

Price Management Guide

Price Management in AdvancePro

Many businesses are not simply run on a one-price-fits-all model. Whether you sell your products in bulk discounts, negotiate special customer pricing or you just want to run a seasonal promotion, AdvancePro has the pricing tools you need.

In this guide, we will walk you through the multiple levels of pricing, volume discounts and we will provide you with a pricing hierarchy table in case this all looks a bit confusing.

Importing Customer Pricing

Customer specific pricing can be imported from an Excel spreadsheet. The instructions are outlined in another guide on the AdvancePro knowledgebase and can be found [here](#).

Table of Contents


AdvancePro has multiple pricing options which we will review one at a time in this guide. Those options include:

1. Base selling price
2. Customer specific pricing across all products
3. Customer pricing exceptions or promotions on specific products.
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5. Customer Pricing Exceptions on Orders
6. Volume Discounts
7. Global Pricing
8. Pricing Hierarchy Table
9. Importing Customer Pricing

For additional help on topics outside the scope of this document, please visit the [AdvancePro Knowledge Base](#).

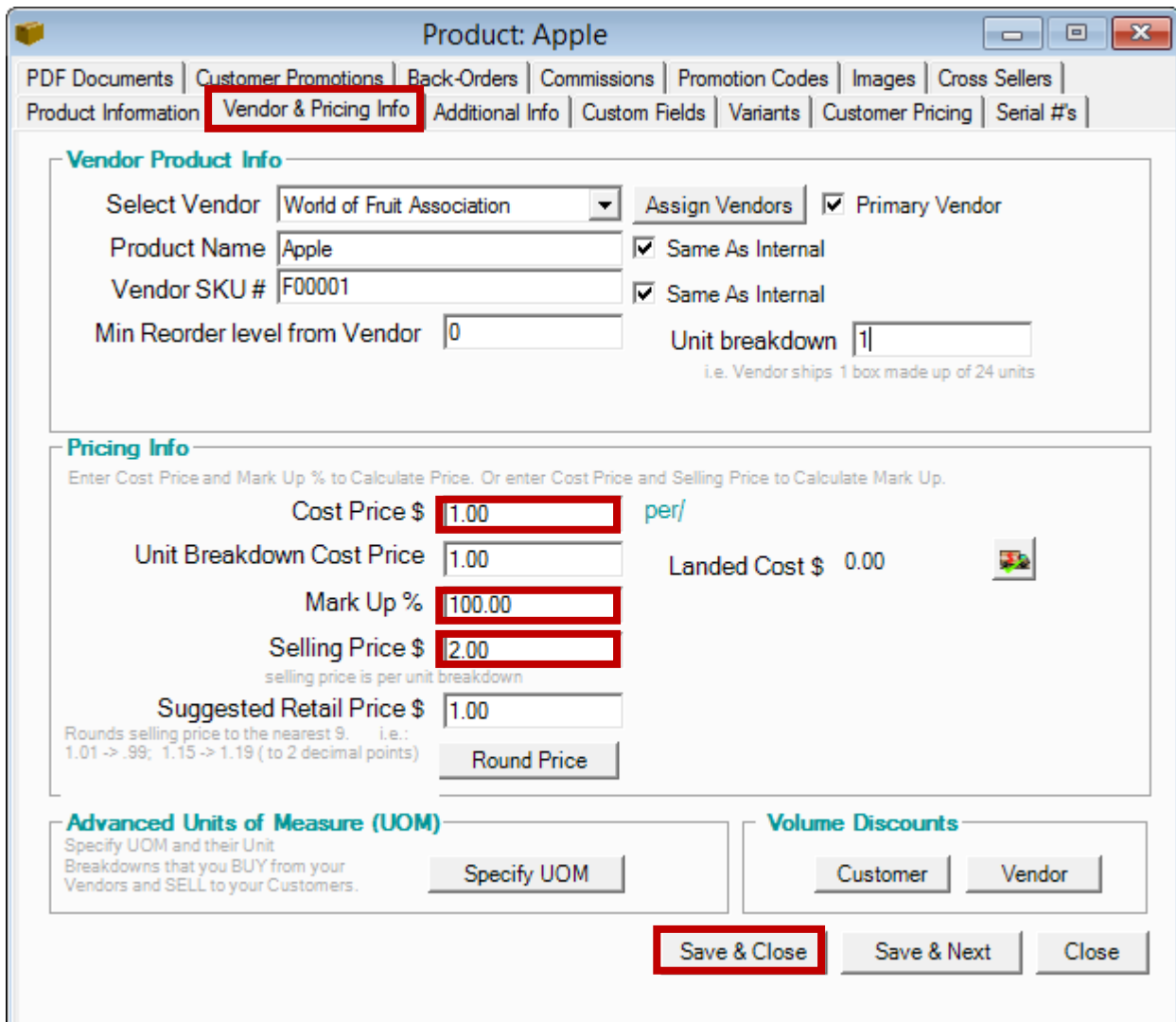
Tier One: Base Selling Price

The first tier of product pricing is the base selling price. This selling price will be applicable on all customer orders. To set the price:

1. The base selling price can be input when creating a new product or can be edited on an already existing product.
 - a. To create the base price for a new product, click on “Products” then “Add Product”.
 - b. To create the base price for an existing product, go to “Products” then “Edit” and click on the  button next to the product you wish to edit.
2. Go to the “Vendor & Pricing Info” tab. Enter the cost price, and either the mark up percentage or the selling price. AdvancePro will calculate the missing field (the mark up if you entered the price, or the price if you entered the mark up).

NOTE: The selling price stays the same for all vendors. If you have already set a price for this product and are entering a cost for a new vendor, AdvancePro will calculate the mark up based on the pre-set selling price.

3. Click “Save & Close”



Product: Apple

PDF Documents | Customer Promotions | Back-Orders | Commissions | Promotion Codes | Images | Cross Sellers | Product Information | **Vendor & Pricing Info** | Additional Info | Custom Fields | Variants | Customer Pricing | Serial #'s

Vendor Product Info

Select Vendor: World of Fruit Association | Assign Vendors | Primary Vendor

Product Name: Apple | Same As Internal

Vendor SKU #: F00001 | Same As Internal

Min Reorder level from Vendor: 0 | Unit breakdown: 1 |
i.e. Vendor ships 1 box made up of 24 units

Pricing Info

Enter Cost Price and Mark Up % to Calculate Price. Or enter Cost Price and Selling Price to Calculate Mark Up.

Cost Price \$: 1.00 per/

Unit Breakdown Cost Price: 1.00 | Landed Cost \$: 0.00

Mark Up %: 100.00

Selling Price \$: 2.00
selling price is per unit breakdown

Suggested Retail Price \$: 1.00
Rounds selling price to the nearest 9. i.e.: 1.01 -> .99; 1.15 -> 1.19 (to 2 decimal points)


Advanced Units of Measure (UOM)
Specify UOM and their Unit Breakdowns that you BUY from your Vendors and SELL to your Customers. | Specify UOM

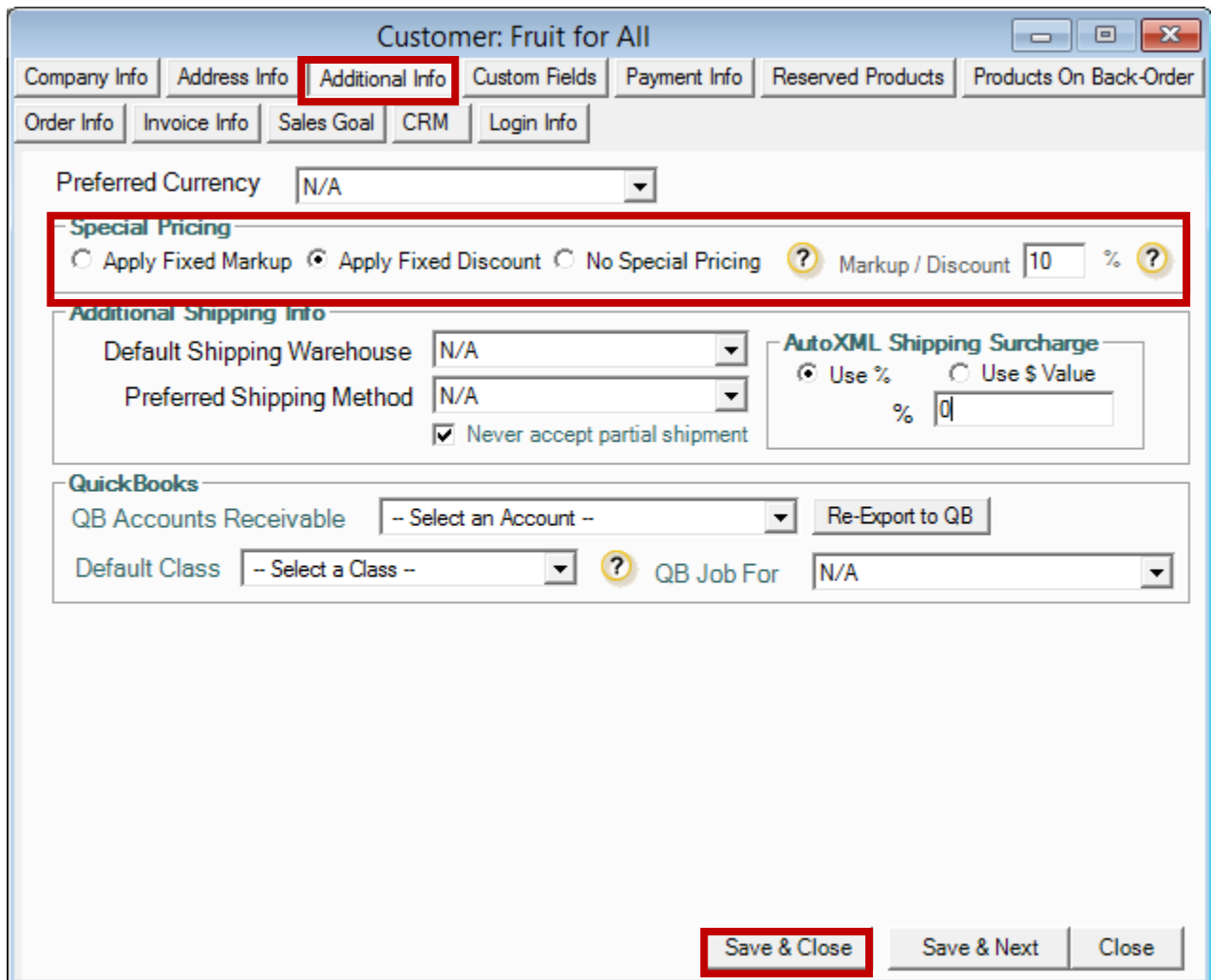
Volume Discounts
Customer | Vendor

Save & Close | Save & Next | Close

Tier Two: Customer Specific Pricing Across All Products

The second tier of product pricing is a customer specific markup or discount across all products. This pricing exception will be applicable on all products this customer orders, and will override the Tier One pricing. To set this level of pricing:


1. The customer specific pricing rule can be input when creating a new customer or can be edited on an already existing customer.
 - a. To create the pricing rule for a new customer, click on “Customers” then “Add A New Customer”.
To create the pricing rule an existing customer, go to “Customers” then “Edit A Customer” and click on the  button next to the customer you wish to edit.
2. Go to the “Additional Info” tab. Select whether “Apply Fixed Markup”, “Apply Fixed Discount” or “No Special Pricing”. Then enter the percentage by which you would like to markup or discount products for that customer.
 - a. Markup applies to the product cost. So, for example, if Product A costs \$20 and you assign this customer a fixed 10% mark up, the selling price of Product A to this customer will be \$22, regardless of your base selling price.
 - b. Discount applies to your base selling price. So if you give this customer a 10% discount, and your base selling price for Product A is \$100, the selling price for this customer will be \$90.
3. Click “Save & Close”.

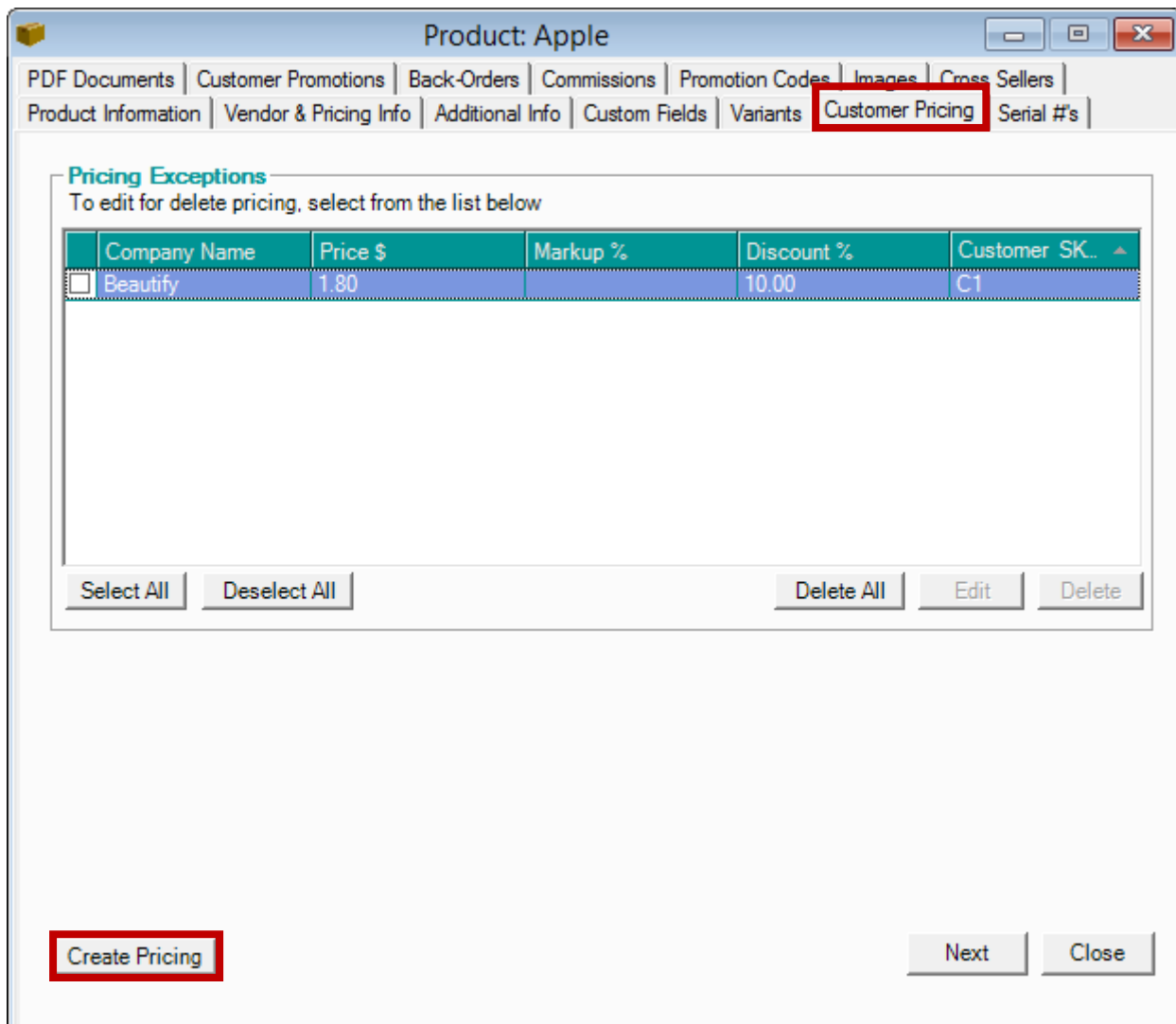


The screenshot shows a software window titled "Customer: Fruit for All" with several tabs: Company Info, Address Info, Additional Info (highlighted with a red box), Custom Fields, Payment Info, Reserved Products, and Products On Back-Order. Below these are sub-tabs: Order Info, Invoice Info, Sales Goal, CRM, and Login Info. The main content area includes a "Preferred Currency" dropdown set to "N/A". A "Special Pricing" section (highlighted with a red box) contains three radio buttons: "Apply Fixed Markup", "Apply Fixed Discount" (which is selected), and "No Special Pricing". To the right of these is a "Markup / Discount" field with the value "10" and a percentage sign. Below this is the "Additional Shipping Info" section with fields for "Default Shipping Warehouse" (N/A), "Preferred Shipping Method" (N/A), and a checked box for "Never accept partial shipment". To the right is the "AutoXML Shipping Surcharge" section with "Use %" selected and a value of "0". The "QuickBooks" section at the bottom has a "QB Accounts Receivable" dropdown (set to "-- Select an Account --"), a "Re-Export to QB" button, a "Default Class" dropdown (set to "-- Select a Class --"), and a "QB Job For" dropdown (set to "N/A"). At the bottom right, there are three buttons: "Save & Close" (highlighted with a red box), "Save & Next", and "Close".

Tier Three: Customer Pricing Exceptions or Promotions on Specific Products

The third tier of product pricing is a customer specific pricing exception or promotion on specific products. This pricing exception is applicable for all selected customers for the product you are currently editing. This will override the pricing in Tier One and Tier Two. To set this level of pricing:

1. The customer pricing exceptions on specific products can be input when creating a new product or can be edited on an already existing product.
 - a. To create the pricing exception for a new product, click on “Products” then “Add Product”.
 - b. To create the pricing exception for an existing product, go to “Products” then “Edit” and click on the  button next to the product you wish to edit.
2. Go to the “Customer Pricing” tab.
3. Click “Create Pricing” to create a new pricing exception.



NOTE: If the product has variations, select the variation to which to apply the pricing, and click “Create Pricing.” Alternatively, click “Create Pricing For All” to apply the pricing to all variations. You can either select one variation at a time, or create the pricing for all variations.

The screenshot shows a software window titled "Product : Shirts" with a menu bar containing: PDF Documents | Customer Promotions | Back-Orders | Commissions | Promotion Codes | Images | Cross Sellers | Product Information | Vendor & Pricing Info | Additional Info | Custom Fields | Variants | Customer Pricing | Serial #'s.

The main content area is divided into two sections:

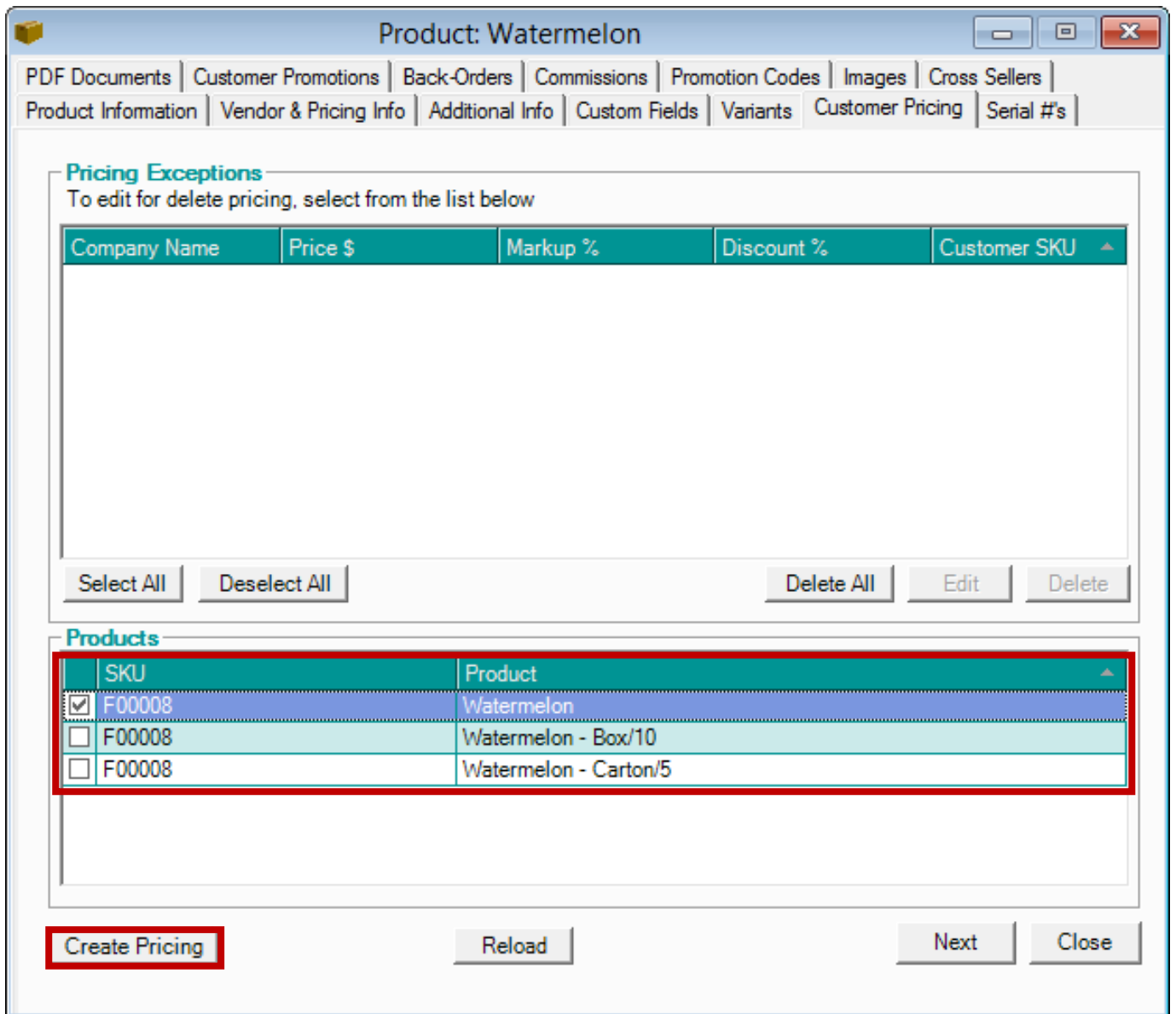
- Pricing Exceptions:** A section with the instruction "To edit for delete pricing, select from the list below" and an empty table with headers: Company Name, Price \$, Markup %, Discount %, and Customer SKU. Below the table are buttons: Select All, Deselect All, Delete All, Edit, and Delete.
- Products:** A table listing product variations with checkboxes for selection.

At the bottom of the window are buttons: Create Pricing, Create Pricing For All, Reload, Next, and Close. The "Create Pricing For All" button is highlighted with a red border.

Company Name	Price \$	Markup %	Discount %	Customer SKU
--------------	----------	----------	------------	--------------

SKU	Product
<input checked="" type="checkbox"/> Shirts-4-B2	Shirts : Black,
<input checked="" type="checkbox"/> Shirts-5-B4	Shirts : Black,
<input checked="" type="checkbox"/> Shirts-6-B6	Shirts : Black,
<input type="checkbox"/> Shirts-1-R2	Shirts : Red,
<input type="checkbox"/> Shirts-2-R4	Shirts : Red,
<input type="checkbox"/> Shirts-3-R6	Shirts : Red,

NOTE: If the product has advanced units of measure, select the unit or units of measure to which you would like to apply the pricing, and click “Create Pricing.”



4. The “Customer Pricing Exceptions” screen will now pop up. Click the checkboxes to select the customer or customers for whom you want to create the pricing exception.

5. You can create a customer specific SKU number in this screen if you wish. Select whether to “Apply Markup” or “Apply Discount”. Then enter the percentage by which you would like to markup or discount this product for the specified customer and click “Calculate.” AdvancePro will calculate the new price. Alternatively, enter the selling price and AdvancePro will calculate the percentage for you. Select the “Lock” checkbox if you would like to lock in this price against future changes to the cost of this product.
- a. Markup applies to the product cost. So, for example, if Product A costs \$20 and you assign this customer a fixed 10% mark up, the selling price of Product A to this customer will be \$22, regardless of your base selling price.
 - b. Discount applies to your base selling price. So if you give this customer a 10% discount, and your base selling price for Product A is \$100, the selling price for this customer will be \$90.

NOTE: If a customer already has a pricing exception for this product, you will be unable to select them. Delete or edit the existing pricing exception for that customer.

Customer Pricing Exceptions

Apply a special markup/discount to this Product per Customer.
To begin, first locate the customer below.

Product Info

SKU # F00004	Base Cost Price \$ 1.00
Product Name Banana	Base Selling Price \$ 1.00

Select Customer

Select All Category DeSelect All

- All Fresh Vegetables
- All Steak Buffet
- Apparel Wear
- Beautify
- Beefy Grills
- Beefy-Q
- Boardz
- Chicken Deli

Pricing Info

Customer SKU # Apply Discount Apply Markup

Customer Markup/Discount % \$
Selling Price

Lock

Markup % is added to COST price of products
Discount % is applied to SELLING price of products

6. Click “Add Pricing” to save your changes. You will then see a listing of the customer pricing exceptions.

Product: Banana

PDF Documents | Customer Promotions | Back-Orders | Commissions | Promotion Codes | Images | Cross Sellers | Product Information | Vendor & Pricing Info | Additional Info | Custom Fields | Variants | Customer Pricing | Serial #'s

Pricing Exceptions
To edit for delete pricing, select from the list below


	Company Name	Price \$	Markup %	Discount %	Customer SK..
<input type="checkbox"/>	All Steak Buffet	0.90		10.00	B4N4N4
<input type="checkbox"/>	All Fresh Vegetables	0.90		10.00	B4N4N4
<input type="checkbox"/>	Apparel Wear	0.90		10.00	B4N4N4

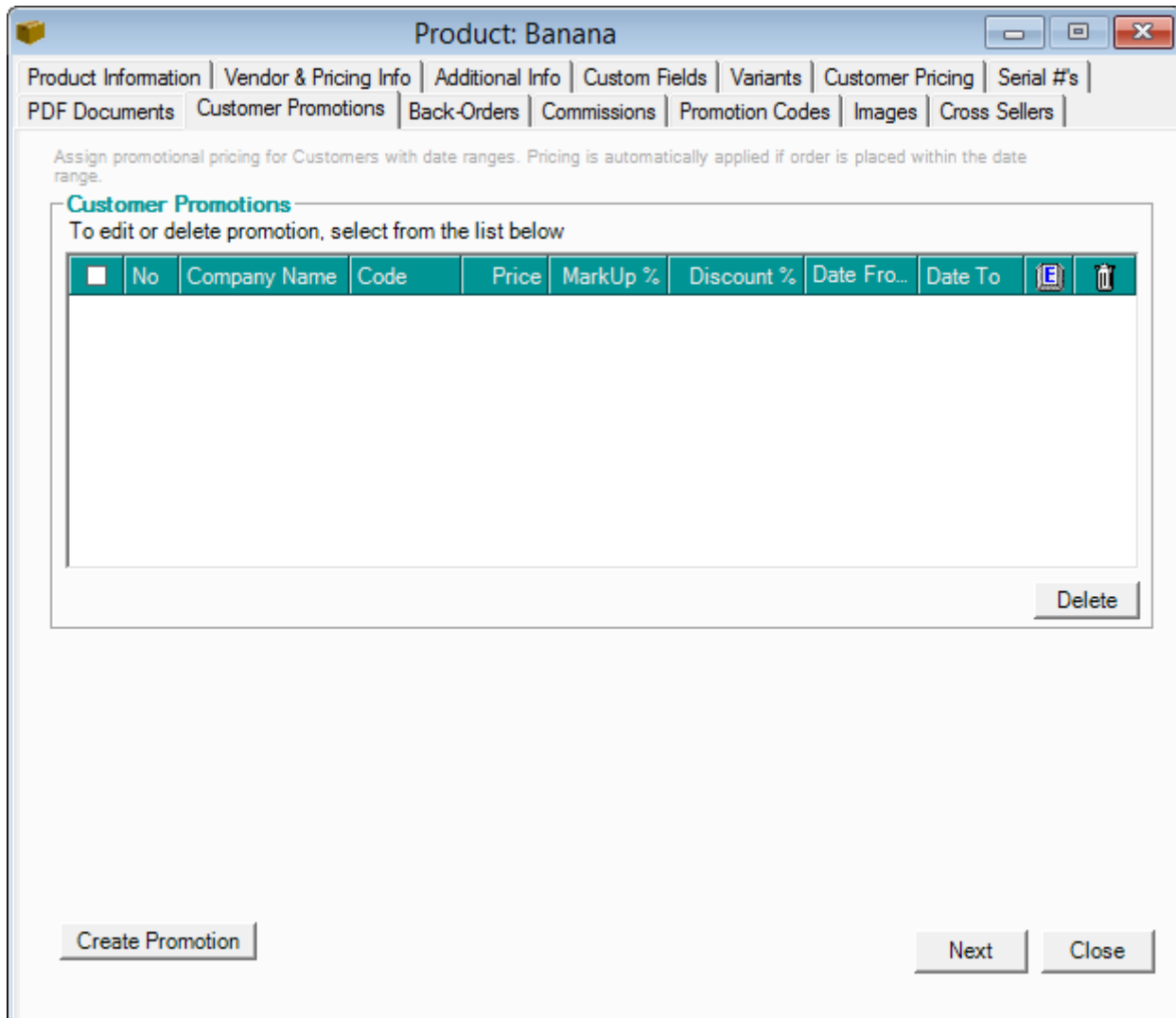
Select All | Deselect All | Delete All | Edit | Delete

Create Pricing | Next | Close

Customer Promotions

AdvancePro allows for the creation of special customer promotions. This process is very similar to entering customer pricing exceptions, as discussed above. The difference is that promotions run for a specific time range.

1. Customer promotions on products can be input when creating a new product or can be edited on an already existing product.
 - a. To create the promotion for a new product, click on “Products” then “Add Product”.
 - b. To create the promotion for an existing product, go to “Products” then “Edit” and click on the  button next to the product you wish to edit.
2. Go to the “Customer Promotions” tab.
3. Click “Create Promotion”



NOTE: If you are editing a product with multiple variations, the form you see will be slightly different. To create customer promotions for selected product variations, select them and click “Create Promotion.” To create customer promotions for all product variations, click “Create Promotion For All.”

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Product: Shirts

Product Information | Vendor & Pricing Info | Additional Info | Custom Fields | Variants | Customer Pricing | Serial #'s
PDF Documents | Customer Promotions | Back-Orders | Commissions | Promotion Codes | Images | Cross Sellers

Assign promotional pricing for Customers with date ranges. Pricing is automatically applied if order is placed within the date range.

Customer Promotions

To edit or delete promotion, select from the list below

<input type="checkbox"/>	No	Company Name	Code	Price	MarkUp %	Discount %	Date Fro...	Date To		

Products

	No	SKU	Product	
<input checked="" type="checkbox"/>	1	Shirts-4-B2	Shirts : Black,	▲
<input type="checkbox"/>	2	Shirts-5-B4	Shirts : Black,	▼
<input type="checkbox"/>	3	Shirts-6-B6	Shirts : Black,	▼
<input type="checkbox"/>	4	Shirts-1-R2	Shirts : Red,	▼
<input type="checkbox"/>	5	Shirts-2-R4	Shirts : Red,	▼
<input type="checkbox"/>	6	Shirts-3-R6	Shirts : Red,	▼

NOTE: If the product has advanced units of measure, select the unit of measure to which you would like to create the promotion, and click “Create Promotion.” To create customer promotions for all units of measure, click “Create Promotion For All.”

Product: Watermelon
⏪ ⏩ ✖

Product Information
Vendor & Pricing Info
Additional Info
Custom Fields
Variants
Customer Pricing
Serial #s

PDF Documents
Customer Promotions
Back-Orders
Commissions
Promotion Codes
Images
Cross Sellers

Assign promotional pricing for Customers with date ranges. Pricing is automatically applied if order is placed within the date range.

Customer Promotions

To edit or delete promotion, select from the list below

<input type="checkbox"/>	No	Company Name	Code	Price	MarkUp %	Discount %	Date Fro...	Date To		
<div style="border: 1px solid gray; height: 100%; width: 100%;"></div>										

Delete

Products

	No	SKU	Product
<input checked="" type="checkbox"/>	1	F00008	Watermelon
<input type="checkbox"/>	2	F00008	Watermelon - Box/10
<input type="checkbox"/>	3	F00008	Watermelon - Carton/5

Create Promotion
Create Promotion For All
Reload

Next
Close

- The “Promotions” form will open. Select the customer or customers. You can search for customers using the search field up top and then clicking the magnifying glass. You can also select all customers or view them by group if desired.

- Select whether to “Apply Markup” or “Apply Discount.”
- Select the dates for which the promotion is applicable. Enter a promotion code to be used in order to apply this promotion.
- Enter a promo code to be used when placing an order to take advantage of the promotion.
- For QuickBooks users, you can select the account where the code exports to.
- Enter the percentage by which you would like to markup or discount this product and click “Calculate.” AdvancePro will calculate the new price. Alternatively, enter the selling price and AdvancePro will calculate the percentage for you.
 - Mark up applies to the product cost. So, for example, if Product A costs \$20 and you assign this customer a fixed 10% mark up, the selling price of Product A to this customer will be \$22, regardless of your base selling price.
 - Discount applies to your base selling price. So if you give this customer a 10% discount, and your base selling price for Product A is \$100, the selling price for this customer will be \$90.
- Select whether the promotion “Is Stackable.” If it is stackable, it can be used in conjunction with other codes.
- Select whether the promotion “Is Taxable”

- Click “Add Promotion” to save your changes. You will then see a listing of the customer promotions for your product.

Product: Watermelon

Product Information
Vendor & Pricing Info
Additional Info
Custom Fields
Variants
Customer Pricing
Serial #'s

PDF Documents
Customer Promotions
Back-Orders
Commissions
Promotion Codes
Images
Cross Sellers

Assign promotional pricing for Customers with date ranges. Pricing is automatically applied if order is placed within the date range.

Customer Promotions

To edit or delete promotion, select from the list below


<input type="checkbox"/>	No	Company Name	Code	Price	MarkUp %	Discount %	Date Fro...	Date To		
<input type="checkbox"/>	1	All Fresh Vege...	Promo11	0.90		10.00	3/11/2015	4/11/20...		

Products

	No	SKU	Product
<input checked="" type="checkbox"/>	1	F00008	Watermelon
<input type="checkbox"/>	2	F00008	Watermelon - Box/10
<input type="checkbox"/>	3	F00008	Watermelon - Carton/5

Customer Pricing Exceptions to Orders

When placing a customer order, if the customer you selected has pricing exceptions assigned, those pricing exceptions will be automatically applied.

1. On the Order Details tab, click the magnifying glass () to display the “Product Selector.”

1. Customer Details | 2. Order Details | 3. Process Order


Customer Purchase Order (New) Date: 3/11/2015
Ref #: 27
PO #: 23

All Fresh Vegetables

Customer Billing Address
All Fresh Vegetables
5th Vegetable Street
Vegetable City, VG, VVV115
Canada Edit



Customer Shipping Address
All Fresh Vegetables
444-1111115 Edit




Acc # 4000 0000 4 | Sales Rep N/A | Payment Terms N/A | Ship date 3/12/2015 | Expected date 3/16/2015 | Cancel Date 3/10/2016 | Carrier N/A | Carrier Acc #

SKU # | Product | Qty 1 | Add | Category - All -  ?

No	SKU #	Product	Qty	Orig. Price \$	Price \$	Total \$	Stock	BM		
----	-------	---------	-----	----------------	----------	----------	-------	----	--	--

Total Weight: 0 lbs | Total Qty: 0 | % 0.00 | Shipping \$ 0.00 | Adjustment \$ 0.00 | Sub Total \$ 0.00
Tax % N/A | Tax \$ 0.00 | TOTAL \$ 0.00
BALANCE \$ 0.00

Enter Discount  

   0.00

Print Queue Invoice Only Print Item Notes Save | PLACE ORDER | Cancel Order | Close

- If you assigned a customer specific SKU number in the pricing exception then that SKU number will appear in the "Product Selector."

Product Selector

All Products

Check the product/s that you wish to select

+ Click to add Products to your order.

If Product has UOM or Variants, the UOM/Variations will be displayed.

<input checked="" type="checkbox"/>	No	SKU #	Product Name	Unit	\$ Price	+	Stock	Order Qty
<input checked="" type="checkbox"/>	1	F00001	Apple		2.00000	+	1000	10
<input type="checkbox"/>	2	P00002	Bacon		1.00000	+	999	0
<input type="checkbox"/>	3	B4N4N4	Banana		0.90000	+	999	0
<input type="checkbox"/>	4	SKB004	Bearings		1.00000	+	990	0
<input type="checkbox"/>	5	B00005	Beef Back Ribs		1.00000	+	999	0
<input type="checkbox"/>	6	B00006	Beef Cubes		1.00000	+	999	0
<input type="checkbox"/>	7	V00006	Bell Pepper		1.00000	+	1000	0
<input type="checkbox"/>	8	SNB002	Bindings		1.00000	+	1000	0
<input type="checkbox"/>	9	SNB003	Boots		1.00000	+	990	0
<input type="checkbox"/>	10	B00008	Brisket		1.00000	+	1001	0
<input type="checkbox"/>	11	V00002	Cabbage		1.00000	+	1000	0
<input type="checkbox"/>	12	V00007	Carrots		1.00000	+	981	0
<input type="checkbox"/>	13	C00002	Chicken Breast		1.00000	+	1000	0
<input type="checkbox"/>	14	C00009	Chicken Feet		1.00000	+	1000	0
<input type="checkbox"/>	15	C00008	Chicken Gizzard		1.00000	+	1004	0
<input type="checkbox"/>	16	C00007	Chicken Heart		1.00000	+	1000	0
<input type="checkbox"/>	17	C00006	Chicken Liver		1.00000	+	1004	0
<input type="checkbox"/>	18	C00004	Chicken Neck		1.00000	+	1000	0
<input type="checkbox"/>	19	C00010	Chicken Tail		1.00000	+	1004	0
<input type="checkbox"/>	20	C00003	Chicken Wings		1.00000	+	1000	0
<input type="checkbox"/>	21	V00010	Cucumber		1.00000	+	1000	0
<input type="checkbox"/>	22	C00001	Drum Stick		1.00000	+	1000	0
<input type="checkbox"/>	23	V00005	Garlic		1.00000	+	1000	0

View stock in multiple warehouses

Advanced UOM Service

Has Variants Item Kit

Assembly Item Drop Ship Item


Add Close

3. You can view the original selling price by clicking on the linked product name.

Product Details

Apple

Fruit



SKU #: F00001
UPC #: 5550001
In Stock: 1001
Available: 1000
Unit: N/A
Weight p/unit: 3 lbs
Min. Order Qty: 1

DUTY 0

Selling Price \$: 2.00
Cost Price \$: 1.00

Close

- When you add that product to the customer's order, it will automatically use the special pricing. The original price also shows up in the "Original Price" column.

1. Customer Details | 2. Order Details | 3. Process Order
(New)
Date: 3/11/2015

Customer Purchase Order

All Fresh Vegetables

Customer Billing Address

All Fresh Vegetables
5th Vegetable Street
Vegetable City, VG, VVW115
Canada

Customer Shipping Address

All Fresh Vegetables
444-1111115

Acc # 4000 0000 4

Sales Rep N/A

Payment Terms N/A

Ship date 3/12/2015

Expected date 3/16/2015

Cancel Date 3/10/2016

Carrier N/A

Carrier Acc #

SKU # Product Qty Add - All -

No	SKU #	Product	Qty	Orig. Price \$	Price \$	Total \$	Stock				
1	F00001	Apple	10	2.00000	1.80000	18.00	1000				

Total Weight: 30 lbs % Shipping \$ Adjustment \$ Sub Total \$

Total Qty: 10 Tax % Tax \$ **TOTAL \$**

BALANCE \$


Print Queue Invoice Only Print Item Notes

0.00

Volume Discounts

AdvancePro allows you to create pricing discounts based on volume purchases. Volume discounts will override base selling price, customer special pricing and customer promotions and/or pricing exceptions.

NOTE: Volume discounts do not apply to products with variations.

1. Volume discounts on products can be input when creating a new product or can be edited on an already existing product.
 - a. To create the volume discount for a new product, click on “Products” then “Add Product”.
 - b. To create the volume discount for an existing product, go to “Products” then “Edit” and click on the  button next to the product you wish to edit.
2. Go to the “Vendor & Pricing Info” tab. Click the “Customer” button under “Volume Discounts.” (You can create volume discounts for vendor orders as well).

Product: Cabbage

PDF Documents | Customer Promotions | Back-Orders | Commissions | Promotion Codes | Images | Cross Sellers |
Product Information | **Vendor & Pricing Info** | Additional Info | Custom Fields | Variants | Customer Pricing | Serial #'s

Vendor Product Info

Select Vendor: World of Vegetable Association | Assign Vendors | Primary Vendor
Product Name: Cabbage | Same As Internal
Vendor SKU #: V00002 | Same As Internal
Min Reorder level from Vendor: 0 | Unit breakdown: 1
i.e. Vendor ships 1 box made up of 24 units

Pricing Info

Enter Cost Price and Mark Up % to Calculate Price. Or enter Cost Price and Selling Price to Calculate Mark Up.

Cost Price \$: 1.00 per/
Unit Breakdown Cost Price: 1.00 | Landed Cost \$: 0.00
Mark Up %: 0.00
Selling Price \$: 1.00
selling price is per unit breakdown
Suggested Retail Price \$: 1.00
Rounds selling price to the nearest 9. i.e.: 1.01 -> .99; 1.15 -> 1.19 (to 2 decimal points)
Round Price

Advanced Units of Measure (UOM)
Specify UOM and their Unit
Breakdowns that you BUY from your Vendors and SELL to your Customers.
Specify UOM

Volume Discounts
Customer | Vendor

Save & Close | Save & Next | Close

- The “Assign Volume Discounts” form will open. Enter the threshold quantity at which the price break comes into effect. Then enter the discount percentage and click “Add” or enter the selling price, click “Calculate” and then click “Add.”

Assign Volume Discounts

Assign Volume Discounts to this Product

Product Info

SKU # V00002

Product Name Cabbage

Selling Price \$ 1

Create Volume Discount

? Move mouse over for instructions

Threshold Qty Discount % \$

Volume Discounts

Select a volume discount to edit or delete

No.	From Qty	To Qty	Discount %	New Price
<input type="checkbox"/> 1	10000	Infinite	50	0.50

- You can repeat steps above for as many volume discounts as you like. When you are finished, click “Done.”
- To edit or delete any volume discounts, as with most other forms in AdvancePro, select the discount using the checkbox and make your edits. Click “Update” or “Delete” when done.
- Click “Save & Close.”

- When placing a customer order, if you add a product that has volume discounts you will be notified with a red dot. By clicking on the dot, you can view all the available price breaks. You can click the checkbox next to the appropriate price break to add that minimum quantity to your order.

AdvancePro 10.00.0.1000* - admin

Admin Customers Vendors Products Warehouse Sales Rep Returns Reports QuickBooks Web MFG MCR

Customers

Place New Order
POS
All Customer Orders
View All Customers
Add New Customer

Vendors

Place New Order
All Vendor Orders
View All Vendors

Products

Add New Product
Manage Inventory
View All Products
Quick Search

Open Windows

Place Customer Order
Edit Product/Item Kit

1. Customer Details 2. Order Details 3. Process Order

Customer Purchase Order (New)

All Fresh Vegetables

Customer Billing Address
All Fresh Vegetables
5th Vegetable Street
Vegetable City, VG, WV115
Canada

Customer Shipping Address
All Fresh Vegetables
444-1111115

Date: 3/11/2015
Ref #: 30
PO #: 23

Acc # 4000 0000 4 Sales Rep N/A Payment Terms N/A Ship date 3/12/2015 Expected date 3/16/2015 Cancel Date 3/10/2016 Carrier N/A Carrier Acc #

No	SKU #	Product	Qty	Orig. Price \$	Price \$	Total \$	Stock	BOH			
1	V00002	Cabbage	10		10000	10.00	1000				

1 100 9... 0.80
 2 100... In... 0.50

Total Weight: 20 lbs
Total Qty: 10

Shipping \$ 0.00 Adjustment \$ 0.00 Sub Total \$ 10.00
Tax % N/A Tax \$ 0.00 TOTAL \$ 10.00
BALANCE \$ 10.00

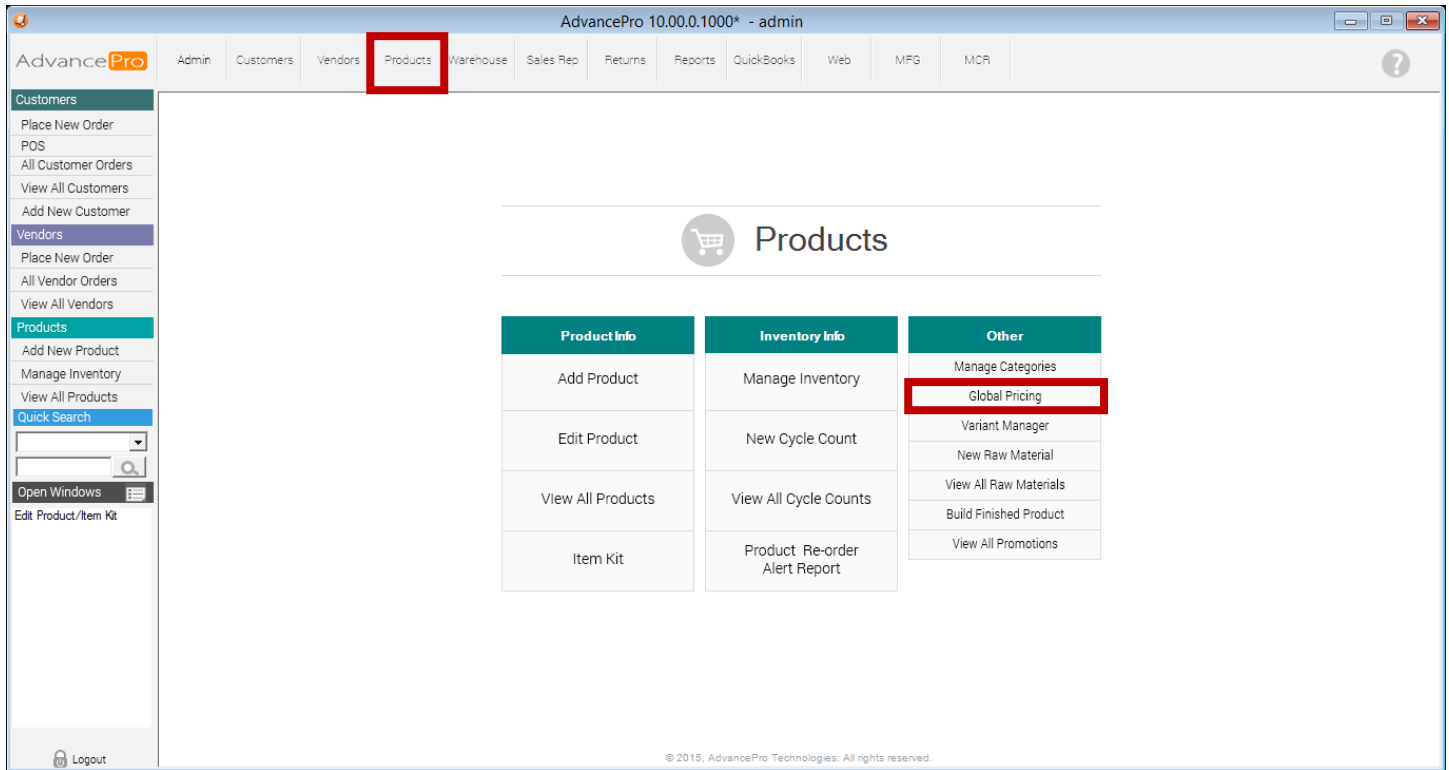
Save PLACEORDER Cancel Order Close

Print Queue Invoice Only Print Item Notes

Global Pricing

Global pricing changes allow you to mass update the customer pricing exceptions and product pricing. In order to set global pricing changes you need to first create Product Categories and Customer Groups.

1. Select “Products” from the switchboard at the top of the screen, then click on “Global Pricing.”



2. The “Global Pricing and Promotions” form will open.

Product Pricing

Make sure the “Product Pricing” tab is selected. You can now make changes to the first tier pricing (base prices) of products in selected categories.

1. Select the category or categories for which you would like to change the base prices.
2. You can change prices globally by a percentage or an amount. Enter a dollar amount or markup percentage by which to change your pricing. Enter a negative sell price or percentage to reduce the prices. Click “Process” for your changes to take effect.

NOTE: Markup percentage will change the mark up on the product’s cost. Selling price amounts will apply to the product’s selling price

3. You can setup margin based pricing by setting your desired margin. The value must be less than 100. The product prices will be changed to reflect this margin. Click “Process” for your changes to take effect.
4. You can also setup global promotions (For use with AdvancePro Web Services). In the “Promotion Code Info” box, select the dates of the promotion. Then enter the discount percentage and whether it’s stackable (can be applied with other discounts). Enter the promotion code and click “Add/Update Promotion Code.” Once the pricing has been processed a confirmation window will open detailing the number of products that have been updated.

Global Pricing and Promotions

Product Pricing | Global Pricing Options and Promotions

Make global Pricing changes to Product Categories.

Product Categories

- Beef
- Chicken
- Fruit
- Pork
- Sports
- Vegetable

Product Pricing Info
You can increase or decrease Selling Price of Products

Selling Price \$ Mark Up % **Process**

Margin Based Pricing
Use margin to re-calculate Selling Price. Margin value must be in the range of $-(\infty) < \text{Margin} < 100$

Margin % Round to the nearest 9 (i.e. : 1.04 -> .99 ; 1.05 -> 1.09) **Process**

Promotion Code Info

From: To: Is Stackable

Discount: % Code: **Add/Update Promotion Code**

Next **Close**

Global Pricing Options and Promotions

Make sure the “Global Pricing Options and Promotions” tab is selected. In the Global Pricing form, you can select a category of customers and apply third tier pricing exceptions to a set of products.

1. Select the customer groups and product categories for which you would like to change third tier pricing.
2. Under “Customer Pricing,” you can check the Lock Customer Pricing box to lock or unlock pricing.
 - a. Lock Pricing: If you have set the customer pricing for a product to be marked up or discounted, the pricing will not change if there are any (further) changes in the base selling price or cost price of the product.
 - b. Unlock pricing: Uncheck the box to unlock the pricing. If you unlock it and any changes are made to the base cost price, the customer pricing will change accordingly.
3. Under “Global Pricing,” select whether you will be applying a markup or discount.
 - a. Markup applies to the cost price.
 - b. Discount applies to the selling price.
4. Enter the markup or discount percentage value.
5. Check the “Replace Existing Customer Pricing” box only if you want to replace the existing price with a new value. Otherwise it will append the marked up or discounted price to the existing price.
6. Click the checkbox to “Lock this Price against future changes,” if desired.

7. Click “Quick Process” or “Process” to apply the changes.
 - a. Quick Process applies the mark up or discount, but does not replace the customer pricing and does not lock the prices against future changes.
 - b. Process applies the mark up or discount, locks the prices, and replaces customer pricing as necessary.
8. Under “Create Promotion,” you can create promotions for specific product groups and customer categories.
 - a. Select the date range for the promotion to be applicable.
 - b. Enter a selling price or a markup/discount percentage. If entering a markup/discount percentage, select whether you are applying a markup or a discount.
 - i. If you enter a selling price, all products in that category will be that price for the selected customer category during the promotion.
 - ii. If you are entering a markup or discount percentage, click the radio box to indicate whether it is a markup (on the product cost) or a discount (on the selling price).
 - c. Click “Process” to save your changes.

Pricing Hierarchy Table

Pricing	Overrides	Applies to UOM	Where to Set
Base Selling Price		Yes. UOM pricing calculated based on base selling price.	Product > Edit Product > Vendor & Pricing Info tab
Customer Pricing Across All Products	<ul style="list-style-type: none"> Base selling price 	No	Customer > Edit Customer > Additional Info tab
Customer Pricing Exceptions	<ul style="list-style-type: none"> Base selling price Customer pricing across all products 	Yes, if the UOM is selected on creating the exception	Product > Edit Product > Customer Pricing tab
Customer Promotions	<ul style="list-style-type: none"> Base selling price Customer pricing across all products Customer pricing exceptions Global pricing promotions on specific customer groups and product categories 	Yes	Product > Edit Product > Customer Promotions
Global Pricing > Product Pricing; Mark Ups, Discounts and Margin Based Pricing	<ul style="list-style-type: none"> Changes base selling price 	Yes. UOM pricing recalculated with new base price.	Product > Global Pricing > Product Pricing tab
Global Pricing > Product Pricing; Promotion Codes	<p>If entered by customer on B2B or B2C sales:</p> <ul style="list-style-type: none"> If “stackable” selected, appended to all other promotions If “stackable not selected, applies to base selling price 	No	Product > Global Pricing > Product Pricing tab
Global Pricing > Global Pricing Options and Promotions; Mark Up / Discount on Selected Customer Groups and Product Categories	<ul style="list-style-type: none"> If replace NOT selected, gets appended to existing customer pricing If replace selected, replaces existing customer pricing 	Yes	Product > Global Pricing > Global Pricing Options and Promotions tab
Global Pricing > Global Pricing Options and Promotions; Create Promotion on Selected Customer Groups and Product Categories	<p>For duration of promotion:</p> <ul style="list-style-type: none"> If other promotion exists on products selected. If UOM exists on products selected. 	Yes	Product > Global Pricing > Global Pricing Options and Promotions tab
Volume Discounts	<p>If selected, overrides</p> <ul style="list-style-type: none"> Base selling price Customer pricing across all products Customer pricing exceptions Customer promotions Global pricing changes of any kind 	No	Product > Edit Product > Vendor & Pricing Info tab