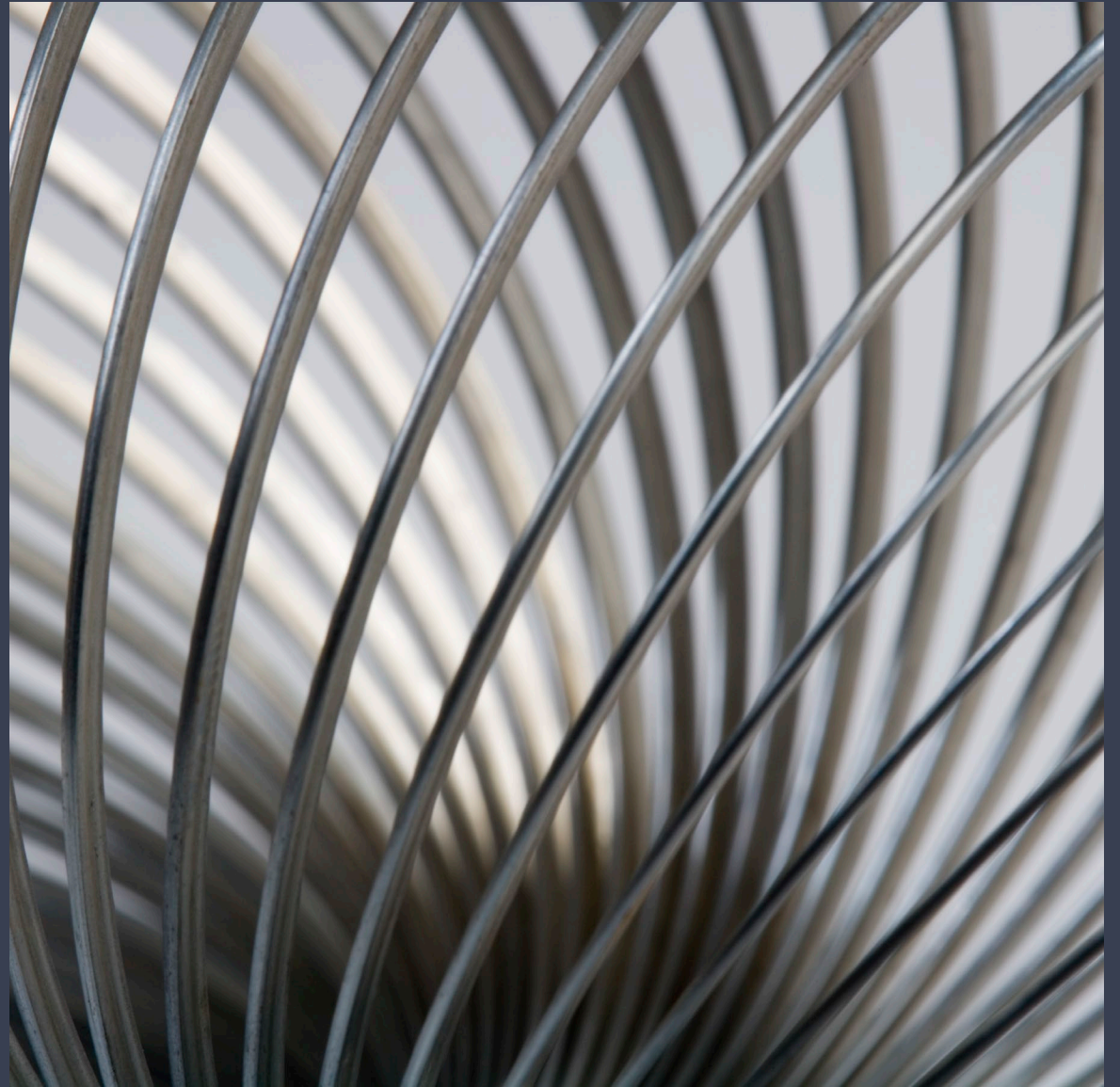


NUGM 2024

SOP PRICING

Joanne Eckenrode, NovoROI Systems, LLC



SOP PRICING AGENDA

- ITEMS.SOP and CATALOG.PRICES
- PRICES.CODES
- DISCOUNTS
- VOLUME.DISCOUNTS
- SPECIAL.PRICING
- SO.ENTRY REBUILD option and SO.REBUILD
- PRICING Audits



ITEMS.SOP AND CATALOG.PRICES

- ITEMS.SOP

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File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

ITEMS.SOP Catalog Prices "CHG" Mode

Item/Part Number	Item Description	Unit of Measure
215 01	Power Supply, 250 W	EA Each
Long Item Number		
Extended Description		Entries 1
250 watt switching power supply		

06 Pricing Comments Entries 0 Last Price

.01)
 .02) 01-11-24

Catalog	UM	Entries	3
08 Code	09 Currency	10 11 Date	12 Quantity
		13 Price	
.01) 1	EA	12-30-23	0.000 32.446
.02) 2	EA	12-30-23	0.000 31.094
.03) 3	EA	12-30-23	0.000 29.742
.04)			
.05)			

Change Which Field, END, TOP, \P

User roi:JME.MAIN, PID 0010 on localhost 0 Ins

- CATALOG.PRICES

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File Edit Commands Scripts Attachments Tools ProcessOpts Help

CATALOG.PRICES.2 "CHG" Mode

Item Number 215|01 Power Supply, 250 W

250 watt switching power supply

Stockkeeping UM EA Prompt For Last Chg 01-11-24

06 Default Sell UM 08 Selling UM

07 Def Pricing Um 09 Pricing UM

10 Pricing Comments Entries 0

.01)
 .02)

Price	From Eff	From	16
13 UM	14 Date	15 Quantity	Unit Price
.01) EA	12-30-23	0.000	32.446
.02) EA	12-30-23	0.000	31.094
.03) EA	12-30-23	0.000	29.742
.04)			
.05)			

Entries 3

Change Which Field, END, TOP, \P

User roi:JME.MAIN, PID 0010 on localhost 0 Ins



UPDATE.CATALOG.PRICES

- Mass change utility

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File Edit Commands Scripts **Tools** ProcessOpts Help

UPDATE.CATALOG.PRICES Update Catalog Prices

01 Item Number	Entries	1	03 Price Group Code	Entries	1
.01) 215 01 Power Supply, 250 W	^	.01)	ALL	^	
.02)	v	.02)		v	
02 Sales Product Code	Entries	1	04 Facility Code	Entries	1
.01) ALL	^	.01)	ALL	^	
.02)	v	.02)		v	

05 From Catalog Number	1	
06 New Catalog Number	4	
07 Delete Through Date		
08 Replace Prices	Y	
09 From Effectivity Date	05-12-24	
10 New Effectivity Date	05-12-24	
11 Change Dollar Amount		
12 Specific New Price		
13 Cost Multiplier		
14 Price Multiplier	150.00	
15 From Currency Code		
16 New Currency Code		

Entries 1 < >

Change Which Field, END, TOP, \P |.....

User roi:JME.MAIN, PID 0010 on localhost 0 Ins

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File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

ITEMS.SOP Catalog Prices "CHG" Mode

Item/Part Number	Item Description	Unit of Measure
215 01	Power Supply, 250 W	EA Each
Long Item Number		
Extended Description	Entries	1
250 watt switching power supply		

06 Pricing Comments	Entries	0	Last Price
.01)			
.02)			05-12-24

Catalog	UM	Entries	4
08 Code	09 Currency	10 11 Date	12 Quantity 13 Price
.01) 1	EA	12-30-23	0.000 32.446
.02) 2	EA	12-30-23	0.000 31.094
.03) 3	EA	12-30-23	0.000 29.742
.04) 4	EA	05-12-24	0.000 48.669
.05)			

Change Which Field, END, TOP, \P |.....

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CATALOG.IMPORT

- Mass update using the DBU tool – NovoMotion mass updates and deletes – Be careful!

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File Edit Commands Scripts Tools Help

CATALOG.IMPORT - Import Catalog Price Utility

01 Source Drive
02 PC/UNC Path
03 PC/UNC File Name
04 Inlay Record
05 Replace/Insert
06 Report or Update

Change Which Field, END, TOP, \P |

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File Edit Commands Scripts Attachments Tools ProcessOpts Help

DEFINE.INLAY.TWO - Data inlays from ASCII flat file "CHG" Mode

Inlay Name

Host File Information Entries 9

	.01)	.02)
02 File Name	<input type="text" value="IM Item Master"/>	<input type="text" value="IM Item Master"/>
03 Attribute	<input type="text" value="0 Part_Number"/>	<input type="text" value="41 Catalog_Prices"/>
04 Value Nbr	<input type="text" value="05 Mnt Nulls"/>	<input type="text" value="-1 05 Mnt Nulls"/>
06 Sub Value	<input type="text" value="07 Mnt Nulls"/>	<input type="text" value="07 Mnt Nulls"/>
08 Default Value	<input type="text"/>	<input type="text"/>
09 Spec Chars	<input type="text"/>	<input type="text"/>

Inlay File Information

	1	2
10 Start/Field	<input type="text"/>	<input type="text" value="NOFMT"/>
11 Data Length	<input type="text"/>	<input type="text"/>
12 Data Format	<input type="text" value="A"/>	<input type="text" value="A"/>
13 Conversion	<input type="text"/>	<input type="text" value="C:034"/>
14 Decimal Place	<input type="text" value="15 Label"/>	<input type="text" value="15 Label"/>

Change Which Field, END, TOP, \P

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PRICE.CODES

- PRICE.CODES is used to assign a specific catalog and indicate if dollars are required in SOP

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File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

PRICE.CODES Maintain Sales Pricing Codes "CHG" Mode

01 Price Code	LST
02 Description	List Price
03 Net Price Required	N
04 List Price Required	N
05 Zero Price Print Option	N/C
06 Default Price Catalog Nbr	1
07 Trade Discounts Allowed	Y

Price Variance Limits

08 Negative Variance Percent	
09 Negative Variance Amount	
10 Positive Variance Percent	
11 Positive Variance Amount	

Change Which Field, END, TOP, \P

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DISCOUNTS

- DISCOUNTS can be used to define part discounts by sales product code

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

DISCOUNTS - Maintain Discount Codes *CHG* Mode

Discount Code 4 02 Description Key Customer
03 Default Percent 5.00

04 Sales Product Code	Discount 05 Pct 1	Discount 06 Pct 2	Discount 07 Pct 3	Discount 08 Pct 4	Net Percent
.01) ACC Accessories	5.00	2.00	2.00		8.76
.02) SYS1 Class 1 System	10.00	5.00	2.00		16.21
.03) SYS2 Class 2 System	10.00	5.00	2.00		16.21
.04) SYS3 Class 3 System	10.00	5.00	2.00		16.21
.05) SYS4 Class 4 System	10.00	5.00	2.00		16.21
.06)					
.07)					
.08)					
.09)					
.10)					
.11)					
.12)					
.13)					
.14)					

Entries 5
Change Which Field, END, TOP, \P |.....

User roi:JME.MAIN, PID 0010 on localhost 0 Ins



VOLUME.DISCOUNTS

- Customer/part codes combination

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc. *CHG* Mode

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

Volume Discount Table Maintenance

Discount Code DIS Distributor Discount
Price Group Code 1 PC Group 1
03 Table Description Distributor Discount

Quantity/Dollar Price Break Table

	04 From Qty	05 From Dollars	06 Price Multiplier	
.01)	0	0.00	1.000	^
.02)	25	15000.00	0.950	
.03)	100	100000.00	0.900	
.04)	1000	250000.00	0.850	
.05)				
.06)				
.07)				
.08)				▼

Entries 4

07 Group Discounts N

Change Which Field, END, TOP, \P

User roi:JME.MAIN, PID 0010 on localhost 0 Ins



DISCOUNTS AND VOLUME.DISCOUNTS

- CUSTOMERS setup

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

CUSTOMERS Pricing and Invoicing Information "CHG" Mode

Customer 1008 Name General Office Products

Pricing and Discounting Parameters		Invoicing Parameters	
03 Max Extra Charge	25.00	09 Invoice Frequency	D Daily
04 Min Order Amount	25.00	10 Invoice Complete	
05 Job Shop Markup %		11 Consolidate Invoices	
06 Discount Code	4 Key Customer	12 File	13 Dictionary Name

Sales Price Codes	
07 Type	08 Price Code
.01) CTO	LST List Price
.02) SL	LST List Price

Entries 7

Credit Card Information	
Card Number	Expiration Date
Card First Name	Middle Initial
Card Last Name	

Maintain Card Information Delete Card Information

Change Which Field, END, TOP, \P |.....

User roi:JME.MAIN, PID 0010 on localhost 0 Ins

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

CUSTOMERS - Name, Address and General Information "CHG" Mode

Customer Number 1008

Name and Address		Phone Numbers	
02 Name	General Office Products	11 Business	612-641-3475
03 Bill-to Address		12 800	
04 ZIP/Post	801 Transfer Road	13 Fax	612-641-3400
05 City	Suite 880	14 Overseas	
06 State	55115		
07 Country	St. Paul	15 Active Flag	Y
08 Time Zn	MN Minnesota	16 Cust Since	12-01-08
09 Contact	USA United States of America	17 Acronym	GOP
10 Vendor #	2001 Joe East	18 Sort Option	OFFICE
		19 Class Code	D
		20 Cust Type	DIS Distributer

SIC Code		Retrieval Codes	
.01) 3573	Electronic Comput Equip	.01)	
.02)		.02)	
.01) 44312	Computer and Software Stores	.01)	Joe East
.02)		.02)	

NAICS Code		Alternate Names	
.01)		.01)	
.02)		.02)	

Change Which Field, END, TOP, \P

User roi:JME.MAIN, PID 0010 on localhost 0 Ins



DISCOUNTS AND VOLUME.DISCOUNTS

- ITEMS.SOP setup

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

ITEMS.SOP Selling Information "CHG" Mode

Item/Part Number	Item Description	Unit of Measure
215101 Long Item Number	Power Supply, 250 W	EA Each

05 Inventory Type	CM Commercial Purchased Part
06 Sales Product Code	SP Spare Parts
07 Price Group Code	1 PC Group 1
08 Commodity Code	
09 GL Sales/COGS Code	
10 Include in Web Sales List	<input type="checkbox"/>
11 Taxable	<input type="checkbox"/>
12 Vat Code	
13 Tax Product Code	

14 Qty Per Package		Vendor Managed Inventory	
15 Broken Pack Charge		19 Minimum Stock Level	
16 Minimum Order Qty		20 Maximum Stock Level	
17 Group Multiplier			
18 Commissionable			

Change Which Field, END, TOP, \P

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EXTRA CHARGES AS DISCOUNTS

- Negative charge amount
 - Can be percentage-based – downside is sales analysis does not reflect amount

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File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

Maintain Extra Charge Codes (019) "CHG" Mode

02 Ex Charge Code	D10	02 Description	10% Total Order Discount
03 Type Code		04 Landed Cost Type	
05 Income Acct	01-4014 Sales Discounts		
06 Expense Acct			
07 Commodity Code			
08 Tax Only Code		10 VAT Code	
09 Taxable Charge	N		
11 Tax Product Cd			

12 Fixed Rate	N	16 Discountable	
13 Fixed Amount		17 Commissionable	Y
14 Percentage Amt	-10.0000	18 Freight Charge	
15 Sales Product Code			
.01)			
.02)			
Entries	0	EDI Codes	
		19 Service Code	
		20 Charge Method	

Change Which Field, END, TOP, \P

✓ ✕ * User roi:JME.MAIN, PID 0010 on localhost 0 Ins



SPECIAL.PRICING

- Customer-specific pricing
- Promotional pricing
- SO.ENTRY Screen L2 or greater

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

SPECIAL.PRICING.1 *CHG* Mode

Quote Number	1400	02 Description	Customer 1008 price	
Quote Effectivity		05 Discount Code		
03 Start Date		06 Payment Terms		
04 End Date		07 Print Quote		
08 Freight Method		10 Delivery Time		
09 Fob Point				
11 Quoted By	ROI ROI Systems, Inc.			
12 Country				
13 Phone Nbr		14 Ext		15 Fax
16 Customer	Entries	1	17 Rfq	18 Contact
.01)	1008 General Office Products			
.02)				
.03)				

Change Which Field, END, TOP, \P |.....

✓ ✕ * User roi:JME.MAIN, PID 0010 on localhost 0 Ins



SPECIAL.PRICING PARTS

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts MSO Help

SPECIAL.PRICING.2 "CHG" Mode

Quote Number 1400 Description Customer 1008 price

Quote Effectivity Start Date End Date

Quantity Break Pricing Information Entries 6

05	Item Number/Description	06	Currency	07	UM	08	From Qty	09	Price	10	Price	11	Auto/Manual
.01)	215 01 Power Supply, 250 W			EA		0.000		100.000				A	^
.02)	215 01 Power Supply, 250 W			EA		25.000		81.114				A	v
.03)	215 01 Power Supply, 250 W			EA		50.000		81.114				A	
.04)	215 01 Power Supply, 250 W			EA		100.000		75.706				A	
.05)	215 01 Power Supply, 250 W			EA		250.000		70.299				A	

Change Which Field, END, TOP, \P |.....

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SPECIAL.PRICING PART DISCOUNTS

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Attachments Tools ProcessOpts Help

SPECIAL.PRICING.3 "CHG" Mode

Quote Number Description

Quote Effectivity Start Date End Date

05 Group Line Items

	06 Price Group Code	Stockkeeping 07 Quantity	08 Quantity Price Multiplier	
.01)	<input type="text"/>	<input type="text"/>	<input type="text"/>	Entries 0
.02)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.03)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.04)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.05)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.06)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.07)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.08)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.09)	<input type="text"/>	<input type="text"/>	<input type="text"/>	
.10)	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Change Which Field, END, TOP, \P

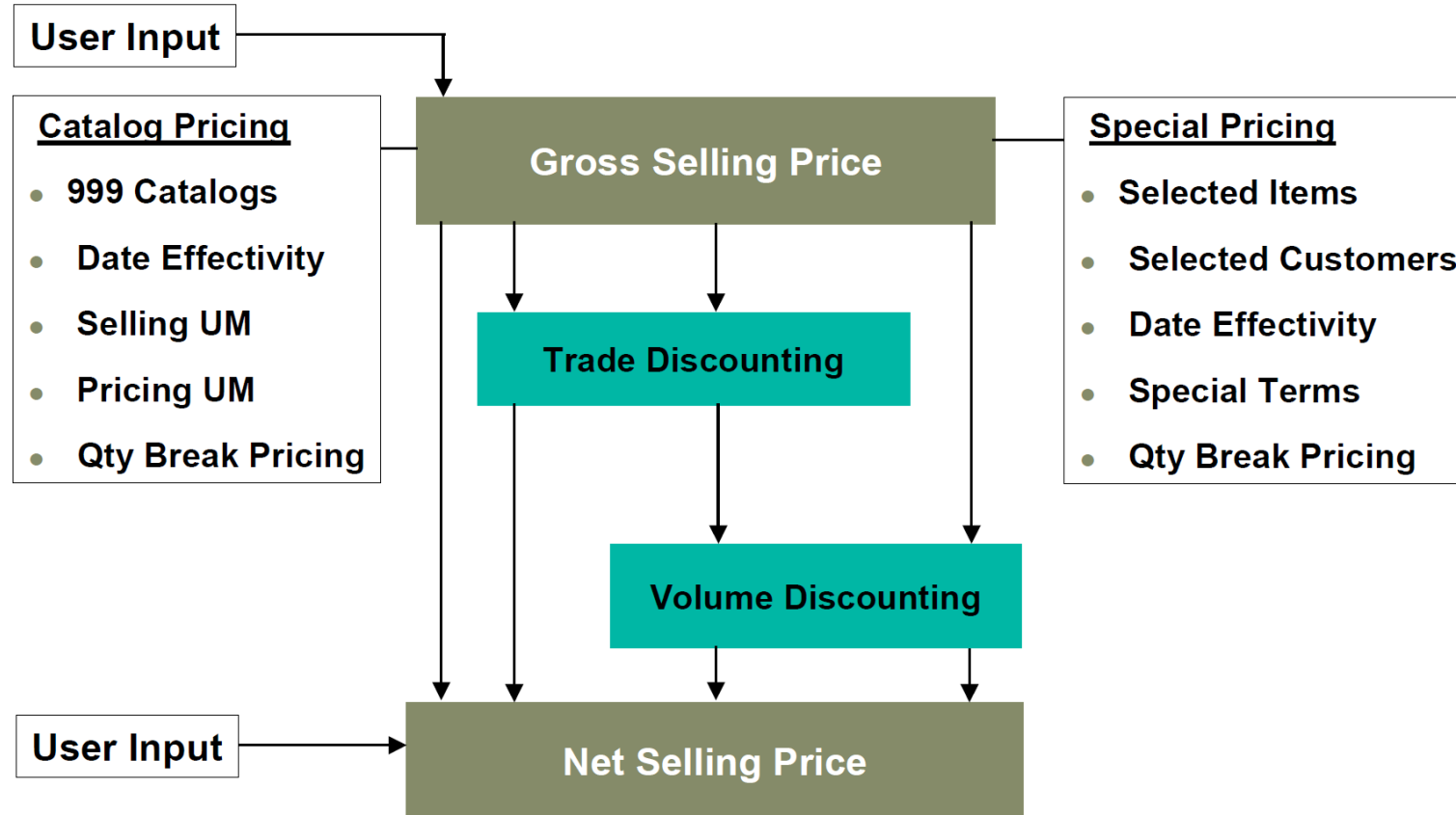
Required Data

✓ ✕ * User roi:JME.MAIN, PID 0010 on localhost 0 Ins



PRICING AND DISCOUNTING INFOGRAPHIC

Pricing and Discounting



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PRICING AUDITS

- SALES.GM.BY.ITEM - standard gross margin reports
- SALES.GM.BY.CUST – gross margin sorted by customer
- SALES.GM.BY.CONTACT – gross margin based on sales order contact
- SALES.GM.BY.PRODUCT – gross margin by sales product code
- SOP.GM.AUDIT – gross margin audits (auditors like this one!)
- SOP.MD.AUDIT – mark-down audits (auditors like this one, too)



PRICE ADDITIONAL PROCESSES

- PRINT.CATALOG.PRICES
- SHOW.SPECIAL.PRICING
- CUSTOMER.PRICING (AS IS application)

• MSO 528S

localhost - roi:JME.MAIN - Manage 2000 - ROI Systems, Inc.

File Edit Commands Scripts Tools Help

Customer Pricing & Product Availability

01 Customer # 1008 General Office Products

02 Product # 215|01 Power Supply, 250 W Entries 1
250 watt switching power supply

UM List Price Dscnt % Cust Price Special Pr Code Special Price
EA Each 32.446 05.00 30.824

Min Order Qty Eff Date

Loc	On Hand	Promised	Avail Use	Alloc/Rsvd	Avail All	
		2	-2	0	0	<input type="checkbox"/> Check Avail
						<input type="checkbox"/> When Avail
						<input type="checkbox"/> SN Avail
						<input type="checkbox"/> ITEMS.LOT
TOTALS	0	2	-2	0	0	

TCL.MGR 21:16 CDT Sun May 12 2024 Epicor Software Corporation Sys M2K81
Pricing for 215|01 and Customer 1008

ward or Page (END, Fn, Bn, Pn) ...

er roi:JME.MAIN, PID 0010 on localhost 0 Ins

Catalog Number	Currency Code	Unit of Measure	Effective Date	From Quantity	List Price	Trade Discount	Volume Discount	Net Price
1		EA	12-30-23	0.000	32.446	1.622	0.000	30.824



HELPFUL DOCUMENTATION

- SOP.DOC
 - PRICING.DISCOUNTING
- DOC.TRAIN
 - SOP.COURSES



NUGM 2024

THANK YOU

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