

Pricing SOP's - 2009



Agenda

- New Menu 5.0 – Online Documentation
- DWMQY Tasks and Best Practices
- Customer Class Pricing
 - 12.2.8
- PVCTG – Menu 5.15
- Product Type Pricing
 - How to set up
 - benefits

New Menu 5.0 Daily Weekly Monthly Quarterly Tasks

MENU-5

NEW PRICING MENU

06:27:13 11 Mar 2009

1 JFE SMM

****CUSTOMER MAINTENANCE****

1. Master - Programs, Class, LPM
2. Detail - PPoint, Disc%
3. Contract Prices (old 5.2)
4. Contract Bulk Menu (old 5.2A)
5. Special One Day Discounts
6. Future Contract Prices

****PRODUCT MAINTENANCE****

8. Master - Class, Type (12.3.2.2)
9. Class Maint (12.3.3)
10. Class Multiplier Maint (old 5.29)
11. Type Maint (12.3.4)
12. Price Maint - Lot Pricing (PB)
13. Block Corp Trans (12.3.2.9)
15. Pricing Matrix (old 5.33)

19. ****PROGRAM MAINTENANCE****

20. AUTO UPDATE PRICING MENU

0. Pricing Class Menu - DWMQY

****LISTINGS/REPORTS****

21. List of Programs (old 5.19A)
 22. List of Customers with PPoint
 23. Contract Price File (old 5.19)
 24. Prices below Min GP% (old 5.21)
 25. Contract Sales (old 5.22)
 26. List Future Contract Changes
 27. Customer Discounts (old 5.3/23)
- ****PRICE BOOKS****
29. Price/Cost Book (old 5.15)
 30. Customer Price Book (old 5.17)
 31. Contract Price Book (old 5.18)
 32. Contract Price List (old 5.25/26)
 33. Block Corp Listing (12.3.23)
 35. Matrix Listing (old 5.24)
 36. List Less Matrix Pricing (ft only)

40. OLD Menu-5

5.0 Daily/Weekly/Monthly/Quarterly/Annual Tasks

```
MENU-5.0 PRICING - DAILY/WEEKLY/MONTHLY/QUARTERLY/YEARLY
12:52:53 18 Mar 2009 19 JFE SMM
1. Daily Tasks
2. Weekly Tasks
3. Monthly Tasks
4. Quarterly Tasks
5. Annual Tasks

19. Pricing FAQ's
20. Development requests
```

Daily Tasks 5.0.1

MENU-5.0.1

PRICING ANNUAL TRAINING

13:23:07 18 Mar 2009

19 JFE SMM

DAILY TASKS

ON-LINE DOCUMENTATION

DAILY TASKS	ON-LINE DOCUMENTATION
1. Contracts with cost change	31.
2. Products with cost change	32.
3. Products with price changes	33.
4. New Products Transmission	34.
5. Customers with no LPM	35.
6. Price overrides	36.
7. Contracts that are expiring	37.
8. File maintenance list	38.
9. JEN Price bulletins	39.
10. Price Override (EVENT 35.19.4)	40.
11. Price Hold (EVENT 35.19.2)	41.
12. Sold Below Cost (EVENT 35.19.3)	42.

**Save all of your Pricing EOD emails to an My Documents Folder – Pricing.
You can create Sub-folders for the different reports to keep them
organized if you choose. My Documents/Pricing/EOD Reports/175
Contracts with Cost Changes**

5.0.1.2: EOD Report 01-181 Products with Cost Changes

Google Docs BETA

Daily Task # 2 : EOD Report P... saved on 4/8/09 3:54 PM by Mary

File Edit View Insert Format Table Tools Help

Styles Verdana 10pt B I U A Link

Daily Task # 2 : EOD Report Products with Cost Changes

Use this report to keep track of products that have cost changes

05:39:26 11 Mar 2009 PRODUCTS WITH COST CHANGES PAGE 1

AOC	VEND	PRODUCT	DESCRIPTION	OLD BR COST	NEW BR COST	OLD DIR COST	NEW DIR COST	SOLD.12MO ON FLYER
A211	B11-947		TO-5 RELAY/CAPACITOR	19.580	20.610	17.999	18.947	451
A211	B12-007		45004 ACID-AWAY 4oz	12.710	13.370	11.579	12.189	30
A211	B12-855		KS1 HARDSTART	22.840	24.050	20.999	22.105	241
A211	B12-856		MP1 HARDSTART	23.610	24.850	21.705	22.841	
A211	B13-545		KS8 HARDSTART	14.140	14.890	13.000	13.684	3
A211	B13-641		45009 ACID AWAY POE	12.820	13.490	11.579	12.189	1
A211	B81-425		65602 FLUOROCLEEN 16	6.550	6.890	6.021	6.337	4
A211	G31-253		55011 PVC CEMENT 1/4	1.260	1.330	1.137	1.200	51
A211	G31-535		25631 #5 PIPECOMPND	3.740	3.940	3.379	3.558	24
A211	G31-536		31631 TRU-BLU SEALAN	3.380	3.550	3.053	3.210	46
A211	G31-537		23631 PIPESLNT T+2 1	3.500	3.680	3.158	3.326	0
A211	G31-742		81873 AIRLOCK 10.5 O	2.310	2.430	2.105	2.210	
A211	G31-743		55015 PVC CEMENT Pt	3.830	4.030	3.463	3.642	61
A211	G31-744		55713 PVC PRIMER 1/2	1.900	2.000	1.716	1.810	37
A211	G31-745		55715 PVC PRIMER Pt	3.150	3.310	2.842	2.989	17
A211	G32-665		23431 PIPESLNT T+2 P	9.270	9.760	8.379	8.821	
A211	G32-668		23551 T+2 SEALNT 1/2	5.860	6.160	5.295	5.568	35
A211	G32-669		25431 #5 PIPECOMPND	8.740	9.190	7.895	8.305	3

5.0.1.3: EOD Report 01-182 Products with List Price Change

Daily Task # 3 : EOD Report 01-182 Products with Price Change Report

Use this report to track List Price changes

If there is any 5.3 or 5.15 pricing set up for this product you will be notified in the Menu 5 Column.

NOTE: You must have parameter 35.10.4 set to Y to begin storing the prices for this report.

AOC VENDOR	PRODUCT	DESCRIPTION	OLD EA PRICE	NEW EA PRICE	OLD LIST PRC	NEW LIST PRC	SOLD.12MO	FLYER	BLOCK	MENU-5
A600	B12-380	B1370803 DEFROST ST	11.48	6.57	25.51	14.6	4		*	
A597	B82-159	1FA0403 MANUAL DAMPE	57.15	43.46	127	96.58			*	5.3
A597	B82-160	1FA0404 MANUAL DAMPE	86.42	65.72	192.05	146.05			*	5.3
A597	B82-161	1FA0406 MANUAL DAMPE	71.09	54.06	157.98	120.14			*	5.3
A597	B82-162	1FA0411 MAN DAMPER	142.17	108.12	315.94	240.28			*	5.3
A597	B82-163	1FA0412 MAN DAMPER	157.5	119.78	350.01	266.19			*	5.3

5.0.1.4 : EOD Report 01-125 New products from Corp Transmission

Daily Task # 4: New Products from Corp Transmission EOD Report 01-125

New Products from Corp Transmission

This EOD report (01-125) should be reviewed each time received via email and menu 12.3.35, List of Possible Duplicate Items, should be run.

When reviewing menu 12.3.35, look at the Existing Part # column and compare to the Vend Desc column. If you have a match, you have a duplicate part number in your system.

Input the part # from the Existing Part # column into stock status. If you have quantity on hand or history, you need to move this Existing Part # to the JS #.

22:07:02 09 Mar 2009 NEW PRODUCTS FROM CORP TRANSMISSION PAGE 1
USE MENU-12.3.2.8 TO MAINTAIN

A.PROD.NO. DESC.1..... VEND.NO. VEND.NAME.....

B17-226 UTR-DPB24T CONDENST PUMP A709 FUJITSU GENERAL AMERICA,
INC.

B99-603 RADS-51B 5K RAC ENRG STR A510 HEAT CONTROLLER, INC.

B99-604 RADS-81B 8K RAC ENRG STR A510 HEAT CONTROLLER, INC.

5.0.1.5 – EOD Report 01-155 List of Customers with No Multiplier

Daily Task #5: EOD Report Lis... edited on 3/6/09 11:54 AM by Mary Share Save Save & C

File Edit View Insert Format Table Tools Help

Styles Verdana 10pt **B** *I* U [Link](#)

Daily Task # 5: EOD Report List of Customers with no Multiplier

End of Day will now generate a report that lists customers with no List Price Multiplier in Menu 12.2.2.2, Screen 2, Field 37. Changes to the report can be made in Menu 16.5 EOD.XREF 01-155.

```
17:09:32 18 Jul 2006      CUSTOMERS WITH NO LIST PRICE MULTIPLIER      Page 1

CUST#.  CUST.NAME.....          PCAT.MULT.
110074 1343 OLYMPIA PARKS CIR
110066 431 CORPORATION
110057 A & A ELECTRIC MOTORS &
110084 ACTION AIR OF FLORIDA -
110085 ACTION AIR OF FLORIDA -
110158 AETNA SPECIALTY PHARMACY
```


5.0.1.7 : EOD Report 01-156 Contracts that are Expiring

Daily Task # 7 : Contracts that are expiring (EOD 01-156)

Use this report to review expiring contracts.

19:32:00 12 Mar 2009 CONTRACTS THAT ARE EXPIRING - CUSTOMER SPECIFIC (5.3) PAGE 1

CUST #.	CUSTOMER NAME	PRODUCT #.....	PRICE EA.	PRICE..	BR.COST...	DIR.COST..	EFF.DATE	EXP.DATE
49275	LACLEDE GAS COMPANY	FGP-SS4-100-100	275.00	417.50	0.000	250.496	08/01/07	03/31/09
49275	LACLEDE GAS COMPANY	Y90AA-3218	5.90	0.00	4.130	4.130	10/30/08	03/31/09

19:32:01 12 Mar 2009 CONTRACTS THAT ARE EXPIRING - PROGRAMS (5.3) PAGE 1

CONTRACT.....	PRODUCT #.....	PRICE EA.	PRICE..	VEND.NO	BR.COST...	DIR.COST..	EFF.DATE	EXP.DATE
508HTG-2008	B82-279	4.47	5.94	A508	4.160	3.849	10/07/08	03/31/09
508HTG-2008	B82-280	7.95	10.55	A508	7.380	6.837	10/07/08	03/31/09
508HTG-2008	B82-282	6.25	8.29	A508	5.810	5.375	10/07/08	03/31/09
508HTG-2008	B84-260	221.72	263.14	A508	197.360	186.190	10/07/08	03/31/09
508HTG-2008	B84-261	186.90	221.82	A508	166.370	156.950	10/07/08	03/31/09
508HTG-2008	B84-265	150.54	178.67	A508	134.010	126.420	10/07/08	03/31/09
508HTG-2008	B84-266	114.70	136.13	A508	102.100	96.320	10/07/08	03/31/09
508HTG-2008	L80-221	30.01	37.48	A508	26.240	24.295	10/07/08	03/31/09
508HTG-2008	L80-222	27.49	34.33	A508	24.030	22.253	10/07/08	03/31/09
508HTG-2008	L86-689	18.97	24.61	A508	17.230	15.953	10/07/08	03/31/09

5.0.1.8 : EOD Report 01-118 File Maintenance

Daily Task # 8: File maintenance list (EOD 01-118)

Use this report to monitor changes made to Customer Master/Detail and Product Master/detail

21:44:03 12 Mar 2009

***** FILE MAINTENANCE LIST ***** PAGE 15

FILE.NAME.	DATE....	TIME....	INT.KEY	EXT.KEY.....	DICT.NAME.....	OLD.....	NEW.....	OPER.
PROD.MAST	03/12/09	10:38AM	900455	H93-018 DIR.QTYS	BRANCH.COST 5800	5800 5800	5800	MARIA
PROD.MAST	03/12/09	10:38AM	203320	H93-045 DIR.QTYS	BRANCH.COST 6320	6320 6320	6320	MARIA
PROD.MAST	03/12/09	10:38AM	900451	H93-016 DIR.QTYS	BRANCH.COST 7000	7000 7000	7000	MARIA
PROD.MAST	03/12/09	10:38AM	900453	H93-017 DIR.QTYS	BRANCH.COST 10800	10800 10800	10800	MARIA
PROD.MAST	03/12/09	11:13AM	448348	MB-105	NEW			RON S

5.0.1.9 – JEN Pricing Center

Daily Task # 9

JEN Pricing Center:

1) Set up daily alerts to notify you when the Cost or List Price changes.

<http://sp.johnstonesupply.com/C17/Pricing%20Center/default.aspx>

Price Change Bulletins:

<http://sp.johnstonesupply.com/Search.aspx?s=All+CORP+Docs%2c&pt=Surn%3aschemas%2cPrice+Change+Bulletin%2cAnd%2c&wd=+where+%22Doc+Type%22+Contains+Price+>

List Price Structure Change:

<http://sp.johnstonesupply.com/Search.aspx?pt=Surn%3aschemas-microsoft-com%3aoffice%2c&wd=+where+%22Doc+Type%22+Contains+List+Price+Structure+Change&>

5.0.1.10 – Event Notification M35.19.4 Price Override

Daily Task # 10 Event Notification - Price Override M35.19.4

Event Notification - Price Override M35.19.4

4. Price Override - Enter the company number that the event will take place. Each company (company 01, 02, etc.) will need to be set up separately.

Note: *Price overrides that come as a result of Menu 5.15 Matrix pricing are excluded from the price override event notification.*

- **Fields 1 - 9 Email Address** - Enter each email address to receive an immediate notification when a price override takes place in Order Entry.
- **Gross Profit %** - allows you to enter a minimum GP%. If the GP% is higher than the amount in line 10 than no event notification will take place.
- **Bypass QTY Pricing** - if 'Y' is entered you will not receive a price override notification as long as the price of the product that was overwritten was found in one of the quantity buckets. Enter 'N' if you want to receive notification. Blank defaults to No.
- **Only New Orders** - If 'Y' is entered - you will only get notified when new orders are created.

```
OPERATOR JOHN M
ORIG OPER
CUSTOMER 15 PREFERRED CASH CUSTOMER
RELEASE# 01083685001 **PICK/PACK**
PRODUCT B92-910
DESC R410A-25 REFRIGERANT
EACH PRC 190.66
PRICE 199.14
***OVERRIDE***
DISCOUNT
COST 145.401
GP% 26.98
```

5.0.1.11 – Event Notification M 35.19.2 Price Hold

Daily Task # 11 Event Notification Price Hold

Price Hold

Menu 35.19.2

2. Price Hold - Enter the company number that the event will take place. Each company (company 01, 02, etc.) will need to be set up separately.

- **Fields 1 - 9 Email Address** - Enter each email address to receive an immediate email notification when someone overrides a price hold in Order Entry.
- **Field 10 Gross Profit %** - allows you to enter a minimum GP%. If the GP% is higher than amount in line 10 then no event notification will take place.

```
OPERATOR  MARK M
ORIG OPER
CUSTOMER  15 PREFERRED CASH CUSTOMER
RELEASE#  01083525001  **INVOICE**
PRODUCT   H25-961
DESC      550B DIGITAL THERMOMETER
EACH PRC  9.99
PRICE     9.99
***FLYER***
DISCOUNT
COST      9.060
GP%       9.30
```


5.0.1.12 – Event Notification M 35.19.2 Items Sold Below Cost

Daily Task #12 Event Notification - Items Sold Below Cost Menu 35.19.3

3. Sold Below Cost - Enter the company number that the event will take place. Each company (company 01, 02, etc.) will need to be set up separately.

- **Fields 1 - 10 Email Address** - Enter each email address to receive an immediate notification when someone sells an item below average cost.

OPERATOR JOHN M
ORIG OPER
CUSTOMER 111198 MATHIS HEATING & COOLING RELEASE# 01083508001 **INVOICE**
PRODUCT b92-242
DESC 61480251 LINE SET
EACH PRC 89.52
PRICE 66.76
DISCOUNT
COST 81.680
GP% -22.34

Converting EOD Reports to Excel Format

- Copy the entire report
- Paste into Excel
- Click on Column A
- Data/Text to Columns
- Walk through the wizard – fixed width/create your columns/apply text formatting to leading zeros - FINISH

Text to Columns

Text to Columns

Separate the contents of one Excel cell into separate columns.

For example, you can separate a column of full names into separate first and last name columns.

In Word, use this feature to convert the selected text into a table, splitting the text into columns at each comma, period, or other character you specify.

[Press F1 for more help.](#)

AOC	VEND	PRODUCT	DESCRIPTION	OLD EA PRICE	NEW EA PRICE	OLD LIST PRC	NEW LIST PRC	SOLD.12MO	FLYER	BLOCK	MENU-5
0597	B93-382	DL-07N12ATAAA4	7.5T	0.00	4340.64	0.00	9646.20	0	*		
A597	B94-755	DL-04N07ATAAA2	4T GA	0.00	2292.32	0.00	5094.22		*		
A499	B94-872	SM115-3QAI	230V COM	1685.35	1611.55	3745.35	3581.35				
A499	B94-873	SM120-3VI	230V COMP	1958.59	1872.82	4352.57	4161.97				
A499	B94-874	SM125-3QAI	230V COMP	1746.49	1670.01	3881.22	3711.26				
A499	B94-875	SM160-3CBI	230V COMP	2206.15	2109.54	4902.73	4688.03				
A499	B94-876	SM175-3QAI	230V COMP	2317.55	2216.06	5150.29	4924.75				
A499	B94-877	SM185-3QAI	230V COMP	2414.81	2309.06	5366.43	5131.42				
A499	B94-852	SM115-4QAI	460V COMP	1685.35	1611.55	3745.35	3581.35			1	
A499	B94-853	SM120-4VI	460V COMP	1958.59	1872.82	4352.57	4161.97				
A499	B94-854	SM125-4QAI	460V COMP	1746.49	1670.01	3881.22	3711.26				
A499	B94-855	SM160-4CBI	460V COMP	2206.15	2109.54	4902.73	4688.03				

Weekly Tasks 5.0.2

MENU-5.0.2

PRICING ANNUAL TRAINING

13:24:54 18 Mar 2009

19 JFE SMM

WEEKLY TASKS

1. JEN upcoming price changes
2. Every 2 weeks send out 5.21 to sales
3. Review passwords on screens

ON-LINE DOCUMENTATION

- 31.
- 32.
- 33.

5.0.2.1 – View JEN Upcoming Price Spreadsheet – Pricing Center

Communicate upcoming cost/price changes to Sales Force

Upcoming Price Change Spreadsheet:

PRICING CENTER - PRICE CHANGE NOTICES											
DEPT	VENDOR	VENDOR#	STOCK# OR PRODLINE	VENDOR'S REASON	ACTION	JOHNSTONE EFF DATE	INDUSTRY EFF DATE	AVERAGE % CHANGE	DATE OF VENDOR NOTICE	STATUS	TRA DAT
A	GE ZONELINE	486	ALL		PRICE CHANGE	01/01/09	01/01/09		12/03/08	ACCEPTED	
L	HENRY TECH	555	ALL		PRICE CHANGE	01/01/09	01/01/09		12/29/08	PENDING	
L	ANTUNES CONTROLS	673	ALL		PRICE CHANGE	01/01/09	01/01/09		01/16/09	NOTICE	
A	HEATCONTROLLER	510			PRICE CHANGE	01/05/09	11/03/08		10/02/08	ACCEPTED	
L	ICM	581	ALL		PRICE CHANGE	01/28/09				NOTICE	
S	VENTAMATIC	442	X90-293		COST CORRECTION	02/01/09			03/03/09	ACCEPTED	
P	A.O.SMITH	433	EVAP COOLER MOTORS		PRICE CHANGE	02/16/09	02/16/09				

5.0.2.3 – Review Pricing Passwords

Weekly Task # 3: Review Passwords

Review Passwords on Menu 5 (Pricing)

The initial password for Menu-5.0.2.3 is **5.0**

The only valid Menus that 5.0.2.3 will view/maintain must start with "5", otherwise the following error message will display:
USE 12.1.14 TO VIEW/CHANGE PASSWORD FOR NON-PRICING MENUS

Monthly Tasks 5.0.3

MENU-5.0.3

PRICING ANNUAL TRAINING

14:09:14 18 Mar 2009

19 JFE SMM

MONTHLY TASKS

ON-LINE DOCUMENTATION

- | | |
|---|-----|
| 1. Contract Price File (5.23) | 31. |
| 2. List Less Matrix Pricing (5.36) | 32. |
| 3. Matrix Listing (5.35) | 33. |
| 4. List of Programs (5.21) | 34. |
| 5. have company meeting and discuss pri | 35. |
| 6. List of Price Overrides | 36. |

Save all of the above Reports to your My Documents Pricing folder for future reference

5.0.3.1 – M 5.23 Contract Price File – New and Old Versions

Monthly Task #1

Menu 5.23 – Contract Price File

There are now 2 options for reporting the Menu 5.3 Contract Prices:

- New Version (Answer Y) – This will be a FT friendly version of the fixed programs or customer contracts, with one line per record.
- Old Version (Press <enter>) – This does a page break on each customer and/or program and has fewer selections and columns.

Step 1 - Answer Y or <enter> to the following prompt:

New Version, includes sold last 12 months (Y/<enter>) ?

Step 2 - Answer the following prompts:

List of contract prices

1. Programs
2. Customer contracts

Enter 1 or 2 ?

Enter Program(s) or <enter> for all ?

Enter Product number(s) or <enter> for all ?

Enter AOC Vendor number(s) or <enter> for all ?

Cost Options

1. Branch Cost
2. Average Cost

3 reports to FT

New 5.23.1

New 5.23.2

Old 5.23 FT into folder and review, delete programs that have expired

Save ALL 3 in Pricing Folder with Date in the file name IE 5.23 NEW 04.01.2009

5.0.3.2: M 5.36 List Less Pricing Matrix

Monthly Task # 2

Menu 5.36 List Less Matrix Pricing (ft only)

Report Of Matrix 5.15 List Less Pricing (DP 23)

List Less Pricing from the Menu-5.15 price matrix
 Enter customer number or <enter> for all ?
 Enter program or <enter> for all ?

cont.no.....	a.cust.no	cust.name.....	PM.VEND	A.PROD.NO.....	description.....	dp.ea	dperc.each	sell.price..	branch.cost	gp%.bc....	dir.cost..	gp%.dc....	sold.12mo
TOOLS			C359	W69-017	91251 GOGGLES	23	58.66	2.84	1.39	51.05			100
TOOLS			C359	W69-018	91111 SPECTACLES	23	74.7	1.9	1.52	20			100
TOOLS			C998	Z95-325	TRIAD SCREWDRIVER	23	58.89	1.78	0	100			100
	109662	ALL CLIMATE SERVICES	A480	B10-164	032158-04 620 SPECIAL	23	70.29	5.64	3.97	29.6	3.955		29.87
	109662	ALL CLIMATE SERVICES	A835	B10-360	A30-261 REFR. CONTROL	23	61.06	33.43	23.95	28.35	21.544		35.55
	109662	ALL CLIMATE SERVICES	A835	B10-514	O10-1402 CONTROL	23	60.4	54.99	41.24	25	37.103		32.52
	109662	ALL CLIMATE SERVICES	A533	B10-735	CD3603 VALVE	23	67.94	1.7	0.95	44.11	0.806		52.58
	109662	ALL CLIMATE SERVICES	A533	B10-736	CD3604 VALVE	23	67.94	1.7	0.95	44.11	0.806		52.58
	109662	ALL CLIMATE SERVICES	A533	B10-739	CD3608 VALVE	23	67.94	1.7	0.95	44.11	0.806		52.58
	109662	ALL CLIMATE SERVICES	A533	B10-740	CD4450 25PK VALVE	23	78.17	4.65	3.49	24.94	2.947		36.62

FT this report for everything – and save to your Documents Pricing Folder Report name and date IE 5.36 04.01.2009

5.0.3.3 – M 5.35 Matrix Listing

Monthly Task # 3

Menu 5.35 Matrix Listing

Report of All Matrix 5.15 Pricing

Customer Price Matrix File Listing

Step 1: Column options:

1. Each Columns
2. Bucket 1 Column
3. Bucket 2 Column
4. Bucket A Column
5. Bucket B Column
6. All columns - this requires running on a PC into a FT
7. COLUMNS - same as 5.20.2. Update Matrix from Excel ** NEW

Enter 1-7 ?

Step 2: Selection Options

1. Select for Specific Vendors
2. Select for Specific Product Classes
3. ALL records (Vendors, Classes, Customers)
4. Select for Specific Customers
5. Select for Specific Products
6. Select for Specific Product Types
7. Select for Specific Product Categories
8. Select for Specific Programs

FT this report for everything – and save to your Documents Pricing Folder Report name and date IE 5.35 04.01.2009

5.0.3.4 – M 5.21 List of Programs

This report gives you all customers assigned to your programs. Also, program tracking and performance data.

Monthly Task # 4 : Menu 5.21 List of Programs (old 5.19A)

M-5.21 –We have added some sales columns to this report to make it more useful in monitoring activity and effectiveness of your programs. This will list sales, cost and qty for program tracking. The sales values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year. The Cost values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year. The Qty sold values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year.

CONTRACT..	CUST #..	CUSTOMER NAME	slsm	CDATE...	SOLD..	SOLD..	SOLD..	SALES\$	SALES\$	SALES\$	COST\$.	COST\$.	COST\$.
					MTD	YTD	LY	MTD	YTD	LY	MTD	YTD	LY
LARGE-544	78350	CLASSIC AIRE CARE INC	64	10/20/2008		4	1	1504	306		1327	286	
LARGE-544	107039	JERRY KELLY HEATING & A/C	64	10/20/2008	17	19	10	6337	7382	4188	5841	6783	3741

**FT this report for everything – and save to your Documents Pricing Folder
Report name and date IE 5.21 04.01.2009**

5.0.3.5 : Have Companywide Meeting to Discuss Pricing

- 1) Set/discuss Short Term Pricing Goals
- 2) Measure Short Term Pricing Goals
- 3) Set/Discuss Long Term Pricing Goals
- 4) Measure Long Term Pricing Goals
- 5) Discuss Previous Month's Override numbers M 10.35 (Next Slide)
- 6) Communicate upcoming Cost/List Price Changes

5.0.3.6 – Override Report

Release number/Customer Number/Customer name/Finalized Date/Part number/Price/EA Price/Cost/OP Name (s)

Monthly Task # 6: Set Goals to Reduce the number of overrides

Use Menu 5.0.3.6 to run an on demand price override report.

```
04.01.2009 16:48:20 List of Price Overrides (Menu 5.0.3.6) Page 1
```

.....	a.cust.no.	cust.name.....	FINALIZED	a.prod.no.....	price..	ea.price..	COST.....	OPERATOR	NAME(S).....
01081699001	CANCTI	A. RETURNS APP	02/02/09	558-704	78.01	27.31	76.039	JOHN W	MARK M
01082760001	108996	AFFORDANT F	02/23/09	799-001	4.00	0.00	0.000	BOB R	MARK M
01082792001	1130	AFTON MFD VTL	02/20/09	105-711	49.95	49.99	39.316	MARK M	
01081756001	111736	AMERICAN REALTY	02/02/09	096-937	752.60	0.00	563.011	QUINTON K	DAVE N
01081757001	111736	AMERICAN REALTY	02/02/09	198-833	674.35	737.27	552.970	QUINTON K	DAVE N
01081864001	108205	ANTON'S A/C B. II	02/04/09	084-219	278.60	348.25	225.670	QUINTON K	
01081864002	108205	ANTON'S A/C B. II	02/10/09	084-219	278.60	348.25	225.670	QUINTON K	BACKORDER

FT this report for the entire month – and save to your Documents Pricing Folder Report name and date IE Monthly Override 04.01.2009

Quarterly Tasks 5.0.4

MENU-5.0.4		PRICING ANNUAL TRAINING	
08:14:16 24 Mar 2009		1 JFE SMM	
QUARTERLY TASKS		ON-LINE DOCUMENTATION	
-----		-----	
1. customer review by salesman		31.	
2. review customer classes		32.	
3. review programs		33.	

5.0.4.1 : Customer Review by Salesman use M 11.2.9 Comparative Sales by SLSM

Quarterly Task # 1: Customer Review by Salesman

1) Menu 11.2.9 Comparative Sales by Salesman This report gives you a comparative sales analysis by salesperson and customer, showing sales totals by period for the current and previous years. The report totals by company and salesperson, and breaks for each salesperson.

```
COMPARATIVE SALES BY SALESMAN REPORT
=====
THIS REPORT GIVES YOU A COMPARATIVE SALES ANALYSIS REPORT
BY SALESMAN, BY CUSTOMER, SHOWING SALES TOTALS BY PERIOD
FOR THE CURRENT AND PREVIOUS YEAR. THE REPORT TOTALS BY
COMPANY AND BY SALESMAN, AND BREAKS FOR EACH SALESMAN
THE REPORT IS SELECTABLE BY COMPANY, CUST CLASS & SALESMAN.

ENTER COMPANY NUMBER (2N), OR <CR> FOR ALL :

ENTER CUSTOMER CLASSES, OR <CR> FOR ALL :

ENTER SALESMAN NUMBERS, OR <CR> FOR ALL :001

COMPARE 1)THIS YEAR VS LAST YEAR 2)LAST YEAR VS 2 YRS AGO :1
```

- Select a printer
- Enter your operator initials
- Enter a company number or Enter for all
- Enter a customer class or Enter for all

5.0.4.2 – M 12.2.40 Customer ABC Report and Executive Reporting : Review Customer Classes

Quarterly Task # 2 : Review Customer Classes

1) Menu 12.2.40 Customer ABC Report

Customer ABC Ranking Report

Enter Company (2N) or <enter> for all ?01

Enter ABC Ranking (ie A), <ENTER> for all or NONE ?

Enter Salesman or <ENTER> for all ?

CO#	ABC RANKING	TYPE	CC1	CC2	CC3	CUST#.....	CUSTOMER NAME.....	CITY.....	ST	ZIP..	PHONE.....	SALES 12MO	PPOINT	MULT..
01	A		AC	AC	GC	110238	A-J FRANJIC HTG & CLG	ST LOUIS	MO	63129	314-845-6927	56,068.06		0.45
01	A	AC	OL	IA	CD	1805	ACADEMY AIR HEATING & CL	MARYLAND HTS	MO	63043	314-770-9800	1,193.92		0.45
01	A		AC	AC	OL	1900	AIR MASTERS	FENTON	MO	63026	636-680-2100	62,095.12		0.45
											314-567-			

Executive Reporting – Customer Vendor Detail

Customer / Vendor Detail

Customer # 107039
 Customer Name JERRY KELLY HEATING & A/C
 Warehouse Combined Totals

Sales | Vendor Totals | Products | Sales History

Vendor Totals

	Vend Num	Vend Name	Sales MTD	Sales YTD v	GP MTD	GP YTD	LY Sales MTD	LY Sales YTD	LY
1	544	GOODMAN MFG	\$33,207.93	\$98,160.21	\$3,451.56	\$10,253.18	\$0.00	\$0.00	\$0.00
2	508	RESEARCH PRODUCTS,	\$539.46	\$17,730.39	\$60.12	\$2,098.95	\$4,521.54	\$5,913.21	\$56.00
3	626	WHITE-RODGERS		\$10,062.81	\$0.00	\$2,272.23	\$267.72	\$785.48	\$56.00
4	694	MARS/GE MOTORS	\$840.43	\$1,948.78	\$341.56	\$516.03	\$184.17	\$1,502.94	\$56.00
5	600	GOODMAN MFG PARTS	\$793.98	\$1,452.26	\$127.61	\$240.92		\$0.00	\$0.00
6	630	HONEYWELL, INC.	\$215.10	\$706.63	\$45.98	\$163.69	\$89.75	\$474.45	\$17.00
7	769	RIDGE TOOL COMPANY	\$699.99	\$699.99	\$98.33	\$98.33		\$0.00	\$0.00
8	625	BELL & GOSSETT	\$46.17	\$605.15	\$12.01	\$223.57		\$0.00	\$0.00
9	721	FLANDERS	\$213.60	\$501.24	\$65.45	\$147.66	\$294.00	\$607.70	\$87.00
10	400	STYLE CREST INC.		\$458.26	\$0.00	\$91.65		\$532.68	\$0.00
11	615	SOURCE 1	\$123.40	\$415.39	\$105.33	\$193.48	\$1,338.69	\$3,966.62	\$34.00
12	306	FLUKE CORPORATION		\$332.43	\$0.00	\$82.93		\$0.00	\$0.00
13	114	EVEREADY/ENERGIZER	\$174.60	\$309.24	\$57.46	\$132.90	\$56.60	\$86.12	\$22.00
14	227	SURFACE SUPPLY	\$50.00	\$50.00	\$50.00	\$50.00		\$50.00	\$50.00

Print Screen Close Record: 107039

start | AccuTerm 2K2... | Inbox - Micros... | Internet E... | Johnstone Sup... | Search with Google | 8:34 AM

5.0.4.3 : Review Programs M 11.16

Vendor Descending Sales

11:03:27 24 Apr 2009 Vendor sales last 12 months PAGE 1
FOR COMPANY ALL

vend#	vendor.name.....	SALES 12M0	GP 12M0	GP%	invent\$
597	UNITARY PRODUCTS GROUP	2,371,903.57	514,969.62	21.71	336775
544	GOODMAN MFG EQUIPMENT	811,280.86	127,469.86	15.71	263991
525	ARKEMA INC.	623,565.30	156,460.13	25.09	128138
626	WHITE-RODGERS	458,437.88	167,199.26	36.47	31202
615	SOURCE 1	363,372.15	150,839.47	41.51	60842
400	STYLE CREST INC.	329,287.63	96,409.28	29.27	58134
630	HONEYWELL, INC.	301,898.76	100,231.95	33.20	40565
508	RESEARCH PRODUCTS, CORP	269,881.62	48,560.22	17.99	55971
437	EMERSON MOTOR DIV	222,973.25	82,490.27	36.99	68974
489	TECUMSEH PRODUCTS CO	220,059.99	73,251.72	33.28	46906
835	ROBERTSHAW UNILINE	163,233.05	60,813.67	37.25	20117
433	A.O. SMITH CORP	158,799.96	61,683.44	38.84	19186
667	AMANA COMPANY	144,926.14	42,763.76	29.50	30289
438	FASCO	142,466.26	70,885.59	49.75	15901
582	MUELLER INDUSTRIES LINE SETS	142,267.73	55,969.17	39.34	15560
600	GOODMAN MFG PARTS	137,945.10	56,977.44	41.30	10536
709	FUJITSU GENERAL AMERICA, INC.	137,061.52	30,447.80	22.21	42928
477	PACKARD INC	119,932.72	66,421.10	55.38	9817

5.0.4.3 : Review Programs - M 6.9 Hits Report – Review Products included on Programs

Quarterly Task #3: Review what products are located on your programs edited on 3/13/09 9:03 AM by Mary Share Save Save

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Styles Verdana 10pt **B** *I* U A Link ABC

Quarterly Task #3: Review what products are located on your programs

You can Use Menu 6.9 Hits Report - Activity Profiling (FT only) for this.

Hits Report - Activity Profiling (FT only)
 Enter Warehouse (3N) or <ENTER> for all ?001
 Enter Minimum number of Hits (ie 10) ?10

WHSE	PRODUCT#.....	ITEM DESCRIPTION.....	Sales Qty.	Vend#.	Vendor Name.....	# Hits....	AVG.COST....	BRANCH COST	DIR.COST.	ON HAND	ROP....	ABC
001	L38-632	Q3400A1024 IGNITOR	156	630	HONEYWELL, INC.	88	35.491	36.58	33.87	4	2A	
001	L37-808	S8610U3009 MODULE	92	630	HONEYWELL, INC.	73	68.399	73.27	70.446	3	2A	
001	L41-698	ST9120U1003 FAN TIMER	67	630	HONEYWELL, INC.	57	53.961	60.25	55.79	4	3A	
001	L38-718	SV9501M2528 GAS VALVE	91	630	HONEYWELL, INC.	56	99.948	103.66	95.976	2	1A	
001	L86-468	FC100A1029 16X25 MEDIA	79	630	HONEYWELL, INC.	54	16.87	17.21	14.71	8	3A	
001	L86-469	FC100A1037 20X25 MEDIA	88	630	HONEYWELL, INC.	51	14.947	17.21	14.71	10	6A	
001	L43-886	S9200U1000 IGNITION CTRL	34	630	HONEYWELL, INC.	29	68.04	68.04	63	2	2A	

Annual Tasks 5.0.5

MENU-5.0.5

PRICING ANNUAL TRAINING

08:15:16 24 Mar 2009

1 JFE SMM

ANNUAL TASKS

ON-LINE DOCUMENTATION

- | | |
|---------------------------------------|-----|
| 1. review all programs | 31. |
| 2. review all customers with programs | 32. |
| 3. review LPM | 33. |
| 4. review customer fixed pricing | 34. |

5.0.5.1

- **Annual Task # 1: Review All Programs – Product groupings**
 - 1) Use Menu 5.23 – Contract Price File for 5.3 programs to get a listing of products on this Contract
 - 2) Use Menu 5.35 and 5.32.2 to get a Matrix Product Listing – TEST Account

5.0.5.2 – Review all Customers assigned to Programs and Program/Customer Performance

Annual Task # 2 : Review all customers with programs using Menu 5.21 List of Programs

M-5.21 –We have added some sales columns to this report to make it more useful in monitoring activity and effectiveness of your programs. This will list sales, cost and qty for program tracking. The sales values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year. The Cost values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year. The Qty sold values in this report are MTD -Month-To-Date, YTD -Year-To-Date and LY-Last Year.

CONTRACT..	CUST #..	CUSTOMER NAME	slsm	CDATE...	SOLD..	SOLD..	SOLD..	SALES\$	SALES\$	SALES\$	COST\$.	COST\$.	COST\$.
					MTD	YTD	LY	MTD	YTD	LY	MTD	YTD	LY
LARGE-544	78350	CLASSIC AIRE CARE INC		6410/20/2008			4	1	1504	306		1327	286
LARGE-544	107039	JERRY KELLY HEATING & A/C		6410/20/2008	17	19	10	6337	7382	4188	5841	6783	3741

5.0.5.3 – Review LPM M 12.2.40 Customer ABC Report

Annual Task # 3: Review LPM – 12.2.40 Customer ABC Report

1) Menu 12.2.40 Customer ABC Report

Customer ABC Ranking Report

Enter Company (2N) or <enter> for all ?01

Enter ABC Ranking (ie A), <ENTER> for all or NONE ?

Enter Salesman or <ENTER> for all ?

CO#	ABC RANKING	TYPE	CC1	CC2	CC3	CUST#.....	CUSTOMER NAME.....	CITY.....	ST	ZIP..	PHONE.....	SALES 12MO	PPOINT	MULT..
01	A		AC	AC	GC	110238	A-J FRANJIC HTG & CLG	ST LOUIS	MO	63129	314-845-6927	56,068.06		0.45
01	A	AC	OL	IA	CD	1805	ACADEMY AIR HEATING & CL	MARYLAND HTS	MO	63043	314-770-9800	1,193.92		0.45
01	A		AC	AC	OL	1900	AIR MASTERS	FENTON	MO	63026	636-680-2100	62,095.12		0.45

5.0.5.4 – Review Customer Specific Pricing – 5.3 and 5.15

- 1) Use Menu 5.23 Contract Price File to review ALL customer specific pricing. We recommend ALWAYS placing an expiration date on these.
- 2) Use Menu 5.35 for ALL Pricing to pull out the customer's with customer specific pricing. Then, use Menu 5.32.3 to get the customer Specific Sell Prices for review.

Pricing FAQ's : M5.0.19

Pricing FAQ's

Q: How can I get a list of my pricing in Menu 5.3?

A: Use Menu 5.23 Contract Price File

Q: How can I get a listing of my pricing in Menu 5.15?

A: Use Menu 5.35 Matrix Listing to determine program/contract names and customer numbers. Then, use Menu 5.32.2 for programs (assign programs to test account.) Or, use Menu 5.32.3 for customer specific 5.15 pricing details.

I have a price/cost that is not updated with the current information...what should I check?

If a product price or cost is not up-to-date, the first thing to check is whether or not there is a price update parameter blocking on this product.

To check this go to M-12.3.2.9 Corp. Price Update Maintenance. The price update blocks can be set system-wide or on a part-by-part basis. Once in m-12.3.2.9, enter the specific part# that is in question. Any field that has an "N" in it shows that isn't being updated during the periodic price and cost transmissions.

If there isn't a specific block on an item, put in "DEFAULT" at the part number prompt. This will show any blocked fields not being updated on a system-wide scale.

2009 Pricing Development: M 5.0.20



Pricing Development Requests: edited on 3/24/09 8:42 AM by Mary

Share Save Save & Close

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Pricing Development Requests:

COMPLETE	IN Progress		
Programming	Requesting	Menu Path	Enhancement
Medium	Portland	5.15	program lookup capability in menu-5.3 & 5.15 and customer master *** March Pricing development after Line 14 comp
Medium	Omaha	5.20.5	add column to upload customer class(es)
Difficult	Omaha	5.3	add new field for next review date - currently only looks at expiration date for EOD report
Medium	Portland	5	new PROGRAM maintenance file for entering list of valid programs with descriptons
		EOD 175 Cost changes	add salesman name to customer specific pricing and customer name
	Ron	Bitmap	
		5.15	in menu 5.15 I would like to see if the vendor selection can be removed from PVCTG and be own its own. For select a vendor and a product type
Easy	INDY Pricing Class		Add to all systems Bridgeton's custom program of Corp's expanded desc to appear in field 2 of prod master
Easy	INDY Pricing		Add to description on menu 5.4 the following: 1) Copy Contracts (5.3 only) 3) Copy & Delete Contracts (5.3 only)

Pricing Strategy and Best Practices

- Identify your top customers – Customer ABC Report
- Place into segments/customer classes
- Identify which products they are “price sensitive” to
- Create Matrix programs
- Assign to customer classes/customers
- Monitor success
- Make adjustments where necessary
- Menu 5 and 12.2.2.2 screen 2 programs – allow limited access
- **COMMUNICATION!!**

Customer Class Programs:

Set up your programs in Menu 5.15 or 5.3 and then assign to customer classes in 12.2.8

```
CUSTOMER CLASS MAINTENANCE
CUSTOMER CLASS:      ac
1. DESCRIPTION      A/C CONTRACTORS
2. PROGRAM          544-large
3. PROGRAM          630-large
4. PROGRAM          651-large
5. PROGRAM
6. PROGRAM
7. PROGRAM
8. PROGRAM
9. PROGRAM
10. PROGRAM
11. PROGRAM
12. PROGRAM
13. PROGRAM
14. PROGRAM
15. PROGRAM

Enter Line#, Backout, DELETE, Edit, 0 to Accept _
```

Which PVCTG should I use?

- P (Product)- Use this option to be specific down to a product for a customer, program, or customer class. This option can also be used for All products.
- V (Vendor) – Use this option to price a specific vendor for a customer, program, or customer class. This option is great to use when making an agreement with a customer for discounts on an entire vendor line.
- C (Class)– Use this option to price a product class for a customer, program, or customer class. Before using this menu, be sure to look over menu 12.3.33 Product List - P/C, P/T, Category and review the content of the product class to make sure it meets your expectations for products. You should review this at least on a quarterly basis to make sure the content still meets your expectations. Corp maintains the product class field and can change this without notice to you. It can be blocked from Corp changes, by product, in menu 5.13.
- T (Type) – Use this option to price a product type for a customer, program, or customer class. On the initial new product download from Corp, they use product class 001 thru 014. After the download, Corp will never touch this field again. No need to block. You can manipulate this field as you wish. Great way to price groups of products after a little work. Example: If you want to price your A coils for a specific markup %, and your Air Handlers with a different % for the same vendor, this is the best way to do so.
- G (Category)– Use this option to price customer, programs, or customer class. Before using this menu, be sure to look over menu 12.3.33 Product List - P/C, P/T, Category and review the content of the product category to make sure it meets your expectations for products. You should review this at least on a quarterly basis to make sure the content still meets your expectations. Corp maintains the product category field and can change this without notice to you. It can be blocked from Corp changes, by product, in menu 5.13. Another good report to use to see what products are setting in this category is Menu 12.3.32 Category On Hand Report.



Product Type Pricing

- T – Use this option to price a product type for a customer, program, or customer class. On the initial new product download from Corp, they use product class 001 thru 014. After the download, Corp will never touch this field again. No need to block. You can manipulate this field as you wish. Great way to price groups of products after a little work. Example: If you want to price your A coils for a specific markup %, and your Air Handlers with a different % for the same vendor, this is the best way to do so.
- Use Menu 12.3.4 Product Type Maintenance to set up New/Maintain Product Types

```
PRODUCT TYPE MAINTENANCE
PRODUCT TYPE:      ==
1. DESCRIPTION
2. SALES G/L #
3. COST OF GOODS G/L #
4. RETAIL % ADD-ON
```

Questions??

