Special Pricing Tutorial
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Special Pricing Rule Lists

You can use the Special Pricing Rule Designer to set up Rule Lists, which allow you to group Special Pricing Rules, then easily view and maintain rules in the lists. For example, you can set up a list of rules for Contract Pricing for a particular customer. Or you can set up a list of rules for a monthly special. Rule lists can be added to the Navigator, providing a nice easy way to view and maintain your Special Price Rules, as shown below:

SP Rule Lists make it easy to find all your rules, and update and renew them in one place. Rule Lists let you group similar rules together, for easy maintenance. When you set up a Rule List, any existing rules that meet your criteria are automatically added to your rule list, so the same rule might be in several Rule Lists.

The examples below explain how to use the SP Rule Designer to:

- Design a special pricing rule list for Contract pricing for a particular customer
- Use the Batch Update function to change prices for a rule list
- Use the Duplicate function to create the same Special Prices for a different Customer
- Design a rule list to pass on discounts from a particular supplier
- Design a rule list to set discounts for different customer reward groups
- Design a rule list for promotional code discounts
- Design a rule list for a monthly special on a product range, using quantity breaks for multi-buy discounts.
Contract Pricing

This example shows how to design a Special Pricing Rule List for contract pricing for a particular customer.

1. Go to Navigator > Setup > Special Pricing > SP Rule Designer.

2. Set the rule Type to Fixed (if it does not default to this already). The rule Type options are:
   - Fixed - Special Prices are keyed in.
   - Sell Relative - a percentage and / or amount is deducted from the Sell Price
   - Cost Relative - a percentage and / or amount is added to the Cost Price.

3. Set the Who Type 1 to Customer.

4. Set the What Type 1 to Product.
5 Enter a name for the rule list in the LIST MAINTENANCE TITLE. This is the name that will appear in the Navigator.

6 Click the Selections Tab.

7 In the Who section, select the Customer in the Customer FROM and TO fields. This means the rule list will only contain rules for the selected Customer.

8 In the What section, select a range of Products in the Product FROM and TO fields. The rule list will only be contain rules for the products selected.

9 In the Details section, click the beside REFERENCE. It will change to a , showing that it is available at run time. Enter a REFERENCE. The REFERENCE will display as a status hint when rules are applied during data entry.

10 Tick the START DATE REQUIRED and END DATE REQUIRED checkboxes, so that these must be set when new Rules are created for the List.

Tip: You can use the Start and End dates to setup Special Prices in advance.
11 Press **Run** to preview the Rule List.

![SP Rule List](image)

12 Any existing rules that meet the criteria will be shown in the Rule List.

![SP Rule List - Asheng Contract Pricing Sept 2013](image)

13 Close the SP Rule List Window. Click **Save** to save the Rule List. Special Pricing Rule Lists are saved to Definition files, like Report Definitions in the Analysis Designers. Save the SP Definition File to the SP Rule folder.

![SP Definition File](image)
14 Enter a file name for the Definition, then click **Save**.
15 Click Add To Navigator.

16 The Script Shortcut Editor window opens, defaulting the SP Rule List to be AVAILABLE IN NAVIGATOR, on the Maintain Tab under the Special Pricing folder. Click Save to accept. Then close the SP Rule Designer window.
17 Go to Navigator > Maintain > Special Pricing and your Rule List will appear.

From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.

18 Click Insert (F4) to create a new rule.

The CUSTOMER, PRODUCT and REFERENCE will default from the Rule List selections.

19 Select a PRODUCT to create a price rule for. Enter the START DATE and END DATE and key the special price into the AMOUNT field. Click Save.
Note: This example has Use QUANTITY BREAKS ticked in Navigator > Setup > Special Pricing > Settings. If you do not have Quantity Breaks ticked, the AMOUNT and PERCENTAGE Fields will appear above the Price Panel.

To create another rule, click Duplicate to copy the rule you just entered.
21 Select a different PRODUCT and add a new price in the AMOUNT field. Click **Save**.

22 When you have finished adding your rules, close the SP Rule window. The rules you added will appear in the SP Rule List.
Batch Update

You can update an existing list of rules by adding or subtracting a percentage to the amount or by replacing the existing percentage.

This example shows how to increase prices in a saved rule list by 10%.

1. Go to Navigator > Maintain > Special Pricing and click the Rule List you wish to update.

2. Click the Batch Update button.
3  Tick **Amount**, then enter the percentage to update the amount by. (In this example we enter 10%.) Click **Save**.

4  The SP Rule List shows amounts have been updated by 10%.

The SP Rule List is a live grid, so changes are saved automatically.

5  When you have finished making changes, close the SP Rule List window.
Batch Duplicate

You can duplicate a list of rules, to use as starting point for a new list of rules.

This example shows how to duplicate the list of Rules for a Customer created above, for a different Customer.

1. Go to Navigator > Maintain > Special Pricing. Click the Rule List to duplicate.
2. Click the Batch Duplicate button.

3. Tick CUSTOMER, then select the customer to duplicate the rules for. Click Save.

4. The SP Rule List displays with the duplicated rules.
The SP Rule List is a live grid, so the rules for the new Customer are automatically created.

5  Once you have finished making changes, close the SP Rule List window.

6  Create a rule list and Navigator shortcut for the duplicated rules. Right-click the original rule List they were duplicated from, and click **Edit Shortcut Source**.

7  The List opens in the SP Rule Designer. Change the **LIST MAINTENANCE TITLE** to refer the new Customer.
8. Click the Selections tab and change the Customer FROM and TO to the new Customer, then click **Save** to save the SP definition file to the SP rule folder.

9. Enter a file name for the Definition, then click **Save**.

10. Add to Navigator as above.

11. Close the SP Rule Designer.

Note: Alternatively you could create one SP rule list that contains rules for both customers.
Passing On Supplier Discounts

This example creates a rule list using the SP Rule Designer to pass on a discount you receive from a supplier.

1. Go to Navigator > Setup > Special Pricing > SP Rule Designer.

2. Set the rule TYPE to Sell Relative, which means the Customer will be charged their usual Sell Price less a percentage and / or amount.

3. Leave the Who TYPE 1 as Blank so that these Rules will apply to all Customers. Set the What TYPE 1 to Creditor to create special prices for products that have a specific creditor as their default.

Note: If you cannot select Creditor, close the SP Rule Designer then go to Navigator > Setup > Special Pricing > What Grid and put a tick beside CREDITOR AVAILABLE and SHOW NAME, then go back to step 1.
4 Enter a name for the special price in the List Maintenance Title. This is the name that will appear in the Navigator.

5 Click the Selections tab. In the What section, select the Creditor in the Creditor FROM field. Click the Lock Selection button in the What section. The key button changes to show a lock. This means the Creditor field will not appear when the Rule List is run and only rules for the selected Creditor can be inserted.

6 In the Details section, you can key in a Reference and / or a Comment. The Reference will display in the status hint when rules are applied during data entry.

7 Tick the Start Date Required and End Date Required checkboxes, so that these will have to be set when the rules are created.
8 Click **Run** to preview the SP Rule List.

If there are existing Rules that meet these criteria, these will be shown in the SP Rule List.

9 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.

10 Add to Navigator as above.

11 Go to Navigator > Maintain > Special Pricing and your Rule List will appear. From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.
12 Click **Insert** to add a rule to the Rule List.

13 Enter the **START DATE** and **END DATE** and enter the **PERCENTAGE** to reduce the Sell Price by. Click **Save**.
14 Close the SP Rule window. The new rule will appear in the SP Rule List.
Customer Reward Group Discounts

This example creates a rule list for customers based on Customer Reward Groups.

Note: In this example, AR CATEGORY 1 is used for Customer Reward Groups.

1. Go to Navigator > Setup > Special Pricing > SP Rule Designer.

2. Set the RULE TYPE to Sell Relative, which means the Customer will be charged their usual Sell Price less a Percentage and / or Amount.

3. Set the Who TYPE 1 as AR Category 1.

Note: If you cannot select AR Category 1, close the SP Rule Designer then go to Navigator > Setup > Special Pricing > Who Grid and put a tick beside AR CATEGORY 1 and SHOW NAME, then go back to Step 1.
4. Enter a name for the special pricing list in the **List Maintenance Title**. This is the name that will appear in the Navigator.

5. Click the Selections tab and enter a **Reference**. The Reference will display in the status hint when rules are applied during data entry.

6. Click **Run** to preview the SP Rule List.

If there are existing Rules that meet these criteria, these will be shown in the SP Rule List.
7 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.

8 Add to Navigator as above.

9 Go to Navigator > Maintain > Special Pricing and your Rule List will appear. From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.

10 Click **Insert** to add a Rule to the rule list.

11 In the **AR CATEGORY 1** Field, select the first Customer Reward Group, enter a **PERCENTAGE** then click **Save**.
12 Click INSERT to add the next rule.

13 In the AR CATEGORY 1 Field, select the next Customer Reward Group, enter a PERCENTAGE, then click Save.
When you have finished adding your rules, close the SP Rule window. The new rules will appear in the SP Rule List.
Promotional Code Discounts

This example creates a Special Pricing rule list for promotional code discounts.

Note: In this data, IN CATEGORY 1 is used for Promotional Codes.

1. Go to Navigator > Setup > Special Pricing > SP Rule Designer.

2. Set the Rule TYPE to Sell Relative which means the Customer will be charged their usual Sell Price less a Percentage and / or Amount.

3. Set the Who TYPE 1 as IN Category 1.

Note: If you cannot select IN Category 1, close the SP Rule Designer then go to Navigator > Setup > Special Pricing > Who Grid and put a tick beside IN CATEGORY 1 and SHOW NAME, then go back to step 1.
4. Enter a name for the special pricing list in the **LIST MAINTENANCE TITLE**. This is the name that will appear in the Navigator.

5. Click the **Selections** tab.

6. In the Details section, enter a **REFERENCE**. The Reference will display in the status hint when rules are applied during data entry.

7. Tick the **START DATE REQUIRED** and **END DATE REQUIRED** checkboxes so that these must be set when new rules are created.

8. Click **Run** to preview the SP Rule List.

If there are existing Rules that meet these criteria, these will be shown in the SP Rule List.
9 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.

10 Add to Navigator as above.

11 Go to Navigator > Maintain > Special Pricing and your Rule List will appear. From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.

12 Click **Insert** to add a Rule to the SP Rule List.

13 In the IN CATEGORY 1 Field, select the first Promotional Code.

14 Enter a **START DATE** and an **END DATE**.

15 Enter a **PERCENTAGE** to be reduced from the Sell Price.
16 Click **Save**.

17 Click **Insert** to add the next Rule to the SP Rule list.
18 Add the next rule, then click **Save**.

![Image of Special Pricing Tutorial](image)

19 When you have finished adding your rules, close the SP Rule window. The new rules will appear in the SP Rule List.
Monthly Special with Quantity Breaks

This example adds Special Pricing rules for a monthly special on a product range, and uses quantity breaks to give a multi-buy discount.

Note: In this example, IC CATEGORY 1 is used for the Product Range.

1. Go to Navigator > Setup > Special Pricing > Settings. Make sure USE QUANTITY BREAKS is ticked. If it is not ticked, click Edit then tick the USE QUANTITY BREAKS checkbox, then click Save.
2 Go to Navigator > Setup > Special Pricing > SP Rule Designer.

3 Set the Rule Type to **Sell Relative** which means the Customer will be charged their usual sell price less a percentage and / or amount.

4 Set the What Type 1 as **IC Category 1**.

If you cannot select **IC Category 1**, close the SP Rule Designer then go to Navigator > Setup > Special Pricing > What Grid, tick IC CATEGORY 1 and SHOW NAME, then go back to Step 2.
5. Enter a name for the Special Pricing list in the LIST MAINTENANCE TITLE. This is the name that will appear in the Navigator.

6. Click the Selections tab and select the IC CATEGORY 1 code required.

7. In the Details section, enter a REFERENCE. This will display in the status hint when rules are applied during data entry.

8. Tick the START DATE REQUIRED and END DATE REQUIRED checkboxes so that these must be set when new Rules are created from the List.

9. Click Run to preview the SP Rule List.
If there are existing Rules that meet these criteria, these will be shown in the SP Rule List.

10 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.

11 Add to Navigator as above.

12 Go to Navigator > Maintain > Special Pricing and your Rule List will appear. From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.

13 Click **Insert** to add a rule to the SP Rule List.

14 Enter a **START DATE** and **END DATE**.

15 Enter the **MIN QUANTITY** for the quantity breaks. Enter a **PERCENTAGE** for each quantity break.
16 Click Save.

17 Close the SP Rule window. The new rule will appear on the SP Rule List.