

Menu 5.15 Pricing Matrix

Which C/P/S should I use?

C/P/S – Enter a 'C' for customer or a 'P' for *program or a 'S' for customer class

- **Option 'C'** – After entering a 'C' you will be prompted for the customer number. Enter 'L' for lookup, 'All' for all customers or enter a valid customer number.
 - **NOTE:** When selecting "ALL" customer numbers, stock status will display the calculated prices from this screen. Enter a "Y" in Menu-12.3.2.2 (Product Master Maintenance), field 21, if you want the Menu-5.15, customer "ALL" price to ALWAYS be used, even if the price in 5.15 is higher than the price in field 14.EACH PRICE. Also, when you set this flag to "Y", the flyer pricing will be blocked, and you will NOT have to block the corp transmission update of this product's price (Menu-12.3.2.2.9, field 4).
- ***Option 'P'** – After entering a 'P' you will be prompted to enter the program name. Enter a name you have selected for this program. Also, enter this program name in Customer Maintenance (menu 12.2.2.2, screen 2, field 7) for all customers that receive this price matrix, similar to contracts in Menu 5.3.
- **Option 'S'** After entering an 'S' you will be prompted for the customer class. Enter a valid customer class

Which PVCTG should I use?

P - 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 – 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 – 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 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 (12.3.2.9).

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. A list of product types can be found in Menu 12.3.25. Then enter the product type you are setting up.

G – Use this option to price customer, programs, or customer class. Before using this menu, be sure to look over menu 12.3.33 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.

Hierarchy for customer pricing Menu 5.15

1. Individual contracts entered in 5.3 – if finds something uses this price, if not moves on to ...

2. Program contracts entered in 5.3 – if finds something uses this price, if not moves on to ...
3. Searches all of 5.15 to find the absolute lowest price and uses that scenario. If nothing is entered in 5.15 then moves back to old menu 5.3 (as explained above).
 - **Note: Any customer specific pricing setup in 5.15 (even for customer ALL) will always override program pricing, even if that program happens to be lower than the customer specific pricing.**
 - **Note: Any Product Specific Pricing setup in 5.15 will always override vendor/product class/product type/catagory pricing even if that price happens to be lower then the product specific pricing.**

On the O/E screen on the lower left had side you will see a small bucket with a code in it such as CP, CV, PP, PV, SP, etc. when a price matrix is used. The following is for reference for the codes:

CP – Customer, Product	PP – Program, Product	SP - Cust.Class, Product
CG – Customer, Category	PG – Program, Category	SG - Cust.Class, Category
CC – Customer, Class	PC – Program, Class	SC - Cust.Class, Prod.Class
CT – Customer, Type	PT – Program, Type	ST - Cust.Class, Prod.Type
CV – Customer, Vendor	PV – Program, Vendor	SV - Cust.Class, Vendor

Sell Price Option:

When the "S"ell price option is selected, the system will prompt for the actual sell price that the user determines. This will then auto setup the matrix as follows. If there is a list price on this product, it will auto fill Field 2, DPOINT with a price pointer of "23" and auto fill Field 3, DISC% with the calculated discount percentage off the list price to get the desired sell price. If there is no list price on this product, it will auto fill Field 2, DPOINT with a price pointer of "0" and auto fill Field 3, DISC% with the calculated discount percentage off the each price to get the desired sell price.

The same 'S'ell Price feature is also available for Bucket 1, Bucket 2, Bucket A, and Bucket B.