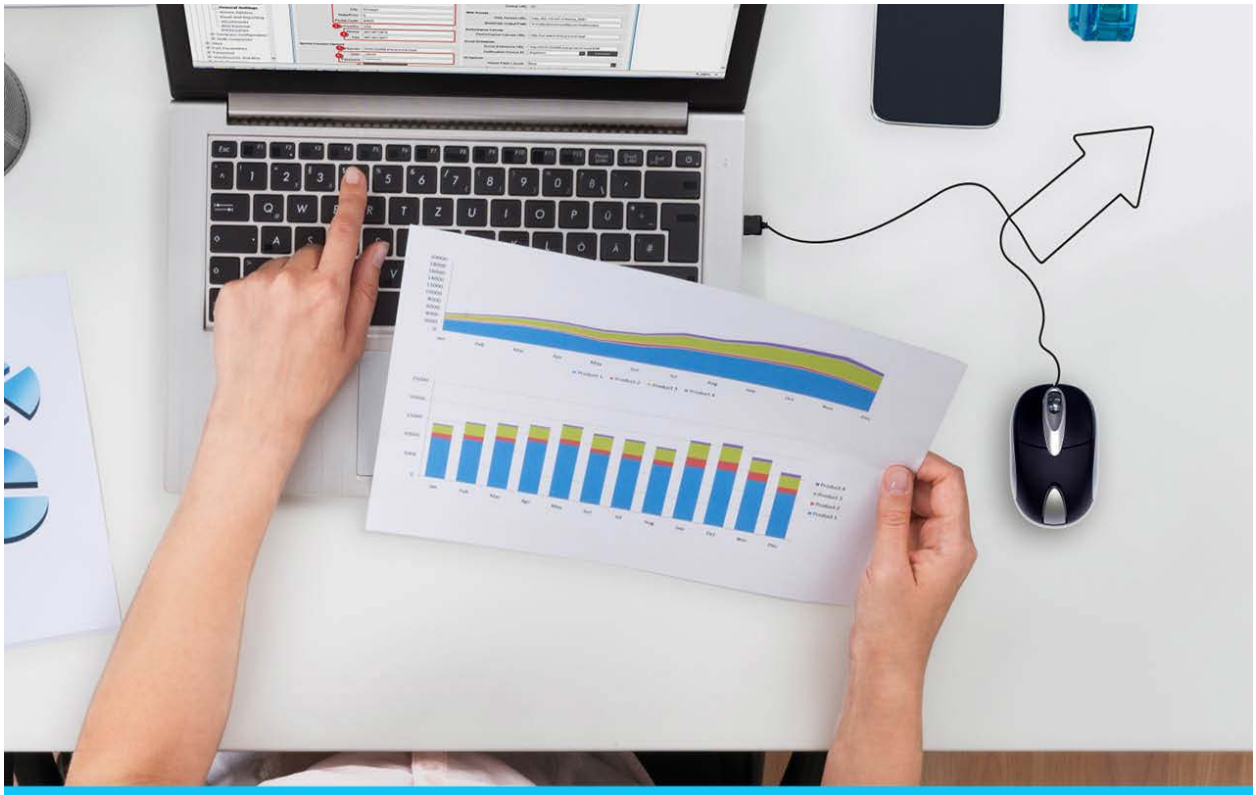

Assigning and Updating Prices in Solar Eclipse

Release 9.0.5

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Publication Date: October 17, 2018

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Pricing Management 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.

This section of the documentation discusses standard pricing logic. For information about using the Strategic Pricing companion product, see Eclipse Strategic Pricing Overview.

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.

You can use the standard pricing matrix hierarchy set up in the Eclipse system, which is not configurable, or you can configure your system to use a pricing procedure designed for your business needs.

Commissions

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

- Gross profit dollars
- Sales dollars

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

Quotes

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

Product Pricing Overview

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

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

About Product Prices on Orders

Standard sales orders do not display any special symbols or characters. However, when a prices displays in bold text, that indicates special pricing has been applies.

The following symbols display after a price on an order when special pricing or overrides apply:

Symbol	Description
L	A lot billing item.
*****	Indicates the price or cost show has a manual override.
+	Indicates contract matrix pricing.
#	Price based on customer-specific matrix pricing.
!	Price based on customer-specific cost matrix.
R	A rebate cost override.
^	Strategic Pricing or Strategic Costing price cube factors applies. This can be displayed in combination with # or +.
J	Small Project Job pricing.

Assigning Pricing Criteria to Products

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

Set the following criteria for products in the product record:

- Product-level quantity breaks
- Product rank
- Discount class
- Commission group
- Serial number tracking

To assign pricing criteria to a product:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter a product ID to display the product record.
3. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
4. Select **File > Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
5. Complete the following fields as needed:

Field	Description
Price As	Enter the product ID whose pricing will be copied. Use this option for one of the following reasons: • To assign to this product the same price sheet that is assigned to another product. These price sheets use corresponding effective dates and prices. • When the product is a substitute for another product. This eliminates the need to populate the product's pricing information on the Product Price Sheet Maintenance window (**Files > Product > Pricing > Price Sheet**).
Matrix Type	enter the product matrix type to override the customer price class used to price this product. This field is required only if the **Valid Product Matrix Types** control maintenance record is populated. Without a matrix type defined, when pricing a product, the system determines the ship-to customer's price class from either a branch-specific price class override or from the default price class override. With a matrix type defined, the system looks at the ship-to customer's price class/product matrix type pairings to determine a price after looking at the branch-specific override, and before using the default price class. If the product has no matrix type, or if the customer has no price class/product matrix type pairing, then the system uses the default price class to determine a price.

Field	Description
Serial Number Option	Do one of the following: • Enter a code to determine the tracking type use for the product in each branch. Set this option when the product is subject to serial number tracking. • Enter **N** (no serial tracking) if the product has no serial number tracking.
Commission Groups	Enter the appropriate commission group, if required.
Sell Package Quantity	Enter a number to allow only order quantities that are evenly divisible by this number. The unit of measure associated with the sell package quantity is the base unit of measure listed in Product Maintenance. Users assigned the SOE.PACKAGE.QTY authorization key can override this restriction.
Price Sheet	Enter a name of a price sheet to maintain different price sheets for different branches.
Discount Class	Assign price sheet discount classes to products in defined branches.

6. Complete the following menu items as needed.

Menu Item	Description
Pricing > Price Sheet	Use to create a new effective date for a price sheet for a product, and then assign values to its cost and price bases. If you enter a product in the **Price As** field on the Product Price Maintenance window, pricing information will be copied from that product.
Pricing > Ranks	Displays the branch ranking information the last time the ranking process was run for a product.
Pricing > Quantity Break	Use to assign product-level quantity breaks to use for a product-specific pricing matrix cell that is assigned the P (product) matrix type.
Pricing > Branch Costs	Shows average cost, last cost, landed average cost, and landed cost for the product in the branches to which you have access.
Pricing > Additional Data	Use to assign the following settings for products on the Additional Price Maintenance window: • Freight factor • Freight charges • Pass-along discounts • Label printing specifications
Pricing > Groups	Use to assign a product to buy or sell groups.
File > Find Branch	At the prompt, enter the branch to find in the list and click **OK**.
File > Insert Branch	Adds the branch to the list that is selected at the prompt.

7. Save your changes and exit the dialog box.

Assigning Products to Buy or Sell Groups

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

Set up sell and buy groups as follows:

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

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

To assign a product to sell or buy groups:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter the product ID to display the product record.
3. Use the **Price** hot key to display the Product Price Maintenance dialog box.
4. Select **File > Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
5. Select **Pricing > Groups** to display the Price Group Maintenance dialog box.
6. Select **Edit > Hierarchy** to enter a branch. All the territories in which that branch resides display under the branch name in the **Branch** field.
7. In the **Sell Group** and **Buy Group** fields, enter the sell group or buy group for each branch, up to 20 characters, to which this product belongs. By default this field displays the name of the price line.
8. Use the **Multiple Item** button to assign multiple buy or sell groups in each field. When a customer orders a product with multiple sell groups, the system checks the matrix cells for the sell groups in the list from top to bottom in search of a match. When it finds a match:
   - And **Best Price Check** is activated, the system continues searching through the group matrix cells for the best price.
   - And **Best Price Check** is not activated, it stops searching regardless of whether the matrix cell for a group lower in the list has a better price.

   To rearrange the order in which the system searches the group matrix cells, rearrange the group order.
9. Save your changes and exit the dialog box.

Assigning Products to Commission Groups

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

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

For more information, see Product Commission Group Details.

To assign a product to a commission group:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter a product's name to display the product record.
3. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
4. Select **File > Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
5. In the **Commission Groups** column, for each branch, enter a commission group, if necessary.

   If this column is blank for a branch, the system uses DEFAULT as its commission group. Therefore, if a commission plan is set up to calculate the sales commission on the sales order total, or if a product that is not assigned a commission group is sold, the system calculates commission using the default commission group.
6. Save your changes and exit the dialog box.

Assigning Price Sheet Discount Classes to Products

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

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

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

To assign a price sheet discount class to a product:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter the product ID to display the product record.
3. Select **Pricing** to display the Product Price Maintenance dialog box.
4. Select **File > Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.

   Note: The system may adjust other branch information for updates on price sheets and discount classes to maintain a discount per price sheet requirement. We recommend reviewing the table after changes to verify any automatic adjustments.

5. In the **Discount Class** column, do one of the following:

   - Enter a discount class.
   - Create a discount class by entering an alphanumeric name for the discount class, up to 10 characters. Then enter different formulas for each discount class in Price Sheet Entry. Set up any discount classes you plan to use before entering price sheet information.

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

   Note: When items in a price line are separated into discount classes, update the prices by discount class. In Price Sheet Entry, you can copy the prices from one discount class to another if many of the prices are the same. Then, make any necessary changes to the prices in the target discount class.

6. Save your changes and exit the dialog box.

Assigning Pricing Values to Product Price Sheets

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

Apply the following guidelines to maintaining price sheets for products:

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

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

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

To assign pricing values to a product price sheet:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window, and enter the product ID for which you want to assign a discount class.
2. Select **Pricing > Price Sheet Maintenance** to display Price Sheet Maintenance window.

   When you display the Price Sheet Maintenance dialog box:

   - The price sheet effective dates display to the left of the table.
   - If the product is new, the table displays the cost and price basis names and the price sheet assigned by the system, but does not display prices for the effective dates.
   - If you entered a product in the **Price As** field on the Product Price Maintenance window, you can assign values to the cost and price basis names, and you can edit the values, if necessary.
   - If this product has different price sheets assigned to the price line, the screen displays a list of all the price sheets assigned to the product's price line. Select the price sheet for the branch whose prices you want to view or edit. The screen then displays basis values for as many as five effective dates for the price line.
   - If the price sheet inherits some values from the default price sheet (~ price sheet), the values display in gray, italicized text.
   - If the value is left blank, the system completes blank cells with the next active price in the dates below it.

   Note: The price sheet only inherits its value if the most recent date is blank. The local sheet settings take priority. This setup ensures that if you can use a default price

sheet to keep most settings for price sheets throughout your company the same, but adjust a setting for a local branch that make handle costs differently. For more information, see How Eclipse Handles Price Sheet Hierarchies.

The following fields and columns apply to Price Sheet Maintenance:

Field	Description
Description	The product description from the Product Maintenance window.
Price Sheet	One of the following displays: • If the product's price line has only one price sheet, the product's price sheet displays having only a null price sheet, implies that the product's costs and prices are the same in all branches of the company. • Select a price sheet from the list of existing price sheets if the price line has multiple price sheets that contain data on this product.
Currency	Any foreign currency assigned to the basis in Price Line Maintenance. This field is read-only. • If a foreign currency displays in this field, the cost or price you enter in an effective date column for a basis is calculated in this foreign currency. • If this field is blank, the cost or price you enter in an effective date column for a basis is calculated in your company's base currency.
Per	The unit of measure used to price the product. For example, per *each*, per *box*, per *case*, per *c* (hundred), per *m* (thousand), and so forth. **Note:** You must have a per quantity and per unit of measure (UOM) on a least one price sheet per product. By default, the system uses the default UOM from the price line and the lowest UOM.
Per Qty	The number of units contained in the unit of measure entered in the **Per** field. For example, if the Per is box, the Per Qty might be four per box. **Note:** You must have a per quantity and per unit of measure (UOM) on a least one price sheet per product. By default, the system uses the default UOM from the price line and the lowest UOM.
Basis name columns	The local basis assigned in the **Basis Names** column on the Price Line Maintenance window for the product's price line, supplied by the system after you enter all the information necessary to select the price sheet. You can have as many as 20 basis name columns.

4. Save your changes and exit the dialog box.

More Options

The following are common options you might use while assigning pricing values to product price sheets:

To...	Select this menu option...
return the screen to its settings before you started making changes	**File > Recall**
display all effective dates for a specific price sheet	**View > All Effective Dates**

To...	Select this menu option...
select a specific effective date for the price sheet	**Edit > Effective Dates** To edit blank entries, ensure that the **All Effective Dates** option under the **View** menu is selected.
display a record of all pricing-related changes to the product on the price sheet, and any corresponding user-supplied reason for change	**File > Maintenance Log**
check the values set to inherit from a default price sheet	**Pricing > Price Line Maintenance**

Assigning Product Level Quantity Breaks

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

To assign a product-level quantity break:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window, then enter the **Product ID** to display the product record.
2. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
3. Select **File > Hierarchy** to enter a branch. All the territories in which that branch resides display under the branch name in the **Branch or Territory** column.
4. Select **Pricing > Quantity Break** to display the Quantity Breaks dialog box.
5. Select **File > Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
6. In the **Break1** through **Break5** columns, enter the quantity for each price break.

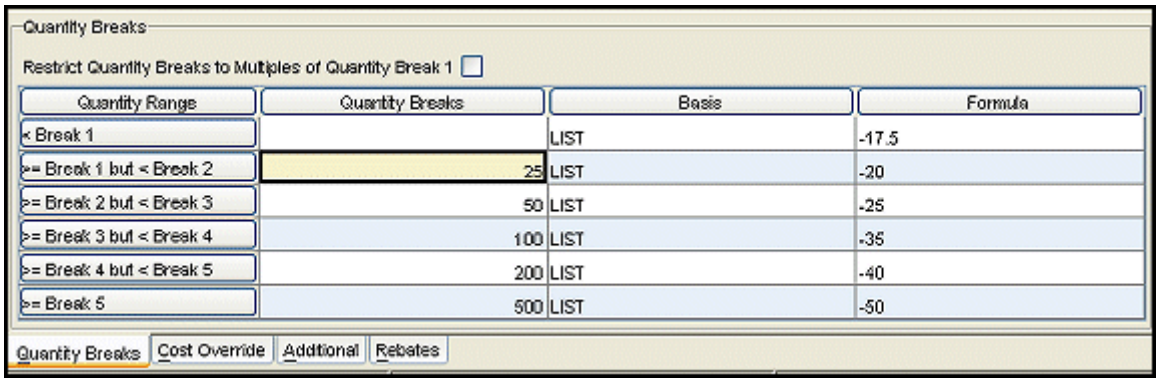
   For example, price breaks for a steel bolt with units of measure defined as *ea* and *bx* that comes 100 to a box could be defined as follows:

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

   The default unit of measure is flagged as the default sell unit of measure on the Product Maintenance window. You can also create breaks with any unit of measure defined for the product, or use a weight or dollar amount. For more information, see Working With Quantity Breaks.
7. Save your changes and exit the dialog box.

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 50 percent discount.

This diagram shows the quantity break set up as follows:

- Five quantity breaks in the **Quantity Range** column.
- 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 window.
G (group)	displays the unit of measure for the sell group in the **Group Price Unit of Measure** field on the Buy/Sell Group Maintenance window.

For the matrix type...	The system...
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 window for the quantity breaks for the product.

Weight

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

Dollars

To use dollars to define quantity breaks, enter the dollar sign ($) after the number in the **Quantity Breaks** column on the Sell Matrix Maintenance window. 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. 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 window. To use load factor to define quantity breaks, enter **L** after the number in the **Quantity Breaks** column on the Sell Matrix Maintenance window.

Requirements for Setting Up Quantity Breaks

On the Price Line Maintenance window:

- 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 so all quantity breaks and corresponding costs are displayed.

Viewing and Editing Price Sheets in Product Pricing

All the products in a price line typically experience price changes as a group. Maintain a record of the old prices and retain the prices on previous dates by creating a new effective date for the price sheet, instead of overwriting and losing the old prices. When you enter a new price sheet for a product, the system inserts the row at the top of the window. So, the most recent effective price sheet displays first.

Each price sheet can have any number of effective dates. For example the price sheet DEL~ has three price sheets on file, one each for effective dates 01/01/06, 01/01/08, and 01/01/09. On each effective date the system starts to use the price sheet with that date's cost and prices. You can retain price sheets with expired effective dates for up to 999 days.

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

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

1. From the **Maintenance** menu select **Product** to display the Product Maintenance window.
2. In the **Product** field enter a product ID to display the product record.
3. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
4. Select **Pricing > Price Sheet** to display the Price Sheet Maintenance dialog box.

   The system displays all price sheets assigned to this product and determines the columns to display based on the settings in Price Line Maintenance.

   Note: If the **UOM** or **Per Qty** rows are blank, the row inherits the values from the previous (earlier) price sheet. If your cursor is on the blank row, the Per UM and Per Qty display in the status bar.

5. Adjust information in the cost columns, as needed, for the current price sheet associated with this product.
6. To edit effective dates for the price sheet, select **Edit > Effective Dates** to display the Price Line Dates dialog box and complete the following fields:

Field	Description
Purge Age (days)	Enter the number of days to retain the effective date list before it is purged (up to 999 days). The default is 365 days.

Field	Description
Effective	Do one of the following: • To create a new effective date for this price sheet, select the first blank line of the **Effective** column, and enter the new date. If no blank line displays, click **Alt+Insert** to add a new line. • To edit an effective date, select the date you want to change, and enter the new date. The columns to the right of the **Currency** field on the Product Price Sheet dialog box are used to assign and display the values for the cost or price bases for the product that go into effect on the displayed date. Since replacement cost is typically the cost assigned by the system to a product on a purchase order, every time there is a price change by a vendor, update the replacement cost so that the next time you purchase the product, the correct cost displays on the purchase order. • If you have entered prices in advance of the actual effective date, the system uses the costs and prices associated with the current effective date, unless overridden, until the date with the new costs and prices arrives. • If a cost or price is missing from the current effective date, the system uses the values on the previous effective date. • If you make a change to information on this window, the system displays a Reason for Change prompt where you can enter why you made the change. If you supply a reason, it will follow the Eclipse supplied log comment on the Maintenance Log Viewing window. **Note:** To delete old price sheet formulas in the Eclipse Product File use the Rebuild Price Sheet/Discount Class Cache Utility. For example, if a vendor gives you disks with new price sheets and discount classes, run this utility to delete the old price sheets and discount classes in your Eclipse Product File.

7. Click **OK** to return to Price Sheet Maintenance.
8. Save your changes and exit the dialog box.

Changing Product Ranking

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

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

To change product ranking:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter a product ID to display the product record.
3. Select **Pricing** to display the Product Price Maintenance dialog box.
4. Select **Pricing > Ranks** to display the Rank Maintenance dialog box.
5. In the **Branch/Territory/All** field, enter a branch or enter **All** to view results for all accessible branches.

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

   Note: Access the Ranking window for the products in a price line from the Price Line Maintenance window (**Maintenance > Price Maintenance > Price Line > Ranking)**. If a product's rank is not what you expected rerun the price line ranking to update the report. The last-run ranking date displays on the Ranking window.
7. Save your changes and exit the dialog box.

Viewing and Editing Branch Costs

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

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

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

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

To view or edit branch costs:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window, and enter the product ID to display the product record.
2. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
3. Select **Pricing > Branch Costs** to display the Branch Costs dialog box.
4. In the **Branch/Territory/All** field, enter the branch or territory ID, or enter **All** to view all branches available to the user.

   The remaining fields display the following information:

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

5. Use the following menu items as needed:

Menu item	Description
Edit > Freight Factor	A freight factor is an estimated freight charge for a product, applied as a percentage of the purchase price. The system uses the freight factor to estimate freight charges on the purchase order if the actual freight charge is not known.
Edit > Maintenance Log	Displays the Maintenance Log Viewing window, which shows a history of comments made regarding changes to Branch Costs window.
Edit > Activity Log	Displays the history of all changes made to the Branch Costs window and who made them. To view branch cost activity, you must be assigned the BR.COST.ACTIVITY.VIEW authorization key.

6. Save your changes and exit the dialog box.

Inquiring About Branch Costs

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

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

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

To inquire about branch costs:

1. Access the Branch Costs Inquiry window in one of the following ways:
   - From the **Orders > Inquiries** menu, select **Branch Cost Inquiry**. The **Branch** field defaults to your home branch, and the cursor displays in the **Reference** column.
   - From the **Maintenance > Product Maintenance** window, enter a product, and then select **Pricing > Product Price Maintenance**. Then select **Pricing > Branch Costs** to display the Branch Costs dialog box. Then select **Edit > Branch Cost Inquiry**.
2. View or edit the following fields:

Field	Description
Branch	Your home branch, by default, or if accessing this dialog box from Product Pricing, the branch selected on the previous dialog box. Your authorization level determines whether you can access this field.
Product	If accessing from order inquiry, enter the description of the product whose costs are displayed, otherwise the dialog box displays the description of the product you accessed in Product Maintenance. Your authorization level determines whether you can access this field. The list sorts in either ascending or descending order. You can change the sort order by selecting **View > Change View** if accessing the dialog box from order inquiry.
As Of Date	Displays the as-of date for the product. You can change this date.
Cost Type	Select between the landed average cost and average cost. The currently displayed cost type displays in the lower part of the window. The selected cost type and settings display the next time you access the window.

3. Click the **Update** button to update the columns according to your selections.

Column	Description
Reference	The order transaction number that affected the average cost.

Column	Description
Date	Date of the change to average cost.
Prev. On Hand	Quantity on hand before change.
Prev. Cost	Average cost before change.
Qty	The quantity of the item on the order that the system factored into the new average cost calculation.
Cost	The actual cost on order.
On Hand	Quantity of the product on hand after change.
On Hand Cost	Average cost of product after change.
Customer/Vendor	The customer or vendor associated with the sales or purchase order. Select **View > Change View > Customer/Vendor** to display this field.

4. Select the options as needed.

To...	Select this menu option...
display the order for the selected transaction in view-only mode.	**File > View Reference**
display the last Branch Cost Inquiry Print report run for this item.	**File > View Report**
display the Product Activity Log Viewing screen for the product and branch.	**File > Product Change Log**
displays a product's availability and inventory information.	**Inquiries > Inventory Inquiry**
displays information about future commitments for the product and branch if you are fully authorized.	**Inquiries > Future Ledger**
displays all transactions for the product and branch if you are fully authorized.	**Inquiries > Inventory History Ledger**
displays the product record for the selected product.	**Inquiries > Product Maintenance**
toggles between the **Customer/Vendor** view, and the basic view.	**View > Change View > Customer/Vendor** or **View > Change View >Basic View**

5. When finished viewing branch costs, exit the dialog box.

Defining Additional Product Pricing Criteria

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

To define additional product pricing criteria:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. In the **Product** field, enter a product ID to display the product record.
3. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
4. Select **Pricing > Additional Data** to display the Product Price Additional Data dialog box. The name of the product displays at the top of the dialog box.
5. Select **File > Toggle Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
6. In the **Freight Charge** column, to each branch, assign a static freight charge that is added to a sales order each time this product is ordered.
7. In the **Pass Along Discount** column, enter the percentage discount to offer on this product. This amount is subtracted from the sale price of the product when purchased. A pass-along discount is a percentage discount from the vendor that you can pass-along to your customers. You can also assign pass-along discounts at the price line level.

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

8. In the **Print One Label Per** column, enter the number of this product needed on an order before a product label prints, for example, one label per every 100 items.
9. In the **Freight Factor %** column, enter an estimated freight charge for the product for this branch, as a percentage of the purchase price. The system uses this charge when the freight charge is not known at the time the purchase order is written.
10. In the **Print Price Sheet** column, check the box to respect the product price maintenance Additional Data branch-specific flag to exclude a product from the price sheet report when selected by the Print Price Sheets **Parameters** tab. This field works with the entry in the **Respect Print Flag** field on the Print Price Sheets window. The following table describes the results of your entries in these fields.

If the entry in the product maintenance Print Price Sheets (Y/N) field is...	and the entry in the Respect Print Flag (Y/N) field is...	then...
Yes (default)	**Yes**	the product is included on price sheets for the branch.
No	**Yes**	the product is *not* included on price sheets for the branch.

If the entry in the product maintenance Print Price Sheets (Y/N) field is...	and the entry in the Respect Print Flag (Y/N) field is...	then...
Yes	**No** (default)	the product is included on price sheets for the branch.
No	**No**	the product is included in the report for the branch.

11. Select **Restrict Price Changes in OE** for any branch to restrict users without the SOE.OVRD.NO.PRC.CHANGE authorization key from making changes to the price of this item in Sales Order Entry.
12. In the **Economic Amount** column, enter the amount below which the system recommends not returning items to inventory. For more information about this field see *Determining the Economic Return Amount* in the Purchasing documentation.
13. Save your changes and exit the dialog box.

Pass-Along Discount Details

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

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

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

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

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

Inquiring About Product Pricing

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

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

To Inquire about product pricing:

1. From the **Orders > Inquiries** menu, select **Inventory Inquiry** to display the Inventory Inquiry window.
2. In the **Product** field, enter a product name to display the product inventory record.
3. Select **Maintenance > Product Pricing** to display the Product Pricing window.
4. Scroll through the list of price classes to view corresponding sell matrix information.

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

Field	Description of read-only information
Branch	The branch where the inquiry is taking place. Either the branch where the order is being taken, or the branch displayed on the Inventory Inquiry window.
Group	The product sell group. This provides the y axis for the matrix cell information displayed. The **Class** column displays the x axis.
Price Sheet	The product price sheet currently in effect for the product.
Product Description	The product description carried over from the Inventory Inquiry window.
Class	The customer price classes displayed in order from lowest to highest price class level according to the price class level assigned to you and the OE.PRICE.CLASS.LEVEL authorization key. The customer class is the x axis for the matrix cell information displayed. The **Group** column displays the y axis.
Price/ea	The price for the item as determined by the sell matrix. **How the System Displays Product Pricing** The system looks at the following to determine what price to display on the Product Pricing screen. • Your OE.PRICE.VIEW.LEVEL authorization key accessibility level. • The view level assigned to the local basis name on the Price Line Maintenance screen. For the basis name you are permitted to view, the system displays the price or cost from the Product Price Sheet Maintenance screen, followed by the calculated prices or costs for the class/group matrix cell determined by your price class accessibility and the OE.PRICE.CLASS.LEVEL authorization key.
Basis	The first three basis names listed display the first three basis names from the price line. The remaining basis names correspond to the matrix cells most likely to be used, based on the pricing hierarchy, and depending on your view level.

Field	Description of read-only information
Formula	The formula corresponding to the basis name most likely to be used to determine the price depending on the pricing hierarchy, and depending on your view level.

5. When finished reviewing product pricing, exit the window.

Auto Price Updating Overview

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

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

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

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

The process for automatically updating products involves the following tasks:

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

Importing Price Update Files into Eclipse

Changing the Auto Price Update Format

Defining Auto Price Update Parameters

Importing Price Update Files into Eclipse

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

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

This topic contains the following procedures:

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

To import price update files:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

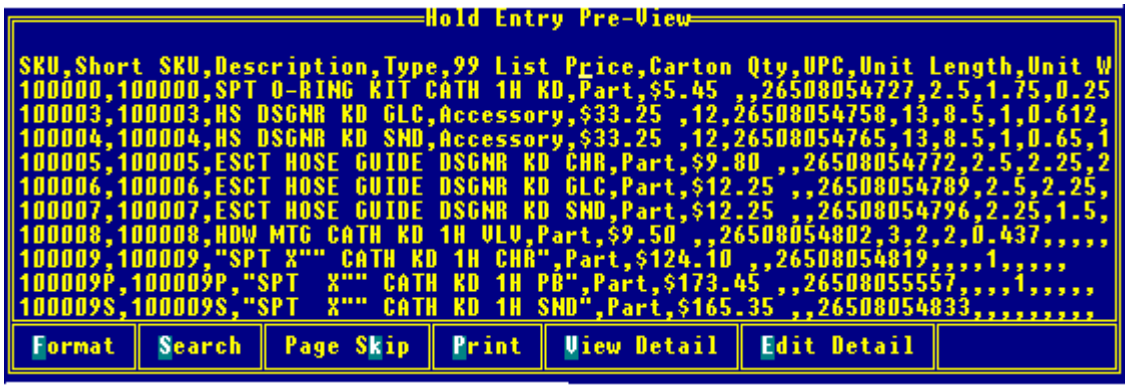
   Note: The messages, 0 bytes Transferred to Host and Upload Impossible, display in the message bar when you have entered the path name incorrectly.

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

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

To view the uploaded file:

1. Display the character based system.
2. On the Spooler Control screen, scroll to the file name and use the **View** hot key to display the file in the Hold Entry Pre-View screen.
3. Identify the columns in the file, so you can fill out the User Defined Auto Price Updating screen.
   - If the file is in .csv (variable) format, the data runs together and be separated by commas (or another delimiter).



- If the file is in fixed-width (blocked) format, the data displays in distinct columns. Fixed-width data files are normally accompanied by a vendor specification sheet that identifies the column descriptions and widths. Use this sheet to set the update parameters in the system.

4. Verify that the data is correct and press **Esc** to redisplay the Spooler Control screen.
5. Set update parameters and run the update. See Setting Auto Price Update Parameters for more information.

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

Changing the Auto Price Update Format

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

To change the auto price update format:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

   A work ID can determine a format-specific template for processing a spreadsheet. It does not have to be vendor-specific. You can use the same work ID for different vendors if several vendors send their data in an identical format.

7. Use the **Rec Layout** hot key to display the Auto Price Updating Record Layout screen.
8. In the **Record Type** field, enter one of the following formats for the update file:

   - **Blocked** - fixed-length.
   - **Variable** - comma-delimited.

   Note: A delimiter may also separate data elements in a blocked record.

9. In the **Record Length** field, enter one of the following:

   - Enter the number of characters necessary if the vendor specifies a record length.
   - Leave the field blank if the vendor does not specify a record length.

   Note: This field is accessible only for blocked-type records.

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

    The system does not recognize the dollar sign ($) as a numeric value, so enter a dollar sign in this field if the vendor puts a dollar sign in front of prices.

13. Press **Esc** to save the information and return to the User Defined Auto Price Updating screen.

Defining Auto Price Update Parameters

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

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

To define auto update parameters:

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

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

   Price Update Index Search

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

   For example, Instead of using UPC numbers to identify its products, a vendor might use its own part numbers. One of those fields would contain that user-defined part number. Point to that field by selecting **User Defined #1**, **User Defined #2**, **User Defined #3**, or **User Defined #4**. If you point to one of those fields and it does not contain any data, the update will not work because there is nothing to match.

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

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

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

10. In the **Upd UPC with Prefix (Y/N)** field, enter one of the following:

    - **Y** - Uses a prefix to index products and stores the prefix with the part number.
    - **N** - Does not use a prefix with the part number. The default is **N**.

11. In the **New Items Mode** field, enter one of the following:

    - **Prompt** - Selectively adds new products to the file. The Auto Price Updating Product Matching screen displays every time the system encounters a new product. This update may take several minutes if the update file contains many new products. See Adding New Products While Updating Prices for more information.
    - **Ignore** - Updates existing products without adding new products. Unless the update contains a new line of products only, use Ignore mode the first time you run the update. Run it a second time for existing products that were missed by the update, after correcting the records. See Auto Updating Product Pricing Information for more information.
    - **Add** - Updates existing products and adds any new products in the update file. Run the update in Add mode only after you have updated the products. If the file contains a new line of products only, you can use Add the first time you run the update. See Adding New Products While Updating Prices for more information.

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

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

    For blocked records:

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

    For variable records:

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

Data Format	Description of column information from update file
Prc Upd ID#*	Price update ID. This is a required field.
Description	Description of products.
Price Basis #1* to #5	Basis name you are updating. **Price Basis #1*** is a required field.
Weight	Weight of each product.

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

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

Hot Key	Description
Begin	Begins processing the upload file. Ensure the update criteria are set properly before using this hot key.
New Profile*	Defines the data for an initial product record for each new product the system encounters during the update. See Adding New Products While Updating Prices for more information.
Rec Layout*	Identifies the User Defined Auto Price Updating format of blocked or variable for the file you are importing.
Del	Deletes the current work ID. You are prompted for confirmation of the deletion.
UM Table*	Defines unit of measure codes and assigns the corresponding quantity to the code.

Hot Key	Description
Add'l Data	Transfers information from the update file to notes in the product record during a price update.
Scan	Ensures the price update runs as expected by checking the displayed information.

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

Deleting Price Update Templates

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

To delete a price update template:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

   The system deletes the update template.

8. Press **Esc** to return to the User Defined Auto Price Updating screen.

Creating Price Sheets in Auto Price Update

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

To create a price sheet in Auto Price Update:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

    The last effective date and the new effective date display.

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

Assigning Formulas to Price Sheets

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

To assign a formula to a price sheet:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

   For example, the **Rnd** column displays 3, so when you run the price update, prices display three characters beyond the decimal point.

   - The vendor's update diskette shows a LIST price of 10.00.
   - The formula for REP-COST is *.4873.
   - The updated REP-COST is 4.873.
10. In the **Prc Bas** field, enter the number (1-5) that corresponds to the **Update Basis #** field on the User Defined Auto Price Updating screen that points to the price data in the update file.
11. In the **CalcBase*** and **Formula** fields, enter the basis name and formula to use to calculate the price. For example, REP-COST is LIST less 40 percent, so enter **LIST** in the **CalcBase*** field and ***.40** in the **Formula** field.

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

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

Creating Default Product Profiles

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

To create a default product profile:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

   The default product status is **Review** so you can review new product records before the products are sold. After verifying that records are correct, you can use Mass Load to set the statuses to either **Stock** or **Nonstock**.
9. In the **Price Line** field, enter the price line for the new products.
10. In the **Buy Line** field, enter the buy line for the new products.
11. In the **Proc Group** field, enter the procure group for the new products. Leave this field blank if a procure group has been determined in the buy line record.
12. In the **Comm Code** field, enter the commodity code, if required, to assign to each new product.
13. In the **Sales Type** field, enter the G/L product sales type for the new products.
14. In the **Index Type** field, enter one of the following index types:
    - **Primary** - Stock items currently held in inventory. This is the default.
    - **Catalog** - Nonstock items available for order from the vendor catalog.
15. In the **Desc Prefx** field, add a description prefix, up to 25 characters, to the first character of the description for new products. Enter a prefix as follows:
    - A vendor name or initial as a prefix - Displays a space between the prefix and the first character of the description.

- A prefix followed by a tilde (~) - No space displays between the prefix and the first character of the description.

16. In the **Word Wrap Desc to 35 Chars (Y/N)** field, enter one of the following:
    - **Y** - Wraps product description exceeding 35 characters to the next line after the last whole word.
    - **N** - Does not wrap product descriptions exceeding 35 characters.
17. Press **Esc** to save the data and return to the User Defined Auto Price Updating screen.

Defining Unit of Measure Codes for Price Updates

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

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

> **Note:** You must have a per quantity and per unit of measure (UOM) on a least one price sheet per product. By default, the system uses the default UOM from the price line and the lowest UOM.

To define unit of measure codes for price updates:

1. Display the character based system.

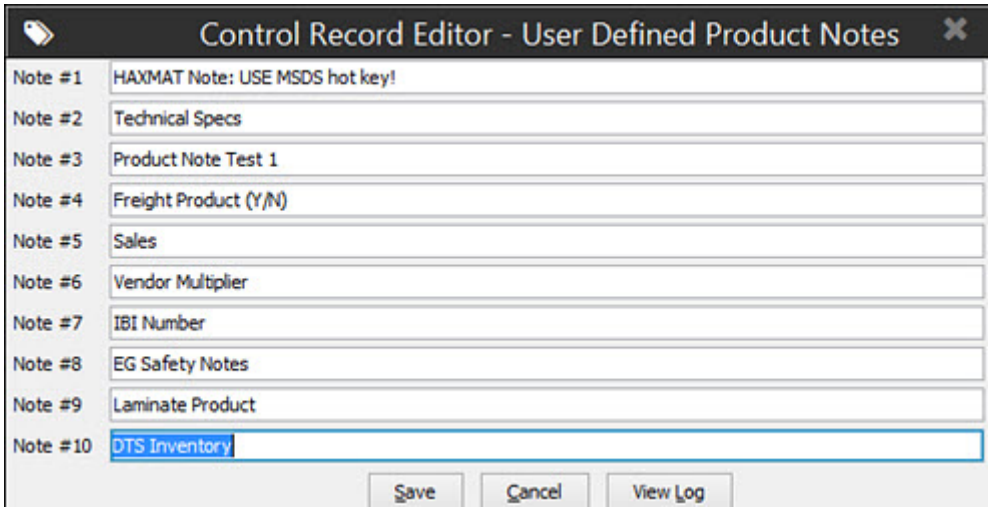
   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

Transferring Price Update Data to Product Notes

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

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



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

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

To transfer update data to a product note:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

   Either **Start** or **Elmt#** display as headings in the first active field, depending on the update file's format.

7. Scroll to the note number listed in the **Data Format** field. The system will transfer the data to this location. Enter the following, depending on the format:

- For blocked records, in the **Start** field, enter the number provided by the vendor for the data format you want to match.
- For variable records, in the **Elmt#** field, enter the column number from the update file for the data format you want to match.

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

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

Scanning Price Update Files

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

To scan a price update file:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

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

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

See Also:

Auto Price Updating Overview

Defining Auto Price Update Parameters

Verifying Data on Price Sheets

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

To verify data on a price sheet:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

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

   For basis names you are updating from the file, verify that the **CalcBase*** field displays AUTO and the **Formula** field displays *1. If not, change the values.

8. In the **Prc Bas** field verify that the number (1-5) corresponds to the correct number of the **Price Basis #** field in the **Data Format** column on the User Defined Auto Price Updating screen.

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

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

   If the basis name used to calculate another value is updated from the file, enter that number (1-5) in the **Prc Bas** field.

9. Repeat the verification process for each price sheet being updated.
10. Press **Esc** to return to the Price Update Scan screen.

Matching Products During Price Updates

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

To match products during a price update:

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

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

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

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

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

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

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

Auto Updating Product Pricing Information

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

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

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

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

To update product information:

1. Display the character-based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

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

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

   - *Skipped* - New items and products that were not updated because the price sheet was incomplete.
   - *Updated* - Items that have successfully updated. When the system encounters a product with a new price line or price sheet discount class, it displays the Price Sheet Entry screen so you can make corrections, if needed.
7. Use the **Begin** hot key and select an effective date.
8. At the Ignored Items prompt, enter one of the following:

   - **Y** - Creates and sends the Ignored Items report to your Hold file. This report lists new products and existing products that were not updated.
   - **N** - Runs the update without creating a report.
9. At the **##of Steps/Continue/Edit update** prompt, enter **E** (edit product) to display the Product Maintenance screen for the last product displayed in the list in the background.
10. View the first updated product record to verify that information was entered correctly.

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

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

14. When you finish updating records, press **Esc** until you return to Spooler Control.

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

Adding New Products While Updating Prices

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

- Import the vendor's price update file.
- Define default information for new products. This default product information allows the system to create a product record for each product on the update file not found in your inventory.
- Run the update on any products already in your inventory.

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

To add new products while updating prices:

1. Display the character based system.

   Note: The Auto Price Update functionality has not been incorporated into Solar Eclipse as of this release.

2. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
3. Position the cursor on the name of the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
4. In the **Processing Type** field, enter **Auto Product Price Updating** and use the **Begin** hot key to display the User Defined Auto Price Updating screen.
5. In the **Work ID** field, enter the appropriate work ID for the update file.
6. Set the **New Items Mode** field to one of the following to create new product records during a price update:

   - **Prompt** - Selectively adds new products to the file. The Auto Price Updating Product Matching screen displays every time the system encounters a new product. This update may take several minutes if the update file contains many new products.
   - **Add** - Updates the products and adds any new products in the update file. Run the update in Add mode only after you have updated the products. If the file contains a new line of products only, you can use Add the first time you run the update.

7. Use the **New Profile** hot key to create a default profile for new products.
8. Press **Esc** to save the new product data and return to the User Defined Auto Price Updating screen.
9. Verify all necessary information for the price update is included on the User Defined Auto Price Updating screen before running the update.

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

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

Preparing Vendor Update Files for the Matrix Upload Utility

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

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

To prepare the vendor update file for matrix upload:

1. Display the character based system.

   Note: The Matrix Upload Utility functionality has not been incorporated into Solar Eclipse as of this release.

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

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

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

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

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

Customer Number (CN)	Enter the customer number for which you want to create matrix cells. A period in front of the number is not necessary.
Vendor Number (VN)	The rebate vendor that will be the rebate vendor on the rebate information screen. A period in front of the number is not necessary.

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

Example 1 - .txt File Opened in Microsoft Excel

The following spreadsheet contains vendor information that has been imported into an Excel spreadsheet, and is ready to be saved in .csv format and imported into the system.

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

Example 2 - .csv File opened in a Text Editor

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

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

Defining the File Format for Price Updates

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

To define the file format for price updates:

1. Display the character based system.

   Note: The Matrix Upload Utility functionality has not been incorporated into Solar Eclipse as of this release.

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

   A work ID can determine a format-specific template for processing a spreadsheet, and does not need to be vendor-specific. You can use the same work ID for different vendors if several vendors send their data in an identical format.

7. Complete the remainder of the fields.
8. Use the **File Format** hot key to display the Upload File Format screen.
9. In the **Record Type** field, enter one of the following formats for the update file:

   - **Blocked** - fixed-length.
   - **Variable** - comma-delimited.

   Note: You can also separate data elements in a blocked record by a delimiter.

10. In the **Record Length** field, do one of the following: The **Record Length** field is accessible only for blocked-type records.

    - Enter the number of characters necessary if the vendor specifies a record length.
    - Leave the field blank if no length is specified.

11. In the **Delimiter Char** field, enter the character used between each field as a delimiter. This field is accessible only for variable-type files.
12. In the **Delete Chars** field, enter any characters that you do not want read as data, such as quotation marks or the dollar sign.

    The system does not recognize the dollar sign as a numeric value, so if the vendor puts a dollar sign in front of the prices enter **$** in this field.

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

Creating User-Defined Matrix Cells During Price Updates

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

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

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

Complete the following tasks before running the update:

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

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

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

To create buy or sell matrix cells during price updates:

1. Display the character based system.

   Note: The Matrix Upload Utility functionality has not been incorporated into Solar Eclipse as of this release.

2. Complete the required tasks described above.
3. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
4. Select the update file, and use the **Process** hot key to display the User Defined Upload Processing screen.
5. In the **Processing Type** field, enter **User Defined Matrix Upload** and use the **Begin** hot key to display the User Defined Matrix Entry screen.
6. In the **Work ID** field, enter a selection.
   - Leave the field blank - Does not save the template after this update.
   - A name that identifies to the vendor who sent the file - Creates a new template.
   - The name of the price line being updated - Creates a new template.

- Press **F10** and select an ID - Uses an existing template.

7. In the **Desc** field, enter a complete description for the update.
8. In the **Br/TR/ALL** field, enter a branch or territory selection.
   - **Enter a branch ID** - Creates branch-specific matrix cells for a single branch or territory.
   - **Leave the field blank** - Creates matrix cells that are not branch-specific, using the DFLT branch. This is the default.
   - **Enter ALL** - The DFLT branch option is used for the matrix cells created.
9. In the **Matrix Type** field, select which matrix type you want to create: **Sell** or **Buy**.

   The **Data Format** column below displays different items depending on which matrix type you select.
10. In the **Effective Date** field, enter the date the matrix cell becomes effective.
11. In the **Expiration Date** field, enter the date the matrix cell is no longer effective.
12. In the **Comment Type** field, enter a comment type to attach a comment to the matrix cells. Press **F10** to select from the same comment type selection screen displayed when you use the **Comment** hot key on the Matrix Maintenance screens. This field is required if you enter a **Comment** data point, below.
13. In the **Write Info to Customer Rebate Screen** field, enter one of the following:
    - **Y** - Copies rebate information to the Customer Rebate Maintenance screen. Display this screen from Customer maintenance by pressing the **Rebate** hot key.
    - **N** - Does not copy information to the Customer Rebate Maintenance screen. This is the default.
14. In the **Start** or **Elmt#** field of the **Data Format** section of the screen, scroll the data format list to find the format you want to update, enter the column number of that data from the update file.

    For blocked records:
    - **Start** - Enter the starting position character number that begins the section of data.
    - **Lngth** - Enter the corresponding length of the field.

    For variable records:
    - **Elmt#** - Enter the element number sequence as it appears in the record.

    Data Formats for matrix cells.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matrix Cells	Description
Class	✓		Price class for the matrix cell. Class or customer data are required.
Customer	✓		Customer specified on the matrix cells. If you entered *Sell* in the **Matrix Type** field, above, Customer displays here. Class or customer is required. If left blank, class is used.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matrix Cells	Description
Vendor		✓	Vendor specified on the matrix cells. If you entered *Buy* in the **Matrix Type** field, Vendor displays here. Vendor data are required.
Product Group	✓	✓	Product group specified on the sell matrix cells. Either a product group or a product is required. If both are entered, the system uses the product first.
Product	✓	✓	Product specified on the matrix cells. Either product group or product are required. If both are entered, the system uses the product first. The product information can be either the Eclipse ID or the primary UPC.
Basis	✓	✓	Price basis specified on the matrix cells. The basis used in the update file must be represented in Price Line Maintenance. You can also use one of the following the following basis names not represented in Price Line Maintenance: • Lnd Cost • Avg Land • Ord COGS • Ord Comm If you use one of these basis names, the format must be exactly as stated here.
Formula	✓	✓	Formula to apply to the basis.
Matrix Effective Date	✓	✓	Effective date specified for the matrix cells. This setting overrides the setting in the **Effective Date** field, above.
Matrix Expiration Date	✓	✓	Expiration date specified for the matrix cells. This setting overrides the setting in the **Expiration Date** field, above.
COGS Override Basis	✓		Basis applied to COGS override. The basis used in the update file must be represented in Price Line Maintenance.
COGS Override Formula	✓		Formula to apply to the COGS override basis.
COGS Override Code	✓		Cost override code for COGS override.
COGS Override Effective Date	✓		COGS price effective date override.
Comm-Cost Override Basis	✓		Basis for Comm-Cost override basis. The basis used in the update file must be represented in Price Line Maintenance.

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

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matrix Cells	Description
Direct Comm-Cost Override Basis	✓		Basis for direct Comm-Cost override basis. The basis used in the update file must be represented in Price Line Maintenance.
Direct Comm-Cost Override Formula	✓		Formula to apply to the direct Comm-Cost override basis.
Direct Comm-Cost Override Code	✓		Direct cost override code for Comm-Cost overrides.
Direct Comm-Cost Override Eff Date	✓		Direct Comm-Cost price effective date override.
Direct Rebate Contract	✓		Contract number to use for direct rebate.
Direct Rebate Vendor	✓		Vendor to which the direct rebate applies.
Direct Rebate Effective Date	✓		Price effective date to use for direct rebates.
Direct Rebate Expire Date	✓		Date the direct rebate expires.
Rebate Multiplier	✓		Populates the **Rebate Multiplier** column on the **Rebate** tab in Sell Matrix Maintenance on the **Default** mode line. For example, a sell price is increased by $1.00, the factor is applied to the increase, ($1.00 x .90), = .90. Costs will increase by ninety cents (.90). The imported value must have a decimal point defined on the import file, for example the rebate multiplier would be (.50) ;
Direct Rebate Multiplier	✓		Populates the **Rebate Multiplier** column on the **Rebate** tab in Sell Matrix Maintenance on the **Direct** mode line.
Minimum COGS Threshold	✓		Populates the **Minimum COGS Threshold** column on the **Rebate** tab in Sell Matrix Maintenance on the **Default** mode line. The imported value must have a decimal point defined on the import file, for example, 548.00. Even though there are no partial dollars, the zero cents must be defined.
Direct Minimum COGS Threshold	✓		Populates the **Minimum COGS Threshold** column on the **Rebate** tab in Sell Matrix Maintenance on the **Direct** mode line.

Data Format for Sell Matrix Cells	Sell Matrix Cells	Buy Matrix Cells	Description
Best Price Check	✓		Selects or deselects the **Best Price Check** check box in Sell Matrix Maintenance when using Quick Sell Matrix. Enter **Yes** to select and **No** to deselect.
Best Cost Check	✓		Selects how to handle best cost checks. Valid entries: **Yes**, **No**, **All**.
Split Quantity Pricing	✓		Selects how to handle pricing for split quantities. Valid entries: Yes, No, Extendable
Enable Rounding Rules	✓		Selects or deselects the **Enable Rounding Rules** check box on the **Additional** tab in Sell Matrix Maintenance when using Quick Sell Matrix. Enter **Yes** to select and **No** to deselect.
Restrict Price Changes in Order Entry	✓		Selects or deselects the **Restrict Price Changes in Order Entry** check box on the **Additional** tab in Sell Matrix Maintenance when using Quick Sell Matrix. Enter **Yes** to select and **No** to deselect.
Exclude Items Using This Matrix	✓		Selects or deselects the **Exclude Items Using This Matrix** check box on the **Additional** tab in Sell Matrix Maintenance when using Quick Sell Matrix. Enter **Yes** to select and **No** to deselect. **Note:** If you set this option to **Y**, and the control maintenance record is not activated, a prompt asks if you want to activate it.
Expiration Quantity Type	✓		Populates the **Type** field in the **Expire Quantities** area in Sell Matrix Maintenance. Select one of the following: **U** - Unit, **W** - Weight, **L** - Load Factor, **D** - Default List.
Expiration Quantity	✓		Populates the **Original** field in the **Expire Quantities** area Enter a value to expire this matrix cell after a quantity of product is sold

15. Use the **File Format** hot key to define the file format of the import file.
16. Use the **Begin** hot key to run the update.
17. Use the **Delete** hot key to delete the template, if necessary. The system prompts to confirm the deletion.
18. Press **Esc** to return to a blank User Defined Matrix Upload screen.

Updating Trade Service Prices

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

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

This topic includes the following procedures:

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

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

1. Display the character based system.

   Note: The **Trade Service Upload** functionality has not been incorporated into Solar Eclipse as of this release.

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

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

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

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

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

To import Trade Service data:

1. Display the character based system.
2. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

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

3. Enter **Trade Service Diskette Import**, and use the **Begin** hot key. One of the following occurs:

   If a Trade Service file has been used on the system, the Clear Previous Data and Load Type (Y/N) prompt displays. Do one of the following:

- If you uploaded a data from a CD-ROM, FTP, or diskette, enter **Y**. This action clears the previous pricing information and imports the new data. The system displays the number of records updated. The Downloading screen displays. Select **The data only on one line - No Conversion** when the Downloading screen displays.
- If your data originated from a 4mm data tape, enter **N**. This action does not clear the old pricing information or import new data. Select **The data on multiple lines - Remove CR/LF** when the Downloading screen displays.

If a Trade Service file has not been used on the system, the system imports the Trade Service file and displays how many records were imported.

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

To load Trade Service prices:

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

Hot key	Description
Formulas	Displays the Price Sheet Entry (Auto Updates) screen where you can assign formulas to change product prices on the update.
Eff Dates	Displays the Price Sheet Days screen.
Buy Line	Displays the Enter Buy Line for Vendor # prompt. Press **F10** and select a buy line for each product.
Edit Data	Displays the Price Update Data Edit screen with each product's data displayed.

<table>
<tr><th>Hot key</th><th>Description</th></tr>
<tr><td>UPC</td><td>Displays the UPC Selection screen, where you select the following for matching data on the update file:
Primary UPC - Uses only the primary UPC for matching. Primary and secondary are the default.
Secondary UPC - Uses only the secondary UPC for matching. Primary and secondary are the default.
Up to 10 user-defined UPCs - Uses user-defined UPCs numbered 1 through 10 for matching.
Multiple UPCs - Uses only the first match for updating.</td></tr>
<tr><td>Updates</td><td>Displays a view-only screen showing detailed update information on this product.
Update Detail Field Descriptions
The Update Details screen displays the following view-only information:<table><tr><th>Field</th><th>Description</th></tr><tr><td>Vendor</td><td>The vendor number for the products.</td></tr><tr><td>Price Line</td><td>The price line ID for the products.</td></tr><tr><td>Price Sheet</td><td>The price sheet for the products.</td></tr><tr><td>Discount Class</td><td>The discount class for the products.</td></tr><tr><td>Effective Date</td><td>The effective date for the prices of the products.</td></tr><tr><td>Price Updates</td><td>The number of items that contain pricing updates.</td></tr><tr><td>Revisions</td><td>The number of revisions or changes.</td></tr><tr><td>New Items</td><td>The number of new items on the update file.</td></tr><tr><td>Deletes</td><td>The number of items set to a status of delete.</td></tr><tr><td>UPC Changes</td><td>The number of UPC changes.</td></tr><tr><td>No Updates</td><td>Number of items that are not being updated.</td></tr></table></td></tr>
<tr><td>Replace</td><td>Displays the Replace Existing Products screen.</td></tr>
</table>

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

Defining Product Details for Trade Service Updates

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

To define product details to replace:

1. Display the character based system.

   Note: The **Trade Service Upload** functionality has not been incorporated into Solar Eclipse as of this release.

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

Price Sheet Entry Overview

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

In Price Sheet Entry you can change the following:

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

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

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

How Eclipse Handles Price Sheet Hierarchies

Price sheets are lists of products and their prices. Depending on your vendor's pricing and other pricing strategies, you can use price sheets to make sure that your products are priced to benefit both you and your customer. Price sheets correspond with price lines which in turn correspond to your products.

Two kinds of price sheets help you maintain the pricing structure at the price sheet level: default price sheets and local price sheets.

> **Note:** You must be assigned the PRICE.SHEET.MAINT, Level 4 to edit price sheets.

Default Price Sheets

The default price sheet (~tilde sheet) holds the most common settings used throughout your company. Price sheet changes usually occur because of price changes by the manufacturer. Each branch can maintain its own price sheets, but can inherit the values from the default price sheet.

For example, your company may use the same settings across branches and territories for all values. However, your branches in California have different standard cost and replacement cost. You set up a default price with all standard settings. Then your Pricing Manager for the California branches can edit the standard and replacement costs for the California price sheet only.

Traditionally, default price sheets contain a tilde (~) in the price sheet name.

Local Price Sheets

Local price sheets house the settings specific to how that branch or territory maintain their pricing structure. They have specified values for a product's Price Sheet Discount Class at the branch or territory level. They may retrieve settings from the default price sheet, but maintain several values that are specific to the territory. The local sheet settings take priority. This arrangement ensures that if you can use a default price sheet to keep most settings for price sheets throughout your company the same, but adjust a setting for a local branch that make handle costs differently.

> **Note:** Price sheets loaded into the ALL territory are considered local.

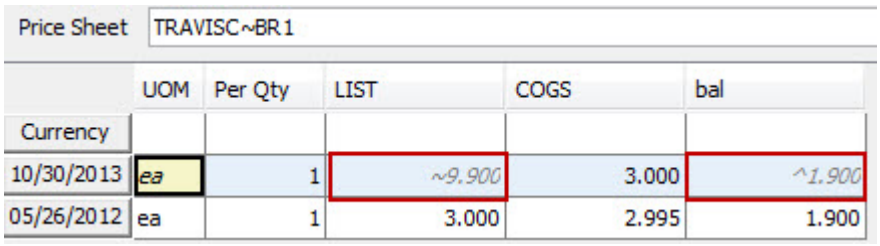
Local price sheets inherit settings from the default price sheets under the following circumstances:

- For a basis, you have selected **Inherit From Default Price Sheet** in Product Maintenance.
- The local price sheet is blank even though a price sheet is in effect for the item as of the date of the order.

About Product Price Sheet Dates

Local price sheet dates do not have to exactly match the default price sheets for the inherit functionality to work. Similar to basis field value validation, if a local sheet is blank and the Use Default is enabled, then the system looks for the effective basis field value in the default price sheet. For example, on June 1, 2013 an item has a local sheet dated 1/1/2013 with a blank value. When looking up the value on the default sheet, the last effective price sheet is found on 5/15/2013. This is the value used and displayed.

In Price Sheet Maintenance for the *local* price sheets, values inherited from the default price sheet display in gray, italicized text with a carrot preceding it. In Price Sheet Maintenance for *default* price sheets, values inherited by "looking backward" to the most recent effective price sheet display in gray, italicized text:



Price Sheet TRAVISC~BR1

	UOM	Per Qty	LIST	COGS	bal
Currency					
10/30/2013	ea	1	~9.900	3.000	^1.900
05/26/2012	ea	1	3.000	2.995	1.900

Consider the following control maintenance records for price sheets:

Use Future Price Sheet If No Current Price Sheet Is Found

Copy Default Price Sheet To Blank Sheets In Product Maint

Selecting Price Sheets

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

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

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

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

To select a price sheet:

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

   A dialog box displays, listing the price lines and the number of items in each price line. The default price sheet is always the first in the list.
3. Select the price sheet.

   A dialog box displays, listing this price sheet's effective dates.
4. Select the effective date of the price sheet you want to view. The price sheet displays unless the price sheet includes a discount class.

   Note: To create a new price sheet, select **NEW/CHANGE**.
5. If this price sheet has discount classes, select the discount class from the **Discount Class** field.

   If the price sheet has multiple discount classes, a prompt asks if you want to display only the selected discount class. Enter one of the following to define what discount classes are displayed in the Price Sheet Entry/Update window when you manually enter prices:
   - **Y** - The system limits the discount class to the one displayed in the top right of the screen.
   - **N** - The system uses all discount classes associated with the price line.
6. Make the necessary changes to this price sheet.
7. Save your changes and exit the dialog box..

Changing Price Sheet Effective Dates

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

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

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

You can use a default price sheet (tilde (~) price sheet) to keep most settings for price sheets throughout your company the same, but adjust a setting for a local branch that make handle costs differently. For more information, see How Eclipse Handles Price Sheet Hierarchies.

To change a price sheet effective date:

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

   If this price line has more than one price sheet, a list of the price sheets and the number of items in each displays. The default price sheet is the first in the list.
3. If the price sheet list displays, select the price sheet containing pricing rules closest to those you want to create in a new price sheet.

   An effective date list displays with all of the effective dates for that price sheet and the NEW/CHANGE option.
4. Select **NEW/CHANGE** to display the Price Sheet Days window.
5. In the **Purge Age (days)** field, enter the number of days to keep this price sheet active. The default is 365.
6. In the **Effective** column, scroll to the first empty row, enter the new effective date, and click **OK**.

   The effective date list re-displays including the effective date you just created. The price sheet only inherits its value if the most recent date is blank. The local sheet settings take priority.
7. Select the new effective date from the list.
8. If discount classes exist for this price line, select the sheet you want to view from the **Discount Classes** field. The price sheet displayed contains the new effective date, and the other window information is identical to the existing price sheet.
9. Enter any new pricing criteria for this price sheet.
10. Save your changes and exit the dialog box.

Limiting the Product List in Price Sheet Entry

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

Use the following criteria to limit the product list:

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

To limit the product list in Price Sheet Entry:

1. Display a Price Sheet.
2. Select **Selection > Include Deleted Items** to include products on the Price Sheet Entry/Update dialog box that have a status of Delete. This status is assigned to products on the product record.
3. Select **Selection > Selection Criteria** to display the Item Select dialog box.
4. Enter selection criteria in the fields to determine which products to list on the Price Sheet Entry/Update dialog box.

Selection Criteria	Description
Select Discount Class	Enter one or multiple discount classes separated by commas. Leaving the field blank selects all discount classes. Assign discount classes to products in Product Maintenance.
Sheet Sort By	Select one of the following to determine the default status of the product list on the Price Sheet Entry/Update dialog box: • **Sort Code** - Lists products by sort code, determined in the product record. This is the default entry. • **Product ID** - Lists products by product ID, determined in the product record. • **Status** - Lists products by status, determined in the product record. • **Description** - Lists products according to the first line of the description in the product record. • **Prod Sequence** - Lists products as they are listed in the price line record used for this price sheet.
Product Index Type	Select one of the following: • **Primary** - Includes stock items only. • Catalog - Includes nonstock items only. • Both - Includes stock and nonstock items. This is the default. Product index types are assigned in the product record as Catalog or Primary.

Selection Criteria	Description
Maximum Lines of Desc	Determine how many lines of description are necessary to distinguish between products on the Price Sheet Entry/Update dialog box. Enter the maximum number of lines needed.
Entity	Select either customer or vendor for this price update: The part number displays on the Price Sheet Entry/Update dialog box for any products that have customer or vendor specific part numbers under the product's description. In addition, the customer or vendor name displays at the bottom of the window next to the **Entity** indicator.
Null Basis Only	Select this check box to lists the *null* basis products - products in the price line that have a blank **Basis** field in Price Sheet Entry. These products did not get updated. If left unselected, the system lists all products in the price line. Run this selection after running an update to get a list of products in the price line that did not get updated.

5. Click **OK** to activate the selection.
6. Select **File > Enter Prices** on the Price Sheet Entry window to view the list of products on the Price Sheet Entry/Update dialog box.

Printing Price Worksheets for Manual Updates

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

To print price worksheets for manual updates:

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

   If you type ENTER in the **Calculation Basis** column for any of the bases, the worksheet displays a column of old prices followed by a column of blank lines where you enter the new prices. If the **Calculation Basis** column does not contain ENTER, no worksheet prints.
3. Do the following to organize the product list before printing the worksheet:
   - Rearrange the product list in the price line for easy product location.
   - Sort the products on the price sheet to organize products or limit the list on the worksheet.
   - To determine if you should include or exclude products in the worksheet that have been assigned a Delete status on the Product Maintenance window, select **Include Deleted items**.
4. Select **File > Print Worksheet** to generate the worksheet.

   The worksheet prints to your Hold file and the Phantom messages you when the worksheet is available.
5. Transfer the data from the vendor's price sheet onto your worksheet by hand.
6. Select **File > Enter Prices** to display the Price Sheet Entry/Update dialog box. The items listed should match the items on the worksheet.

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

See Also:

Manually Updating Prices

Price Sheet Entry Overview

Manually Updating Prices

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

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

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

This topic contains the following procedures:

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

Important: Pressing **Enter** in the Price Sheet Entry/Update window causes dependent costs to update. That is, when the cursor moves right after pressing **Enter**, the cost on the newly highlighted cell updates. If you move the cursor down, the entire row is updated.

Use the **Tab** key and the arrow keys to move your cursor through the table without updating.

To set up a price sheet for update:

1. From the **Maintenance > Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry window.
2. In the **Price Line** field, enter the price line ID and select the price sheet and discount class.
3. Select one of the following:
   - **New/Change** - To enter the new effective date.
   - **An existing effective date** - To display a price sheet.
4. In the **Price Change Variance Checking** area, enter the percentage limits for the high and low end for this price sheet in the fields provided. Example:

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

5. In the **Calculation Basis** field, enter the action for each basis name listed:

Options	Descriptions
ENTER	Displays this basis name as a column heading on the Price Sheet Entry/Update window, where you manually assign a new value to that basis name, for example: 1. In the **Calculation Basis** field for LIST, type **enter**. 2. Select **File > Enter Prices** to display the Price Sheet Entry/Update dialog box. 3. In the **LIST** column, update the prices as listed on the vendor's price sheet. **Note:** You are not required to enter a formula for basis names with a calculation basis of ENTER, because you manually enter prices for these basis names.
PREVIOUS	The system checks each of the price sheet's effective dates beginning with the most recent, and applies the formula and the basis name for the most recent price sheet that contains a value.
NO UPDATE	The formula and the basis name for the new effective date remain the same as on the previous effective date. If the previous price sheet contains a null entry, when a price search is in process for a product, the system checks the price sheets beginning with the most recent effective date, and applies the price from the most recent effective date that contains a value.
Basis name	Enter one of the following: • A basis name that is different from that entered in the **Basis Names** column, but is associated with this price line. This entry includes the added basis name's formula in the value. For example, a price sheet from a vendor shows that all REP-COSTS are increasing, and lists the individual price changes. You want to calculate your LIST price from the vendor's REP-COST for the products in this price line. • The same basis name as the basis name in the **Basis Names** column. This entry takes the basis name times 1 (*1).

6. In the **Formula** field, enter the formula you want the system to use with the entry in the **Calculation Basis** field to calculate the selling price.
7. In the **Round-To** field, enter the number of decimal places for rounding cents. Valid entries are 0 to 3; 0 does not round cents, 1 rounds to a hundredth, 2 rounds to whole cents, 3 rounds to the tenth of a cent.
8. Select the **Display** check box to display this basis name in the Price Sheet Entry/Update dialog box. otherwise leave it unchecked.

   This field is active only for lines with PREVIOUS, NO UPDATE and basis name entries in the **Calculation Basis** column. If you leave the box unchecked for PREVIOUS, or NO UPDATE, entries in the **Calculation Basis** column are calculated but do not display in the update dialog box.
9. Save your changes and exit the dialog box.

To enter prices on the update window:

1. Set up the price sheet for update.

Note: You must be assigned the PRICE.SHEET.UPDATE authorization key to edit prices.

2. Select **File > Enter Prices** on the Price Sheet Entry window to display the Price Sheet Entry/Update dialog box. The following information displays:
   - The view-only **Status** and **UM** columns display the product's status and unit of measure.
   - The basis name column headings on the right side of the dialog box are defined by the entries in the **Calculation Basis** and **Display** fields on the Price Sheet Entry window, described above.
   - Select **Views > Expanded** to add the following columns to the table.
     - **Sort Code** - Assigned to the product in Product Maintenance.
     - **Product ID** - Assigned to the product in Product Maintenance.
     - **Product Sequence** - Determined by the product ID sequence.
3. To sort the items by any of the column headings, right-click on the table heading and select the intended sort method. For example, to sort the list to display the items with the smallest LIST price first, right-click on the LIST table heading, and select **Sort By Descending**.
4. In each basis name column (for example, LIST and REP-COST), enter the vendor's price for each product.
5. Save and exit the dialog box when finished entering prices to update the prices.

To view price sheets for products:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window.
2. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.

   Price sheets display in the columns in consecutive order starting with the most recent.
3. Save your changes and exit the dialog box.

Copying Price Sheets

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

Copy price sheet information for the following reasons:

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

This topic includes the following procedures:

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

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

1. From the **Maintenance > Price Maintenance** menu, select **Price Sheet Entry** to display the Price Sheet Entry window.
2. In the **Price Line** field, enter the price line that contains the price sheet you want to copy.
3. Select **File > Copy Pricesheet**, and select the price sheet to which you want to apply the copied information, then select one of the following:
   - The **effective date** to which to copy the information. The system prompts you to enter the number of price or cost bases to copy.
   - **NEW/CHANGE** - To copy the information to a new effective date. Enter the **Purge Age (days)** in the field provided, then enter the new effective date in the first blank row.
4. Click **OK** to copy the information and return to the Price Sheet Entry window.

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

1. From the **Maintenance > Price Maintenance** menu select **Price Sheet Entry** to display the Price Sheet Entry window.
2. In the **Price Line** field, enter the price line that contains the price sheet from which you want to copy the discount class.
3. Select **File > Copy to Discount Class** to display a list of discount classes applied to the price sheet.
4. Select the discount class to copy.

   The system copies the discount class you entered in step 3 to the price sheet containing the discount class you select.
5. Make changes as necessary to any of the Price Sheet Entry fields.
6. Save your changes and exit the window.

Maintaining Price Sheets for Different Branches

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

Maintain multiple price sheets for the following reasons:

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

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

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

This topic includes the following procedures:

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

To create a branch-specific product price sheet:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window, and enter a product in the **Product** field.
2. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
3. Select **File > Toggle Hierarchy**, enter a branch, and click **OK** to view the settings for a specific branch and where those settings came from. All territories that contain that branch display in the **Branch /Territory** column below the branch, in the order of the territory priority. For more information, see Branch Hierarchy Details.
4. In the **Price Sheet** column, do the following:

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

5. Exit the dialog box to return to the Product Maintenance window.
6. If the Price Sheet Days dialog box displays, do one of the following in the **Purge Age (days)** field:

- Click **OK** to accept the entry of **365** and click **OK**.
- Enter the number of days you want this price sheet to remain on record after the expiration date, and click **OK**.

7. In the **Effective** field, select an existing effective date, or enter a new effective date for this price sheet.

   Note: The Price Sheet Days dialog box displays for each branch-specific price sheet you entered in the **Price Sheet** field on the Product Price Maintenance dialog box.

8. Click **OK** to save your changes and exit the dialog box.

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

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window, and enter a product in the **Product** field.
2. Select **Pricing > Product Price Maintenance** to display the Product Price Maintenance dialog box.
3. Select **Pricing > Price Sheet** to display the Price Sheet Maintenance dialog box.
4. Scroll to an effective date, or create an effective date by selecting **Edit> Effective Dates**.
5. In the price sheet effective date row, enter the prices for each basis name, as needed.
6. Do one of the following:
   - Select another price sheet for editing.
   - Save your changes and exit the dialog box.

Generating Price Sheets

Price sheets are lists of products and their prices. Generate price sheets for all or part of your product file: customers, vendors, sales representatives at the counter or in the field, and branches. Use data source selections to limit the information displayed on our price sheets.

Note: You must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet.

To set general options:

1. From the **Price Update** menu, select **Print Price Sheets** to display the Print Price Sheets window.
2. In the **Price Sheet** field, enter a price sheet ID or click **New Price Sheet** to create a new price sheet from which to work.
3. On the **Parameters** tab:
   - Review and complete the fields in the **General** area, as needed.

Field	Description
As of Date	Enter the date for the pricing data on the price sheet. The field defaults to the current date. This field accepts variable dates. Use the **Future Date** field to print future-dated pricing data in addition to the as of date pricing data. For example, to compare today's pricing data with next month's pricing data, enter the date one month from the current date.
Branch	Enter the branch, branches, or territories to use for pricing the items on the price sheet.
Selection	The entry in this field determines the next field's name and selections: If you select **Customer/Vendor,** the system prints price sheets for selected customers or vendors. The next field becomes **Customer/Vendor**, where you enter the customer or vendor's names to include in the price sheet. • **Customer name** - Prints price sheets specific to that customer. • **Vendor name** - Prints price sheets that show what you pay this vendor for the products in the price lines. If you select **Out Salesperson**, the system prints price sheets for selected salespeople. The next field becomes **Out Salesperson**. • **Enter a salesperson's ID** - Prints a list of all of this salesperson's customers. • Leave this field blank, and enter price classes using the **CLASS#** selection in the **Data Source** field to create a generic price book. If you select the **Only Customers with Assigned Lines** option, you cannot make a selection in this field.
Last Activity Date	Enter a date to include only the products purchased from a vendor or sold to a customer on or after that date.

Field	Description
Future Date	Enter a date in the future to print future-dated pricing data in addition to the as of date pricing data. For example, to compare today's pricing data with next month's pricing data, enter the date one month from the current date.
Saved List	Leave this field blank unless you want to enter a saved list, if so enter the name of a saved list in this field. If you are using a saved list, deselect the following options. The system ignores, or does not allow entry in these fields when using a saved list: • Only Custs with Assigned Lines • Only Customer Specific PNs • Select from Reorder Pad • Sort by (Format tab) **Note:** If no saved list exists, and if you understand how to use TCL (Terminal Control Language), you can build your own editable saved list. Alternately, you can contract with Eclipse to create a saved list that gives you the information you want.
Only Customer Specific Overrides	Select the check box to include only those products whose prices come from a customer-specific sell matrix for each customer's price sheet. If this item remains unchecked, all products are included on the report regardless of which sell matrix it comes from.
Only Customers with Assigned Lines	Select the check box to print the price sheet for only those customers who have price lines assigned in Customer Maintenance, and include only the products in those price lines. This entry overrides the **Price Lines** field on the **Product Selection** tab. If you select this option, you cannot populate the **Selection** field.

- Review and complete the field in the **Product Selection** area, as needed.

Field	Description
Price Lines	Enter price lines to include on the price sheets. The lists can be saved for future use. If you leave this blank, the system includes all price lines assigned to the customer. The system ignores settings on this window if **Only Customers with Assigned Lines** is selected, price lines specified in this field are ignored.
Product Status	Limit the list of products on the price sheets to only those assigned a certain status, for example, stock, nonstock, or miscellaneous charges on the product record.
Sell Group	Limit the products in the price sheets to those assigned to certain sell groups.

Field	Description
Print Quantity Breaks	Select one of the following for products subject to quantity break pricing: • **None** - Does not display the product's quantity breaks on the price sheet. If this option is activated, the **Extend Quantity Breaks** option is not available. • **Row** - Prints the product's quantity breaks in rows below the product. • **Column** - Prints the product's quantity breaks in columns to the right of the price column. If the **Print Quantity Breaks** option is set to **Row** or **Column**, check **Extend Quantity Breaks** to display the dollar amount that the customer has to spend to reach each break point on the price sheet. If this option is not checked, the break point dollar amount on the price sheet does not display. Use the CUST SPEC data source to display quantity breaks on the report.
Inventory "Stock" Status	This option works with the **Stock** column on the Primary Inventory Maintenance window for all products in the branch. Select one of the following: • **Stock** - Includes the product if the **Stock** field on the Primary Inventory Maintenance window contains **Yes** or **Auto** and meets the minimum number of hits to consider the product a stock product. • **Nonstock** - Includes the product if the **Stock** field on the Primary Inventory Maintenance window contains **No** or a **Auto** and does not meet the minimum number of hits to consider the product a stock product.. • **All** - Includes both stock and nonstock items.

- Select the remaining check boxes in the **Product Selection** area, as needed:

Select this check box...	To...
Select Active Products Only	limit the products on the price sheet to only those that are active at the selected branches. Use the **Branch/Terr** field to select the branches in which you want to limit the active product selection.
Select from Reorder Pad	print a price sheet for only those products on the customer's Reorder Pad. If deselected, the system selects all products for the price lines specified.
Respect Print Flag	honor the **Respect Print** flag in Additional Product Pricing. The **Respect Print Flag** check box is dependent upon the entry in the **Print Price Sheet** column in the Product Price Additional Data window (**Maintenance > Product Maintenance > Pricing > Additional**) being deselected. The **Print Price Sheet** option flags a product on a branch-by-branch basis to include or exclude from a price sheet. If this **Respect Print Flag** option left deselected, the **Print Price Sheet** flag is ignored, and all selected products are included on the price sheet print.

Select this check box...	To...
Only Customer Specific PNs	create a price sheet that includes only products that have a customer-specific part number. If deselected, the system includes all products in the selected price lines. This option is active only when you enter a customer in the **Customer/Vendor** field. **Note:** If a save list is used for this report, it displays in the **Use Save List** field, and the **Only Customer Specific PNs** option is inactive.
Extend Quantity Breaks	display the extended dollar amount needed to hit the defined break, set to **Yes**. This works in conjunction with the **Print Quantity Breaks** field in the **Product Selection** area.
Select Both Reorder Pad and Customer Overrides	have the system check to see if an item is in the Reorder Pad or has a customer specific override. If either is true, the system includes the item in the price sheet. Select this field only if both the **Select from Reorder Pad** and **Only Customer Specific Overrides** fields are selected. If this field is not selected and the **Select from Reorder Pad** field and **Only Customer Specific Overrides** field is selected, the system first checks the Reorder Pad and then checks the customer part number. If the item exists in the Reorder Pad and the **Only Customer Specific Overrides** field is selected, the system includes it in the list.
Only Price Changes	include products whose dollar amounts change between the **As of Date** and the **Future Date**. Price changes can be further filtered by using combinations of the following fields: • Respect Print Flag • Select from Reorder Pad • Only Customer Specific PNs • Select Reorder Pad and Override This field is dependant upon the inclusion of at least one of the following data sources: CUS SPEC BASIS# COGS CUST COMM DLFT COST DFLT LIST LIST GP% CUST GP% COST OVRD For more information about data sources, see Defining Data Sources and Columns for Price Sheets.
Only Fixed Pricing	limit the price sheet to select only customers that have fixed pricing (price formulas that start with $)
GP Range From and **GP Range To**	include only customers with a gross profit that falls into that range. Using these fields allows you to print the price sheet for only customers with margins less than or more than what you specify.

4. On the **Format** tab:

- Select your price sheet display options.

Field	Description
Sort By	Select whether to sort the price sheet by price line or customer part number.
Date Format / Date Separator	Select how you want your dates to display on your price sheets. Indicate the date format, such as MMDDYYY and the separator such a /. Your dates display as 10/26/1998.
Page Break On	Select one of the following page break preferences: • **Price Line** - Breaks at each price line. • **Customer** - Breaks at each customer. • **Nothing** - Breaks where the page margin dictates. • **Customer/Price Line** - Breaks at each customer and each price line. • **Salesperson** - Breaks at each outside salesperson.
Report Break	Select this check box to start a new report on each new item in the **Page Break** field. For example, if you set the **Page Break** field to **Customer**, a new report begins for each customer. Leave this check box deselected to create one report. A blank row is inserted between each item, and the report breaks as you specified in the **Page Break** field.
Data Source	Select a data source for each column heading to include on this price sheet. You must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet. **Note:** To delete old price sheet formulas in the Eclipse Product File use the Rebuild Price Sheet/Discount Class Cache Utility. For example, if a vendor gives you disks with new price sheets and discount classes, run this utility to delete the old price sheets and discount classes in your Eclipse Product File.

- Format the column structure using the table to adjust your price sheet format.

Column	Description
Column	The column on the price sheet you are formatting.
Data Source	Select the type of data you want for the column, such as Avg Cost.
Heading	Enter the heading name you want to use.
Justify	Indicate which side of the column to justify the text to, such as R for prices and L for text.
Width	Define the maximum width for the columns depending on the data. For example, the column for branches may only need to be 3 characters wide, while a part number may need 15 characters.
Pad	Select the separator between columns: periods, zeroes, or blank spaces.
Decimals	Enter the number of decimal places you want to use in the column. Leave blank to eliminate decimals.
Comma	Indicate if you want to use commas in when there are more than four place values, such as $4,623.

Column	Description
Support Zero	Indicate if you want to support zeroes in the column.

5. Set options and generate the price sheets. You can schedule price sheets to print regularly, if needed using the Phantom Scheduling.

   Note: If you make changes to the price sheets through the phantom scheduler, the system pushes the changes back to the original report. You do not need to delete and reschedule the price sheets to run to make changes.

Defining Data Sources and Columns for Price Sheets

The system uses data sources, such as AVG COST, to help you analyze your price sheets. For example, you can review price lines, units of measure, matrix group and sell groups across products. Use the Format function on your price sheet to determine the data sources that display on a printed price sheet. The system predefines data sources, and you must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet.

To define data sources and columns for a price sheet:

1. Display the Print Price Sheets window.
2. Enter the necessary criteria for the price sheet as described in Generating Price Sheets.
3. Click the **Format** tab.

   You must be assigned the COGS.VIEW or COST.VIEW authorization key to print cost on a price sheet.
4. In the **Sort By** field, select how to sort the data: **Line** (sorts by price line) or **Part Number**.
5. In the **Page Break on** field, indicate where to add page breaks.
   - **Price Line** - Breaks at each price line.
   - **Customer** - Breaks at each customer.
   - **Nothing** - Breaks where page margin dictates.
   - **Customer/Price Line** - Breaks at each customer and each price line.
6. Check **Report Break** to start a new report on each new item in the **Page Break On** field. For example, if you set the **Page Break On** field to **Customer**, a new report begins on each customer. If this is unchecked, the list continues without page breaks. A blank row is inserted between each item in the list.
7. In the **Data Source** column, enter a data source for each column to display on this report.

Data Source	Description
LINEBREAK	Inserts a line break and starts printing the following columns of information on a new line. The columns after the *LINEBREAK* print on the next line down.
3M SQTY	Prints the quantity sold in the last three months to the customer entered on the price sheet.
ATTB#	Prints the value in the product file assigned to the attribute number that you enter. You must know the dictionary layout of the product file to know what value you are pulling. Enter the attribute number next to the number sign (#), before moving to the next column. For more information, see Eclipse Dictionary Overview.
AVG COST	Prints the current system-calculated average cost for the product in inventory at the branch.
BASIS#	Prints the price that corresponds to the local basis name in the line provided, counting down from the top. Enter the basis number next to the number sign (#), before moving to the next column.

Data Source	Description
CLS#	Enter the class price for the products to include on the price sheets. This class prices the items as if the customer were assigned to that price class. Enter the class number next to the number sign (#) before moving to the next column.
COGS COST	Prints the price assigned on the Product Price Sheet Maintenance window to the local basis name that is assigned to the COGS COST global basis name for the product's price line.
COMM CODE	Prints the commodity code assigned to the product on the Product Maintenance window.
COST OVRD	Prints any cost override associated with the product. The column is blank if there is no override cost.
CUST COGS	Prints overridden cost of goods sold cost from the matrix cell for the customer. If an override does not exist on the matrix cell for this customer, the report displays the value found in the basis that is pointing to the global basis COGS-COST in Price Line Maintenance. Use this option only for internal reporting.
CUST COMM	Prints overridden commission cost from the matrix cell for the customer. If an override does not exist on the matrix cell for this customer, the report displays the value found in the basis that is pointing to the global basis COMM-COST in Price Line Maintenance. Use this option only for internal reporting.
CUST GP%	Prints gross profit percent that is found based upon the matrix for the customer. The system uses the cost of goods sold cost when calculating the GP%. Use this option only for internal reporting.
CUST ID	Prints the customer's internal ID number, which identifies the customer to the system.
CUST PN	Prints the customer-specific part number if one has been assigned to an item that is included on the price sheet.
CUST SPEC	Prints the customer-specific price, which is the customer's normal price for the as-of date of the report.
DESC2-6	Prints lines two through six of the product description.
DESC LINE 1	Prints the first line of the product description, unless DESC.WORD.1 comes before DESC1. Then DESC1 prints everything after the first word in the first line of the product description.
DESC LINE 2	Prints the second line of the product description. If that line is blank, the column contains a blank line.
DESC LINE 3	Prints the third line of the product description. If that line is blank, the column contains a blank line.
DESC MULTI	Prints all lines of the product description.
DESC WORD 1	Prints the first word in the first line of the product description. If DESC WORD 1 comes before DESC LINE 1, DESC LINE 1 prints everything after the first word in the first line of the product description.

Data Source	Description
DFLT COST	Prints the price assigned on the Product Price Sheet Maintenance window to the local basis name that is assigned to the DFLT COST global basis for the product's price line.
DFLT LIST	Prints the price assigned on the Product Price Sheet Maintenance window to the local basis name that is assigned to the DFLT LIST global basis for the product's price line.
DISC CLASS	Prints the discount class assigned to the product on the Product Price Maintenance window.
EXPIRE DATE	Prints the expiration date of the corresponding pricing matrix cell that is currently in effect for the product.
HEADING	Prints the heading as a column value in the report. For example, if the heading were 10 underlines, it prints the underlined area to be used as a place to write something, such as, DATE.
ID	Prints the system's internal product number.
KEYWORD 1	Prints the first word, delimited by a space, that is in the **Additional Key Words** field in the product record. If that line is blank, the column contains a blank line.
KEYWORD 2	Prints the second word, delimited by spaces, that is in the **Additional Key Words** field in the product record. If that line is blank, the column contains a blank line.
LAST COST	Prints the last amount, purchase price, or COGS COST, paid for the product at the branch.
AVG COST	Prints the current system-calculated average cost for the product in inventory at the branch.
LAST SALE DT	Print the date the product was last sold to the customer entered on the price sheet.
LAS SALE PRC	Prints the price the product was last sold to the customer entered on the price sheet.
LIST DISC	Prints the difference between the price the customer is being charged and the LIST PRICE.
LIST GP%	Prints the gross profit percent found using the LIST price of the product to the cost of goods sold cost for the product. Use this option only for internal reporting.
MATRIX GRP	The sell group or product ID on the matrix cell.
PRC LINE	Prints the name of the product's price line.
QTY SOLD	Reports the quantity sold for a specified date range. You can include the QTY SOLD data source only if you set the **Select from Reorder Pad** field to **Yes**.
RANK #	Prints the products for the rank you select.
SELL GROUP #	Prints only the sell group position selected, regardless if the product lives in multiple sell groups.
SELL GROUP	Prints all the sell groups assigned to the product, from the Price Group Maintenance window, in the product's branch.

Data Source	Description
SORT CODE	Prints the sort code assigned to the product on the Product Maintenance window.
SPACE	Inserts a blank column of the defined width.
U/M DESC	Prints the descriptive unit of measure defined in the **Per UM** field on the Product Price Sheet Maintenance window, which describes the unit of measure. For example, box or each. **Note:** When you move to another data source line, the system prompts you to select how to display the unit of measure: Make Upper Case (BX), Make Lower Case (bx), or Keep As Is (default from the system). For each U/M data source, you select how to handle the display.
U/M QTY	Prints the quantity defined in the **Per Qty** field on the Product Price Sheet Maintenance window that is assigned to the unit of measure entered in the **Per UM** field on the same window. For example, if the **Per UM** were box, the **Per Qty** might be 12 per box. **Note:** When you move to another data source line, the system prompts you to select how to display the unit of measure: Make Upper Case (BX), Make Lower Case (bx), or Keep As Is (default from the system). For each U/M data source, you select how to handle the display.
UPC	Prints the number in the **Primary UPC** field on the UPC Codes Maintenance window, accessed by using selecting **Additional Data >UPC Code Maintenances** on the Product Maintenance window.
WEIGHT	Prints the weight assigned to the product on the Product Maintenance window.
YTD QTY	Prints the total quantity, in the lowest unit of measure, of the item that has been sold out of the branch from the beginning of the fiscal year through the as of date.

8. In the **Heading** column, enter the name of the heading to display for each data source.

   The heading is user-defined up to the width of the column. If you enter a heading that exceeds the width of the column, the system truncates it to fit the column width.

9. In the **Jus** column, enter the justification you want for the column:

   - **L** (left) - Starts printing the entry at the left side of the column. Use this setting if the data is alphabetic.
   - **R** (right) - Starts printing the entry at the right side of the column. Use this setting if the data is numeric.

   Note: If you enter **L** in this column and move the cursor to the **Pad** column, an entry is required in the **Pad** column before exiting that column to ensure blank spaces display appropriately.

10. In the **Width** column, enter the number of characters for displaying data in each column. The width of the column depends on the remaining number of character spaces available. The total number of characters available in portrait mode is 80. The total number of characters available in landscape mode is 100.

11. In the **Pad** column, enter one of the following:
    - **Y** (periods) - Fills the blank spaces in a column with periods before or after the data, depending on the justification selected.
    - **Z** (zeros) - Fills the blank spaces in a numeric column with zeroes.
    - **N** (blank spaces) - Leaves the blank spaces in a column blank.
12. In the **Decm** (decimal) column, enter the number of decimal places for a numeric entry. You cannot access this column if the **Jus** column is set to **L**.
13. Select the **Comma** check box for each data source that you want to insert a comma in numeric entries greater than 999.

    You cannot access this column if the **Jus** column is set to **L**.
14. Select the **Support Zero** check box for each data source if you want to leave a numeric field blank for entries of zero. If left deselected, entries of zero print as numeric.

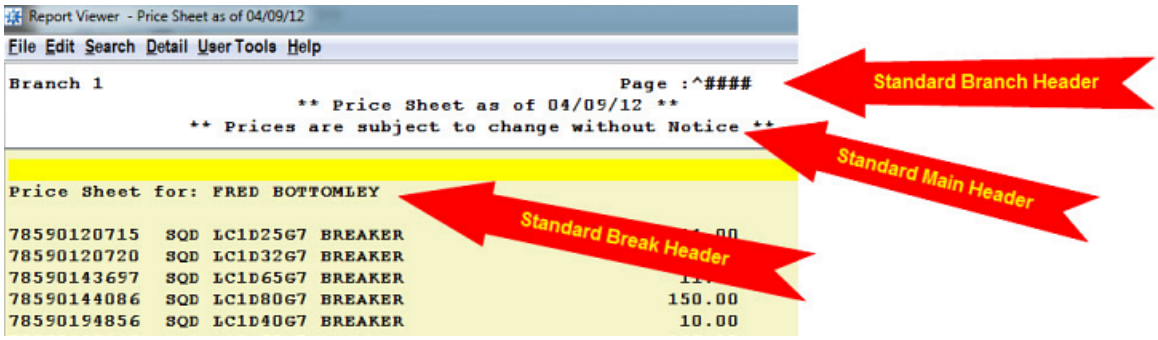
    You cannot access this column if the **Jus** column is set to **L**.

Customizing Price Sheet Headers

You can change the header on your price sheets, if needed, so they reflect the information you need to see regularly. For example, you can add a comment to display on each header sheet, such as "All prices associated with miscellaneous charge items are under review."

To customize a price sheet header:

1. Display the price sheet that you want to add a new header to.
2. From the **Edit** menu, select **Header Edit**.
3. Select **Column Headers** if you want to include default column headers when creating price sheets.
4. Use the following fields to define how you want to use or replace the header information for different areas:

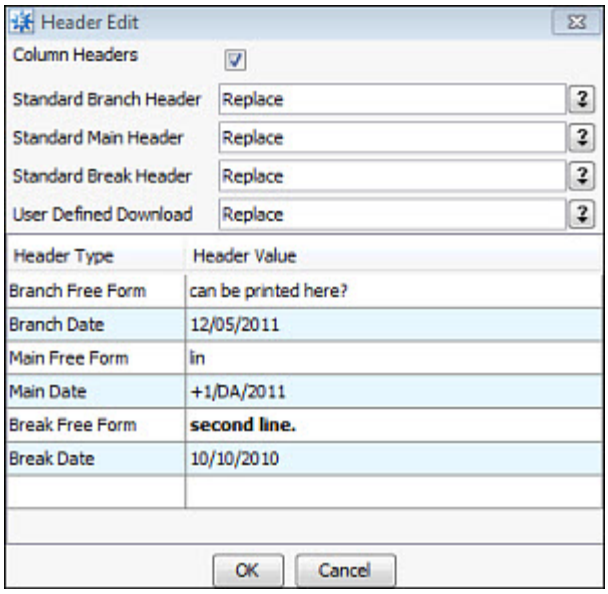


- **Standard Branch Header** - Indicate if you want to include the standard branch header on the price sheet you are managing.
- **Standard Main Header** - Indicate if you want to include the standard main header when customizing your price sheets.
- **Standard Break Header** - Indicate if you want to include the standard break header when customizing your price sheets
- **User-Defined Download** - Indicate if you want to use the standard extract for price sheets or if you want to use the user-defined download utility to pull pricing information for your price sheets.

Note: You can also choose to replace the any of these selections with something more specific using the table at the bottom of the page.

5. If you selected to replace any of the headers, use the Header Item table to define what to use as a replacement:
   - **Header Type** - Select which kind of field you want to use for the header.
   - **Heading Value** - To correspond with the Column Header Type, enter the information you want to use on the header, such as the date format.

   For example:



6. Click **OK** to save your changes and return to the price sheet details.

Defining Price Sheet Download Parameters

The Price Sheet Download function allows the user to select a file name and format which auto populates the e-mail, FTP and windows direct option. You can run price sheets and have it e-mail a file, such as MS Excel, of the pricing automatically using the parameters you define.

To define the download parameters for a price sheet file:

1. From the **Price Update** menu, select **Print Price Sheets** to display Price Sheet Entry.
2. Display the price sheet for which you want to define download parameters.
3. From the **File** menu, select **Download** to display the Download Options.
4. Complete the download parameters for the price sheet:

Field	Description
File Name	Enter the name you want the file to have each time it is extracted, such as *Branch 3 NStock*.
File Extension*	Select the type of file you want the extract to be in: **.csv**, **.pdf**, **.txt**, **.xlsx**, or **Other**. This field is five characters long.
Column Delimiter*	Select how to separate the values in the file for each column: **pipe** (|), **comma**, **semicolon** (;), **tilde** (~), **none**, **space**, **tab**, or **other**. The delimiter is two characters long. In addition: • If you select **.csv** in the **File Extension** column, the system auto-populates this field with a comma and you cannot edit it. • If you select **.pdf**, **.xls**, or **.xlsx** in the **File Extension** column, the system grays out this field and you cannot edit it because these formats typically are not delimited.
Line Delimiter*	Select how to separate the values in the file on each line: **pipe** (|), **comma**, **semicolon** (;), **tilde** (~), **CR**, **CRLF**, **LF**, **space**, **Tab**, or **Other**. The delimiter is two characters long.
Trim Blanks	Type **Yes** to have the system eliminate any blanks that are not delimiters.
No Decimals	Type **Yes** to remove decimals from the extract.
Footer Comment	Enter any footer comment you want to add, such as "Prices are subject to change without notice."

*** If you select Other, the system prompts you for a user-defined entry.**

5. Save your changes and exit the window.

Buy and Sell Group Overview

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

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

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

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

Pricing Group Guidelines for Matrix Cells

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

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

Customer Price Classes

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

The customer type is used for promotional pricing. Define the customer type and default price class from the customer record. For example, your customer types may be: large contractor, small contractor, electrical, industrial, and retail. You can give all electrical customers a discount this month on certain products.

Product Groups

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

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

Buy Groups and the Buy Matrix

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

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

Manufacturers:	**Sylvania Mfg.**	**Phillips Mfg.**	**General Electric**	**Seagull Lighting**
Buy Groups:				
MIN-LMP (Miniature Lamps)	TRADE -20	TRADE -21	TRADE -20/2	TRADE -20

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

The system requires buy groups for the following reasons:

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

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

Sell Groups and the Sell Matrix

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

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

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

Creating Buy and Sell Groups

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

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

To create a buy or a sell group:

1. From the **Maintenance > Price Maintenance** menu, select **Buy/Sell Group** to display the Buy/Sell Group Maintenance window.
2. In the **Group ID** field, click the **New Group** button, enter an ID for the buy or sell group, and click **OK**.

   Note: To display an existing buy or sell group press **F10** to display a list from which to select. For more information, see Assigning a Group ID to a Buy or Sell Group.

3. In the **Description** field, enter a description of the buy or sell group.
4. In the **Price Line** field, enter the price line to use with this group.
5. In the **Representative Product** field, enter the representative product for each sell group.
6. In the **Group Price Unit of Measure** field, enter the unit of measure to use when setting up a matrix cell with quantity breaks for the sell group, and when assigning the G (Group Quantity Break) matrix type in Sell Matrix Maintenance.
7. In the **Group Type** field, assign a group type to this buy or sell group. Group types are used for reporting purposes and are defined in the **Valid Buy/Sell Group Types** control maintenance record.
8. In the **Combo Group** field, enter the name of the combination group if this group will be part of a combination group.
9. In the **Combo Contributor** field, select how to handle the quantities, if items in this group are part of a combination group:
   - **No, do NOT add group's qtys into total Combo break but use Combo pricing** - Does not add the group's quantities to the total Combo break, but uses Combination (type C matrix cell) pricing.
   - **Yes, add group's qtys into total Combo break and use Combo pricing** - Adds the group's quantities to the total Combo break, and uses Combination (type C matrix cell) pricing.
   - **Qtys are to be added to total Combo break but do not use Combo pricing** - Adds quantities to the total Combo break, and does not use Combination (type C matrix cell) pricing.
   - **No, do NOT add group's qtys into total Combo break but use Combo pricing** - Does not add the group's quantities to the total Combo break, but uses Combination (type C matrix cell) pricing.
   - **Yes, add group's qtys into total Combo break and use Combo pricing** - Adds the group's quantities to the total Combo break, and uses Combination (type C matrix cell) pricing.

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

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

10. In the **Minimum Price Basis** field, enter the global basis to be used to determine the minimum sell price for a product.

    The Minimum Sell Basis represents the minimum price a user can use when overriding the sell price to the customer. This check occurs before any GP% check that could be set up in the system.

    The system checks the product's sell group first for a Minimum Price Basis. If a basis field is not selected, the system checks the Price Line for a Minimum Price Basis.

    The Minimum Sell Basis represents the minimum price a user can use when overriding the sell price to the customer. This check occurs before any GP% check that could be set up in the system.

    Note: You must have the SOE.MIN.SELL.PRICE authorization key assigned in order to manually override the minimum selling price for the item in Sales Order Entry.

11. Save your changes and exit the window.

Assigning Group IDs to Buy or Sell Groups

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

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

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

Naming Groups

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

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

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

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

Changing Buy and Sell Group IDs

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

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

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

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

To change a buy or sell group ID:

1. From the **Maintenance > Price Maintenance** menu, select **Change Buy/Sell Group ID** to display the Change Buy/Sell Group ID window.
2. In the **Current Group ID** field, enter the group ID you want to change.
3. In the **New Group ID** field, enter the new group ID.
4. Select **File > Begin** to change the group ID throughout the system.

Combination Group Pricing Details

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

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

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

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

When combination group matrix cells are all matrix type C

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

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

A class 1 customer places an order for:

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

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

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

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

When combination group matrix cells are not all matrix type C

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

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

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

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

A class 1 customer places an order for the following:

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

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

- For the 9 items in sell groups DELTA1 and DELTA2 the matrix cell is a type C, so these products receive quantity break pricing.
- For the 2 items ordered in sell group DELTA3 the matrix cell is type N, so these items do not receive quantity break pricing.

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

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

Combining Sell Groups for Quantity Break Pricing

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

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

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

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

To combine sell groups for quantity break pricing:

1. Create your buy and sell groups.
2. From the **Maintenance > Price Maintenance** menu, select **Buy/Sell Group.** On the Buy/Sell Group Maintenance window, enter the necessary information to create the buy or sell group. Then enter a combination group ID in the **Combo Group** field.
3. In the **Combination Group** field, enter the name of the combination group, or click the **New Group** button to display the New Combination Group dialog box, where you complete the following fields:
   - **Price Line** - Select the price line ID that contains the sell groups for the combination group.
   - **New Combination Group** -Enter the name of the new combination group.

   Click the **Create** button to display the Combination Group Maintenance window.
4. In the **Description** field, enter a description for the contents of the combination group, up to 23 characters.
5. In the **Unit of Measure** field, enter a common unit of measure for defining quantity breaks for the items sold as part of the combination group.

   Sell groups in a combination group can have different units of measure for pricing, but they must have a common combination group unit of measure. Use one of the units of measure defined for the price line, # (weight), or $ (dollars).

   Note: The combination group unit of measure overrides the sell groups unit of measure.
6. Check the **Split Qty Pricing** check box to activate split quantity pricing for the combination group.
7. In the **Quantity** column for Quantity Break 1 through Quantity Break 5, set up your definitions for quantity breaks. When you enter a number, the system appends the combination group unit of measure to the number.

When you create a C-type matrix cell for each sell group in the combination group, the system displays the quantity breaks and unit of measure defined on the Sell Matrix Maintenance window.

More Options for Combining Sell Groups for Quantity Pricing

Menu item	Description
File > Recall	Preserves the entries in the **Line** and **Combo** fields and changes the remaining fields back to their original settings.
File > Delete	Deletes the combination group. You are prompted for confirmation.

Quote Pricing Overview

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

Quotes are:

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

The Quote Process

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

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

See Also:

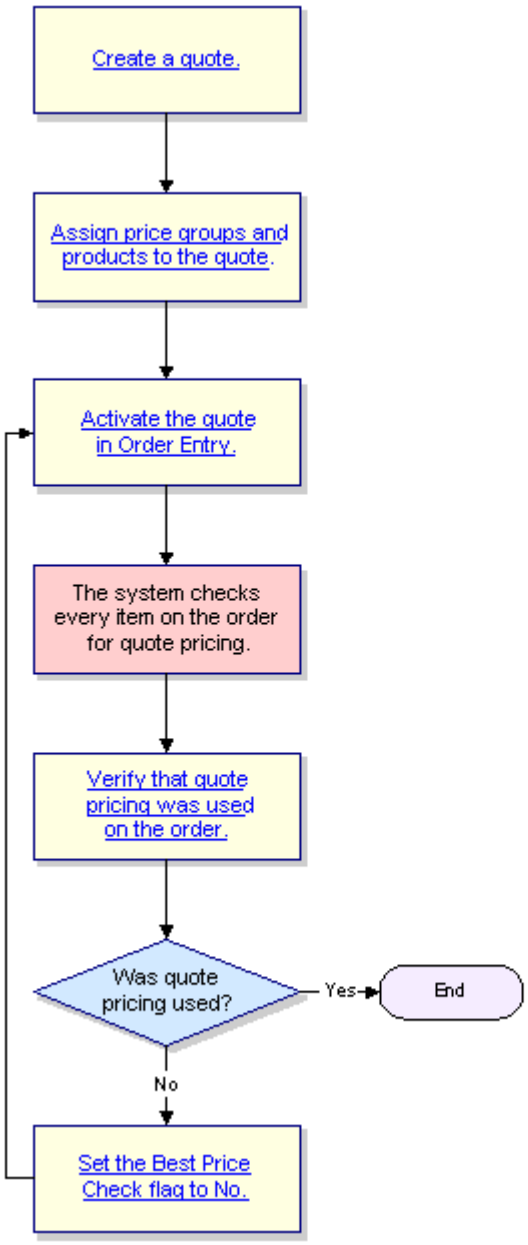
Creating Quote Pricing

Assigning Price Groups and Products to Quotes

Setting Expiration Quantities for Matrix Cells

Applying Pricing Quotes in Sales Order Entry

Quote Pricing Workflow



Creating Quote Pricing

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

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

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

To create a quote:

1. From the **Maintenance > Price Maintenance** menu, select **Quote Maintenance** to display the Quote Maintenance window.
2. In the **Quote Number** field, click the **New Quote** button and enter the name of the quote at the prompt.

   Note: To display an existing quote, enter the quote ID.

3. In the **Expire Date** field, enter the date the quote expires. You cannot select this quote from order entry after the expiration date. This expire date for a quote can be different from the expiration date in the matrix cells for the products or groups.

   Note: A quote might expire earlier than this date if you have activated expire quantity on the matrix cell, and the quantity reaches zero.

4. In the **Description** field, enter a description of the quote, such as "Sanyo Air Conditioner Special," or customers who benefit from the quote, such as "Plumber Special."

   You can use as many as 99 lines of 30 characters each to describe the quote. This description displays with the quote ID in the selection list in the **Quote Number** field.

5. Do one of the following:

   - To make the quote pricing available to all customers save and exit the dialog box.
   - To restrict the quote pricing to the customers or vendors listed, enter the name of each entity to benefit from the quote in the Customer/Vendor column, and then save your changes and exit the window.

6. To delete a quote select **File > Delete**. The system prompts for confirmation.

Assigning Price Groups and Products to Quotes

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

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

To assign price groups or products to a quote:

1. From the **Maintenance > Price Maintenance** menu, select **Sell Matrix** to display the Initial Matrix Information dialog box.
2. In the **Type/Quote** field, enter the quote ID.
3. Enter a value in one of the following fields:
   - **Group** - Enter a sell group ID for matrix cells that are not product specific. Enter **All** to include all sell groups in the matrix cell.

     Note: If you select a Type/Quote, you cannot use **ALL** in the **Group** field.

     Note: If you use **All**, you can use only global basis names in the **Basis** field because All is not a sell group in a price line to which local basis names have been assigned.
   - **Prod** - Enter a product ID to create a product-specific sell matrix cell.
4. In the **Branch/Territory** field, enter one of the following:
   - **A branch ID** - Includes that branch in the matrix cell.
   - **DFLT** (default) - Includes all branches in the matrix cell.
5. Select **NEW** at the prompt.
6. In the **Effective** field, enter the date the matrix cell becomes effective.

   Note: To display an existing matrix cell, enter the effective date for that cell.
7. In the **Expires** field, enter the date the matrix cell will expire.
   - If the matrix cell is in effect for a quantity, the cell will expire 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 hierarchy until it finds the cell to use when pricing a product.
8. In the **Expire Quantities** area, enter the following:
   - **Original** field - Enter the product quantity available at the quote price.

   The system populates the **Exp Qty: Remaining** field with the same quantity. As this item is purchased at the quoted price, the amount displayed in the **Remaining** field reduces. The quote pricing for the product expires either when the remaining amount reaches zero, or on the quote matrix expire date.
   - **Type** - Enter the quantity type. Quantity can be a dollar amount, the product's unit of measure, weight, or load factor.

9. In the **Matrix Type** field, enter a matrix type:
   - C - Combo Qty Break
   - D - Different Matrix
   - G - Group Qty Break
   - M - Matrix Qty Break
   - N - No Qty Break
   - O - Override Cost Only
   - P - Product Level Quantity Break
10. In the **Best Price Chk** field, enter **N**. When the system checks a price, it looks only at normal pricing, where quote pricing is at the top of the pricing matrix hierarchy.
11. In the **Basis** field, enter the basis name for this quote.
12. In the **Formula** field, enter the quote pricing formula.
13. Use the **Comment** hot key to add a comment to the quote for easy identification.
14. Save your changes and exit the window.

Price Tags Overview

Use price tags to provide product and pricing information for regular and sale-priced items in your showroom. Use the Price Tag Print Queue to print one or a range of price tags for products with a location type of Display in Product Location Maintenance.

> **Note:** An **L** in the **T** column in Product Location Maintenance indicates a display location for a product.

As you print tags for products in the queue, the system moves the products to the Price Tag Reprint Queue where they remain until you manually delete them. Access the Price Tag Reprint Queue through the Price Tag Print Queue by changing the queue type to **Reprint**. The selection and printing functions in both queues work the same.

Regular Price Tags

Regular price tags have two print areas, one that a customer sees in the showroom, and a tear-off portion that provides information to locate the product on display in the showroom. You remove the bottom portion of the price tag after locating the product and placing the price tag on an item in the showroom.

The top portion of the price tag includes the following information:

- Eclipse product ID and bar code.
- Product description..
- The date the tag was printed.
- The current sell price.
- User-defined product details.

The system determines the regular price by searching all sell matrix cells that do not have promotional codes set.

Special Price Tags

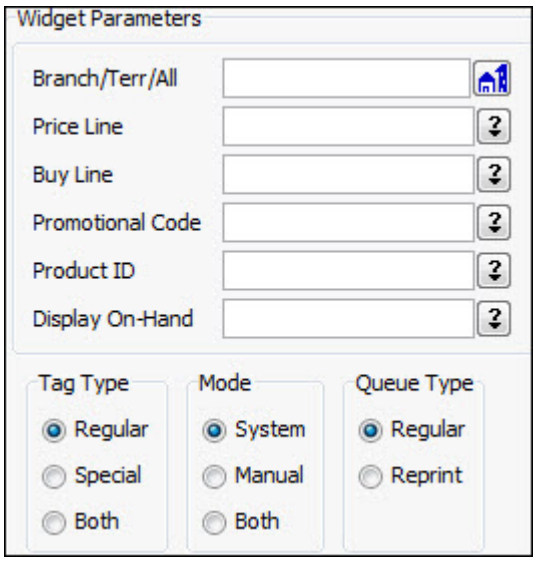
Special price tags are for products that are on sale or promotional priced products and contain the same information on the regular price tag plus the regular price of the item and an additional user-defined field at the bottom. Changes in promotional codes and pricing drive the printing of special price tags for products.

Price Tag Print Queue

The Price Tag Print Queue displays all items in your showroom, that is, those items with a product location type of Display, that require new price tags. Check for price updates using the Phantom Scheduler or by running the update manually. The system adds products to this queue if any of the following information changes:

- Product description
- Selling price
- Promotional code

If you run price tag prints frequently, you can add a widget on your Solar Main window and run them, when needed. You can set all the details available in Price Tag Print Queue and run the price tags with a single action. For more about adding widgets, see Adding Widgets to the Widget Toolbar in the Navigation documentation.



For more information, see Printing Price Tags.

Price Tag Reprint Queue

After you print tags from the Price Tag Print Queue, the system removes the item from that queue and places it in the Price Tag Reprint Queue. Use this queue to reprint any necessary tags that you may have misplaced or damaged. Items remain in this queue until you manually delete them.

Setup Requirements for Price Tags

Before printing price tags using the Price Tag Print Queue, some setup tasks are required for them to work. Review and complete the following:

- Create a customer in Customer Maintenance to use for all price tags, such as Price Tag Customer. You use this customer to create pricing matrix cells the system uses to determine price changes that require new price tags.
- Create matrix cells for your price tag customer and the products or product groups that require price tags.
- Check for price tag updates.
- Check that you have defined promotional codes for price tags, if needed..

Creating Sell Matrix Cells for Printing Price Tags

Use the print price tag feature to generate price tags on demand for sale items and regularly priced items that you have in your showroom.

Before creating matrix cells, complete the setup instructions in the system to handle price tags. Then, create a matrix cell for your price tag customer and the products or product groups that require price tags. Customers in the same price class as the Price Tag Customer receive the same pricing as displayed on the tag. Any other customer receives their normal pricing based on how they are set up in the matrix.

Schedule a price tag update phantom to run regularly to check for price changes. This phantom evaluates the matrix file for each product and determines if a price has changed for items with a display location, defined in Product Maintenance. If the price has changed, or if items go on sale, these items are sent to the Price Tag Print Queue where you can print the required tags.

To create a matrix cell for printing price tags:

1. From the **Maintenance > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance window.
2. Complete the sell matrix information on the Initial Matrix Maintenance window.
3. In the **Effective Date** field, enter the date from which you want to begin using the price tag matrix cell.
4. Click the **Additional** tab.
5. In the **Promotional Code** field, select the promotional code you want to use for price tags.

   Note: Use the **Valid Promotional Codes** control maintenance record to setup a code for price tags.

6. Save your changes and exit the window.

Defining Promotional Codes for Price Tags

Use promotional codes to identify products in your showroom that are on sale. Any product associated with a promotional code requires a special price tag. If the promotional code for a sell matrix cell changes, the system places all products using that sell matrix cell in the Price Tag Print Queue the next time the Phantom Scheduler checks for price tag updates or you manually run the routine. Promotional codes result in special price tags that contain the sale price along with the regular price. Define the valid promotional codes before setting them in a sell matrix cell.

To define a promotional code for a price tag:

1. From the **Maintenance > Price Maintenance > Price Tags** menu, select **Valid Promotional** codes to display the Valid Promotional Codes window.
2. In the **Code** field, enter the code as it should display in the selection lists in the Sell Matrix or Print Price Tag Queue. You can use up to nine (9) characters.
3. In the **Description** field, enter a more complete description for the code.
4. In the **Label Text** field, enter the text you want to include on the special tag for the items that use the promotional code.

   For example, you enter *Fall* in the **Code** field to indicate a discount you offer in the autumn months of the year. In the **Description** field, expand on that code by entering additional information about the promotion, such as *Fall Discount of 10 Percent*. In the **Label Text** field, enter the text that you want to your customers to see for the special, sale-priced items, such as *Fall Blowout* or *Fall Clearance*.
5. Repeat steps 2-4 to define additional promotional codes.
6. Save your changes and exit the window.

To set promotional codes in a sell matrix sell:

1. From the **Maintenance > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance window.
2. Display a sell matrix cell.
3. Click the **Additional** tab.
4. In the **Promotional Code** field, enter or select the promotional code for the pricing matrix. The system associates each product that uses the matrix cell with the promotional code you assign.
5. Save your changes and exit the window.

Adding Product Details on Price Tags

You can add product classification information, if needed, on price tags. For example, if a product contains wattage information, create a dictionary in the PROD.CLASS file for MAX_WATTAGE and then set the Product Classification in the Product Maintenance window to **MAX_WATTAGE** indicating maximum wattage as listed in Product Maintenance. Then enter **Watts** the Classification Description to list what to display on the price tag. If you use the MAX_WATTAGE dictionary for wattage information changes, the system places the product in the Price Tag Print Queue the next time the check for price tag updates routine runs.

> **Note:** Dictionary files are setup in Dictionary Maintenance and these product classifications are normally defined during installation and setup.

To add product details, you must create a price tag customer, create a matrix cell for your price tags, and define promotional codes.

Adding Product Classifications to Product Files

Before adding product details to your price tags, you must identify for each product you expect to have a price tag for. You can use Mass Load to upload classify data all at once.

To add product classifications to Product Files:

1. From the **Maintenance** menu, select **Product** to display the Product Maintenance window and display a product record.
2. From the **File** menu, select **Classify** to display the User-Defined Data for the product.

   The system displays the current **File Name** and **Desc ID** fields for the product.
3. In the **Input** column, add the details for the price tag for each corresponding Input column entry.

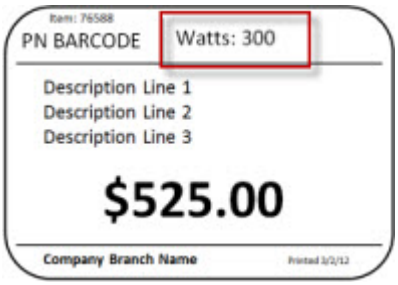
Setting Classification Types in Price Maintenance

After adding product classifications, use Price Maintenance to select classification types for price tag codes and descriptions.

To add classification types in Price Maintenance:

1. From the **Maintenance > Price Maintenance > Price Tags** menu, select **Price Tag Maintenance** to display the Price Tag Maintenance window.
2. In the **Price Tag Customer** field, enter the customer you set up for managing price tag parameters.

   The system may auto-populate this field with the customer you have set up in Customer Maintenance.
3. In the **Product Classification for Label** field, use the drop-down menu to select the product classification you want to use, such as MAX_WATTAGE. These selections are setup in the Product Maintenance during system setup.
4. In the **Description Title for Label** field, enter the text you want to display on the tag with the information, such as WATTS or COLOR. This text is used *only* in this field in the system.



6. Save your changes and exit the window.

Checking for Price Tag Updates

Check for price updates using the Phantom Scheduler or by manually running an update. The system searches for products, with a location type of Display in Product Location Maintenance, that contain changes to the following information since the last time the price tag check ran: product details, product description, selling price, and promotional code.

> **Note:** The system first determines if a product has a **Display** location type, then determines if the product is part of the matrix cell defined for the customer in the **Price Tag Customer** control maintenance record.

To check for price tag updates:

1. From the **Maintenance > Price Maintenance > Price Tags** menu, select **Check for Price Tag Updates** to display the Price Tag Updates window.
2. In the **Price As of Date** field, enter the date after which you want to search for changes.

   For example, if you want to check for price changes that occurred or are scheduled to occur after October 1, 2010, enter 10/01/10 in the **Price As of Date** field. The system searches for products that have sell matrix cells effective as of the date, and also searches for products that have changes as listed above.

   Note: You cannot check for price updates for dates in the past.

3. From the **File** menu, select **Begin** or schedule the phantom to run when convenient.

Printing Price Tags

The Price Tag Print Queue lists all the products that have Display locations defined in Product Location Maintenance that have a price or product change. The system determines a product requires a new price tag based on any of the following information changing for the product: product details, product description, selling price, and promotional code. You can also create a widget for the price tag queue to keep track of changes, as needed.

Check for price tag updates regularly using the Phantom Scheduler or run the check manually prior to printing tags. You can also manually add products to the Price Tag Print Queue. You can insert tags manually, if you need to print a tag that is not displayed in the queue. By default, price tags print as 4 inches wide and 3 inches tall.

> **Note:** Products with display locations that have zero on-hand that have had a price or product change also appear in the Price Tag Print Queue.

As you print tags for products in the queue, the system moves the products to the Price Tag Reprint Queue where they remain until you manually delete them. Access the Price Tag Reprint Queue through the Price Tag Print Queue by changing the queue type to **Reprint**. The selection and printing functions in both queues work the same.

This topic discusses the following tasks for printing price tags:

- Populating the Price Tag Print Queue.
- Selecting Products and Printing Price Tags.
- Removing Products From the Price Tag Queues.
- Purging the Price Tag Print Queue.

Populating the Price Tag Print Queue

Populate the Price Tag Print Queue to display the products for which you want to print price tags.

To display the Price Tag Print Queue:

1. From the **Maintenance > Price Maintenance > Price Tags** menu, select **Price Tag Print Queue** to display the Price Tag Print Queue.
2. Use the Header fields to limit the price tags you want to display in the queue.

Field	Description
Branch/Terr/All	Enter the branch or territory for which you want to display products in the queue.
Promotional Code	The promotional code assigned to the product in the sell matrix. **Note:** Promotional code information is applicable only to special tag types. If you selected **Regular** in the **Tag Type** field, the cursor moves directly to the **Mode** field.
Price Line	Limit the queue to a single price line.
Product ID	Limit the queue to tags for a single product ID.
Buy Line	Limit the queue to a single buy line.

Field	Description
Display On-Hand	The on-hand quantity of the product in the display location.
Tag Type	Select one of the following: • **Regular** - Only products that have regular pricing information defined and that require new price tags display in the queue. • **Special** - Only tags with promotional codes that require new price tags display in the queue. • **Both** - All regular-priced and promotional prices products that require new price tags display in the queue.
Mode	Select one of the following: • **System** – Displays products that the system found during the last price tag update check. • **Manual** – Allows you to enter products in the print queue manually and displays the products you have added to the queue manually, but have not yet printed price tags for. For example, you may find a price tag missing in your showroom and need to replace it. Use the manual mode to add it to the queue. For more information, see Manually Adding Tags to the Price Tag Print Queue. • **Both** – Displays products that the system found during the last price tag update check and those that you manually added to the queue, but have not yet printed price tags for.
Queue Type	Indicate if you want to display the queue for regular print tags or reprint tags.

2. Click **Update**.

   The system displays the queue with the defined parameters.

Column	Description (View Only)
Branch	The branch where the product is located.
Description	The product description, as defined in the product record.
Tag Type	• **Regular** - Only products that have regular pricing information defined and that require new price tags display in the queue. • **Special** - Only tags with promotional codes that require new price tags display in the queue. • **Both** - All regular-priced and promotional prices products that require new price tags display in the queue.
Promotional Code	The promotional code assigned to the product in the sell matrix.
Effective Date	The effective date of the pricing as defined in the sell matrix cell.
Queue Date	The date the item was added to the queue. As you print items, the system moves them to the Price Tag Reprint Queue.
Display On-Hand	The on-hand quantity of the product in the display location.
Stock On-Hand	The total on-hand quantity of the product that you have in stock that is available to sell.

Printing Price Tags

To print price tags from the Price Tag Print Queue:

1. Display the Price Tag Print Queue.
2. Verify the tags are the ones you want to print.
3. Do one of the following:
   - Use the check boxes to select a specific range of tags to print and from the **File** menu, select **Print**.
   - Press **Ctrl-A** to select all the check boxes.
   - Press **Shift** and select the first and last in a range of tags to print.

Manually Adding Tags

After populating the queue, if you need to add a tag to print, you can insert it. You must have the **Mode** set to **Manual** or **Both** in the Header of the queue.

1. Display the Price Tag Print Queue.
2. Select a record after which you want to insert a tag to print.
3. From the **File** menu, select **Create Manual Tag**.
1. Enter the **Product ID** and the **Branch** number for the product tag you are entering.

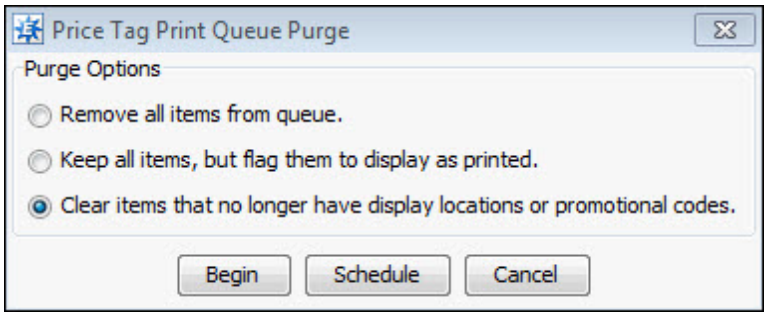
   Note: The product you enter must have a valid display location.
5. Click **OK** to return to the queue.
6. Print the tags.

Purging the Price Tag Queue

To clean up the price tag queue, you can purge the items that have already printed or ones that no longer have promotional codes.

To purge the price tag queue:

1. From the **File > Price Maintenance > Price Tags** menu, select **Price Tag Maintenance** to display Price Tag Maintenance.
2. From the **File** menu, select **Price Tag Print Queue Purge** to display the following selections:



3. Click **Begin** purge immediately or **Schedule** to run the phantom and purge the queue at a later time.

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