

Special Pricing Tutorial

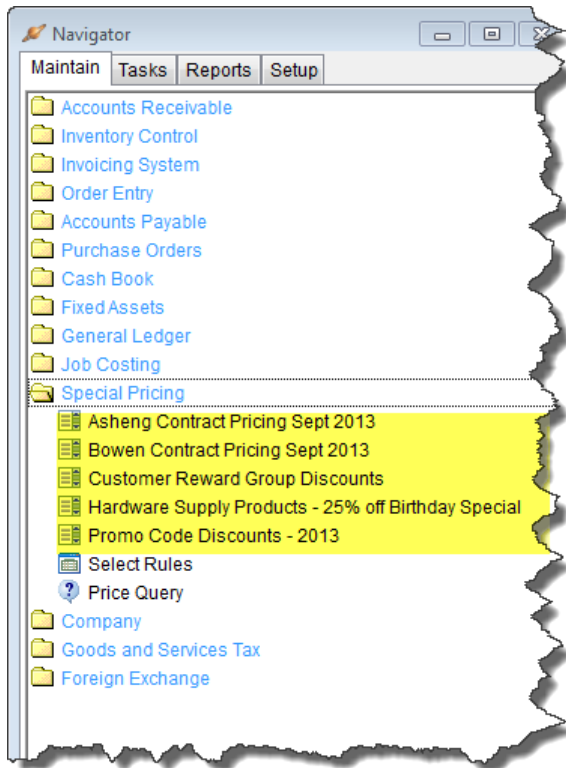


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Special Pricing Rule Lists

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.

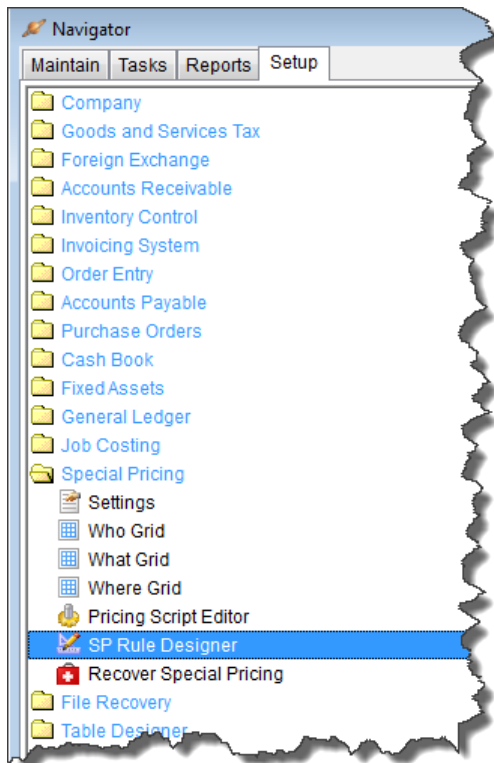
The examples below explain how to use the SP Rule Designer to:

- 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.

The screenshot shows the 'SP Rule Designer' window with the 'Definition' tab selected. The 'Rule' section has 'Type' set to 'Fixed'. The 'Who' section has 'Type 1' set to 'Customer'. The 'What' section has 'Type 1' set to 'Product'. The 'Where' section is empty. The 'Settings' section has 'List Maintenance Title' set to 'Asheng Contract Pricing Sept 2013'. The 'Allow Bypass Min Margin' and 'Auto Select Rules' checkboxes are unchecked. The 'Comment' section is empty. The bottom buttons are 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

The SP Rule Designer window is shown with the 'Definition' tab selected. It contains three main sections: 'Who', 'What', and 'Details'.

- Who:** Customer section. 'From' and 'To' are both set to 'ASHENG', which corresponds to 'Asheng Engineering Ltd' in the dropdown.
- What:** Product section. 'From' is set to '1.8MWARDROBE' (1800mmx1200mmx600mm Wardrobe) and 'To' is set to 'BLANKBOX' (Rimu Blanket Box 1Mx50mmx60mm).
- Details:** Contains checkboxes for 'Priority' (unchecked), 'Reference' (checked), and 'Comment' (unchecked). The 'Reference' dropdown is set to 'Contract'. There are also checkboxes for 'Start Date Required' and 'End Date Required', both of which are checked. A 'Filter Rules' button is located below these options.

At the bottom of the window, there are buttons for 'Load...', 'Save...', 'Add To Navigator...', and a large green 'Run' button.

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

The SP Rule List window displays a table of rules that match the criteria. The table has columns for Customer, Product, Start Date, End Date, Priority, Reference, and Comment.

Customer	Product	Start Date	End Date	Priority	Reference	Comment
ASHENG	BLANKBOX			9	Contract	
ASHENG	1.8MWARDROBE	1/09/2013	30/09/2013	9	Contract	
ASHENG	BEDCABINET	1/09/2013	30/09/2013	9	Contract	
ASHENG	2XBEDCAB	1/09/2013	30/09/2013	9	Contract	
ASHENG	BEDSUITE	1/09/2013	30/09/2013	9	Contract	

Below the table, there are checkboxes for 'Display Inactive' and 'Auto Select', and a 'Select Rules' button.

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 Rule Designer

Definition Selections

Who

Customer

From: ASHENG Asheng Engineering Ltd

To: ASHENG Asheng Engineering Ltd

What

Product

From: 1.8MWARDF 1800mmx1200mmx600mm Wardrobe

To: BLANKBOX Rimu Blanket Box 1Mx50mmx60mm

Details

Priority: 9 ☒ Start Date Required

☒ Reference: Contract ☒ End Date Required

☐ Comment

Filter Rules

Load... Save... Add To Navigator... Run

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

Save As

Forms > SPRule

Search SPRule

Organize New folder

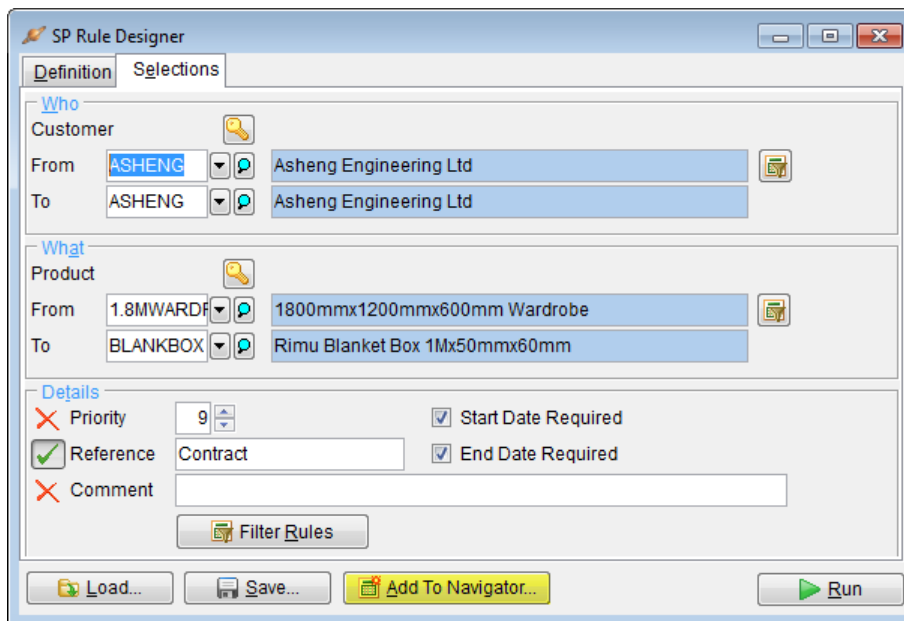
Name	Date modified	Type
Asheng Contract Pricing.pfp	4/11/2011 1:59 p.m.	PFP File
Chester Contract Pricing.pfp	1/11/2011 11:57 a.m.	PFP File
Collier Contract Pricing.pfp	1/11/2011 11:57 a.m.	PFP File
Fine Contract Pricing.pfp	1/11/2011 11:57 a.m.	PFP File
Sept Special.pfp	1/11/2011 11:57 a.m.	PFP File

File name: Asheng Contract Pricing September 2013

Save as type: SP Selection Files (*.pfp)

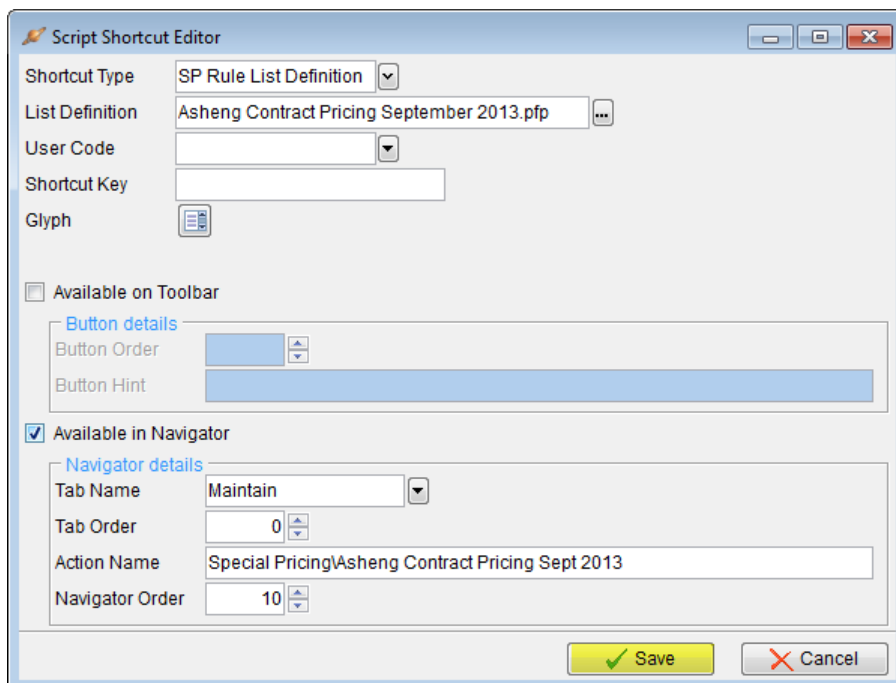
Hide Folders Save Cancel

15 Click Add To Navigator.



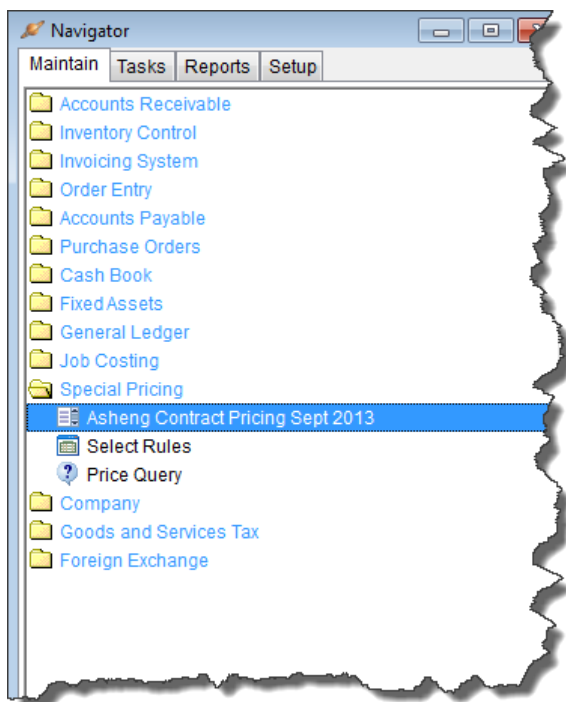
The SP Rule Designer window is shown with the 'Definition' tab selected. It contains three main sections: 'Who', 'What', and 'Details'. The 'Who' section is for Customer, with 'From' and 'To' both set to 'ASHENG' and 'Asheng Engineering Ltd'. The 'What' section is for Product, with 'From' set to '1.8MWARDF' and '1800mmx1200mmx600mm Wardrobe', and 'To' set to 'BLANKBOX' and 'Rimu Blanket Box 1Mx50mmx60mm'. The 'Details' section has checkboxes for 'Priority' (unchecked), 'Reference' (checked), and 'Comment' (unchecked). There are also checkboxes for 'Start Date Required' and 'End Date Required', both of which are checked. A 'Filter Rules' button is present. At the bottom, there are buttons for 'Load...', 'Save...', 'Add To Navigator...' (highlighted in yellow), and 'Run'.

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.



The Script Shortcut Editor window is shown. It has fields for 'Shortcut Type' (set to 'SP Rule List Definition'), 'List Definition' (set to 'Asheng Contract Pricing September 2013.pfp'), 'User Code', 'Shortcut Key', and 'Glyph'. There is a checkbox for 'Available on Toolbar' which is unchecked. Below this is a section for 'Button details' with 'Button Order' and 'Button Hint' fields. There is a checked checkbox for 'Available in Navigator'. Below this is a section for 'Navigator details' with 'Tab Name' (set to 'Maintain'), 'Tab Order' (set to 0), 'Action Name' (set to 'Special Pricing\Asheng Contract Pricing Sept 2013'), and 'Navigator Order' (set to 10). At the bottom, there are 'Save' and 'Cancel' buttons.

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 screenshot shows the 'Asheng Contract Pricing Sept 2013' window. At the top, there are selection fields for 'Customer - From' (ASHENG), 'Customer - To' (ASHENG), 'Product - From' (1.8MWARDOBE), and 'Product - To' (BLANKBOX). There are also fields for 'Reference' (Contract), 'Start Date', and 'End Date'. Below these are checkboxes for 'Display Inactive' and 'Auto Select', along with a 'Select Rules' button. The main area contains a table with the following data:

Customer	Product	Start Date	End Date	Priority	Reference	Comment
ASHENG	1.8MWARDOBE			9	Contract	
ASHENG	BEDCABINET			9	Contract	
ASHENG	BLANKBOX			9	Contract	

The 'Insert (F4)' button is highlighted in the bottom left corner of the window.

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.

The screenshot shows the 'Asheng Contract Pricing Sept 2013' window. The top section contains fields for Rule Type (Fixed), Customer (ASHENG), Product (2XBEDCAB), Priority (9), Reference (Contract), Comment, Start Date (1/09/2013), End Date (30/09/2013), Inactive (unchecked), Currency (NZD), and Bypass Min Margin (unchecked). Below these fields is a summary bar showing Cost (\$412.20), Sell (\$743.61), Discount (5.00%), Effective Price (\$706.43), and Effective Margin (41.65%). The bottom section is titled 'Breaks' and contains a table with the following data:

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$649.00	NZD	0.00	\$649.00	36.49%

At the bottom right of the window are 'Save' and 'Cancel' buttons.

20 To create another rule, click **Duplicate** to copy the rule you just entered.

This screenshot shows the same 'Asheng Contract Pricing Sept 2013' window, but with the 'Duplicate (Shift+F4)' button highlighted in the top left corner. The rest of the window, including the rule configuration fields and the 'Breaks' table, remains the same as in the previous screenshot.

21 Select a different PRODUCT and add a new price in the AMOUNT field. Click **Save**.

The screenshot shows the 'Asheng Contract Pricing Sept 2013' window. The 'Rule Type' is 'Fixed'. The 'Customer' is 'ASHENG'. The 'Product' is 'BEDSUITE'. The 'Priority' is '9'. The 'Reference' is 'Contract'. The 'Start Date' is '1/09/2013' and the 'End Date' is '30/09/2013'. The 'Currency' is 'NZD'. The 'Cost' is '\$2,240.20', 'Sell' is '\$4,099.57', 'Discount' is '5.00%', 'Effective Price' is '\$3,894.59', and 'Effective Margin' is '42.48%'. The 'Breaks' table shows a single row with 'Min Quantity' '0.00', 'Amount' '\$3,499.00', 'Currency' 'NZD', 'Percentage' '0.00', 'Effective Price' '\$3,499.00', and 'Effective Mar...' '35.98%'. The 'Save' button is highlighted.

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$3,499.00	NZD	0.00	\$3,499.00	35.98%

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

The screenshot shows the 'Asheng Contract Pricing Sept 2013' window with the 'SP Rule List' displayed. The list contains five rules for customer 'ASHENG'. The 'BEDSUITE' rule is highlighted in yellow.

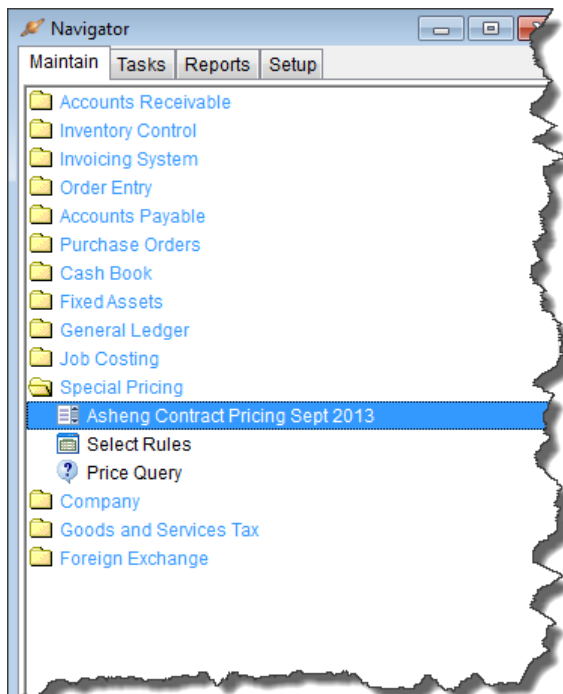
Customer	Product	Start Date	End Date	Priority	Reference	Comment
ASHENG	1.8MWARDROBE			9	Contract	
ASHENG	BEDCABINET			9	Contract	
ASHENG	BLANKBOX			9	Contract	
ASHENG	BEDSUITE	1/09/2013	30/09/2013	9	Contract	
ASHENG	2XBEDCAB	1/09/2013	30/09/2013	9	Contract	

Batch Update

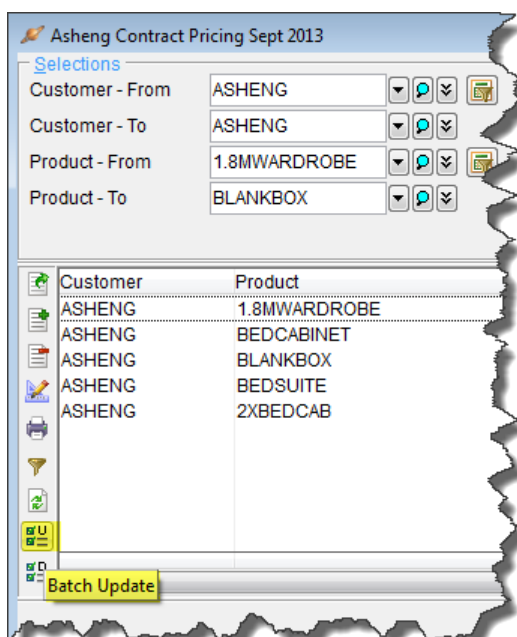
You can update an existing list of rules by adding or subtracting a percentage to the amount or by replacing the existing percentage.

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**.

Asheng Contract Pricing Sept 2013 Batch Update

Customer: [Text Box]
 Product: [Text Box]
 Reference: [Text Box]
 Start: [Text Box]
 End: [Text Box]
 Inactive: ☐
 Currency: [Text Box]
☒ Amount: Percentage 10.00%
☐ Percentage: Replace 0.00%

Save Cancel

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

Asheng Contract Pricing Sept 2013

Selections
 Customer - From: ASHENG
 Customer - To: ASHENG
 Product - From: 1.8MWARDROBE
 Product - To: BLANKBOX
 Reference: Contract
 Start Date: [Text Box]
 End Date: [Text Box]
 Display Inactive: ☐
 Auto Select: ☐ Select Rules

Customer	Product	Start Date	End Date	Priority	Reference Comment	Rule Type	Base Cost	Base Sell	Curr...	Bypa...	Amount
ASHENG	1.8MWARDROBE			9	Contract	Fixed			NZD		\$880.00
ASHENG	BEDCABINET			9	Contract	Fixed			NZD		\$330.00
ASHENG	BLANKBOX			9	Contract	Fixed			NZD		\$352.00
ASHENG	2XBEDCAB	1/09/2013	30/09/2013	9	Contract	Fixed			NZD		\$713.90
ASHENG	BEDSUITE	1/09/2013	30/09/2013	9	Contract	Fixed			NZD		\$3,848.90

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

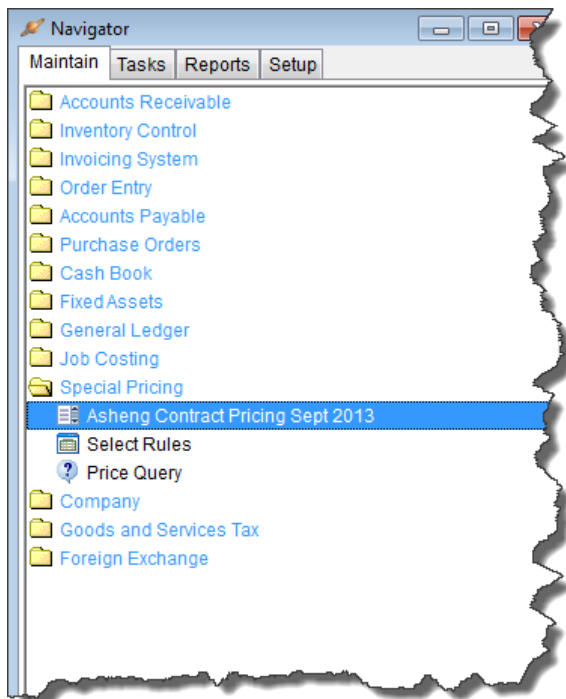
5 When you have finished making changes, close the SP Rule List window.

Batch Duplicate

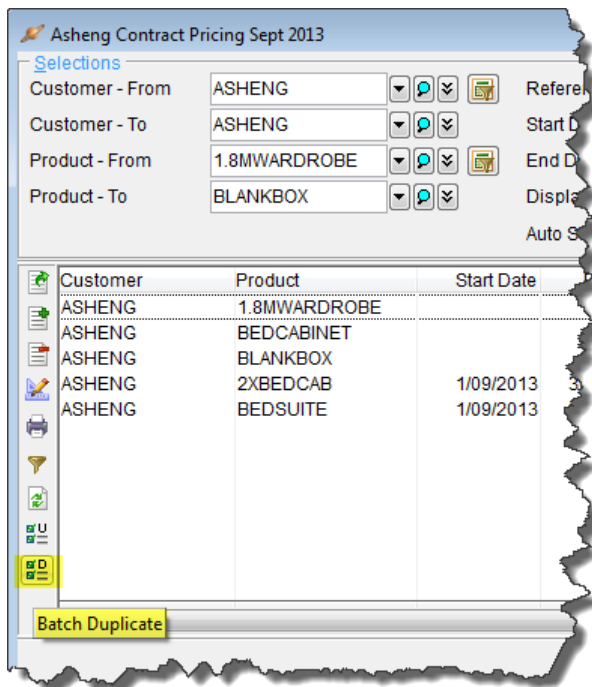
You can duplicate a list of rules, to use as starting point for a new list of rules.

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

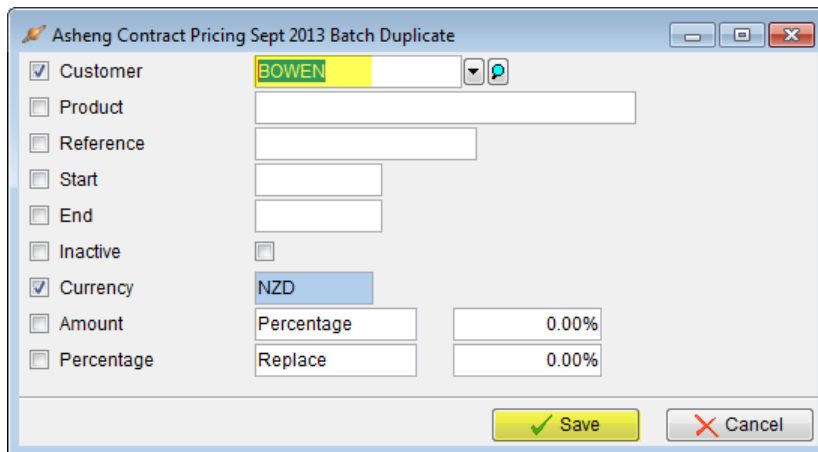
- 1 Go to Navigator > Maintain > Special Pricing. Click the Rule List to duplicate.



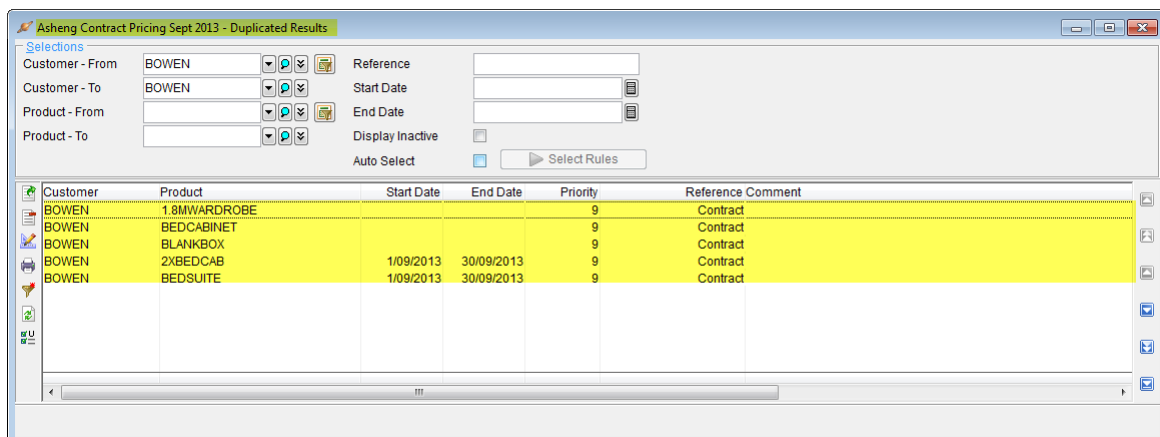
2 Click the Batch Duplicate button.



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



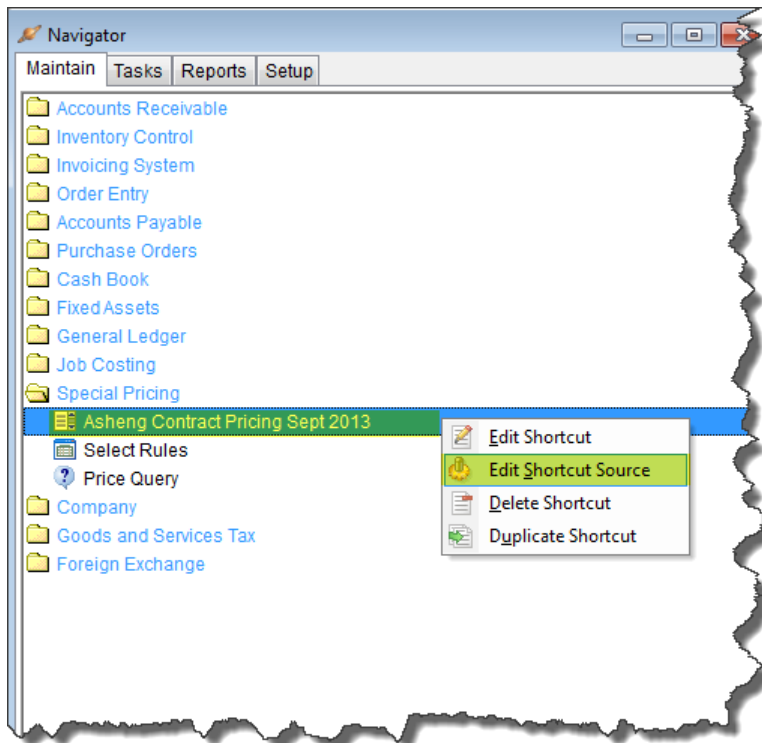
4 The SP Rule List displays with the duplicated rules.



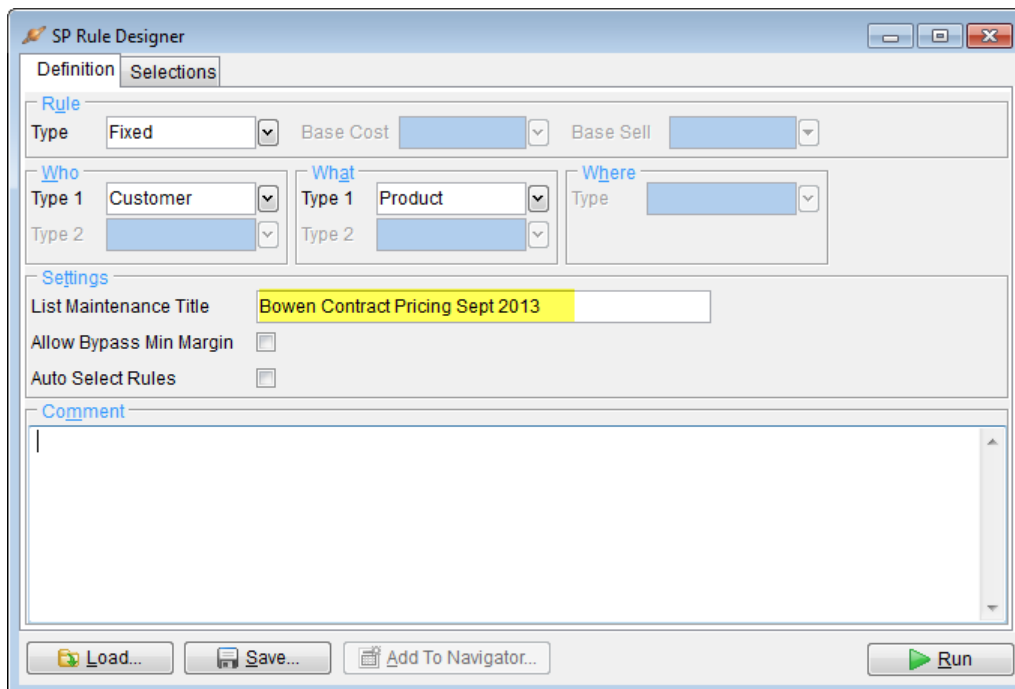
The SP Rule List is a live grid, so the rules for the new Customer are automatically created.

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.

The screenshot shows the 'SP Rule Designer' window with the 'Selections' tab selected. The window is divided into three sections: 'Who', 'What', and 'Details'.
- **Who**: Under 'Customer', 'From' is set to 'BOWEN' (Bowen Paint & Paper Ltd) and 'To' is also set to 'BOWEN' (Bowen Paint & Paper Ltd).
- **What**: Under 'Product', 'From' is set to '1.8MWARDF' (1800mmx1200mmx600mm Wardrobe) and 'To' is set to 'BLANKBOX' (Rimu Blanket Box 1Mx50mmx60mm).
- **Details**: 'Priority' is 9, 'Reference' is 'Contract', and 'Comment' is empty. Checkboxes for 'Start Date Required' and 'End Date Required' are checked.
At the bottom, there are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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

10 Add to Navigator as above.

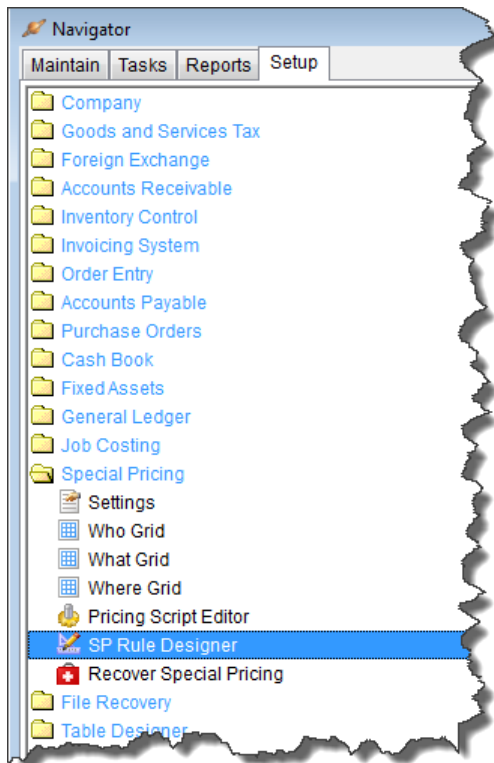
11 Close the SP Rule Designer.

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.

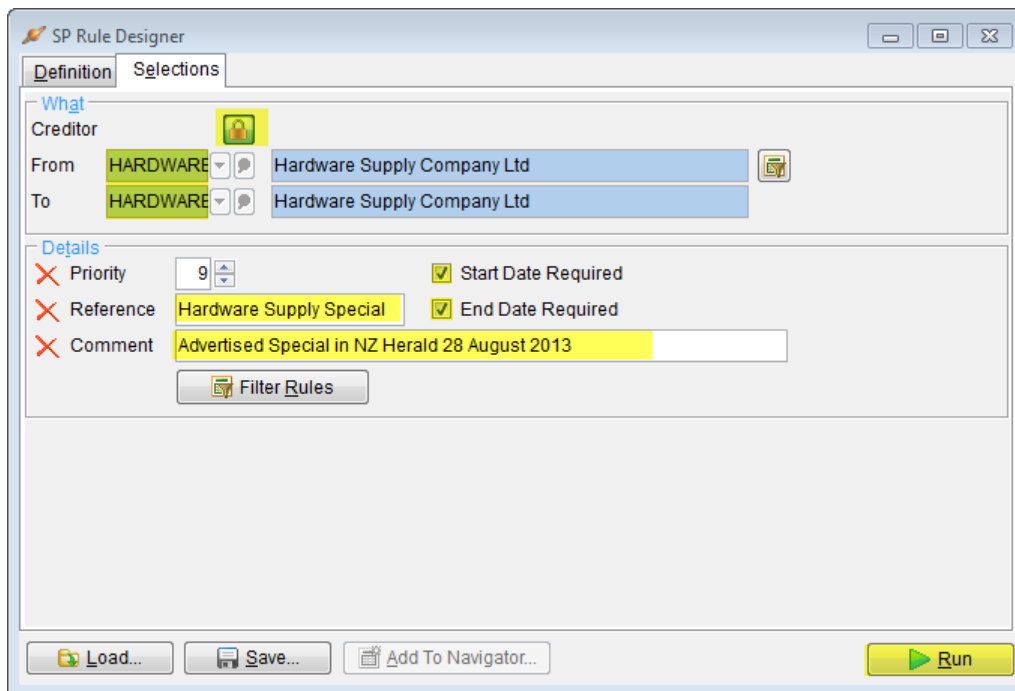
The screenshot shows the 'SP Rule Designer' window with the 'Definition' tab selected. The 'Rule' section has 'Type' set to 'Sell Relative'. The 'Who' section has 'Type 1' and 'Type 2' dropdowns. The 'What' section has 'Type 1' set to 'Creditor' and 'Type 2' as a dropdown. The 'Where' section has a 'Type' dropdown. The 'Settings' section has 'List Maintenance Title' set to 'Hardware Supply Products - 25% off Birthday Special', and 'Allow Bypass Min Margin' and 'Auto Select Rules' are unchecked. The 'Comment' section is a large text area. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

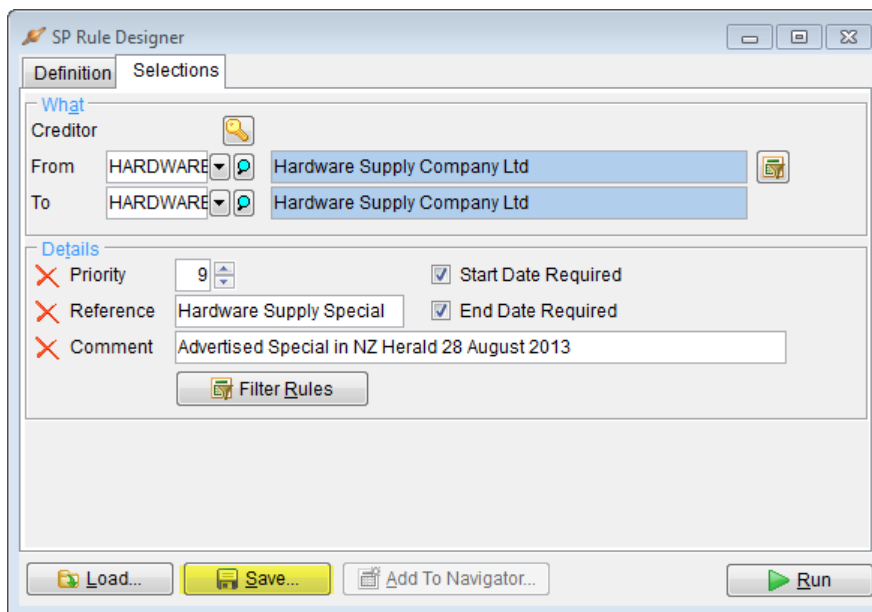
7 Tick the START DATE REQUIRED and END DATE REQUIRED checkboxes, so that these will have to be set when the rules are created.

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.

Hardware Supply Products - 25% off Birthday Special

Selections

Start Date

End Date

Display Inactive ☐

Auto Select ☒

Creditor	Start Date	End Date	Priority	Reference	Comment

Insert (F4)

13 Enter the START DATE and END DATE and enter the PERCENTAGE to reduce the Sell Price by. Click Save.

Hardware Supply Products - 25% off Birthday Special

ID

Rule Type

Creditor

Priority

Reference

Comment

Start Date

End Date

Inactive ☐

Currency

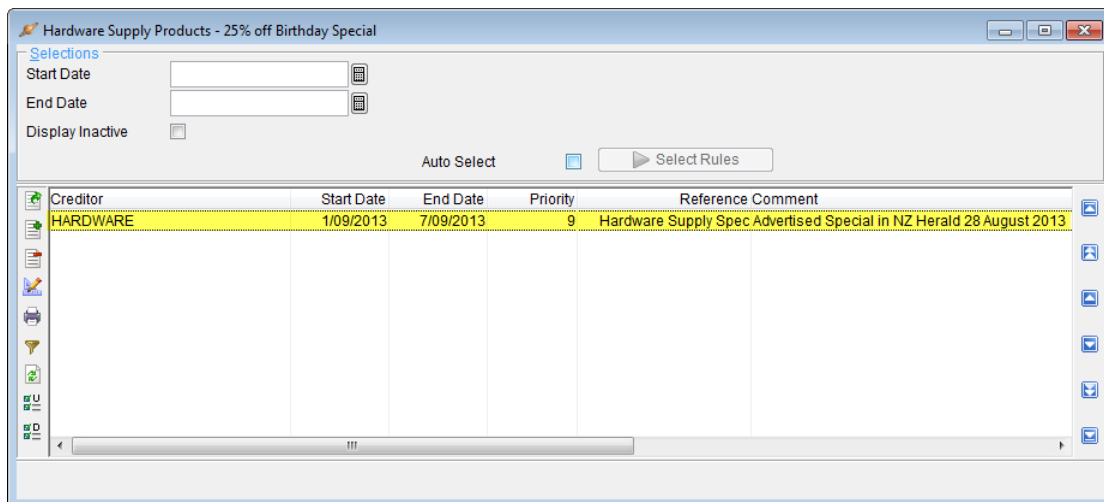
Bypass Min Margin ☐

Cost Sell Discount Effective Price Effective Margin

Breaks

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$0.00	NZD	25.00%		

14 Close the SP Rule window. The new rule will appear in the SP Rule List.

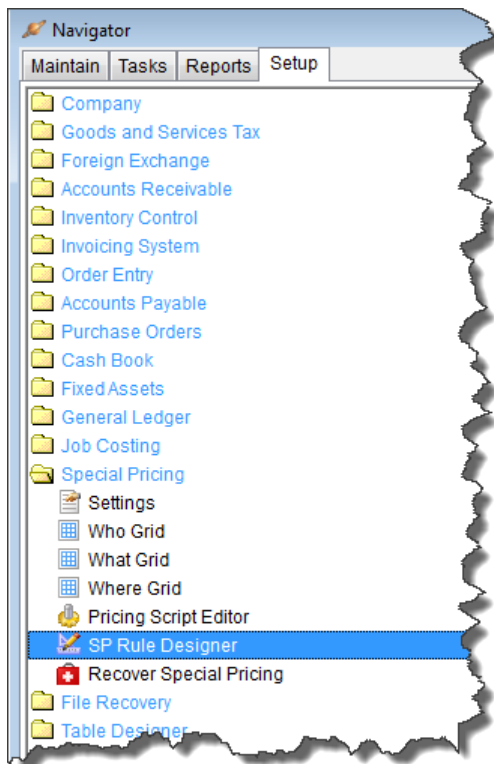


Customer Reward Group Discounts

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.

The screenshot shows the 'SP Rule Designer' window with the 'Definition' tab selected. The 'Rule' section has 'Type' set to 'Sell Relative'. The 'Who' section has 'Type 1' set to 'AR Category 1'. The 'What' and 'Where' sections are empty. The 'Settings' section has 'List Maintenance Title' set to 'Customer Reward Group Discounts', 'Allow Bypass Min Margin' unchecked, and 'Auto Select Rules' unchecked. The 'Comment' section is empty. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

The screenshot shows the 'SP Rule Designer' window with the 'Selections' tab selected. The 'Who' section has 'AR Category 1' and a 'Code' field. The 'Details' section has 'Priority' set to 9, 'Reference' set to 'Reward Group Special', and 'Comment' empty. There are checkboxes for 'Start Date Required' and 'End Date Required', both unchecked. A 'Filter Rules' button is present. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

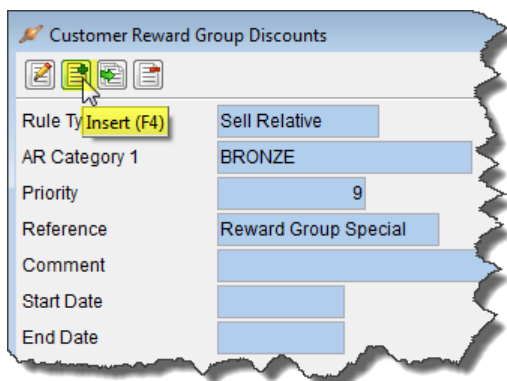
9 Go to Navigator > Maintain > Special Pricing and your Rule List will appear. From here you can click on the Rule List to view and maintain the rules and customise the rule list as required.

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**.

Min Quantity	Amount Currency	Percentage	Effective Price	Effective Mar...
0.00	\$0.00 NZD	5.00%		

12 Click INSERT to add the next rule.



Customer Reward Group Discounts

Rule Type: Sell Relative

AR Category 1: BRONZE

Priority: 9

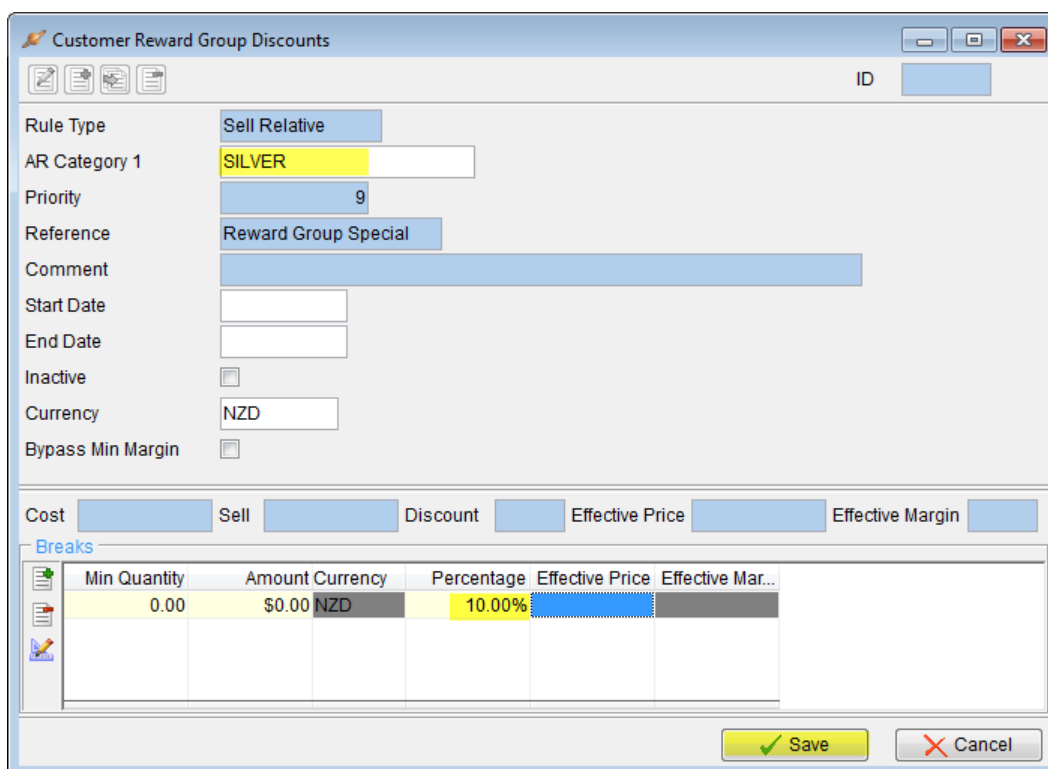
Reference: Reward Group Special

Comment:

Start Date:

End Date:

13 In the AR CATEGORY 1 Field, select the next Customer Reward Group, enter a PERCENTAGE, then click **Save**.



Customer Reward Group Discounts

ID:

Rule Type: Sell Relative

AR Category 1: SILVER

Priority: 9

Reference: Reward Group Special

Comment:

Start Date:

End Date:

Inactive: ☐

Currency: NZD

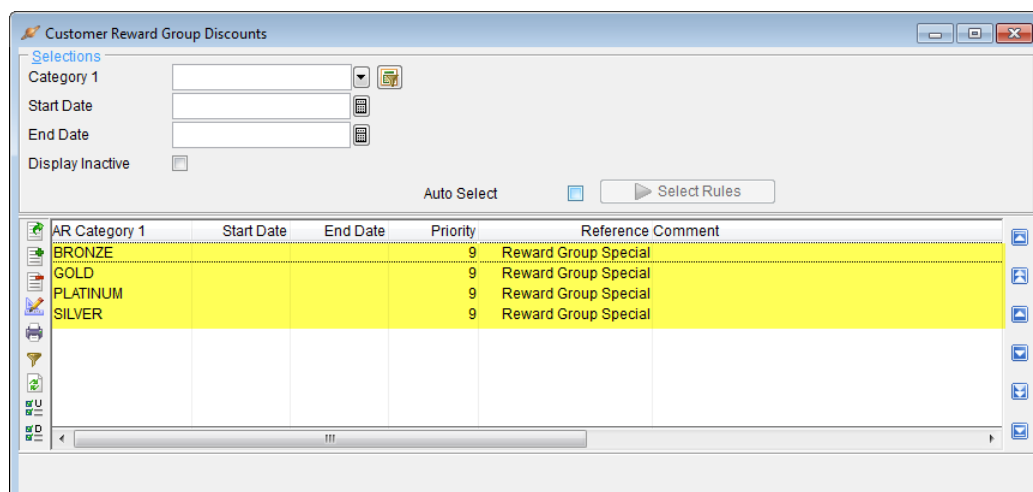
Bypass Min Margin: ☐

Cost: Sell Discount Effective Price Effective Margin

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$0.00	NZD	10.00%		

Save Cancel

14 When you have finished adding your rules, close the SP Rule window. The new rules will appear in the SP Rule List.



The screenshot shows a software window titled "Customer Reward Group Discounts". It has a "Selections" section at the top with fields for "Category 1", "Start Date", "End Date", and a "Display Inactive" checkbox. Below these fields are "Auto Select" and "Select Rules" buttons. The main area is a table with the following data:

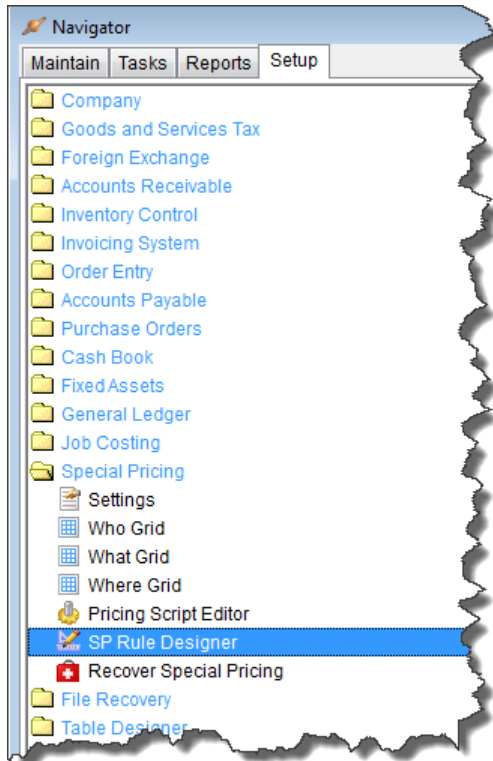
AR Category 1	Start Date	End Date	Priority	Reference Comment
BRONZE			9	Reward Group Special
GOLD			9	Reward Group Special
PLATINUM			9	Reward Group Special
SILVER			9	Reward Group Special

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.

The screenshot shows the 'SP Rule Designer' window with the 'Definition' tab selected. The 'Rule' section has 'Type' set to 'Sell Relative'. The 'Who' section has 'Type 1' set to 'IN Category 1'. The 'What' section has 'Type 1' and 'Type 2' dropdowns. The 'Where' section has a 'Type' dropdown. The 'Settings' section has 'List Maintenance Title' set to 'Promo Code Discounts - 2013', 'Allow Bypass Min Margin' unchecked, and 'Auto Select Rules' unchecked. The 'Comment' section is empty. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

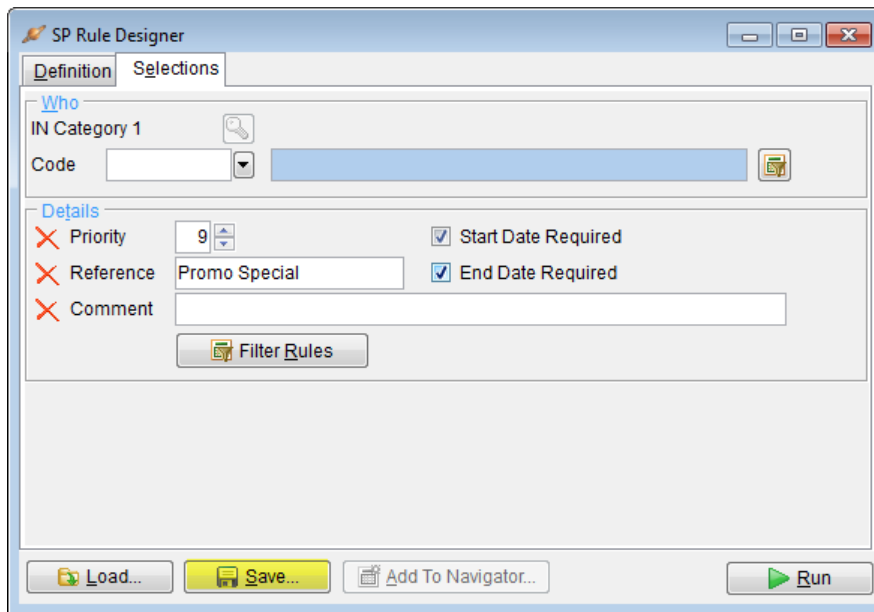
7 Tick the START DATE REQUIRED and END DATE REQUIRED checkboxes so that these must be set when new rules are created.

8 Click Run to preview the SP Rule List.

The screenshot shows the 'SP Rule Designer' window with the 'Selections' tab selected. The 'Who' section has 'IN Category 1' and a 'Code' dropdown. The 'Details' section has 'Priority' set to 9, 'Reference' set to 'Promo Special', and 'Comment' empty. The 'Start Date Required' and 'End Date Required' checkboxes are checked. A 'Filter Rules' button is present. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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

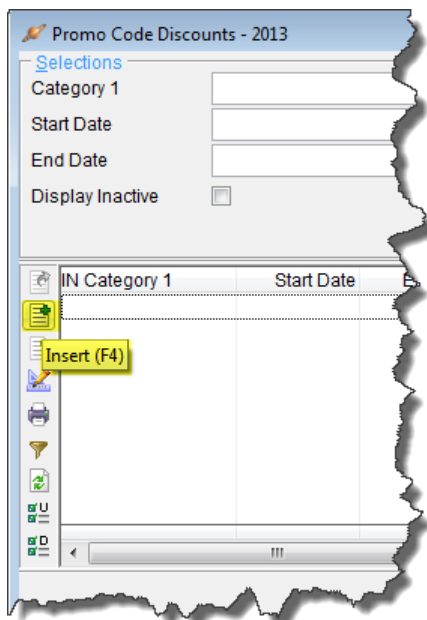
9 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.



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.

Promo Code Discounts - 2013

Rule Type: Sell Relative

IN Category 1: LABDAY

Priority: 9

Reference: Promo Special

Comment:

Start Date: 28/10/2013

End Date: 28/10/2013

Inactive: ☐

Currency: NZD

Bypass Min Margin: ☐

Cost: Sell Discount Effective Price Effective Margin

Breaks

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$0.00	NZD	15.00%		

Save Cancel

17 Click Insert to add the next Rule to the SP Rule list.

Promo Code Discounts - 2013

Rule Type: Insert (F4) Sell Relative

IN Category 1: LABDAY

Priority: 9

Reference: Promo Special

Comment:

Start Date: 28/10/2013

End Date: 28/10/2013

Inactive: ☐

Currency: NZD

Bypass Min Margin: ☐

18 Add the next rule, then click **Save**.

The screenshot shows the 'Promo Code Discounts - 2013' window. The 'Rule Type' is 'Sell Relative'. 'IN Category 1' is 'SCHOOL'. 'Priority' is '9'. 'Reference' is 'Promo Special'. 'Start Date' is '1/07/2013' and 'End Date' is '14/07/2013'. 'Currency' is 'NZD'. 'Bypass Min Margin' is unchecked. Below the form, there are tabs for 'Cost', 'Sell', 'Discount', 'Effective Price', and 'Effective Margin'. The 'Breaks' table is visible with the following data:

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
0.00	\$0.00	NZD	20.00%		

At the bottom, there are 'Save' and 'Cancel' buttons.

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

The screenshot shows the 'Promo Code Discounts - 2013' window with the 'Selections' tab selected. It displays a list of rules with the following columns: IN Category 1, Start Date, End Date, Priority, Reference, and Comment.

IN Category 1	Start Date	End Date	Priority	Reference	Comment
LABDAY	28/10/2013	28/10/2013	9	Promo Special	
SCHOOL	1/07/2013	14/07/2013	9	Promo Special	
STAKE	21/03/2013	28/03/2013	9	Promo Special	
XMAS	1/12/2013	24/12/2013	9	Promo Special	

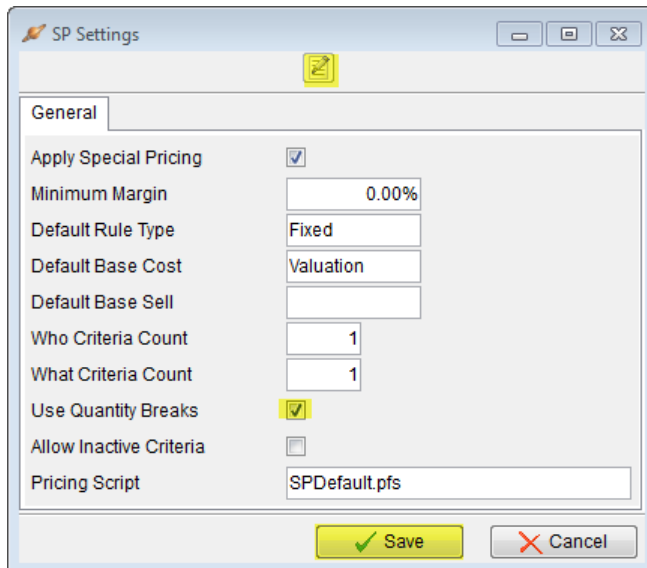
At the bottom, there is a 'Select Rules' button.

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.

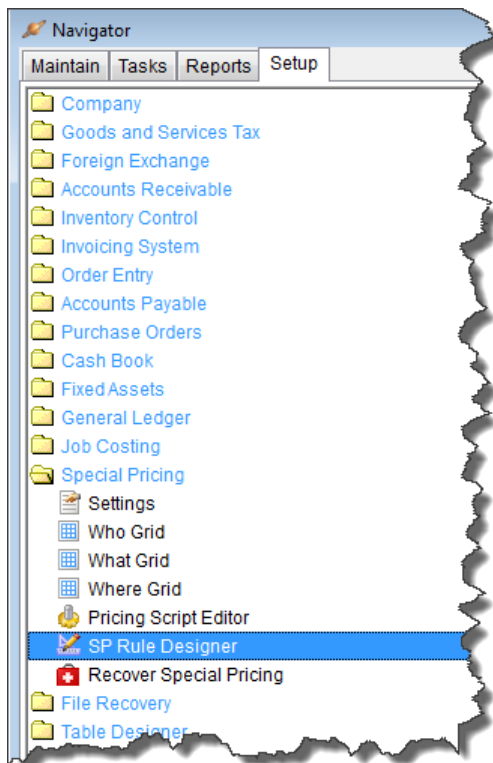
- 1 Go to Navigator > Setup > Special Pricing > Settings. Make sure USE QUANTITY BREAKS is ticked. If it is not ticked, click **Edit** then tick the USE QUANTITY BREAKS checkbox, then click **Save**.



The screenshot shows the 'SP Settings' dialog box with the 'General' tab selected. The 'Apply Special Pricing' checkbox is checked. The 'Minimum Margin' is set to 0.00%. The 'Default Rule Type' is 'Fixed' and the 'Default Base Cost' is 'Valuation'. The 'Who Criteria Count' and 'What Criteria Count' are both set to 1. The 'Use Quantity Breaks' checkbox is checked. The 'Allow Inactive Criteria' checkbox is unchecked. The 'Pricing Script' field contains 'SPDefault.pfs'. At the bottom, there are 'Save' and 'Cancel' buttons.

Apply Special Pricing	<input checked="" type="checkbox"/>
Minimum Margin	0.00%
Default Rule Type	Fixed
Default Base Cost	Valuation
Default Base Sell	
Who Criteria Count	1
What Criteria Count	1
Use Quantity Breaks	<input checked="" type="checkbox"/>
Allow Inactive Criteria	<input type="checkbox"/>
Pricing Script	SPDefault.pfs

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.

The screenshot shows the 'SP Rule Designer' window with the 'Definition' tab selected. The 'Rule' section has 'Type' set to 'Sell Relative'. The 'Who' section has 'Type 1' and 'Type 2' dropdowns. The 'What' section has 'Type 1' set to 'IC Category 1' and 'Type 2' as a dropdown. The 'Where' section has a 'Type' dropdown. The 'Settings' section has 'List Maintenance Title' set to 'Monthly Special - Standard Range - with Qty Breaks', 'Allow Bypass Min Margin' unchecked, and 'Auto Select Rules' unchecked. The 'Comment' section is empty. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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.

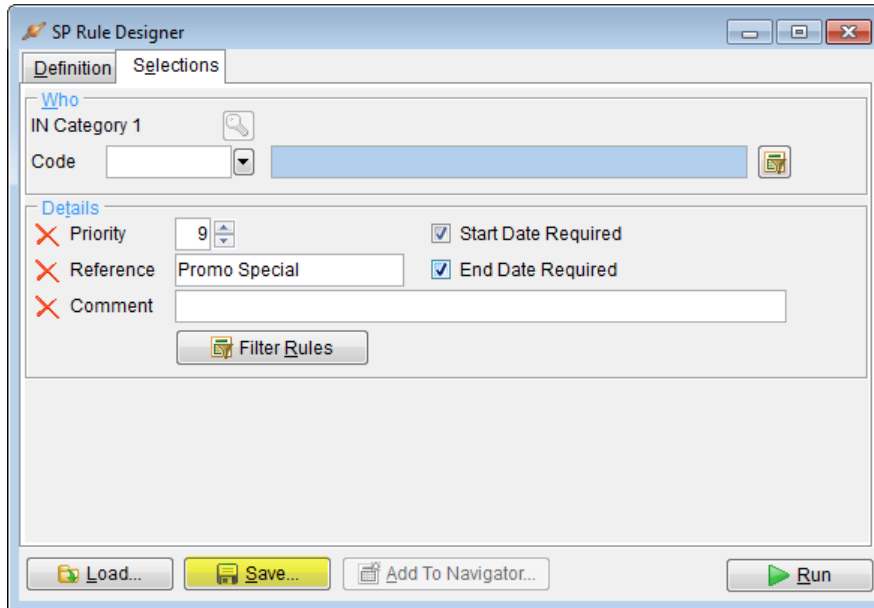
8 Tick the START DATE REQUIRED and END DATE REQUIRED checkboxes so that these must be set when new Rules are created from the List.

9 Click Run to preview the SP Rule List.

The screenshot shows the 'SP Rule Designer' window with the 'Selections' tab selected. The 'What' section has 'IC Category 1' selected with a search icon, 'Code' set to 'STD' with a dropdown arrow, and 'Standard Range' with a document icon. The 'Details' section has 'Priority' set to '9', 'Reference' set to 'Std Range Sept Special', and 'Comment' as an empty text box. Checkboxes for 'Start Date Required' and 'End Date Required' are both checked. A 'Filter Rules' button is below the details. At the bottom are buttons for 'Load...', 'Save...', 'Add To Navigator...', and 'Run'.

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

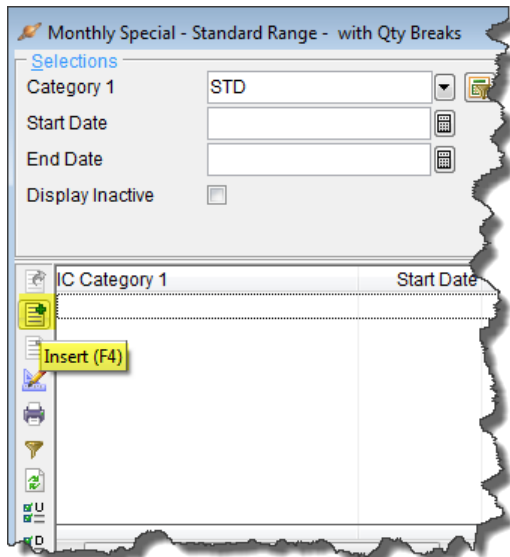
10 Close the SP Rule List window, then click **Save** to save the SP definition file to the SP rule folder. Enter a file name for the Definition, then click **Save**.



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.

Monthly Special - Standard Range - with Qty Breaks

Rule Type: Sell Relative

IC Category 1: STD

Priority: 9

Reference: Std Range Sept Speci

Comment:

Start Date: 1/09/2013

End Date: 30/09/2013

Inactive: ☐

Currency: NZD

Bypass Min Margin: ☐

Cost: Sell Discount Effective Price Effective Margin

Breaks

Min Quantity	Amount	Currency	Percentage	Effective Price	Effective Mar...
1.00	\$0.00	NZD	5.00%		
6.00	\$0.00	NZD	7.00%		
11.00	\$0.00	NZD	9.00%		

Save Cancel

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

Monthly Special - Standard Range - with Qty Breaks

Category 1: STD

Start Date:

End Date:

Display Inactive: ☐

Auto Select: ☐ Select Rules

IC Category 1	Start Date	End Date	Priority	Reference	Comment
STD	1/09/2013	30/09/2013	9	Std Range Sept Speci	