT** – Includes costing or pricing for branches and territories that do not require individual costing or pricing rules. When you enter an item on an order, and the system does not find a matrix cell with branch-specific costing or pricing, it uses this matrix cell. If a matrix cell with the same parameters already exists, the system prompts to create a new effective date or select an existing effective date for the customer and product criteria.
Effective	Enter one of the following to define the date that the matrix cell is effective: • To create a new matrix cell, enter the date the system can begin using the matrix cell for calculating prices. • To display an existing matrix cell, enter the effective date for that cell.
Expires	Enter the date the matrix cell will expire. Consider the following information when creating matrix cells: • 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 when pricing a product until it finds a matrix cell to use. **Note:** In Quick Sell Matrix Maintenance, you can use the **Expire** hot key to apply a date to all matrix cells in the list.

Field	Description
Matrix Typ	Enter one of the following matrix types to determine how the system calculates pricing: • C – Combo Qty Break • D – Different Matrix – Entering D requires that you complete the fields in the Different Matrix area. • G – Group Qty Break • M – Matrix Qty Break • N – No Qty Break • O – Override Cost Only (sell matrix only) • P – Product
Exp Qty	Enter a value to expire this matrix cell after a quantity of product is sold. Quantity can be a dollar amount, the product's unit of measure, weight, or load factor.
Splt Qty Pricing	Enter one of the following to determine how the system handles pricing based on quantity purchases: • **Y** – Splits the quantity break into two different pricing types if quantities ordered fall between quantity breaks. This option encourages the purchase of package quantities. If a customer orders quantity to reach and exceed the first quantity break, but does not order enough to reach the second quantity break, all items ordered beyond the first quantity break receive standard pricing, not quantity break pricing. Setting this option splits the quantity break into two different pricing types if quantities ordered fall between quantity breaks. • **N** – Does not split the quantity break. If you order quantity to reach and exceed the first quantity break, but do not order enough to reach the second quantity break, all items ordered beyond the first break receive the first quantity break pricing. • **E** – Informs the writer on a sales order when an item's quantity on the order is more than the remaining quantity available at the price associated with this matrix cell.
Prc Date	Enter a price date to override the matrix cell's effective date. A price date applies an earlier price sheet to the matrix cell. Use this option when you have negotiated pricing with your vendor using an old price sheet, or if your customer has done the same with you. For more information about determining what price is selected for an item, see Pricing Matrix Hierarchy Details and Required Dates and Shipping Dates.
Restrict Quantity Breaks to Multiples of Quantity Break 1	Enter one of the following to determine if the system restricts quantity breaks to multiples of the value of the first break: • **Y** – Quantity breaks must be multiples of the first quantity break listed in the **Qty Brks** field. For example, if you enter 10 for the first break, for each break after enter a quantity into which you can divide 10, such as, 20, 50, 100, and so on. • **N** – Quantity break can be any number greater than the previous quantity break.

5. In the **Best Price Chk** field, enter one of the following to determine how the system selects a matrix cell for pricing:

   - **N** – Selects the most specific matrix for pricing and does not search for promotional matrix cells.

     If the matrix cell is for a negotiated price for a product for a period of time for which there is a signed contract, enter **N** in this field.

- **Y** – Searches all matrix cells from most specific to least specific for the best available price.

Set the Best Price Check Through Matrix Cells control maintenance record to indicate how the system should check matrix cells for the best price for an item. Setting the **Best Price Chk** field to **N** overrides a **Y** setting in the Best Price Check Through Matrix Cells control maintenance record.

Follow these guidelines for setting the **Best Price Chk** field:

If the...	Is set to...	Then...
Default Best Price Check In Sell Matrix Maint To No control maintenance record	**Y**	the **Best Price Check** field on this screen defaults to **N**, and the best price check function is disabled.
Stop Best Price Check At First Valid Sell Group control maintenance record	**Y**	the system uses the first sell group matrix cell found. If set to **N**, the system checks all sell group matrix cells to find the one with the best price, assuming the best price flag is set for each cell. This process applies to all sell group levels for contract and non-contract pricing.
sell group is not the same as the price line and the Include Price Lines With Sell Groups For Pricing control maintenance record	**Y**	the system searches both the price line and sell group for the best price.

6. In the **Best Cost Check** field (sell matrix only), enter one of the following to determine how the system checks the best cost on a sales item:

- **Y** – The system continues to check through the pricing matrix hierarchy for cost overrides to find the best cost.
- **N** – The system checks no further in the pricing matrix hierarchy than the current matrix cell for the cost. This is the default.
- **ALL** – The system compares the cost on the current matrix cell to the ALL/ALL matrix cell and uses the better of the two costs.

Note: Best cost check is disabled for direct transactions.

Follow these guidelines for setting the **Best Cost Check** field:

If the...	Is set to...	Then...
Best Cost Through All Matrix Cells For Sales Orders control maintenance record	**Yes**	the system checks the entire pricing matrix hierarchy, regardless of the setting in this field.

If the...	Is set to...	Then...
Best Cost Check field on this screen	**Y** or **ALL**	the cost override on the current cell is compared to the cost override on the ALL/ALL matrix cell, if the ALL/ALL matrix cell is the next valid matrix cell found in the pricing matrix hierarchy.

7. Complete the following fields to define the default pricing and, if needed, quantity breaks:

Field	Description
Qty Brks	Enter the number or amount, and unit of measure at which each quantity break starts.
Basis	Enter the basis name to use with the formula to determine price for the product or products associated with this matrix cell. Considerations for selecting basis names: • If you use **All** as the group, 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. • If you use **Order COGS** as the price basis, the matrix cell uses the COGS override on the order to calculate the gross profit. • If you enter a constant dollar value ($) in the **Formula** field for this basis name, you override Product Velocity Pricing.
Formula	Enter the formula used with the basis to determine the price for the product or products associated with this matrix cell. Entering a constant dollar value ($) in this field overrides Product Velocity Pricing.

8. Use the following hot keys, as needed:

Hot Key	Description
Rebate (sell matrix only)	Displays the Matrix Cell Rebate Maintenance screen where you apply rebate information to the sell matrix cell.
Delete	Deletes this matrix cell. You are prompted for confirmation.
Cost Ovrd	Displays the Matrix Cell COGS Override screen where you enter a date, basis name, and formula for the cost override to the matrix cell.
Comment	Attaches a comment to a matrix cell that displays in order entry.
Log	Displays the Maintenance Log Viewing screen where you view all changes to the matrix cell.
Velocity Pricing (sell matrix only)	Applies pricing to a customer or product based on rank. Velocity pricing builds matrix cells based on customer ranking. With velocity pricing, sale prices update to reflect changes in a customer's rank.
Commission Plan (sell matrix only)	Assigns a commission plan to the sell matrix cell.

Hot Key	Description
Addl (sell matrix only)	Applies any of the following pricing features to the sell matrix cell: • **Rounding rules** • **Restrict price changes in Sales Order Entry** • **Exclude Items Using This Matrix Cell From Demand Calc**

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

See Also:

Pricing Matrix Hierarchy Details

Creating Buy and Sell Groups

Assigning Branches to Matrix Cells

Quantity Break Guidelines

Pricing Basis Fundamentals

Creating Matrix Cells in Quick Matrix Maintenance

Quick Matrix Overview

Quick Buy Matrix is where you create most of the matrix cells that comprise the buy matrix. You can review and edit the following parameters for more than one matrix cell at a time:

- Formulas and basis names
- Effective and expiration dates
- Price or cost overrides
- Add multiple matrix cells to the matrix.

Display related cells by the following criteria:

- Vendor
- Customer
- Customer type
- Buy group, sell group, or product
- Price class
- Quote

Each matrix cell displays as a line item, and you can access each buy matrix to set up detailed pricing rules.

Use the Quick Buy Matrix Maintenance screen to set up and maintain groups of buy matrix cells, and use the Buy Matrix Maintenance screen to add special pricing guidelines to individual matrix cells, such as:

- When a vendor is running cost specials.
- When a commodity item (pipe, wire, fasteners, etc.) is purchased from more than one vendor.
- When products are procured from competitors at a higher price than usual.
- When the vendor offers quantity break pricing.

See Also:

Setup Requirements for Buy and Sell Matrix Maintenance

Creating Matrix Cells in Quick Matrix Maintenance

Pricing Matrix Overview

Editing Matrix Cells in Quick Sell Matrix

Edit several sell matrix cells at once to avoid having to display each matrix cell to make changes. For example, if you need to change the formula and basis name on all of your Class 1 matrix cells, you can change them all in one operation from Quick Sell Matrix Maintenance. Select all or a portion of the cells listed in Quick Sell Matrix Maintenance, and then use Quick Sell Matrix Edit to change the field entries.

You must be assigned the SMATRIX.MAINT and SMATRIX.MAINT.CUS.CLASS authorization keys to edit in Quick Sell Matrix Maintenance.

> **Note:** In Sales Order Entry you can run the Sell Price/Cost Overrides Report on a line item to verify how the system determined the selling price of that item.

To edit a matrix cell in Quick Sell Matrix Maintenance:

1. From the **Files > Price Maintenance** menu, select **Quick Sell Matrix** to display the **Quick Sell Matrix Maintenance** screen.
2. Enter the necessary information to display the matrix cells you want to edit.
3. Select the first matrix cell that requires editing. For example, to make changes from line 5 through line 15, select line 5.
4. Use the **Edit** hot key to display the Quick Sell Matrix Edit screen.
5. In any of the following fields, enter the new values that apply to the matrix cells you are editing.

Field	Description
Matrix Type	Enter the matrix type that applies to the cells you are editing.
Price Basis	Enter the basis name to use with the formula to determine the price for the product or products associated with this matrix cell.
Price Formula	Enter the formula to use with the basis to determine the price for the product or products associated with these matrix cells.
Price Date	Enter a price date to override the matrix cells' effective dates. You can use this field to apply an earlier price sheet to the matrix cells.
Cost Basis	Enter basis name that applies to the cost override.
Cost Formula	Enter formula that applies to the cost override.
Cost Date	Enter the price effective date for the cost override.
COGS Basis	Enter basis name that applies to the cost of goods sold override.
COGS Formula	Enter formula that applies to the cost of goods sold override.
COGS Date	Enter the price effective date for the cost of goods sold override.

6. Use the **Cost Mode** hot key and determine if this change should affect direct sales items:

If you select...	and a direct cost override...	and a default cost override...	then the system...
Default	*is not* set	*is* set	uses the default cost override on direct and non-direct orders.
Default	*is* set	*is not* set	uses the direct cost override for direct orders only.
Default	*is* set	*is* set	uses the direct cost override for direct orders, and default cost overrides for non-direct orders.
Default	N/A	N/A	uses the direct cost override for direct orders, if one exists.

Note: "Direct" or "Default" display at the top of the screen, depending on the mode you select.

7. Press **Esc** to display the **Copy Lines** prompt.

   The prompt displays the line your cursor is currently on.

8. Enter the last line in the series of matrix cells through which to apply your changes, and press **Enter**. For example, to make changes from line 5 through line 15, your cursor is currently on line 5, so enter **15**.
9. The system prompts for confirmation of your line selection. Enter **Y** to continue.
10. Enter a cost code override at the prompt, if you have the **Prompt For Cost Code On Cost Override In Matrix Maintenance** control maintenance record set to **Y**.

    The system applies your changes to the selected matrix cells, and returns you to the Quick Sell Matrix Maintenance screen.

See Also:

Creating Matrix Cells in Quick Matrix Maintenance

Creating Individual Matrix Cells

Matrix Type Guidelines

A matrix type is a required field when creating matrix cells. The matrix type determines how the system prices quantity breaks and price overrides. Define matrix types from the **Group** field on the Buy Matrix Maintenance screen or Sell Matrix Maintenance screen

Matrix Type C – Combo Qty Break

Assign type C, combination quantity break, if the buy or sell group meets the following criteria:

- Part of a combination group.
- Quantity breaks are based on the combined purchase of all items within all buy or sell groups included in the combination group.

Use the Combination Group Maintenance screen to define the following:

- Combination groups.
- Quantity breaks.
- The common unit of measure used to determine break points for products included in a combination group. Each buy or sell group in the combination group must have common units of measure.

Assign the buy or sell groups to a combination group in the Buy/Sell Group Maintenance.

Matrix Type D – Different Matrix

Assign type D, different matrix, only when creating a customer-specific matrix cell. It is used to point a customer-specific matrix cell to another matrix cell (class/group) for its pricing rules.

For example, a customer is in the A2 price class for most products. This customer sometimes buys products from a different price class. For that group of products, assign the D-type matrix cell to point to a class/group matrix cell that offers a better price.

Note: If the pricing rules for the referenced matrix cell changes, the customer receives correct pricing without additional file maintenance.

Note: When a D matrix type cell is displayed in Quick Sell Matrix Maintenance it displays the price basis and formula of the matrix cell to which it points for its pricing rules.

To create a type D matrix cell:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. In the **Cust** field, enter the customer ID.
3. In the **Group** or **Prod** field enter the ID of the sell group or product that will get special pricing.
4. In the **Matrix Type** field, enter **D**.

5. In the **Brch** field, do one of the following:
   - If all branches use the same price rules, enter **DFLT**.
   - To point this matrix cell to a matrix cell in another branch, enter the branch ID, or press **F10** to select a branch.
6. In the **Class** field, enter the customer class assigned to the matrix cell that provides the pricing rules for this cell.
7. In the **Group** field, enter the sell or buy group assigned to the matrix cell that provides the pricing rules for this matrix cell. Buy and sell groups identify groups of products that share the same pricing rules.

   Note: The group for the referenced matrix cell must be part of the price line to which the product in the D type matrix cell belongs. If it does not, you cannot exit the **Brch**/**Class**/**Group** fields.

8. Press **Esc**.

   The system populates the basis and formula information from the referenced matrix cell.

   Note: If this product was part of a group, because it has override pricing, the price does not change when a quantity break point is reached, although other products in the group still contribute to reaching break points

   Note: Items on the Sales Order Entry screen that are subject to override pricing display *Cus Spec* in the **Cls/Type** field in the Audit Pricing view.

Matrix Type G – Group Quantity Break

Assign type G, group quantity break, when the following criteria are met:

- Quantity breaks are defined for products in the matrix cell.
- Quantity breaks are based on the combined purchase of all items on an order assigned to the buy or sell group on the matrix cell.

The system looks to all items that fall within the group to determine if the quantity break has been met.

The unit of measure used with the quantity breaks for the G type matrix cell is the unit of measure defined for the group on the Buy/Sell Group Maintenance screen.

Matrix Type M – Matrix Quantity Break

Assign type M, matrix quantity break, when the following criteria are met:

- Quantity breaks are defined on the matrix cell.
- Quantity breaks are based on multiple purchases of the same product.

The system looks at the line item on the order to determine if the product has met the quantity break, unlike a group quantity break where the system looks to all items that fall within the group to determine if the quantity break was met.

Matrix Type N – No Quantity Break

Assign type N, no quantity break, when you do not want quantity breaks assigned to the matrix cell. The matrix cell's formula does not change regardless of the quantity purchased.

Matrix Type O – Override Cost Only

Assign type O, override cost only, to assign a price date or cost override to the normal COGS cost for the matrix cell. For example, a class or product O-type matrix cell might be used when a special purchase of a product is tied to customer/product-level matrix cell.

A matrix cell for a cost override is independent of any sales pricing configuration. The O-type matrix cell must be at a different matrix hierarchy level from the pricing matrix cells for the system to detect it. Multiple O-type matrix cells follow the same pricing hierarchy as sell matrix cells follow.

Matrix Type P – Product-level Quantity Break

Assign type P, product-level quantity break, when the following criteria are met:

- Quantity breaks are defined in the product record.
- Quantity breaks are based on multiple sales of the same product.

The system looks to the quantity breaks set in Product Maintenance (**Files > Product > Prices** hot key **> Qty Break** hot key) when this matrix type is selected. When defining a P-type matrix cell, the fields in the Qty Brks column in Sell or Buy Matrix Maintenance are inaccessible.

Use product-level quantity breaks to promote the sale of box quantities of a product by setting the quantity break amount at the box quantity.

> **Note:** The **Quantity Break Display Percentage** control maintenance record controls a message that displays on the Order Entry screen when the quantity of a product subject to a quantity break approaches the percentage of the next break point. For example, if your first quantity break is 12 pieces and the percentage in the control record is 75 percent, when a customer orders 9, 10, or 11 pieces, the message lets you know the number of pieces needed to reach the next quantity break price. If you want the system to always advise the sales writer of the next break point, set the percentage to zero.

See Also:

Quantity Break Guidelines

Copying Matrix Cells

Copy matrix cells to a similar or different customer, type, group, or product. You can copy matrix cells if the type, basis, formula, effective date, and expiration date fields contain complete information. After copying the matrix cells to the new location, make changes to them as needed.

For example:

- Copy to Class – Creates a new customer class with matrix cells that are similar to those assigned to an existing class. In this case, create the new class and assign customers to that class. Then copy the matrix cells you want to the new class.
- Copy to Customer – Copies the matrix cells from the existing customer to the new customer. Use this option if you get a new customer whose business is similar to that of an existing customer.
- Copy to Type – Copies matrix cells to a customer type for promotional pricing. Use this option when you assign a special price that is in effect over a time period. After the special expires, you can change the effective and expiration dates and run the special in the future.

To copy matrix cells:

1. From the **Files > Price Maintenance** menu, select **Quick Buy Matrix** or **Quick Sell Matrix** to display the Quick Buy Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the required information to display the list of matrix cells that contain those you want to copy.
3. Select the first matrix cell to copy.
4. Use the **Copy** hot key to display the Quick Matrix Copy screen.
5. At the prompt, enter the number of the last line to copy.

   The system copies the matrix cells from the line the cursor is on to the line that you enter.

   Depending on how the matrix cell was set up (vendor, customer/group, product), different fields display on the Quick Buy Matrix Copy screen and the Quick Sell Matrix Copy screen. The table below describes which fields display for which matrix cells.

Matrix cells set up by:	Options:	
	Quick Buy Matrix Maintenance	Quick Sell Matrix Maintenance
Group **Product**	Copy to Group : Copy to Product :	Copy to Branch : Copy to Group : Copy to Product : Effective Date : Expires :

Matrix cells set up by:	Options:	
	Quick Buy Matrix Maintenance	Quick Sell Matrix Maintenance
Vendor	Copy to Branch : Copy to Class : Copy to Vendor : Copy to Type :	N/A
Class **Customer** **Customer type** **Quote**	N/A	Copy to Branch : Copy to Class : Copy to Cust : Copy to Type : Copy to Quote : Effective Date : Expires :

6. Enter data in the Copy screen's fields as described in the following table:

Copy to:	Enter:	
	Quick Buy Matrix Maintenance screen	Quick Sell Matrix Maintenance screen
Branch	Enter a branch name to copy matrix cells to a branch. Enter ALL to create a default branch matrix cell that does not copy to a target branch. An entry is required in this field .	
Class	N/A	Enter the target class. Press **F10** for a list.
Customer	N/A	Enter a target customer. Press **F10** for a list.
Vendor	Enter a target vendor. Press **F10** for a list	N/A
Type	N/A	Enter the target customer type. Press **F10** for a list.
Quote		Enter the target quote. Press **F10** for a list.
Group	Enter the target group. Press **F10** for a list.	
Product	Enter the target product. Press **F10** to use the quick access list.	

7. In the **Effective Date** field, enter the date the matrix cell becomes effective.
8. In the **Expires** fields, enter the date the matrix cells expire.
9. To copy or enter rebate information for sell matrix cells, use the **Rebate Viewing** hot key, as needed, to display the Matrix Cell Rebate Maintenance screen. This is the same screen used to enter rebate information in individual matrix cells.
10. Press **Esc** to copy.

    The system prompts to confirm the operation.

    If the system prompts you to overwrite cells that already exist, enter one of the following:

- **Y** – Copies the cell displayed in the prompt and overwrites the existing cell. The prompt displays for any other existing cells.
- **N** – Does not overwrite the cell displayed in the prompt. The prompt displays for any other existing cells.
- **C** – Continues the operation, copying and overwriting any existing cells without prompting you.
- **A** – Aborts the operation without copying any cells.

11. Press **Enter** to accept the operation and return to the Quick Matrix Maintenance screen.

See Also:

Quick Matrix Overview

Creating Matrix Cells in Quick Matrix Maintenance

Limiting the List of Matrix Cells in Quick Matrix Maintenance

Limit the list of matrix cells in Quick Matrix Maintenance by entering selection criteria that filter the matrix cells. This creates a shorter list and makes it easier to update matrix cells.

To limit the list of matrix cells in Quick Matrix Maintenance:

1. From the **Files > Pricing Maintenance** menu, select **Quick Sell Matrix** or **Quick Buy Matrix** to display the Quick Sell Matrix Maintenance screen or the Quick Buy Matrix Maintenance screen.
2. Enter the required information to display the list of matrix cells containing those cells to copy.
3. Use the **Select** hot key to display the Matrix Selection Input screen.
4. The **Prompt** field displays the types of information available for a search.
5. In the **Criteria** field, press **F10** to select from the following criteria for the text string entered in the **Selection** field:
   - **Containing**
   - Not Containing
   - Beginning With
   - Ending With
   - Exact Match
   - Equal To – Press F10 to select from the User Quick Access List.
   - Not Equal To – Press F10 to select from the User Quick Access List.
6. In the **Selection** field enter the text string on which to search, or press **F10** to select from the User Quick Access List in validated fields.
7. Use the **Multiple** hot key to enter multiple values for any criteria in the **Selection** field.
8. Press **Esc** to run the search and return to the Quick Sell Matrix Maintenance or Quick Buy Matrix Maintenance screen.

See Also:

Creating Matrix Cells in Quick Matrix Maintenance

Searching for Matrix Cells

Searching for Matrix Cells

Search the matrix cell list by select criteria on the Quick Matrix Maintenance screens.

To search for a matrix cell:

1. From the **Files > Price Maintenance** menu, select **Quick Sell Matrix** or **Quick Buy Matrix** to display the Quick Buy Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the required information to display the list of matrix cells that contains those cells you want to copy.
3. Use the **Search** hot key to display the search criteria screen.

   The **Search** hot key is not activated if you list matrix cells from the group or product perspective.
4. In the **Start Search at Beginning** field, enter one of the following:
   - **Y** – Starts the search from the beginning of the list.
   - **N** – Starts the search from the cursor's position.
5. Enter the group or product name for which you want to search in one of the following fields:
   - **Enter Group Search String** – Searches the list for a group.
   - Enter Product Search String – Searches the list and displays a list of products containing that text string.

   Note: Do not enter a product number unless the product number is part of the product description.
6. In the **Enter Specific Product** field, enter a product ID to search for that product.
7. Press **Esc** to begin the search and return to the Quick Matrix Maintenance screen.

   If the system does not find the item, it displays "Search String Not Found."

See Also:

Quick Matrix Overview

Creating Matrix Cells in Quick Matrix Maintenance

Changing Matrix Cell Effective and Expiration Dates

You can change the effective or expiration dates on several matrix cells at once using Quick Matrix Maintenance.

This page includes the following procedures:

- Changing effective dates
- Changing expiration dates

To change the effective date:

1. From the **Files > Price Maintenance** menu, select **Quick Buy Matrix** or **Quick Sell Matrix** to display the Quick Buy Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the required information to display the matrix cells you want to change.
3. From the first buy or sell matrix cell you want to change, use the **Effective** hot key and enter one of the following at the prompt:
   - **All Cells** – The system prompts for a new effective date.
   - **Cells in a Date Range** – The system prompts for the starting date and ending date of the range of cells to change. Then the system prompts for a new effective date.
4. Enter the earliest effective date you want to change.

   The system prompts for an ending line.
5. Enter the last line number you want to change. The default is the last matrix cell in the list.
6. Press **Enter**.

   The system changes the effective date for all the cells in the range you selected. The system then displays how many cells were changed.

To change the expiration date:

1. From the **Files > Price Maintenance** menu, select **Quick Buy Matrix** or **Quick Sell Matrix** to display the Quick Buy Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the required information to display the matrix cells you want to change.
3. From the first buy or sell matrix cell you want to change, use the **Expire** hot key and enter one of the following at the prompt:
   - **All Cells** – The system prompts for a new expiration date.
   - **Cells in a Date Range** – The system prompts for the starting date and ending date of the range of cells to change. Then the system prompts for a new expiration date.
4. Enter the earliest expiration date you want to change.

The system prompts for an ending line.

5. Enter the last line number you want to change. The default is the last matrix cell in the list.
6. Press **Enter**.

   The system changes the expiration date for all the cells in the range you selected. The system then displays how many cells were changed.

See Also:

Copying Matrix Cells

Adjusting Formulas in Quick Matrix

Change the pricing or costing of items by editing formulas for individual matrix cells in the Quick Buy Matrix or Quick Sell Matrix.

To adjust a matrix cell formula in Quick Matrix:

1. From the **Files > Price Maintenance** menu, select **Quick Buy Matrix** or **Quick Sell Matrix** to display Sell Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the required information in the screen to display the list of matrix cells you want to edit.
3. Place your cursor on the first price formula in the list you want to change.
4. Use the **Adjust Formula** hot key to display the Quick Sell/Buy Matrix Adjust Formula screen.
5. In the **Price or Cost Formulas** field, enter the type of formula, either **Price** or **Cost**.
6. In the **Adjust Formula Type** field, enter one of the following:
   - **Multipliers** – Arithmetic expressions, such as addition (+), subtraction (-), multiplication (*), and division (/).
   - **Constants** – Dollar values.
7. In the **Treat Discounts as Multipliers** field, enter one of the following:
   - **Y** – Converts the discount formulas (+/-) in the **Price Formula** field of the Quick Matrix screen to multipliers. The following table shows the result of price formulas changing to multipliers.

The price formula...	changes to ...
-10	*0.9
-20	*0.8
+10	*1.1
+200	*3.0

     For example, the discount formula in Quick Sell Matrix Maintenance for a product is -20 (-20 percent). You adjust the formula to **Multiply** and add the adjustment value **2** in the appropriate fields, below. The system converts the product's formula (-20) to *0.8, then multiplies this new number by 2 to get *1.6. This number is then changed back into the discount formula +60.
   - **N** – Does not change discount formulas (+/-) in the **Price Formula** field of the Quick Matrix screen to a multiplier.
8. In the **Adjustment Function** field, enter one of the following to change the arithmetic function:

- **Add**
- **Subtract**
- **Multiply**
- **Divide**

9. In the **Adjustment Value** field, enter the amount to adjust the multiplier or a constant as follows:
   - **Multiplier** – Affects the numeric values in the formula. For example, if the formula is REP-COST x 1.35 and you enter 0.1, the result is the formula REP-COST x 1.45.
   - **Constant** – Affects the dollar amounts. For example, enter 0.1 and the system adds ten cents to the price.
10. Press **Esc**. The system prompts for an ending line.
11. Enter the line of the last matrix cell you want to change. The default is the number of the last line in the list.
12. Press **Enter**. The system makes the changes and displays how many records it changed.
13. Press **Enter** to return to the Quick Matrix Maintenance screen.

See Also:

Pricing Basis and Formula Guidelines

Quick Matrix Overview

Assigning Branches to Matrix Cells

A simple pricing matrix includes customer and product information. You can also add a branch to introduce a third dimension to a matrix to control costing and pricing by branch.

At the time of order generation, the system looks for a branch-specific matrix cell. If none is found, the default branch costing is used.

You can use branch-specific matrix cells to simplify pricing throughout your organization. The following example describes how to assign branches that share similar pricing rules.

For example, you have branches 1, 2, 3, 4, and 5. Branch 4 is assigned to a matrix cell, and branch 5 uses the same costing rules as branch 4. You need only maintain the costing rules for branch 4 because branch 5 refers to branch 4 for its costing rules.

To create this scenario, the following set up applies:

1. Create a matrix cell using the default branch. This covers branches 1, 2, and 3.
2. Create a matrix cell for branch 4. This matrix cell is unique to branch 4.
3. Create a matrix cell for branch 5 using branch 4's pricing rules.

This page includes the following procedures:

- Assigning a branch to a matrix cell.
- Using a previously created matrix cell as costing for a branch.

To assign a branch to a matrix cell:

Note: You can adapt this procedure for sell matrix cells.

1. From the **Files > Pricing Maintenance** menu, select **Buy Matrix Maintenance** to display the Buy Matrix Maintenance screen.
2. Populate the **Vendor**, and **Product** or **Group** fields as needed to create a matrix cell.
3. In the **Br/Tr** field, do one of the following to set up branch costing rules:
   - **Enter DFLT** (default) – Includes costing for branches that do not require individual costing rules. When you enter an item on a purchase order, and the system does not find a matrix cell with branch-specific costing, it uses this matrix cell.
   - **Enter a branch** – Assigns costing rules specific to this branch.
4. In the **Effective** field, enter the date this matrix cell becomes effective.
5. Continue populating the fields to assign pricing rules for this branch or the default branch matrix cell.
6. Press **Esc** to save the settings and return to a blank Buy Matrix Maintenance screen.

To use a previously created matrix cell as costing for a branch:

1. From the Buy Matrix Maintenance screen, begin creating a matrix cell as described in step 2, above.
2. In the **Br/Tr** field, enter the branch that shares costing rules with an existing matrix cell.
3. Enter the same effective date as for the existing matrix cell.
4. Enter **Y** to use the previous matrix as a prototype.
5. Press **Esc** to save the settings and return to a blank Buy Matrix Maintenance screen. The system prompts to enter a reason for changing settings.

See Also:

Creating Individual Matrix Cells

Pricing Matrix Hierarchy Details

Applying Cost Overrides to Matrix Cells

Use cost overrides primarily for contracts and rebates. By entering a cost override in a matrix cell, the price sheet cost remains in tact, but the sales order reflects the cost override. Apply a cost override to the following:

- Assign a cost override with the matrix cell for either cost of goods sold cost (COGS Cost) or commission cost (Comm Cost).
- Assign the cost override to direct sales or to normal sales and credits.
- Assign a cost override code.

  Note: If the **Search For Cost Overrides During Pricing** control maintenance record is activated, the system includes overrides when searching for prices.

You must be assigned the BMATRIX.MAINT authorization key at a level greater than 2 to view the Matirx Override screen.

To apply a cost override to a matrix cell:

1. From the **File > Price Maintenance** menu, select one of the following matrix maintenance screens:
   - **Sell Matrix** – Displays the Sell Matrix Maintenance screen
   - **Quick Sell Matrix** – Displays the Quick Sell Matrix Maintenance screen.
   - **Buy Matrix** – Displays the Buy Matrix Maintenance screen.
   - **Quick Buy Matrix** – Displays the Quick Buy Matrix Maintenance screen.
2. Do one of the following:
   - In Sell Matrix Maintenance or Buy Matrix Maintenance, enter the necessary information to display the matrix cell
   - In Quick Sell Matrix Maintenance or Quick Buy Matrix Maintenance, select the matrix cell to change, and press **Enter**.
3. Use the **Cost Ovrd** hot key to display the Matrix Override screen.

   Depending on the setting in the **Default Cost View On Matrix Maint Cost Override to COMM-COST** control maintenance record, the screen displays as one of the following:
   - **Matrix Comm-Cost Override screen** – Assigns a commission cost override to the products included in this matrix cell.
   - Matrix Cell COGS Override screen – Assigns a cost of goods sold (COGS) cost override to the products included in this matrix cell.

   Note: Direct COGS is the only option displayed on the Matrix Override screen for a buy matrix cell.

Use the **Cost View** hot key to toggle between these views.

Note: For a detail lot item, if a cost is not defined in the detail lot record, a COGS/Comm Cost override has no effect on the costing of the detail lot item, and the system uses Average Cost. If a cost is defined in the detail lot record, the system uses that cost.

4. Use the **Mode** hot key to assign a cost override formula to one of the following:
   - **Direct sales** – Applies to all direct sales of products in this matrix cell.
   - **Default sales** – Applies to all transactions other than direct sales of products in this matrix cell. This includes normal sales and credits.

   The mode you select displays, highlighted on the screen.
5. In the **Prc Eff Date Ovrd** field, do one of the following to define an effective date for the override:
   - **Leave this field blank** – Uses the current effective price sheet to calculate the cost override on the order.
   - **Enter the price sheet date to use** – Overrides the price sheet in effect for the order date.

     If you enter a date, the system always uses the price sheet in effect for that date. Therefore, if a price increase takes place, the system ignores it and uses only the values it finds on the date entered to formulate the cost on the order.

   Note: You can also use the **Prc Date** field on the Sell Matrix Maintenance screen to assign a different price date. For example, you can offer a customer a better price on an item than what is on the current price sheet by changing the price sheet date to a previously dated price sheet that has a lower price. Use the **Prc Date** field only to base your pricing formula on an historical price sheet. Make sure the cell expires when the discount expires.
6. In the **Basis** field, enter the cost basis from the price sheet that this matrix cell will use for an override.

   Note: You cannot use the Ord COGS or Ord COMM basis names in this field.
7. In the **Formula** field, enter the formula to define the cost override.

   Note: If you enter a net amount ($) in the **Formula** field, enter a basis name in the **Basis** field, even though the system ignores the entry.
8. Use the **Code** hot key to enter a code that explains why a cost override is being assigned to the matrix cell. Cost override codes are defined in the **Valid Cost Override Codes** control maintenance record.

   By creating codes such as "Rebate," "Quotation,"or "Updated Cost," you can spot and track trends throughout your company. For example, if users often apply the cost override code "Updated Cost," then perhaps you should analyze your product cost updating procedures.

When you run the Customer Sales Rebate Report you can include a list of cost override codes to find out how many cost overrides were allowed for the reporting period.

The following control maintenance records, if enabled, affect cost override settings:

- **Prompt for Cost Code On Cost Override in Matrix Maintenance** – The system prompts, upon exiting the matrix cell, to enter a cost override code to explain the reason for the override.
- **Check For Rebate Information For Matrix Cell Cost Overrides** – The system prompts to warn or require you to include rebate information before exiting the matrix cell.

9. Press **Esc** to save the cost override and return to the Matrix Maintenance screen.

See Also:

Pricing Basis Fundamentals

Pricing Basis and Formula Guidelines

Pricing Matrix Overview

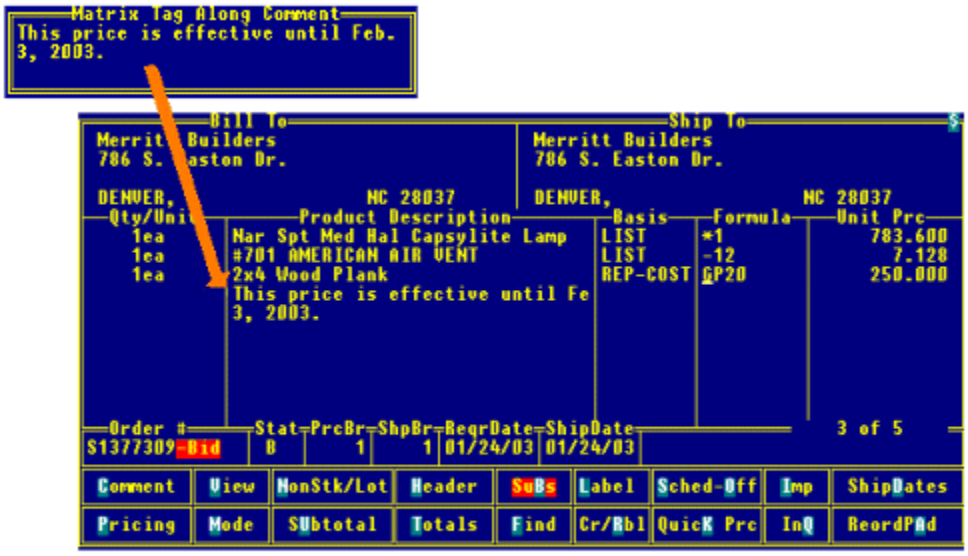
Adding Comments to Matrix Cells

Add comments to matrix cells to relay a message to the order writer when the matrix cell is applied to a price in order entry. For example, to remind a customer that the price for a product is tied to a contract, or to note that the current vendor price for a product is in effect over a period of time. Comments display attached to a product in the following programs:

- Sales Order Entry – When you create the comment in Sell Matrix Maintenance.
- Purchase Order Entry – When you create the comment in Buy Matrix Maintenance.

The following graphic shows a comment attached to a sell matrix cell that displays below the product in Sales Order Entry.

Note: You can also use this procedure on the Buy Matrix Maintenance screen.



To add a comment to a matrix cell:

1. Set up order entry comment types in OE Comment Type Maintenance (**System > System Files > OE Comment Type Maintenance**).
2. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
3. Display the matrix cell you want.
4. Select the **Comment** hot key to display the Comments Type screen.
5. Do one of the following:
   - Select an existing comment type to display the screen used for comment entry.

- Select **Add Type** to add another comment type to the list. Select a type from the Select Type screen, and press **Enter**. The new type displays on the Comments Type screen.

Note: If nothing displays in the selection screen when you use the **Comment** hot key, no comment types exist in Order Entry Comments Maintenance.

6. Enter your comment.
7. Press **Esc** to return to the Sell Matrix Maintenance screen.

   The next time this matrix cell is referenced for pricing, the comment displays on the order below the product.

See Also:

Adding Comments to Sales Orders

Pricing Matrix Overview

Updating Matrix Cell Expire Dates

You can update multiple matrix cell expire dates to extend their effective date. Organize the cells by customer, class, product, or group and update the entire selection.

Determine which matrix cells are about to expire by running the Matrix Cell Expiration Report. Then use Matrix Cell Expire Date Maintenance to change those expiration dates if necessary.

To update a matrix cell expire date:

1. From the **Files > Price Maintenance** menu, select **Matrix Cell Expire Date** to display the Matrix Cell Expire Date Maintenance screen.
2. In the **Br/Tr/All** field, enter the branch or territory for the matrix cells you want to update. Type **All** to update the matrix cells for all branches and territories.
3. In the **Customer** field, enter a customer ID to restrict the matrix cells to that customer. If you enter a customer, the cursor skips the **Class** field.

   Use the **Customer** hot key to enter multiple customers; the field displays *Multi*.
4. In the **Class** field, enter a class to restrict the matrix cells to that price class. Use the **Class** hot key to enter multiple price classes; the field displays *Multi*.

   Leave the **Customer** and **Class** fields blank to include both customer and price class type matrix cells.
5. In the **Product** field, enter a product ID to restrict the matrix cells to that product. Use the **Product** hot key to enter multiple products; the field displays *Multi*. If you enter a product, the cursor skips the **Group** field.
6. In the **Group** field, enter a group ID to restrict the matrix cells to that sell group. Use the **Group** hot key to enter multiple groups; the field displays *Multi*.

   Leave both the **Product** and **Group** fields blank to include both product and sell group matrix cells.

   Note: If you leave the **Customer**, **Class**, **Product**, and **Group** fields blank, the system selects all customer/product, customer/group, class/product, and class/group matrix cells that fall within the effective date.
7. In the **Old Expire Date** field, enter the expire date of the matrix cells you want to update.
8. In the **New Expire Date** field, enter the new expiration date.
9. In the **Starting Effective Date** field, enter a date to limit the search to matrix cells that went into effect *after* this date.
10. In the **Ending Effective Date** field, enter a date to limit the search to matrix cells that went into effect *before* that date.
11. In the **Report (Inc/Exc/Only)** field, enter one of the following:

- **Include** – Updates the matrix cells and sends a report containing a list of the updated matrix cell records to the Hold file containing a list of the updated matrix cell records.
- **Exclude** – Updates the matrix cells, but does not send a report to the Hold file.
- **Only** – Does not update the matrix cells, but sends a report to the Hold file containing a list of the matrix cells.

12. Use the following hot keys, as needed:
    - **Begin** – Runs the update or report process.
    - **Schedule** – Displays the Phantom Scheduler screen, where you schedule the update to run at a later time or date.

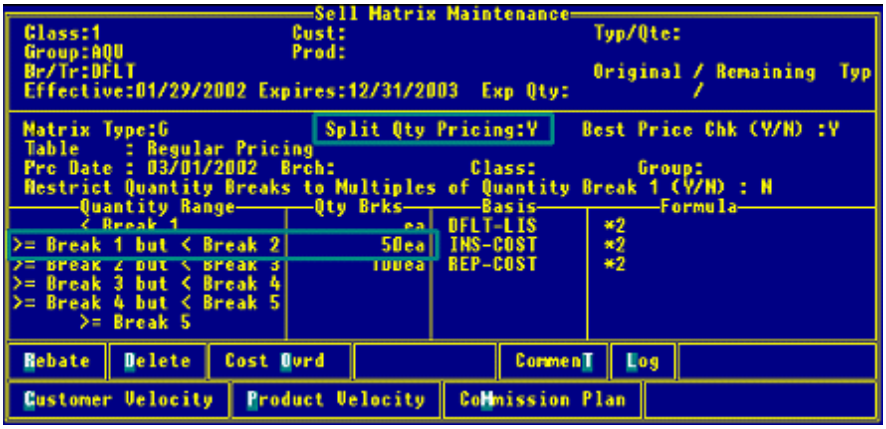
See Also:

Pricing Overview

Split Quantity Pricing Details

Use split quantity pricing to encourage the purchase of package quantities on an order. If a customer orders quantity in excess of a matrix cell's first quantity break, but the remaining quantity does not reach the break point of the next quantity, the excess items purchased are priced without quantity break pricing.

The following screen shows quantity break pricing with **Split Qty Pricing** set to **Y** and 50ea for the first quantity break in the matrix cell. A customer who orders 55 pieces from this price line receives the first quantity break pricing on 50 items, but the remaining 5 items are priced with no quantity break pricing. If **Split Qty Pricing** is set to **N**, all 55 items receive the quantity break price.



Keep the following information in mind when setting up split quantity pricing:

- With the proper authority and the assignment of the SOE.SPLIT.PRICING authorization key, you can override split quantity pricing in Sales Order Entry.
- The split quantity pricing setting on the Combination Group Maintenance screen overrides the setting on the Sell Matrix Maintenance screen.
- The **Split Qty Pricing** field is inaccessible if the matrix type is set to **O** (override cost only).
- Split quantity pricing is not supported when repricing items.

See Also:

Quantity Break Guidelines

Pricing Matrix Overview

Creating Individual Matrix Cells

Defining Expiration Quantities for Matrix Cells

You can set a buy or sell matrix cell to expire when the amount of on-hand product reaches a set quantity.

For example, if you run a promotion on an item and want to end the promotion after you sell 100 pieces of the item, set the matrix cell to expire after 100 are sold.

To define an expire quantity for a matrix cell:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** or **Buy Matrix** to display the Sell Matrix Maintenance screen or Buy Matrix Maintenance screen.
2. Enter the customer, vendor, and product information for the matrix cell.
3. Complete the following fields, as needed:

Field	Description
Matrix Type	Enter the matrix type for this cell to determine how the system prices quantity breaks and overrides.
Original / Exp Qty	Enter the amount of product, dollar value, or unit value of items available for this pricing matrix. After that quantity is sold, the matrix cell expires. For example, if you run a promotion on an item and want to end the promotion after you sell 100 pieces of the item, set the matrix cell to expire after 100 are sold. The **Remaining** field initially displays the same amount entered in the Exp Qty/ Original field. The Remaining field's quantity decreases as this product is sold.

Field	Description

Typ	Enter one of the following to apply a unit of measure to the quantity:
	• **U-Unit** – Applies the unit of measure from the product record to the quantity.
	• **W-Weight** – Applies the product weight (lbs.) from the product record to the quantity.
	• **L-Load Factor** – Applies the load factor from the product record to the quantity.
	• **D-DFLT LIST** – Applies the default LIST amount to the value in the **Exp Qty** field. This makes the entry a dollar value.
	The results of the setting in the Exp Qty field depends on whether you set up a buy or sell matrix cell:
	For costing on the buy matrix cell – As products are sold, the remaining quantity on the matrix cell reduces by the quantity bought. When this value reaches zero, the matrix cell expires.
	For pricing on the sell matrix cell – As products are sold, the remaining quantity on the matrix cell reduces by the quantity bought. If a customer orders more than the remaining quantity, the items are priced depending on the settings in the **Splt Qty Pricing** field:
	• **N** – The system prices items according to the normal matrix cell applicable to the product and the customer entered in the matrix cell.
	• **Y** – The system prompts you in order entry to override split pricing for the item. Enter one of the following at the prompt:
	  • **Yes** – The remaining quantity is priced at the special price and the number of items over that quantity is priced according to the normal matrix cell.
	  • **No –** Items are priced according to the normal matrix cell applicable to the product and the customer.

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

See Also:

Copying Override Pricing to the Matrix

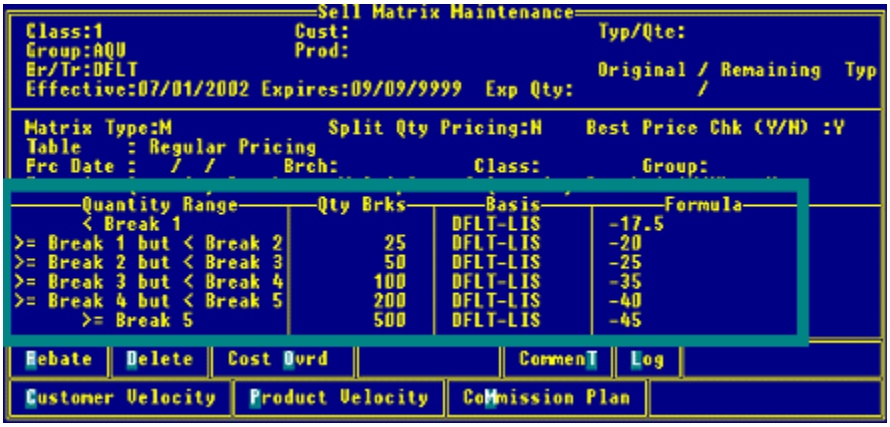
Split Quantity Pricing Details

Quote Pricing Overview

Pricing Matrix Overview

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.

See Also:

Combination Group Pricing Details

Pricing Basis Fundamentals

Units of Measure Guidelines in Pricing

Pricing Matrix Overview

Matrix Type Guidelines

A matrix type is a required field when creating matrix cells. The matrix type determines how the system prices quantity breaks and price overrides. Define matrix types from the **Group** field on the Buy Matrix Maintenance screen or Sell Matrix Maintenance screen

Matrix Type C – Combo Qty Break

Assign type C, combination quantity break, if the buy or sell group meets the following criteria:

- Part of a combination group.
- Quantity breaks are based on the combined purchase of all items within all buy or sell groups included in the combination group.

Use the Combination Group Maintenance screen to define the following:

- Combination groups.
- Quantity breaks.
- The common unit of measure used to determine break points for products included in a combination group. Each buy or sell group in the combination group must have common units of measure.

Assign the buy or sell groups to a combination group in the Buy/Sell Group Maintenance.

Matrix Type D – Different Matrix

Assign type D, different matrix, only when creating a customer-specific matrix cell. It is used to point a customer-specific matrix cell to another matrix cell (class/group) for its pricing rules.

For example, a customer is in the A2 price class for most products. This customer sometimes buys products from a different price class. For that group of products, assign the D-type matrix cell to point to a class/group matrix cell that offers a better price.

Note: If the pricing rules for the referenced matrix cell changes, the customer receives correct pricing without additional file maintenance.

Note: When a D matrix type cell is displayed in Quick Sell Matrix Maintenance it displays the price basis and formula of the matrix cell to which it points for its pricing rules.

To create a type D matrix cell:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. In the **Cust** field, enter the customer ID.
3. In the **Group** or **Prod** field enter the ID of the sell group or product that will get special pricing.
4. In the **Matrix Type** field, enter **D**.

5. In the **Brch** field, do one of the following:
   - If all branches use the same price rules, enter **DFLT**.
   - To point this matrix cell to a matrix cell in another branch, enter the branch ID, or press **F10** to select a branch.
6. In the **Class** field, enter the customer class assigned to the matrix cell that provides the pricing rules for this cell.
7. In the **Group** field, enter the sell or buy group assigned to the matrix cell that provides the pricing rules for this matrix cell. Buy and sell groups identify groups of products that share the same pricing rules.

   Note: The group for the referenced matrix cell must be part of the price line to which the product in the D type matrix cell belongs. If it does not, you cannot exit the **Brch**/**Class**/**Group** fields.

8. Press **Esc**.

   The system populates the basis and formula information from the referenced matrix cell.

   Note: If this product was part of a group, because it has override pricing, the price does not change when a quantity break point is reached, although other products in the group still contribute to reaching break points

   Note: Items on the Sales Order Entry screen that are subject to override pricing display *Cus Spec* in the **Cls/Type** field in the Audit Pricing view.

Matrix Type G – Group Quantity Break

Assign type G, group quantity break, when the following criteria are met:

- Quantity breaks are defined for products in the matrix cell.
- Quantity breaks are based on the combined purchase of all items on an order assigned to the buy or sell group on the matrix cell.

The system looks to all items that fall within the group to determine if the quantity break has been met.

The unit of measure used with the quantity breaks for the G type matrix cell is the unit of measure defined for the group on the Buy/Sell Group Maintenance screen.

Matrix Type M – Matrix Quantity Break

Assign type M, matrix quantity break, when the following criteria are met:

- Quantity breaks are defined on the matrix cell.
- Quantity breaks are based on multiple purchases of the same product.

The system looks at the line item on the order to determine if the product has met the quantity break, unlike a group quantity break where the system looks to all items that fall within the group to determine if the quantity break was met.

Matrix Type N – No Quantity Break

Assign type N, no quantity break, when you do not want quantity breaks assigned to the matrix cell. The matrix cell's formula does not change regardless of the quantity purchased.

Matrix Type O – Override Cost Only

Assign type O, override cost only, to assign a price date or cost override to the normal COGS cost for the matrix cell. For example, a class or product O-type matrix cell might be used when a special purchase of a product is tied to customer/product-level matrix cell.

A matrix cell for a cost override is independent of any sales pricing configuration. The O-type matrix cell must be at a different matrix hierarchy level from the pricing matrix cells for the system to detect it. Multiple O-type matrix cells follow the same pricing hierarchy as sell matrix cells follow.

Matrix Type P – Product-level Quantity Break

Assign type P, product-level quantity break, when the following criteria are met:

- Quantity breaks are defined in the product record.
- Quantity breaks are based on multiple sales of the same product.

The system looks to the quantity breaks set in Product Maintenance (**Files > Product > Prices** hot key **> Qty Break** hot key) when this matrix type is selected. When defining a P-type matrix cell, the fields in the Qty Brks column in Sell or Buy Matrix Maintenance are inaccessible.

Use product-level quantity breaks to promote the sale of box quantities of a product by setting the quantity break amount at the box quantity.

> **Note:** The **Quantity Break Display Percentage** control maintenance record controls a message that displays on the Order Entry screen when the quantity of a product subject to a quantity break approaches the percentage of the next break point. For example, if your first quantity break is 12 pieces and the percentage in the control record is 75 percent, when a customer orders 9, 10, or 11 pieces, the message lets you know the number of pieces needed to reach the next quantity break price. If you want the system to always advise the sales writer of the next break point, set the percentage to zero.

See Also:

Quantity Break Guidelines

Expiring Matrix Cells

If you no longer need a matrix cell, we recommend setting the matrix cell to expire rather than delete it. This way you can check price histories on the orders that used the matrix cell.. Run a matrix cell purge after giving the cell a new expire date to delete obsolete matrix cells.

This page contains the following instructions:

- Expiring a matrix cell
- Purging expired matrix cells
- Using Quick Matrix Maintenance to delete matrix cells

To expire a matrix cell:

1. From the **Files > Pricing Management** menu, select **Buy Matrix** or **Sell Matrix** to display the Buy Matrix Maintenance screen or the Sell Matrix Maintenance screen.
2. Display the cell matrix that you want to change.
3. In the **Expires** field, enter a date earlier than the current date as the purge cell date.

To purge an expired matrix cell:

1. From the **Files > Merge/Purge** menu, select **Purge Expired Matrix Cells** to display the Matrix Purging screen.
2. **IMPORTANT!** Before this purge, verify that all customer price classes are defined in Control Maintenance.
3. Enter the date of the earliest matrix cell you want to keep, or press **F10** to select a date from the Eclipse calendar. All expired matrix cells dated before this date are deleted.

   The system prompts to confirm the deletion. Press **F12** to abort.

Deleting an Expired Matrix Cell In Quick Matrix Maintenance

You can delete one expired matrix cell at a time from the lists in Quick Buy or Quick Sell Matrix Maintenance. Make sure you are deleting only matrix cells that have expired, and that have no active cells linked to them.

To delete an expired matrix cell in Quick Matrix:

1. From the **Files > Price Maintenance** menu, select **Quick Buy Matrix** or **Quick Sell Matrix** to display the Quick Buy Matrix Maintenance screen or the Quick Sell Matrix Maintenance screen.
2. Enter the necessary information to display the matrix cells to delete.
3. Scroll to the first matrix cell to delete.
4. Ensure this cell is dated before the current date in the **Expires** column.

5. Press **Alt-Delete**.
6. At the prompt, enter one of the following:
   - **Y** – Deletes the cell.
   - **N –** Does not delete the cell. You can also press **F12** to abort.
   - **S** (suppress prompt) – Does not show the prompt when you press **Alt-Delete**. The prompt is inactive only for this screen session. When you exit and return to the screen the prompt is active.
7. Press **Esc** to save your changes and display a blank Quick Matrix screen.

See Also:

Purging Expired Matrix Cells

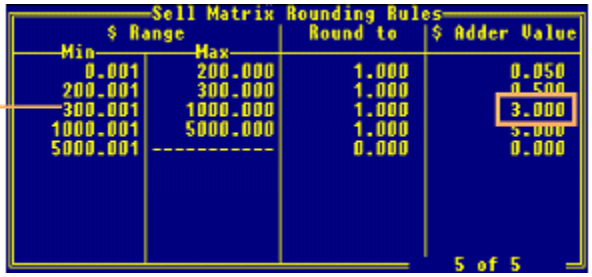
Pricing Matrix Overview

Defining Price Rounding Rules

Define dollar amounts to round product prices for price ranges. You can round each dollar range differently. You can also add a dollar amount to the price after the price is rounded. When a product and the pricing matrix cell have rounding rules enabled, the system calculates the matrix pricing, applies the rounding rules, and then includes the additional dollar amount.

For example, the screen below shows the dollar range $300.001 to $1000.000 is set to round to $1.000, and a value of $3.000 is added to the rounded price, as shown in the diagram below. An item entered on a sales order normally displays a price of $378.42, but with rounding rules enabled, the system calculates $379.00 as the rounded value, and then adds $3.00, therefore displaying a price of $382.00 in order entry.

The product price falls into this rangs, so it rounds up to the nearest $1.00, and the system adds $3.00 to that price.



When a customer orders a product that has a price-per quantity on the price sheet, and the pricing matrix cell has rounding rules enabled, the system applies rounding rules as follows:

- The product's price per quantity on the price sheet is $325 per 100, so its initial unit price is $3.25 each. The rounding rules determine the range for the dollar value at the quantity level ($325). Using the screen example above, an item in this price range rounds to $1.00 and has $3.00 added to the price. The system applies the rounding rules to the price per dollar of $325, then adds the $3.00. The new price equals $328. The system then divides this amount by 100 to make the price per each $3.28.
- To ensure pricing accuracy, insure that the number of digits defined in the Number of Digits of Accuracy for Pricing control maintenance record and on the Sell Matrix Rounding Rules screen agree with each other. If the matrix rounding rule is set to round to the nearest tenth of a penny ($0.001), but the number of digits of accuracy for pricing is set to the whole penny ($0.01), the price rounds at the matrix cell first to a tenth of a penny, and then rounds again to the whole penny.

This page contains the following instructions:

- Setting up price rounding rules.
- Enabling rounding rules for a matrix cell.

To define price rounding rules:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix Rounding Rules** to display the Sell Matrix Rounding Rules screen.

The **Min** field displays 0.001. You set the maximum values in the **Max** field, and the system begins the next dollar range at the next tenth of a penny ($0.001). For example, if a price range max is $5.731, the next range begins at $5.732 in the **Min** field.

2. In the **Max** field, enter the maximum value for each dollar range. You can define as many ranges as needed, but price ranges may not overlap
3. In the **Round to** field, enter the dollar increment to which each price should round.
4. In the **Adder Value** field, enter a dollar amount to add to the purchase price, if needed.

   The following table shows examples of how to use rounding rules:

Rounding Rule	Example
Round to next dollar value	Enter 1.000 to round $73.40 to $74.00.
Round to dime increments	Enter 0.90 to round to increments of 0.90, 1.80, 2.70, 3.60, and so forth.
Round to quarter increments	Enter 0.25 to round to increments of 0.25, 0.50, 0.75, 1.00, and so forth.
Round to 99 cents on a dollar	Enter 1.00 in the **Round To** field, and then enter 0.99 in the **Adder Value** field.
Round to nine cents on each dime.	Enter 0.100 in the **Round To** field for dime increments 1.10, 1.20, 1.30, and then enter 0.09 in the **Adder Value** field to get increments of 1.19, 1.29, 1.39, and so forth.

Important: You must enable rounding rules for matrix cells, as described below, and then log off of the system and then back on again for rounding rules to take effect.

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5. Press **Esc** to save the entries and return to the Pricing menu.

To enable rounding rules for a matrix cell:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. Enter the necessary information to display the matrix cell. For more information, see Creating a Sell Matrix Cell.
3. Use the **Addl** hot key to display the Matrix Maint Additional screen.
4. In the **Enable Rounding Rules** field, enter one of the following:
   - **Y** – Enables the rounding rules set up for this matrix cell.
   - **N** – Does not enable the rounding rules set up for this matrix cell. This is the default.
5. Press **Esc** to return to the Sell Matrix Maintenance screen.

   Note: You must log off of the system and back on again for the changes to take effect.

See Also:

Creating Individual Matrix Cells

Restricting Price Edits in Sales Order Entry

You can restrict users from entering changes to matrix pricing in Sales Order Entry. When this feature is activated for a matrix cell, and a user attempts to change the selling price of an item that uses that matrix cell, the system warns that products on the order belong to a restricted matrix cell, and no changes are allowed. If you have been assigned the PRICE.CHANGE.OVRD authorization key you can override the restriction in order entry.

To restrict price edits in Sales Order Entry:

1. From the **Files > Price Maintenance** menu select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. Enter the necessary information to display the matrix cell.
3. Use the **Addl** hot key to display the Matrix Maint Additional screen.
4. In the **Restrict Price Change In Order Entry** field, enter one of the following:
   - **Y** – Restricts users from changing prices affected by this matrix cell in Sales Order Entry.
   - **N** – Does not restrict users from changing prices in Sales Order Entry.
5. Press **Esc** to save your changes and return to the Sell Matrix maintenance screen.

See Also:

Creating Individual Matrix Cells

Excluding Items from Demand Calculation Through Matrix Cells

You may have items in your inventory that you do not want to replenish based on specified types of sales, such as exceptional sales. To exclude these items from the system's demand calculation, you can do either of the following:

- Create product-specific matrix cells, and include those products you do not want to replenish.
- Create sell groups containing those products you do not want to replenish, and then create a group-specific matrix cell.

On the sell matrix, you assign an expiration date, which is the date the system starts allowing demand to accrue again for the products involved in this process.

For example, you can use this procedure when establishing special pricing for products for which you want to reduce surplus inventory.

To exclude items from demand calculation through matrix cells:

1. From the **Files > Pricing Management** menu, select Sell Matrix to display the Sell Matrix Maintenance screen.
2. Enter the necessary information to display this promotional matrix cell.
3. Use the **Addl** hot key to display the Matrix Maint Additional screen.
4. In the **Exclude Items Using This Matrix Cell From Demand Calc** field, enter one of there following:
   - **Y** – Excludes items using this matrix cell from the demand calculation. If you set this option to **Y**, and the control record, Enable Exclusion of Matrix Cells From Demand Calculations is set to **N**, a prompt displays asking if you want to set the control maintenance record. You may want to use this feature if your company handles many contract jobs and uses product-specific and customer-specific matrix cells to handle pricing on those jobs.
   - **N** – Does not exclude items using this matrix cell from the demand calculation.
5. Press **Esc** to return to the Sell Matrix Maintenance screen.
6. Press **Esc** again to save the matrix cell settings and exit the screen.

See Also:

How the System Filters Demand for Forecasting

Flagging Sales Orders as Exceptional

Assigning Rank in Customer Velocity Pricing

Use customer velocity pricing to build matrix cells based on customer ranking. With velocity pricing, sale prices update to reflect changes in a customer's rank. Customer velocity pricing can achieve the following:

- Reward highly ranked customers with lower prices.
- Minimize the number of matrix cells needed for pricing.
- Ensure up-to-date customer performance information is used to set pricing policy.

Set up customer rank in Customer Ranking to measure sales and credit reliability. Velocity pricing and customer ranking work together to change the sell matrix cell formula as customer rank changes over time, as follows:

- **Customer additional velocity pricing** – The system adds a formula to each progressive sell matrix cell that increases the price as the customer's rank falls.
- **Customer alternate velocity pricing** – The system changes the formula on the original sell matrix, including formulas for quantity breaks, based on the customer rank. For each customer/product matrix cell, you can set up alternate velocity pricing for either a customer or product, but not both. Alternate velocity pricing overrides additional velocity pricing.

This page contains the following procedures:

- Displaying the appropriate velocity pricing screen
- Applying customer additional velocity pricing
- Applying customer alternate velocity pricing

Important: Monitor velocity pricing closely because it can create a cycle where reduced customer sales cause higher prices, producing poorer sales and in turn additional price increases.

To display the velocity pricing screen:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. Enter the necessary information to display the sell matrix you want to use.
3. Use the **Velocity Pricing** hot key to display the Velocity Pricing selection screen.
4. Select one of the following:
   - **Customer Additional** – Displays the Customer Velocity Pricing screen. Continue with the additional velocity pricing procedure.

- **Customer Alternate** – Displays the Customer Velocity Pricing - Alternate screen. Continue with the alternate velocity pricing procedure.

To apply customer additional velocity pricing:

1. In the **Rank #** field on the Customer Velocity Pricing screen, enter the number of a customer ranking method. Customers are ranked A through G. Ranking methods use numbers 1 through 5.

   Note: View and compare the performance of one customer to another on the A/R Customer Ranking screen (A/R > A/R Inquiry > Rank). The ranking methods are selected and the ranks are updated, based on customer sales activity, by running the Customer Ranking program, usually at the end of each month.

2. In the **Additional Formula** field, enter the formula that applies to the matrix for each rank to lower or raise the price according to the profitability of the product.

   For example, you might adjust the following ranked customer's pricing as follows:

For ranking method...	Enter...	To...
A	-4	reduce the base price by four percent.
B	-2	reduce the base price by two percent.
C	*1	apply no extra discount.
D	+2	increase the base price by two percent.
E	+4	increase the base price by four percent.

   Note: If both customer and product velocity formulas are assigned to a matrix cell, the system combines the additional formula from each screen and calculates a selling price.

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

To apply customer alternate velocity pricing:

1. In the **Rank #** field on the Customer Velocity Pricing - Alternate screen, enter the number of a customer ranking method. Ranking methods are numbered 1 through 5. Customers are ranked A through G.

   Note: Use the **Ranking** hot key to view current customer ranks.

2. In the **Basis** column for each rank (A through G), enter the basis for determining the selling price.
3. In the **Formula** column for each rank (A through G), enter the formula to use with the basis for determining the selling price.

Note: When the matrix cell's formula is a constant dollar amount, the system applies the formula on the velocity pricing screen to the dollar amount.

For example, you might replace the pricing for a Rank #1 customer as follows:

Ranking Method	< Break 1		>= Break 1 but < Break 2		>= Break 2 but < Break 3	
	Basis	Formula	Basis	Formula	Basis	Formula
A	LIST	*1	LIST	-.5	LIST	-1
B	LIST	-.5	LIST	-1	LIST	-1.5

Note: Use the < and > keys to scroll left or right through the breaks.

4. Press **Esc** to save your changes and return to the Sell Matrix Maintenance screen.

   Alternate velocity pricing entries replace the original matrix cell's pricing set up when the customer places an order.

See Also:

Ranking Customers

Product Ranking Overview

Assigning Rank in Product Velocity Pricing

Pricing Basis Fundamentals

Creating Individual Matrix Cells

Assigning Rank in Product Velocity Pricing

Use product velocity pricing to build matrix cells based on product ranking. With velocity pricing, sale prices update to reflect changes in a product's rank. For example, slower moving products have a higher carrying cost, so set up velocity pricing to charge more for low-ranking products. When customers regularly buy one of your slow-moving products, the product's rank increases. Velocity pricing then decreases the product's price as the product's rank increases.

Product velocity pricing can achieve the following:

- Ensures that up-to-date product performance information is used to set pricing policy.
- Fine tunes pricing for products of different ranks.
- Minimizes the number of matrix cells needed for pricing.

Product velocity pricing and product ranking work together to change the price as product rank changes over time, as follows:

- **Product additional velocity pricing** – The system adds a formula to each progressive sell matrix cell that increases the price as the products rank falls.
- **Product alternate velocity pricing** – The system changes the formula on the original sell matrix, including formulas for quantity breaks, based on the product rank. For each customer/product matrix cell, you can set up alternate velocity pricing for either a customer or product, but not both. Alternate velocity pricing overrides additional velocity pricing.

Product rank in velocity pricing is affected by the following control maintenance records:

- **Default Rank for Velocity Pricing** – Defines which rank the system should use if the product does not have a rank for the pricing branch of an order.
- **Use Central Warehouse Branch Rank If No Pricing Branch Rank** – Determines if the system should use the item rank of the Central Warehouse branch (parent branch) rather than the child branch. The default is **Yes**.

This page contains the following procedures:

- Displaying the appropriate velocity pricing screen.
- Applying product additional velocity pricing.
- Applying product alternate velocity pricing.

Important: Monitor velocity pricing carefully because it can create a cycle where reduced customer sales cause higher prices, producing poorer sales and in turn additional price increases.

To display the velocity pricing screen:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.
2. Enter the necessary information to display the sell matrix you want to use.

3. Use the **Velocity Pricing** hot key to display the Velocity Pricing selection screen.
4. Select one of the following:
   - **Product Additional** – Displays the Product Velocity Pricing screen. Continue with the additional velocity pricing procedure.
   - **Product Alternate** – Displays the Product Velocity Pricing - Alternate screen. Continue with the alternate velocity pricing procedure.

To apply product additional velocity pricing:

1. In the **Rank #** field on the Product Velocity Pricing screen, enter the number of a product ranking method. Products are ranked A through H. Ranking methods use numbers 1 through 5.

   Note: View the product ranks on the Product Maintenance Ranking screen (**Files > Product > Prices** hot key **> Ranks** hot key).

2. In the **Additional Formula** field, enter the formula that applies to the matrix for each rank to lower or raise the price according to the profitability of the product.

   For example, you might adjust pricing on these ranked products as follows:

For ranking method...	Enter...	To...
A	-4	reduce the base price by 4 percent.
B	-2	reduce the base price by 2 percent.
C	*1	apply no extra discount.
D	+2	increase the base price by 2 percent.
E	+4	increase the base price by 4 percent.

   Note: If both customer and product velocity formulas are assigned to a matrix cell, the system combines the additional formula from each screen to calculate a selling price.

   Note: A constant dollar value ($) in the **Basis** field on the Sell Matrix Maintenance screen overrides product velocity pricing.

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

To apply product alternate velocity pricing:

1. In the **Rank #** field on the Product Velocity Pricing - Alternate screen, enter the number of a product ranking method. Ranking methods are numbered 1 through 5. Products are ranked A through H.

   Note: Use the **Ranking** hot key to view current product ranks.

2. In the **Basis** column for each rank (A through H), enter the basis for determining the selling price.
3. In the **Formula** column for each rank (A through H), enter the formula to use with the basis for determining the selling price.

   For example, you might replace the pricing for a Rank #1 product as follows:

Ranking Method	< Break 1		>= Break 1 but < Break 2		>= Break 2 but < Break 3	
	Basis	Formula	Basis	Formula	Basis	Formula
A	LIST	*1	LIST	-.5	LIST	-1
B	LIST	-.5	LIST	-1	LIST	-1.5

   Note: Use the < and > keys to scroll left or right through the breaks.

4. Press **Esc** to save your changes and return to the Sell Matrix Maintenance screen.

   Alternate velocity pricing entries replace the original matrix cell's pricing set up when a customer places an order for the ranked product.

See Also:

Changing Product Ranking

Pricing Basis Fundamentals

Assigning Rank in Customer Velocity Pricing

Creating Individual Matrix Cells

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