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Sales Line Pricing Trace

Megan De Freitas - 2024-11-22 - Troubleshooting

Overview

The Sales Line Pricing Trace plugin allows users to see the details of how the unit price in Sales Line

Items is derived and what factored into the end price. This tool is useful when items have more than one price source (e.g. Great Plains Standard, Group Pricing, and Contract Pricing): the plugin will show

which source was used and the ones that could have been applied.

Note: This plugin will capture pricing details when entering new sales line items, or when changing quantity, price level, and unit of measure on existing ones. The plugin is designed to only show the information; it does not allow you to change the price source (engine).

Security

To access the plugin you must enable *Sales Line Pricing Trace* in the Security Editor. A sub-setting, *Show Cost*, allows the administrator to set whether or not cost is shown in the details (this only applies for GP Standard price - % markup or % margin).

Security			
🗸 Select All	Select None	💻 Copy From	**
Acc Name			7
Sales I	ine Pricing Trace*		
🗴 🖌 Contain	s([Name], 'Pricing Trace') 🔽		Edit Filter
⊿ Misc			
Show Cos		True	¥
Show Cost			
Show Cost Shows the cur either % mark	rent/standard cost in the Price up or % margin).Defaults to 'Fa	Details for GP Standard Pricing (or alse'.	ly applied when price method is

In addition, you must set the Setting *Enable Sales Line Pricing Trace* to True in order for the plugin to capture traces.

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*pricing trace							
Pricing Trace							
Enable Sales Line Pricing Trace True	~						
	_						
Enable Sales Line Pricing Trace							
Enable a pricing trace for Sales Documents that shows the user the criteria of the applied price. Defaults to 'False'.							

Usage

Once the setting is enabled, the plugin will capture a pricing trace each time the user enters a new item, or changes the quantity, price level, or unit of measure on existing items.

The plugin is shown by clicking the button Pricing Trace in the Line Items toolstrip bar (if not visible, use the Configure Action Items screen).

Γ	<u>L</u> ine I	items No	tes	Addresses	Holds	User Fields	Audit	Relat	ted Do	cuments	Purchases	Quid	k Rej	port	FedEx Qu
	1 5	Vew 🙀	De	lete 🛛 📫 İn	sert	📑 🛛 🔏 Prie	cing Tr	race	Item M A100	Number					Item RET
	-	Line Nur	Z.	Package		Item				Descript	tion		Qty	Price	Source

The plugin screen is divided into three grid views:

h					Pricing	Trace						
Line Items				Trace Details								
Item Number	UOfM	Qty	Unit Price	Seq Num / Price Engine			Price	Quantity UOfM		Price Level	Date	^
100XLG	EACH	3	0.00	Trace Number	3							
<u>A100</u>	CASE	4	15.12	1.	00 SPCONTRACT	r	15.12	4	CASE	RETAIL	7/18/2013	
HD-60	EACH	1	170.00	2.	00 SPGROUP		13.00	4	CASE	RETAIL	7/18/2013	
				3.	3.00 SPCUSTOMERSPECIAL		45.60	4	CASE	RETAIL	7/18/2013	
				4.	00 STANDARD		39.60	4 CASE RET		RETAIL	7/18/2013	
				Trace Number	2							
				1.	00 SPCONTRACT	r	15.12	4	EACH	RETAIL	7/18/2013	
				2.	2.00 SPGROUP		13.00	4 EACH		RETAIL	7/18/2013	
				3.	0 SPCUSTOMERSPECIAL		45.60	4	4 EACH RET		7/18/2013	
				4.	4.00 STANDARD		39.60	4	4 EACH RET.		AIL 7/18/2013	
				Trace Number	1							
				1		r	15.12	1	FACH	RFTATI	7/18/2013	~
				Contract Pricing								
				Contract Nu	Detail Number	Contract Price	Contract Qty	Purchased Q	ty Begin Date	e End Date	Use Shipping	g
				5.00	5.00	15.12	20	1	17 7/17/2013	7/17/2014		
											O	к

- The left grid shows a list of all the Line Items in the document.
- The top right grid shows the Trace Details, grouped by trace number.
 - Each action of the user (e. g. entering a new item) corresponds to a single trace number.
 - $\circ~$ Each trace number is composed of one or more price detail. In the example above, trace number

3 shows that there were four possible prices that could have been applied to the item A100 (with quantity of 4, unit of measure CASE, and price level RETAIL). The order in which prices are applied is denoted by the Seq Num field: in this case, SPCONTRACT had the highest priority, therefore it was the final price of item.

• The bottom right grid shows the additional information of the trace detail selected on the Trace Details grid. This additional information varies depending on the Price Engine.

Price Priority

The order in which different prices is set in the Setting Price Priority. Currently, there are three possible options:

- LOWEST PRICE (the price engine with the lowest price is applied)
- HIGHEST PRICE (the price engine with the highest price is applied)
- SEQUENCE (price engines are applied in the following order: Standard Great Plains lowest priority, Group Pricing, Customer Special Pricing, and Contract Pricing highest priority)

📑 Close 📙 Save 🛛 🐻 Export Settings 👹 Import Settings 🗇 Expo	ort Settings List					
Filter:						
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8						
a Sales Document Entry						
Price Priority	SEQUENCE					
	LOWEST PRICE					
	HIGHEST PRICE					
	SEQUENCE					
Price Delovity						
Determine the criteria in which price is applied to a Sales Line Item. Available options are: 'LOWEST PRICE', 'HIGHEST PRICE', and 'SEQUENCE'. The option 'SEQUENCE' applies the following order of pricing: Standard GP (lowest priority), Group, Customer Special, and Contract Pricing (highest priority). Defaults to 'SEQUENCE'.						