

Maintaining Selling Price Rules Transcript

You can change or copy rules using options available from the Selling Price Rules browser. They are maintained using the Properties Option or from the choices available on the right-click menu. Copying existing rules and using the Bulk copy method are a quick way to create new rules.

Use the Properties option to make changes to price rules that are not product specific. From the Selling Price Rules browser, set the filter to locate the rules you need to change. You can use the Group by option to reorganize the list and more easily find the one you need. In this case, we assemble the list by Product Group and then expand the Drywall grouping to get the specific rule.

With a rule selected, click the Properties button. From the Selling Price Rule Properties window, you can change any of the fields except Rule type. We'll change the Markups percent. When all changes are complete, select OK.

Back on the Selling Price Rules window, we see the rule updated with the new Markup percent. Use this method to maintain a single rule at a time. If you have multiple rules that make up a pricing strategy, like this one for Drywall customers, you will need to open each rule individually to make changes. Another way to access the Properties option is from the right-click menu. Edit the rule as needed and then click OK to save the change.

For rules that are Product specific, such as Special Prices, there are additional options available from the right-click menu. To access these, the View must be set to By Customer and Product Specific Prices or By Product Specific Prices. Set the filter for Customer, Customer Address and/or Date to find the rules you want to change. Use Shift and click or Ctrl and click to select multiple rules.

Open the right-click menu. You can use the first two options to increase or decrease the price of the selected products by a percentage. We'll select Increase by %. A pop-up window opens for you to set the Percentage and Valid from and to dates. Once set, click OK to complete the change.

You can also use this function to create Bid Pricing by setting the percentage to zero, and setting a “to” date in the future. For each rule, you can see the updated dates and prices. When the price change is not by a set percentage for all products within the range, use the Quick Edit option.

A new window opens listing the rule properties in a grid format. To change the product Prices, use the scroll bar to display that information. Click on the first Price in the list to be changed. Enter a new amount, and then press Enter. The cursor automatically moves down to the next product’s Price field. Continue to enter new Prices for the products as needed.

Most of the fields in the grid are available for change. For example, if you want to apply a Discount instead of changing the Price, enter the percentage in the Discount 1 column. When you’re done, press OK to save the updates.

There are two methods available for duplicating Selling Price Rules. To copy one at a time, set the filter to find the rules you want duplicated. In this example, the system displays four rules. Select a rule, and then either click the Copy button or open the right-click menu and choose the Copy option.

The New Selling Price Rule window opens with all the fields set to the rule selected. You only need to change those that are different for this new rule. We’ll change the Price Profile and then set a different Markup percent. When finished, click the Add button and then Close the window. The system adds the new rule. Continue to copy any other individual rules as needed.

When you want to duplicate multiple rules at the same time, use the Bulk Copy option. Bulk Copy replicates rules with the same Division, Branch, Type, and related Customer or Price Profile to a new group of rules using the Branch and Customer or Price Profile selected. To begin, we set the filters to View rules By Customer and Product Specific Prices and then select a Customer and Customer Address.

To duplicate the list, we select a rule and then click the Bulk Copy button. The top part of the form shows the Branch, type and Customer details from the Source Rule. In the lower section, you see the Destination Rule Details.

In this case, we set the Branch to Stockton, and the Customer to Anton Custom Homes, but for a different Address. By default, the system enables the Apply to Price Rules and Overwrite existing rules check boxes. Click OK to complete entries.

A message indicates the number of new price rules that will be created and when applicable, the number of rules to be overwritten. Click Yes to proceed with the Bulk Copy. When complete, click OK to clear the message and then Cancel to close the window. To view the new rules, set the Customer address filter to match the Destination setting. The system lists the rules created for the Customer Address record.

Once you add a rule, you can update it as often as needed. The Properties option lets you change non-product specific rules one at a time. The right-click menu has choices for modifying multiple rules and to edit them using a grid form. You can also copy rules quickly, either individually or in bulk.

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