Knowledgebase > SalesPad > Inventory > Item Aggregate Pricing

Item Aggregate Pricing

Megan De Freitas - 2024-11-22 - Inventory

Overview

The Item Aggregate Pricing function allows users to set up sale items that can be grouped together for the purpose of calculating quantities to meet price breaks.

For example, assume that a user wanted to set up a price break of \$2.00 off after the first 25 t-shirts sold. However, different color t-shirts have different item numbers. This functionality allows the user to group the different colored shirts together to meet the quantity price break for each t-shirt color.

Note: Aggregate Pricing will work with Dynamics GP Extended Pricing.

Settings

Follow the steps below in Modules > Settings :

- 1. Filter to Qty Change
- 2. Select Reprice Package Lines When Qty Changes and set to True
- 3. Save the changes

Close Save	
=ilter:	
qty change	
Sales Entry Settings	
Reprice Package Lines When Qty Changes	True

Security

Follow the steps below in Modules > Security Editor:

- 1. In the Security grid, filter to *agg
- Enable Aggregate Pricing and Item Aggregate Pricing by selecting the boxes
 Note: Aggregate Pricing sub-settings use this information if your build has these sub-settings:
 Clear Markdown (Versions 3.9+): If set to True, when a new aggregate price is found both markdown
 amount and markdown percent are set to 0. By default, this is set to False.
 Customer Price Level Permissions {Versions 4.0.1214+): To allow access to the Aggregate Pricing
 plugin on only certain customer price levels, enter a semicolon-delimited list of customer price levels to
 allow. Leave blank to allow access on all price levels.
- 3. Save any changes. You must log out of SalesPad and then back in for security changes to take place.

Setup

Aggregate pricing assumes that the items intended to be included in the pricing definition have price breaks set up in GP for the selected price type.

In the "Item Aggregate Pricing" screen (Modules > Item Aggregate Pricing), set up a pricing definition:

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10	RDER) ORD3067 🖉 🖬	Item Aggregate Pricing]						×
Close	🛃 Save								
- Item Aggr	egate Pricing		Aggreg	ate Pr	icing Details				
👍 Add	💢 Delete 🛛 🗋 Copy		- Ade	i 🗶	Delete				
Name	Descriptio	on Bulk Price Level	Enabled	2	Item Field	Match Type	Match Value	Beg Date	End Date
MINE		(al)		1	Item_Number	StartsWith	HD		
TEST1		(ls)							

- 1. To create a new pricing definition, click the Add button under the Item Aggregate Pricing column (left)
- 3. For the new record, enter a short description, and the Price Level that will control the pricing breaks.
- 4. In the Aggregate Pricing Details column (right), click the **Add** button to enter a detail pricing record:
 - $\circ~$ Enter the desired field name that is to be used for grouping items in the pricing definition. This field name can be any field from the spyltemMaster (which also pulls all fields from

spvltemMaster_Base). Fields are case sensitive and below are a few commonly used fields:

- Item Number
- Item_Description
- Item_Type
- Item_Class_Code
- Price_Level
- Price_Group
- Item_Generic_Description
- Item_Short_Name
- \circ Select the desired Match Type that will be used for comparing items.
- $\circ~$ Enter the Match Value that will be used to compare items.
 - Example:
 - Field: ltem_Number
 - Match Type: Starts With
 - Match Value: HD
 - This will match all item numbers that start with 'HD'
- 5. Save the new pricing definition.

Usage

To use the new aggregate pricing definition, create a new sales document that includes items that match the pricing definition created.

By default, the aggregate pricing will not be automatically applied. To apply the aggregate pricing, click the

Actions dropdown (Lig) from the header and select Aggregate Pricing. This will automatically apply the pricing structure to the items that match the definition.

To have the aggregate pricing automatically applied, modify the Sales workflow (all that apply) in Modules > Workflow. For the queue that the order is in when created, select Aggregate Pricing from the Plugin column:

- Workfl	ow Queues v Queue 🛛 🗱 Delete Selv	ected Queues 🔰 🔋 Resec	quence Queues				
Seq A	Queue	Button Caption	Next Queue(s)	Plugin	Print?	Eval	Force
10	1_SALES	Release	2_MGMT	¥ X		V	
20	2_MGMT			Smart Printing			~
				Purchase Orde	r Generat Weichte	ion	
				Auto Item Con	version		_
				Attach Sales Li	ne to PD		
				Aggregate Pric	ing		
				Document Rela	ase		*

When the sales document leaves this queue, the aggregate pricing will automatically be applied to all items matching the definition.

Before hitting price break for multiple items:

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Une Items	Notes Addr	esses Mok	25 User Fields	Audit Relate	ed Docum	ents	Purchao	es FedEx Quo	e Quick Report In	acking Numbers						
Nen	Delete	f hiet	(III)	Den Nunber HD-50				Sam Class RETAIL	Crite	UOA DAG	M Sibedula			A	alabia 646.00	Onhand 2,454.08
Iten	Description		Tax Schesh/e	Qly	Qty BC	N	UOM	Price Level	Whee	Markdovin Hargin %	Seurce	Cest	Ext Price Vendor	Actual Ship Date	Req Ship	Connent
HD-35	29 Gig Har	d Drive		3		10	EACH	RETAL.	WAREHOUSE	0.00 0%	Open	25.00	75.00	8/17/2010	8(17/2010	
HD-58	53 Gig Har	d Drive		5		1	EACH	RITAL	WAREHOLSE	0.00 0%	Open	25.00	128.00	8/17/2010	8/17/20 13	

After hitting price break for multiple items :

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a ratesy	Hi Deisse Hill Insen		HD-50		RETAIL		EAC	74			1	,647.30	2,654,0
item :	Description	Tax Schedule	Qtv	QIVED NE LOM	PriceLevel	Whee	Markdown Margin %	Source	Cest	ExtPrice Vendor	Actual Ship Date	Reg Ship	Connent
HD-20	20 Gig Hard Drive		3	0 EACH	RETAIL	WARE-IOUSE	0.00 -1.01%	Open	25.00	74.25	0/17/2910	\$/17/2010	
10-50	50 Go Ned Drive		6	0 EACH	RETAL	WARD-KOUSE	0.00 -1.01%	Open	25.00	140.50	0/17/2910	8/17/2010	