

Using Pricing Options

Robert

What are you working on?

Andrew

A customer just returned a quote back to me saying they found a better offer. I want to compete with them, but having a hard time running the numbers... Any suggestions?

Robert

Yeah, Are you familiar with the Pricing Options? You can use that to adjust your quote, while making sure we maintain our margin...

Andrew

Haven't use that in a while, can you walk me through it?

Robert

Sure thing! Select a topic and I'll take you through it.

Topics

- Negotiate Total
- Other Pricing Options

Negotiate Total

Once you add products to the sales document, select Pricing Options.

Open the drop-down list to show the available Options.

The list may vary depending on your permissions.

Select Negotiate Total Price (Lump Sum).

Now select the lines that you want to apply the pricing.

You can set a new Total Price for the entire sale by selecting All Lines on Order.

Now you can see the current Total price, Profit, and Margin %.

You can re-price the document using any of these fields.

Re-pricing the sales document to a Total Price allows you to easily match competitor's quotes or negotiate total prices with your customer.

Re-pricing to a Margin % allows you to quickly recalculate the document's prices to be within your company's minimum or expected margin levels.

Select OK.

BisTrack reprices the sales document to earn the margin % specified.

It also flags all lines with the Lump sum icon and recalculates each product's Sell Price and Margin.

Other Pricing Options

After you make price changes, you can restore them to their calculated amounts if needed.

From Pricing Options, select Restore Calculated Prices.

Set Apply to, to All Lines on Order or Selected Lines.

Choose OK to close the window.

BisTrack restores pricing to the original calculated prices and removes the lump sum icon.

You can enter a new price for products when you choose the Manually Price Lines option.

With the Negotiate Discounts option, you can enter one or two discount amounts to apply to product prices.

Price Profiles and Price Rules allow you to select a specific profile or rule to re-price products to.

With any of these selected, you can apply the option to all lines, selected lines, or by Product Group.

When using the Selected Lines setting, you will need to choose the lines prior to accessing the Pricing Options.

Should you need to re-price to a specific Quote or Template, enter the quote number to use.

You can access Pricing Options from Find Documents for any sales document.

You can even select multiple documents for repricing at the same time.

With the documents selected, open the right-click menu and select Pricing Options.

The pricing options available are based on your permissions.

The next entry changes based on the option you choose.

When you're finished, choose OK to re-price the selected documents.

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2016 Epicor Software Corporation. All rights reserved.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298