Group Pricing Maintenance

Cavallo Support - 2024-11-22 - Sales

Overview

The group pricing maintenance form allows you to selectively mass update price type, price source, price/percent amount, quantity start, and quantity end to existing group pricings.

Usage

The group pricing maintenance form is divided into three parts:

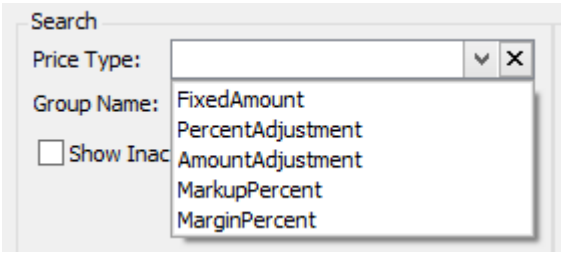
- Search Fields
- Update Options
- Result Grid View

Search



The form allows you to search by Price Type, Group Name, Item Number, Description, Customer Number, or Customer Class. It also allows you to show or hide inactive group pricings.

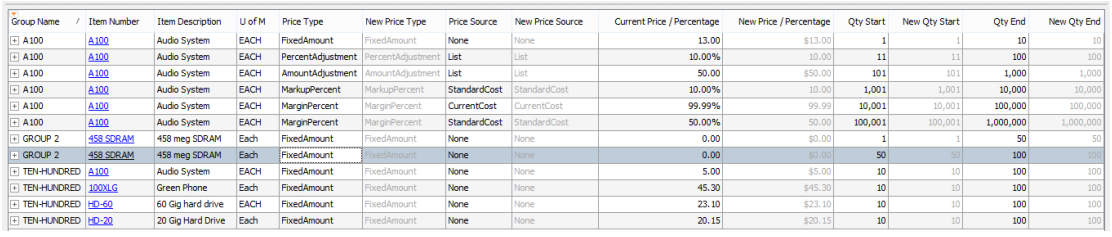
The Price Type field features a dropdown that lists all the available price types.



Note: Switching between price types will automatically trigger a search. This is because the Adjust By, Price Increase, and Percentage of Price update options are available only for selected price types.

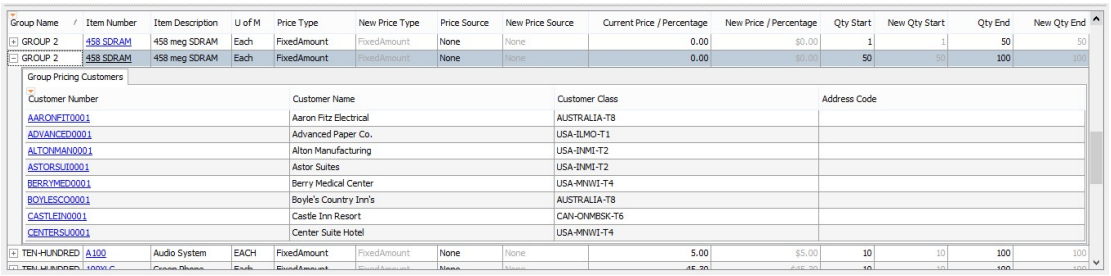
Grid View

The grid view shows all the group pricings (for the criteria defined in the search boxes) listed by item number:



Group Name	Item Number	Item Description	U of M	Price Type	New Price Type	Price Source	New Price Source	Current Price / Percentage	New Price / Percentage	Qty Start	New Qty Start	Qty End	New Qty End
A100	A100	Audio System	EACH	FixedAmount	FixedAmount	None	None	13.00	$13.00	1	1	10	10
A100	A100	Audio System	EACH	PercentAdjustment	PercentAdjustment	List	List	10.00%	10.00	11	11	100	100
A100	A100	Audio System	EACH	AmountAdjustment	AmountAdjustment	List	List	50.00	$50.00	101	101	1,000	1,000
A100	A100	Audio System	EACH	MarkupPercent	MarkupPercent	StandardCost	StandardCost	10.00%	10.00	1,001	1,001	10,000	10,000
A100	A100	Audio System	EACH	MarginPercent	MarginPercent	CurrentCost	CurrentCost	99.99%	99.99	10,001	10,001	100,000	100,000
A100	A100	Audio System	EACH	MarginPercent	MarginPercent	StandardCost	StandardCost	50.00%	50.00	100,001	100,001	1,000,000	1,000,000
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmount	FixedAmount	None	None	0.00	$0.00	1	1	50	50
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmount	FixedAmount	None	None	0.00	$0.00	50	50	100	100
TEN-HUNDRED	A100	Audio System	EACH	FixedAmount	FixedAmount	None	None	5.00	$5.00	10	10	100	100
TEN-HUNDRED	100XLG	Green Phone	Each	FixedAmount	FixedAmount	None	None	45.30	$45.30	10	10	100	100
TEN-HUNDRED	HD-60	60 Gig hard drive	EACH	FixedAmount	FixedAmount	None	None	23.10	$23.10	10	10	100	100
TEN-HUNDRED	HD-20	20 Gig Hard Drive	Each	FixedAmount	FixedAmount	None	None	20.15	$20.15	10	10	100	100

Clicking the **+** symbol will show the list of customers that have the selected item price applied:



Group Name	Item Number	Item Description	U of M	Price Type	New Price Type	Price Source	New Price Source	Current Price / Percentage	New Price / Percentage	Qty Start	New Qty Start	Qty End	New Qty End
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmount	FixedAmount	None	None	0.00	$0.00	1	1	50	50
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmount	FixedAmount	None	None	0.00	$0.00	50	50	100	100

Group Pricing Customers

Customer Number	Customer Name	Customer Class	Address Code
AARONFIT0001	Aaron Fitz Electrical	AUSTRALIA-T8	
ADVANCED0001	Advanced Paper Co.	USA-ILMO-T1	
ALTONMAN0001	Alton Manufacturing	USA-INMI-T2	
ASTORSUI0001	Astor Suites	USA-INMI-T2	
BERRYMED0001	Berry Medical Center	USA-MNWI-T4	
BOYLESCO0001	Boyle's Country Inn's	AUSTRALIA-T8	
CASTLEIN0001	Castle Inn Resort	CAN-ONMBSK-T6	
CENTERSU0001	Center Suite Hotel	USA-MNWI-T4	

TEN-HUNDRED	A100	Audio System	EACH	FixedAmount	FixedAmount	None	None	5.00	$5.00	10	10	100	100

The grid view features two columns for each of the following fields: Price Type, Price Source, Current Price / Percentage, Qty Start, and Qty End. One column is for the current values (black text), and the other column is for new values (gray or red text).

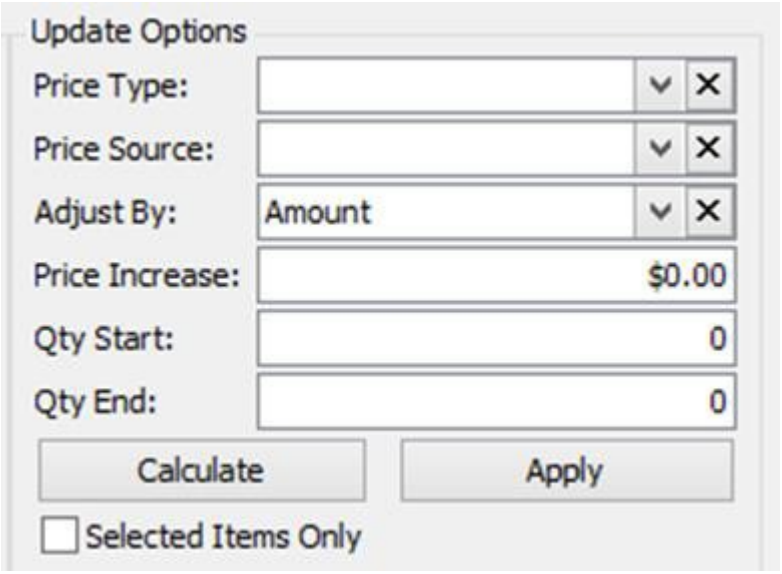


Group Name	Item Number	Item Description	U of M	Price Type	New Price Type	Price Source	New Price Source	Current Price / Percentage	New Price / Percentage	Qty Start	New Qty Start	Qty End	New Qty End
A100	A100	Audio System	EACH	FixedAmo...	PercentAdjust...	None	List	20.00	10.00	1	1	10	10
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmo...	FixedAmount	None	None	0.00	$10.00	1	1	50	50
GROUP 2	458 SDRAM	458 meg SDRAM	Each	FixedAmo...	PercentAdjust...	None	List	0.00	10.00	50	50	100	100
TEN-HUNDRED	A100	Audio System	EACH	FixedAmo...	FixedAmount	None	None	5.00	$50.00	10	10	100	100
TEN-HUNDRED	100XLG	Green Phone	Each	FixedAmo...	FixedAmount	None	None	45.30	$45.30	10	1	100	250
TEN-HUNDRED	HD-60	60 Gig hard drive	EACH	FixedAmo...	FixedAmount	None	None	23.10	$23.10	10	1	100	250
TEN-HUNDRED	HD-20	20 Gig Hard Drive	Each	FixedAmo...	FixedAmount	None	None	20.15	$20.15	10	1	100	250

Values that are unchanged have gray text; whereas new values are highlighted with red text.

Note: All fields marked as New are editable. In order to save the changes, you must click **Apply** in the top right part of the screen. Values can also be mass updated by using the update options pane.

Update Options



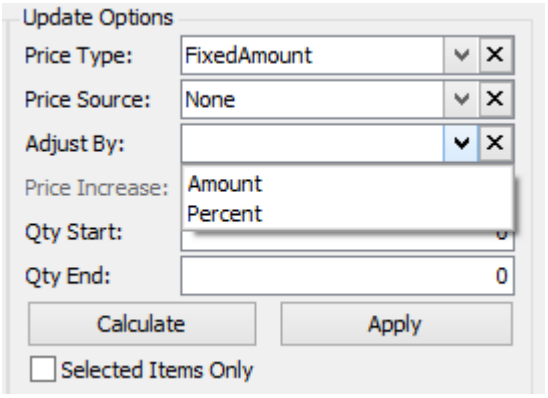
Values such as Price Type, Price Source, Adjust By, Qty Start, and Qty End can be applied to the entire table, or to specific items by highlighting them and then checking the box **Selected Items Only**.

To update your current pricing with the new values in update options, hit **Calculate** first (this will update the values in the grid view), then hit **Apply** to save the new values.

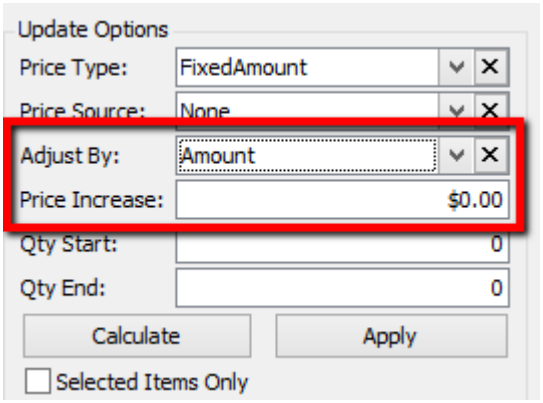
Note: In order to modify the Adjust By amount, you need to filter a specific Price Type; this is because the adjustment value would have different meanings for different price types.

Adjust By

The field Adjust By has two options: Amount and Percent.

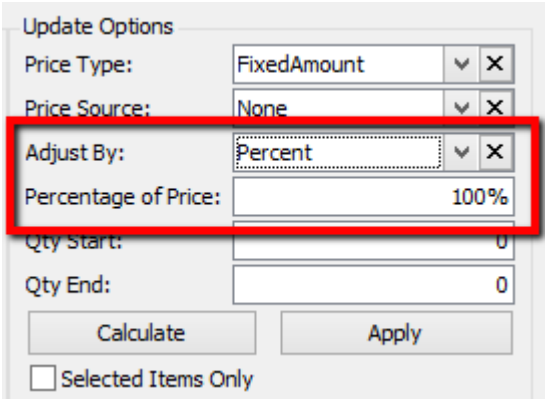


When Adjust By is set to Amount, the value that is put in Price Increase represents the dollar amount change in the price value. For instance, if the group pricing to be updated has a value of $14.59 and you put $5.00 in Price Increase, after you hit **Calculate** and **Apply** the new price value will be $19.59.



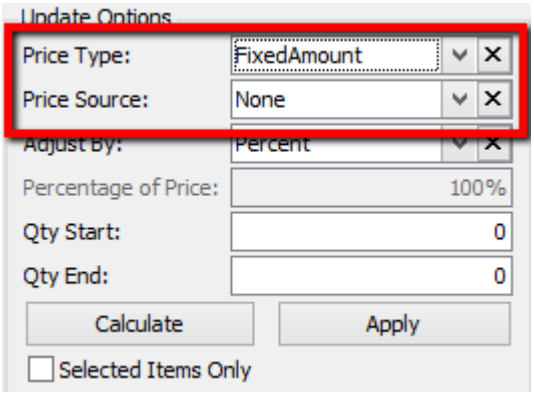
A positive value means an increase in the price adjusted, whereas a negative value will result in a decrease in the price.

When Adjust By is set to Percent, the value that is put in the Percentage of Price field represents the adjustment percent. For instance, if the group pricing to be updated has a value of $20.00 and you put 95% in Percentage of Price, after you hit **Calculate** and **Apply** the new price value will be $19.00.



Values less than 100% will result in a decrease of the price , whereas values greater than 100% will result in an increase.

Price Type and Price Source



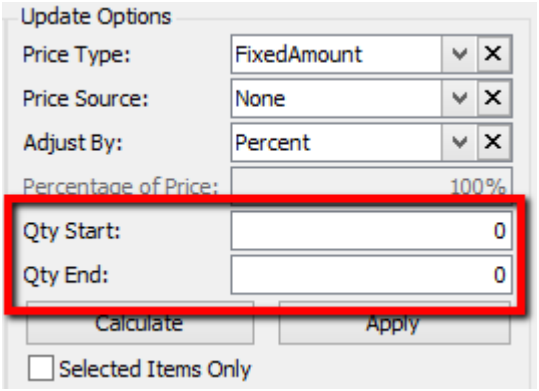
Values for Price Type and Price Source are dependent on each other:

- Fixed Amount:
  - None
- Percent Adjustment:
  - List
- Amount Adjustment:
  - List
- Markup Percent:
  - Standard Cost
  - Current Cost
- Margin Percent:
  - Standard Cost
  - Current Cost

Quantity Start/End

To adjust quantities simply put values in Qty Start and Qty End, then click **Calculate** to update the table, and click **Apply** to save the new values.

Note: Qty End must be greater than Qty Start; under these circumstances, the values will be adjusted in the grid view.



Security

Group Pricing Maintenance - Allows the user to open the Group Pricing Maintenance module.