

Tips & Tricks

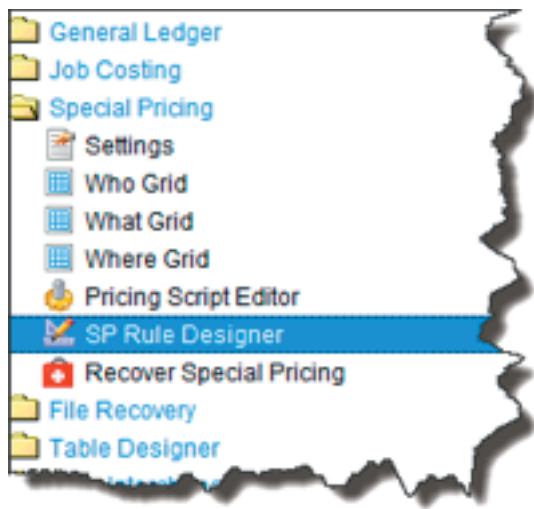
Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

Managing Your Special Pricing Rules

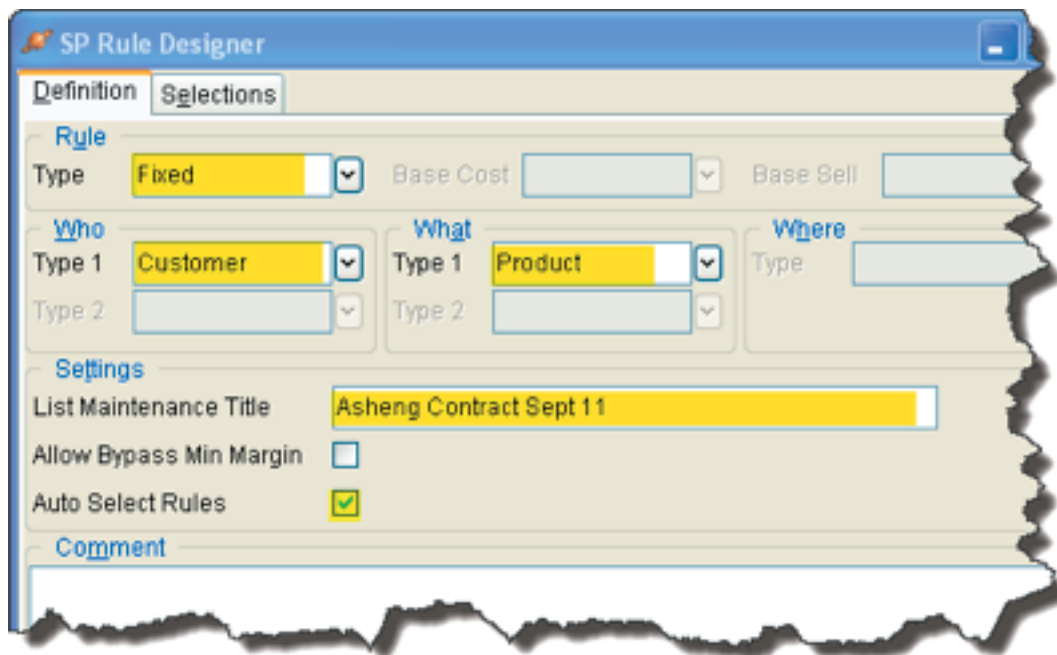
Do you find your special pricing rules hard to manage? Using the SP Rule Designer gives you a nice easy way to create Rule Definitions which you can add to the Navigator for easy viewing and maintenance of your Special Pricing Rules.

We will create a simple SP Rule Definition for some Contract Pricing for our customer Asheng Engineering.

Navigator > Setup > Special Pricing > SP Rule Designer



On the Definition tab, we will set the Rule type as Fixed, the Who Type 1 as Customer and the What type 1 as Product and we will enter "Asheng Contract Sept 11" in the List Maintenance Title and tick the Auto Select Checkbox so the rules will be selected each time the list is run. →



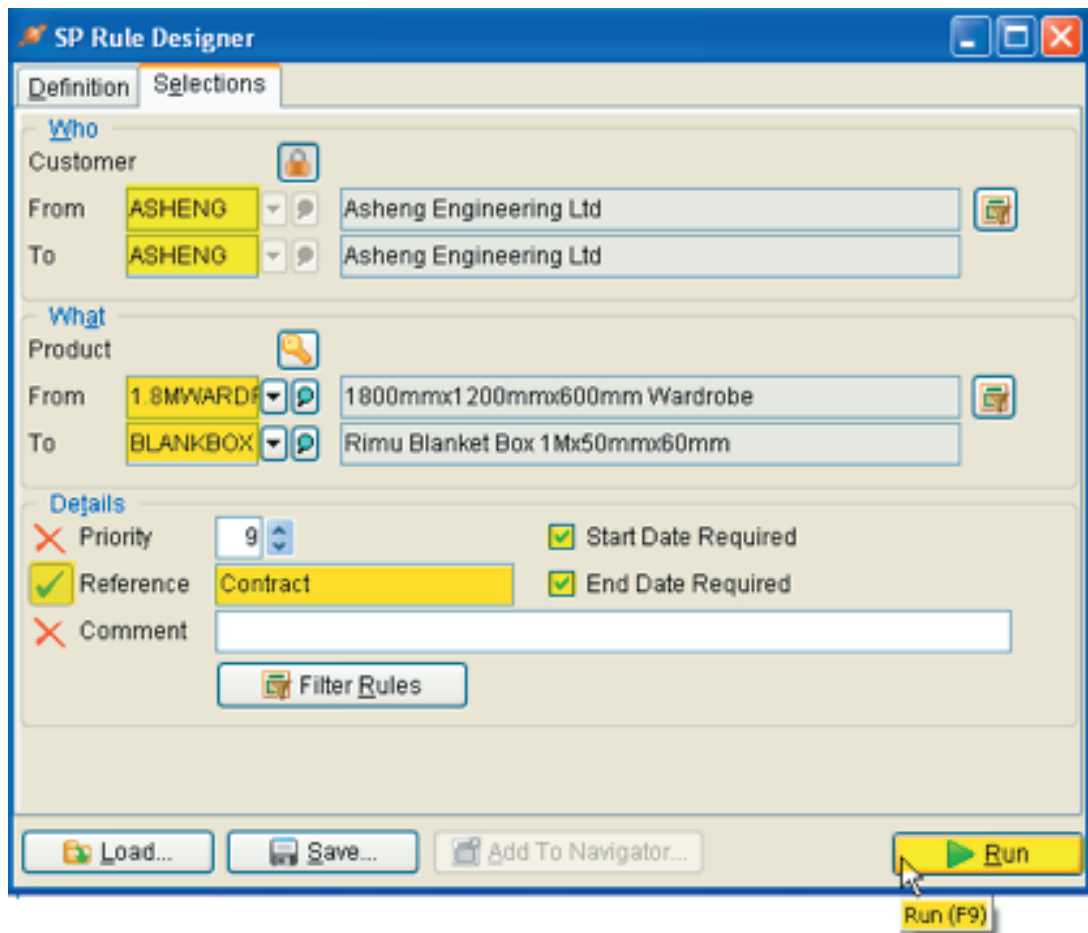
Next we will click the Selections Tab and select our Customer in the Customer From and To Fields and set a range of Products in the Product From and To Fields.

You will note that the selection becomes locked for the Customer as the From and To code are the same, and this means it won't appear when the list is run.

In the details section we will click on the Red cross beside Reference, enter a Reference in, and we will also tick the Start and End Dates.

Clicking on a Red Cross changes it to a Green Tick which means the field will be available at run time.

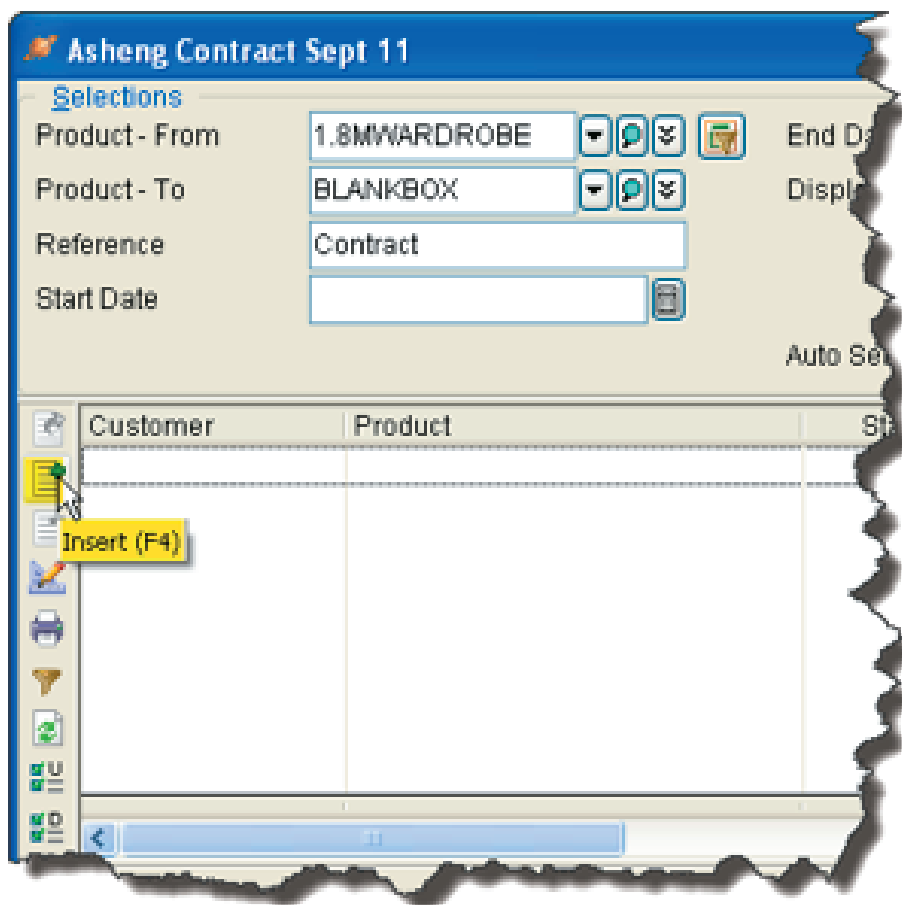
Then we will press Run to bring up the Rule List. →



Any rules we have that meet the criteria on the Selections Tab will load. From the Rules List, we can update or duplicate the batch of rules and we can insert and duplicate new Rules.

We will insert some new Rules.

Click the Insert button to create the first Rule. →



We will enter a Start and End Date and in the Breaks section we will enter our Special Price in the Amount field and press Save. If you also want to use Quantity Breaks, you can enter another line with a minimum Qty and an Amount. →

Asheng Contract Sept 11

ID

Rule Type: Fixed

Customer: ASHENG

Product: 1.8MWARDROBE

Priority: 9

Reference: Contract

Comment:

Start Date: 1/09/2011

End Date: 30/09/2011

Inactive:

Currency: NZD

Bypass Min Margin:

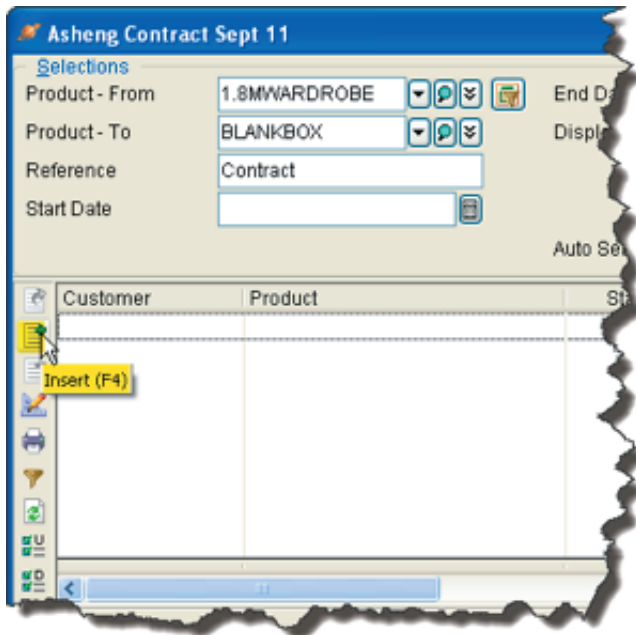
Cost: \$608.20 Sell: \$1,018.74 Discount: 10.00% Effective Price: \$916.87 Effective Margin: 33.67%

Breaks

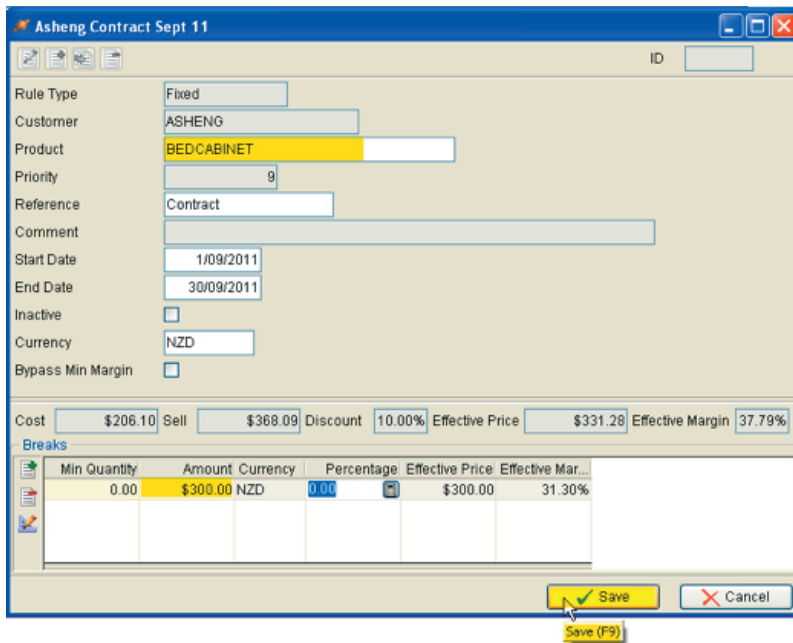
Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$800.00	NZD	0.00	\$800.00	23.98%

Save (F9) Save Cancel

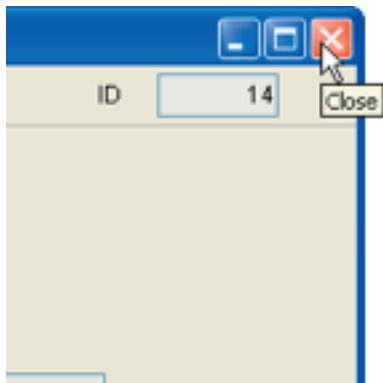
We will press Duplicate to create our next Rule by copying the details of this Rule as a starting point. →



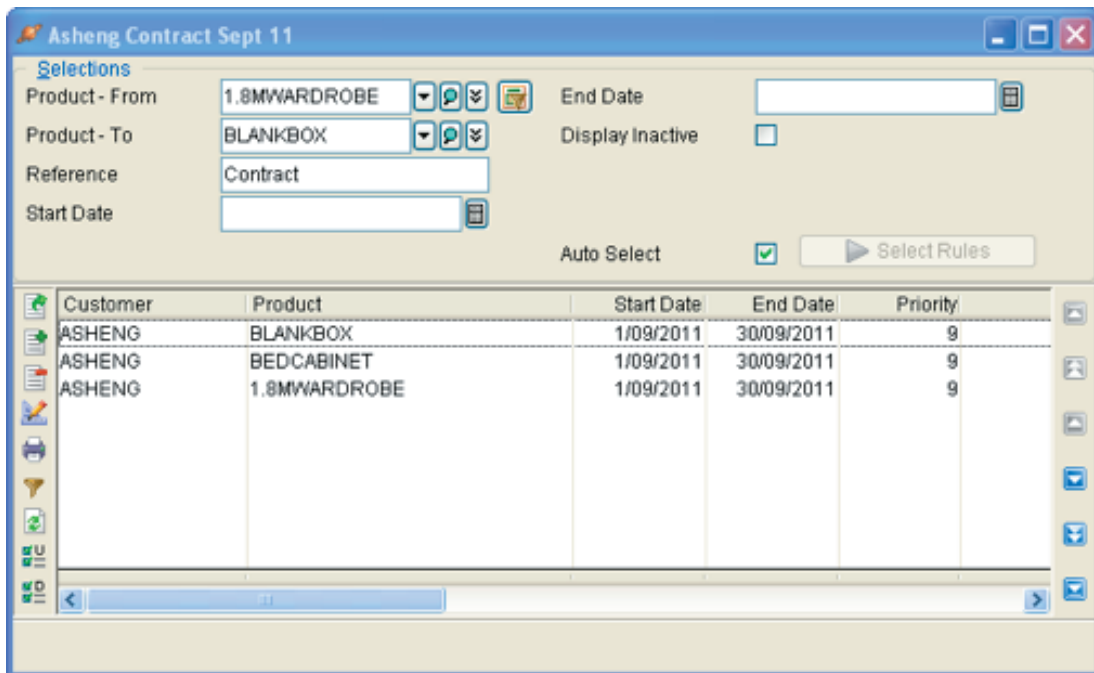
Change the Product Code and Amount and then press Save



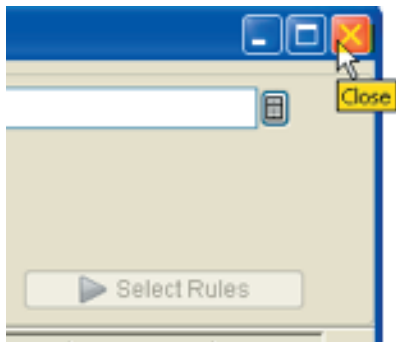
When we have finished adding all the rules, we close the Window. →



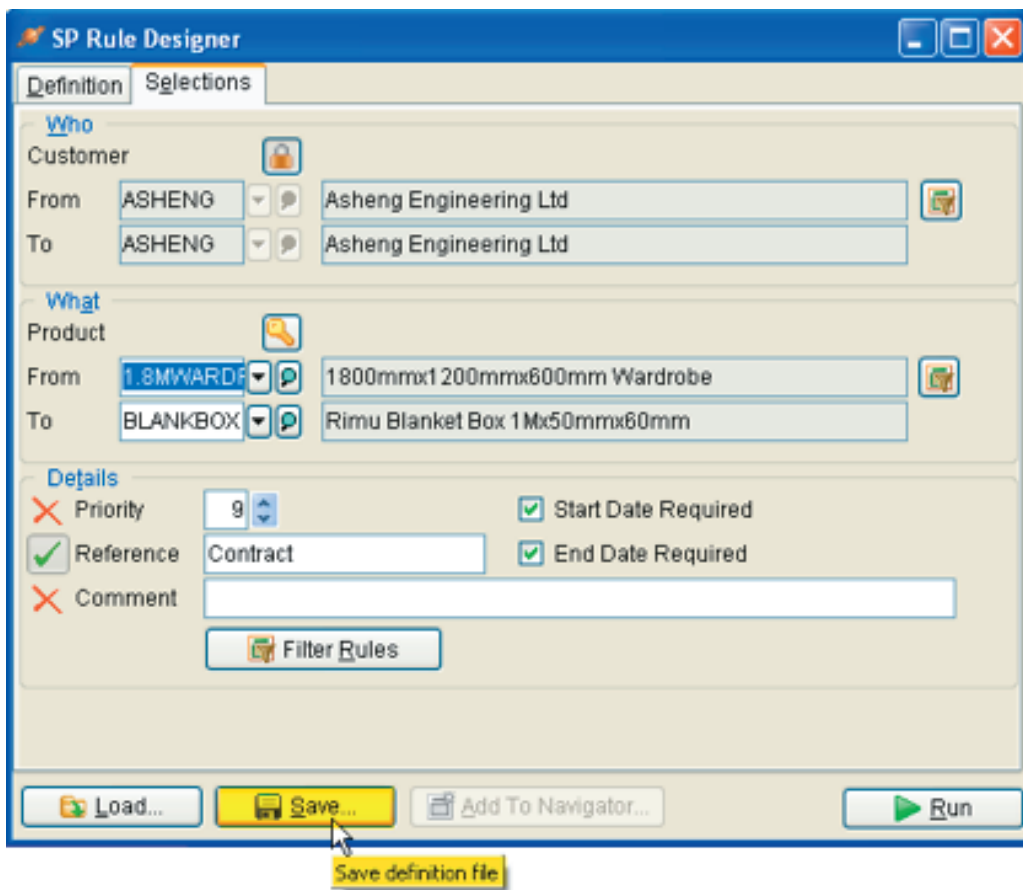
The rules will appear on the Rules List.



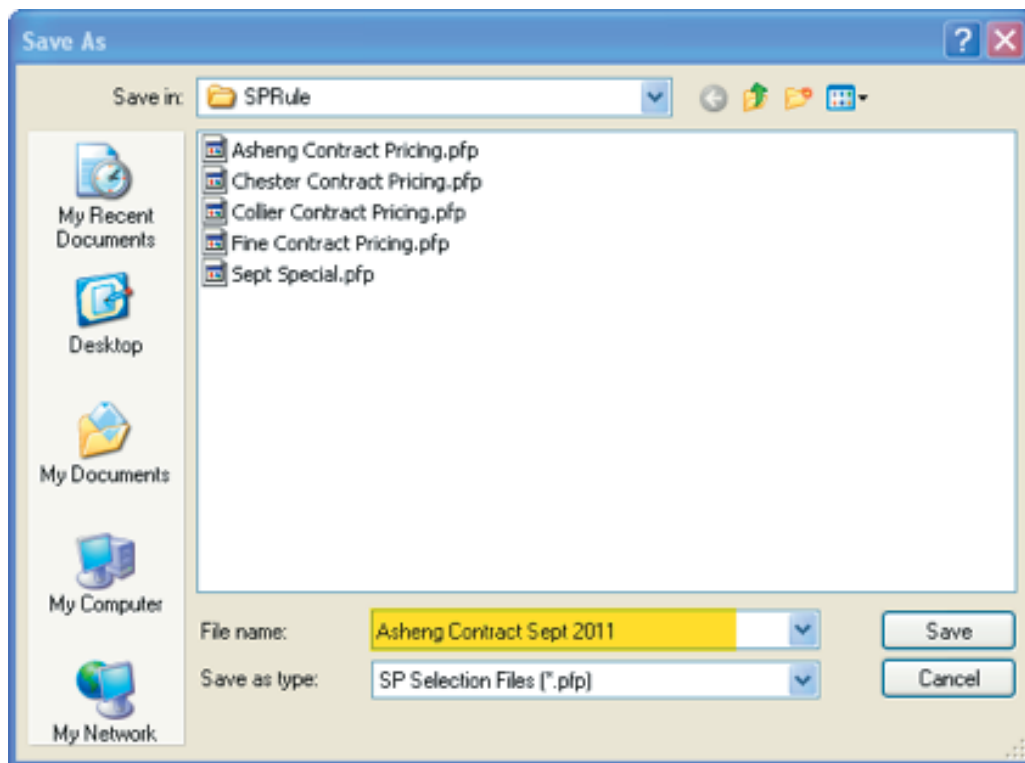
Close the Rules List window. →



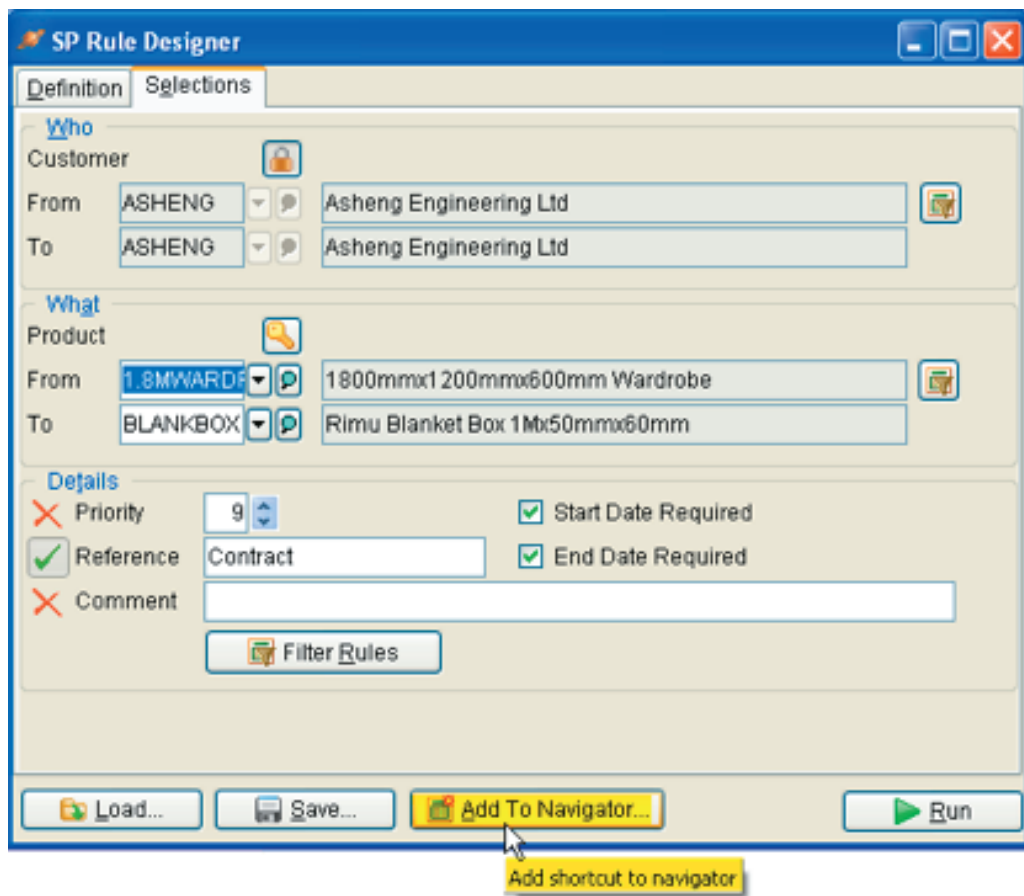
Then we click Save to Save our SP Definition File to the SP Rule folder for later use.



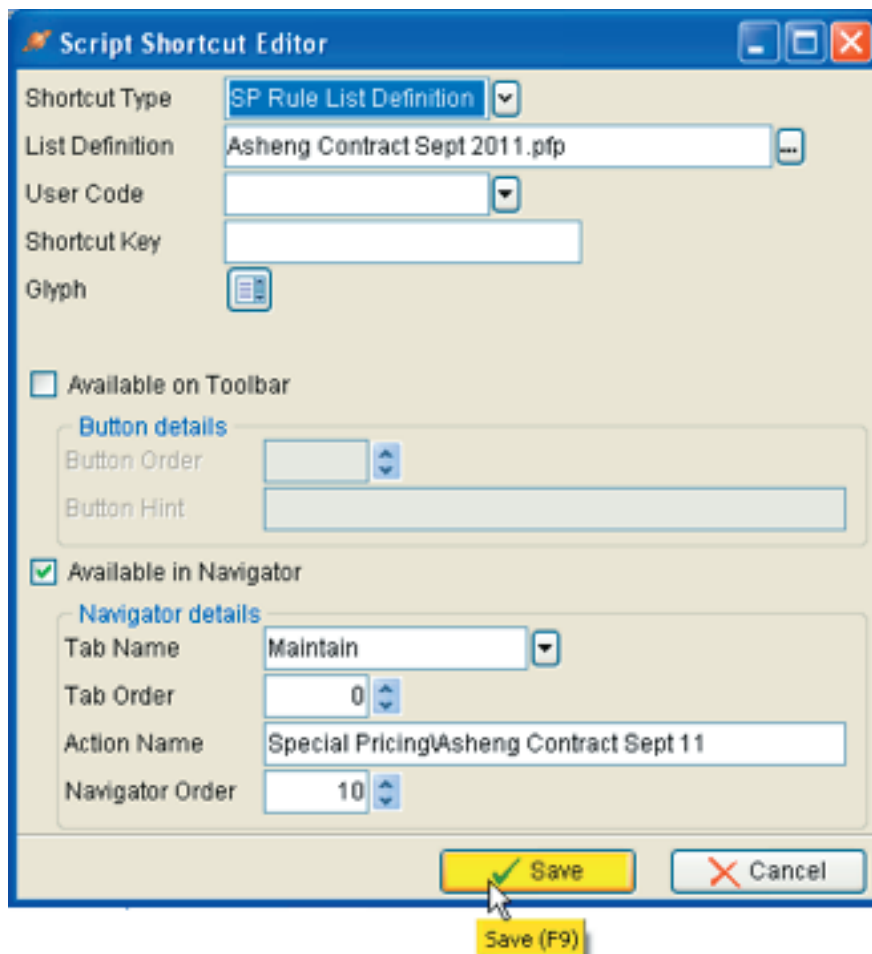
We then give our SP Rule Definition a File name and press Save. →



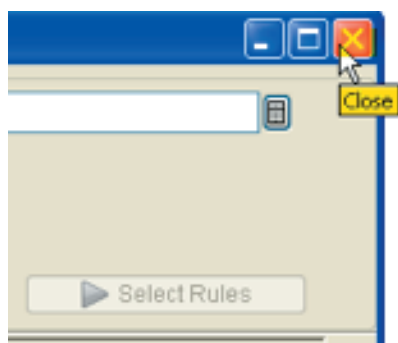
Now we click the Add to Navigator Button. →



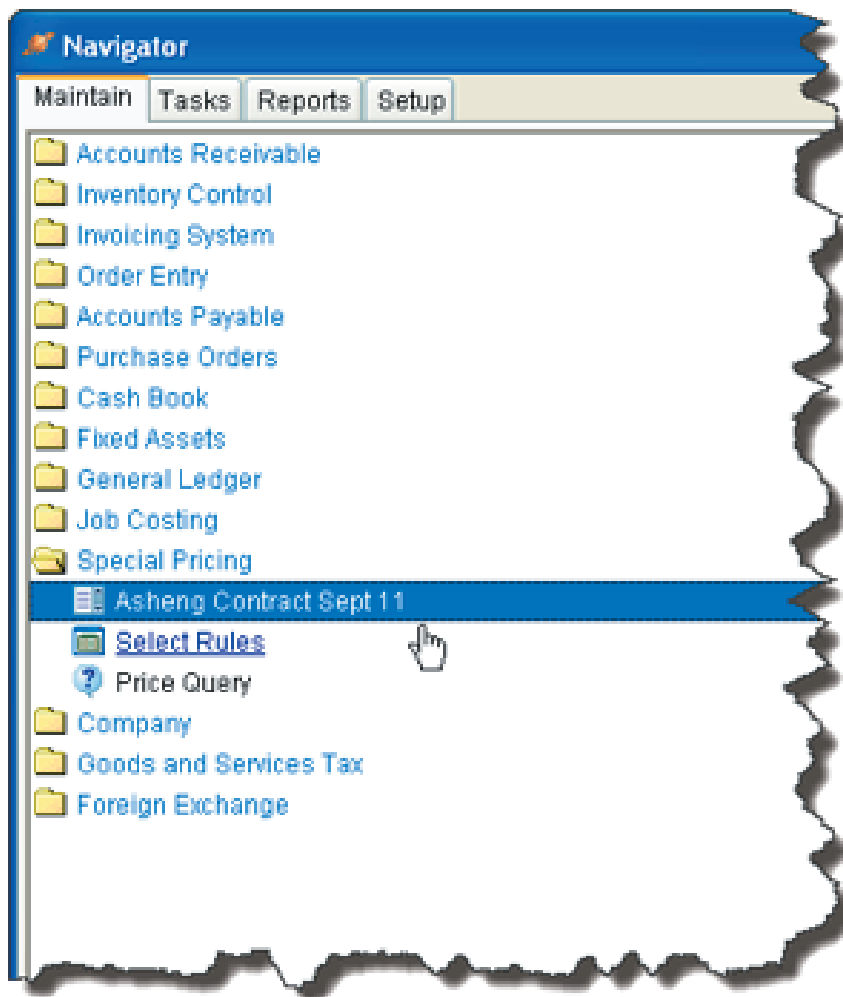
The Script Shortcut Editor window opens, defaulting the List Definition file to be located on the Maintain Tab under Special Pricing folder.
Press Save to accept. →



Then close the SP Rule Designer



Now if we go to Navigator > Maintain > Special Pricing we can see the SP Rule List. →



Just click on the List to open it where you can review and make any changes.

SP Rule Designer works much the same way as the Sales Analysis module.

To create other Rule Lists from saved definition files, just open the SP Rule Designer, Load the Rule Design file, make your changes and review your rules and then Save as a new Rule List Design file.

You can add as many Rule Lists to the Navigator as you wish. ■