

Tutorial:

SEARCH, MANAGE AND CREATE PRICE LISTS

Creating customized customer prices lists
that can be easily searched and updated.

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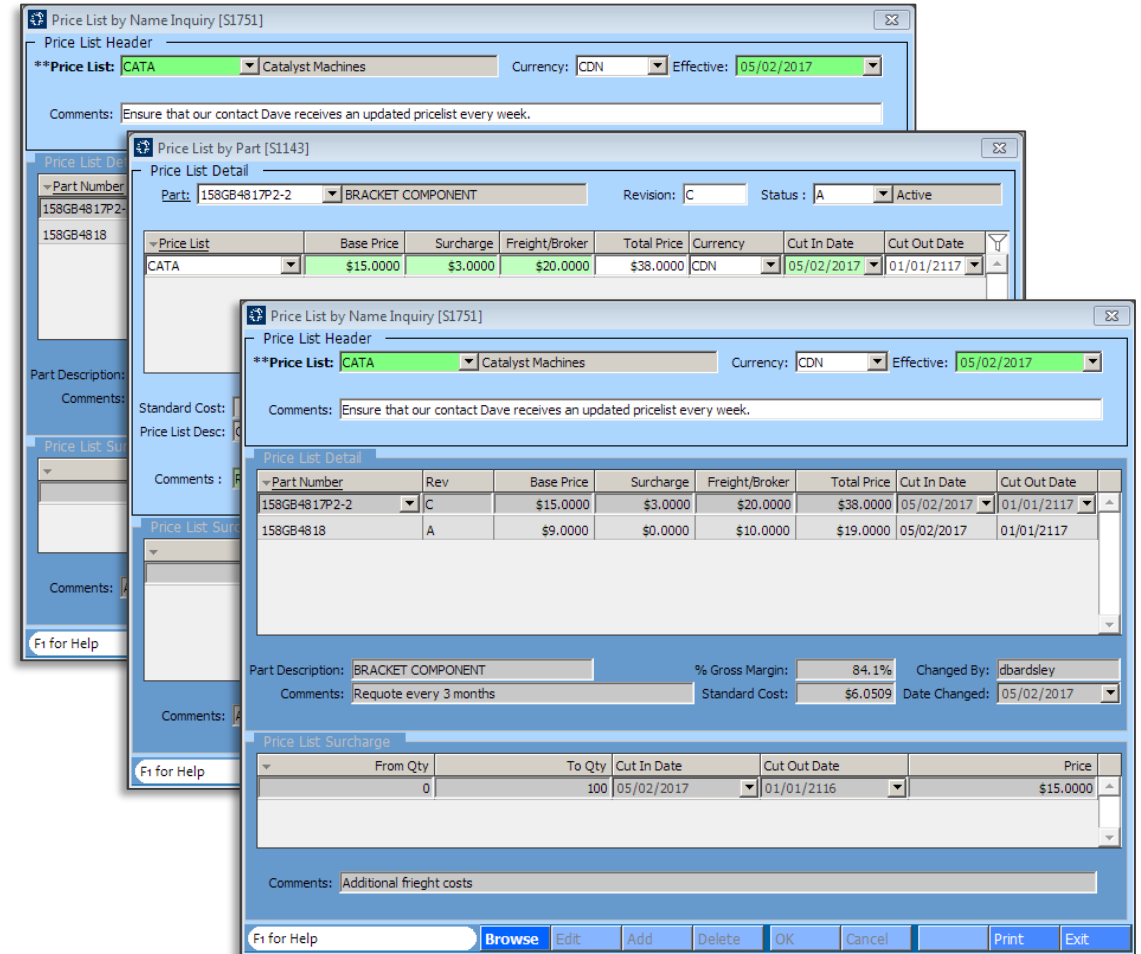
Creating a customizable price list

In this tutorial we will demonstrate how to use the various price list screens to search, manage and create customizable price lists to use with other OnRamp features.

The **Price List By Name [S1144]** is used to search, create and manage price lists for your customers.

The **Price List By Name inquiry [S1751]** screen allows the user to search for customer only without editing capabilities.

Price List By Part [S1143] allows the user to search for a specific part associated with a price list.



Task 1: Creating the new price list name

Open the **Price List by Name [S1144]** screen.

1. Click the **Add** button in the bottom menu.
2. Type in the **Price List** name and the description.
3. Select the **Currency** from the drop down menu.
4. Add any additional **Comments**.
5. Click **OK** when complete.

Price List by Name [S1144]

Price List Header

**Price List: CATA Catalyst Machines

**Currency: CDN

Comments: Ensure that our contact Dave receives an updated pricelist every week.

Price List Detail

Part Number	Rev	Base Price	Surcharge	Freight/Broker	Total Price	Cut In Date	Cut Out Date
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Part Status: Standard Cost: Cut Out Now

Part Description: % Gross Margin:

Comments: Changed By: dbardsley Date Changed: 05/02/2017

Price List Surcharge

From Qty	To Qty	Cut In Date	Cut Out Date	Price
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Comments:

F1 for Help Browse Edit Add Delete OK Cancel Print Exit

Task 2: Adding the part details

1. Click on the **Price List Detail** frame.
2. Click **Add** the add button to start adding parts.
3. Select the **Part Number** you wish to add to the list.
4. Enter the **Base Price**, **Surcharges** and **Freight/Broker** costs.
5. Set the **Cut In** and **Cut Out** dates for the start of the pricing.
6. Add any additional **Comments**.
7. Click **OK** to finish.

Repeat the process to add any new parts until your list is complete.

Note: To edit the any part line item click on the **Edit** button on the bottom menu.

The fields in white will populate automatically when the line item entry is complete.

Price List by Name [S1144]

Price List Header

**Price List: CATA Catalyst Machines

**Currency: CDN

Comments: Ensure that our contact Dave receives an updated pricelist every week.

Price List Detail

Part Number	Rev	Base Price	Surcharge	Freight/Broker	Total Price	Cut In Date	Cut Out Date
158GB4817P2		\$15.0000	\$3.0000	\$2.0000		05/08/2017	06/30/2016

Part Status: Standard Cost: Cut Out Now

Part Description: % Gross Margin:

Comments: Requote every 3 months

Changed By: dbardsley

Date Changed: 05/02/2017

Price List Surcharge

From Qty	To Qty	Cut In Date	Cut Out Date	Price
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Comments:

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Task 3: Adding the price list surcharges

You can add additional individual or multiple surcharges for each line item in the price list.

1. Click on the **Price List Surcharge** frame.
2. Click **Add** in the bottom menu.
3. Enter the **From** and **To Quantity**.
4. Select a **Cut In** and **Cut Out** date.
5. Enter the surcharge **Price**.
6. Enter any additional **Comments**.
7. Click **OK** to finalize.

The screenshot shows the 'Price List by Name [S1144]' window. The 'Price List Header' section includes fields for Price List (CATA), Currency (CDN), and a comment: 'Ensure that our contact Dave receives an updated pricelist every week.' The 'Price List Detail' table shows a line item for part 158GB4817P2-2 with a base price of \$15.0000, a surcharge of \$3.0000, and a total price of \$38.0000. The 'Price List Surcharge' section is highlighted with a red border and contains a table with one row: From Qty 0, To Qty 100, Cut In Date 05/02/2017, Cut Out Date 01/01/2116, and Price \$15.0000. Below this is a 'Comments' field with the text 'Additional freight costs'. The bottom menu bar includes buttons for Browse, Edit, Add, Delete, OK, Cancel, Print, and Exit. Red circles with numbers 1 through 7 are overlaid on the interface to indicate the steps: 1 points to the 'Price List Surcharge' header, 2 points to the 'Add' button, 3 points to the 'From Qty' field, 4 points to the 'Cut In Date' field, 5 points to the 'Price' field, 6 points to the 'Comments' field, and 7 points to the 'OK' button.

Part Number	Rev	Base Price	Surcharge	Freight/Broker	Total Price	Cut In Date	Cut Out Date
158GB4817P2-2	C	\$15.0000	\$3.0000	\$20.0000	\$38.0000	05/02/2017	01/01/2117

From Qty	To Qty	Cut In Date	Cut Out Date	Price
0	100	05/02/2017	01/01/2116	\$15.0000

Search for a price list by company name

The **Price List by Name Inquiry** screen allows users to search for price list information based on the company name or a given date.

Unlike the **Price List by Name** screen users are unable to edit this page.

1. Click the **Price List** drop down menu to select the company name.
2. Select the **Effective** drop down menu to filter line items by date. (*There maybe several price lists for the same customer for multiple parts*)

The screenshot shows the 'Price List by Name Inquiry [S1751]' window. The 'Price List Header' section includes a dropdown for 'Price List' (set to 'CATA') and a dropdown for 'Effective' (set to '05/02/2017'). The 'Price List Detail' section contains a table with columns: Part Number, Rev, Base Price, Surcharge, Freight/Broker, Total Price, Cut In Date, and Cut Out Date. The 'Price List Surcharge' section contains a table with columns: From Qty, To Qty, Cut In Date, Cut Out Date, and Price. The bottom of the window features a toolbar with buttons for Browse, Edit, Add, Delete, OK, Cancel, Print, and Exit.

Part Number	Rev	Base Price	Surcharge	Freight/Broker	Total Price	Cut In Date	Cut Out Date
158GB4817P2-2	C	\$15.0000	\$3.0000	\$20.0000	\$38.0000	05/02/2017	01/01/2117
158GB4818	A	\$9.0000	\$0.0000	\$10.0000	\$19.0000	05/02/2017	01/01/2117

From Qty	To Qty	Cut In Date	Cut Out Date	Price
0	100	05/02/2017	01/01/2116	\$15.0000

Searching a price list by part

The **Price List by Part** screen allows users to search for individual parts associated with existing price lists.

Open the **Price List by Part [S1143]** screen.

1. Click the **Price List Detail** tab
2. Search for the part you are looking for from the **Part** drop down menu.
3. Users can **Edit** the part pricing information in the same way it can be edited on the **Price List by Name [S1144]** screen.

Price List by Part [S1143]

Price List Detail

Part: 158GB4817P2-2 BRACKET COMPONENT Revision: C Status: A Active

Price List	Base Price	Surcharge	Freight/Broker	Total Price	Currency	Cut In Date	Cut Out Date
CATA	\$15.0000	\$3.0000	\$20.0000	\$38.0000	CDN	05/02/2017	01/01/2117

Standard Cost: \$6.0509 Changed By: dbardsley Cut Out Now

Price List Desc: Catalyst Machines Date Changed: 05/02/2017

% Gross Margin: 84.1%

Comments: Requote every 3 months

Price List Surcharge

From Qty	To Qty	Cut In Date	Cut Out date	Price
0	100	05/02/2017	01/01/2116	\$15.0000

Comments: Additional freight costs

Fr for Help Browse Edit Add Delete OK Cancel Print Exit