

Setting Up Price Levels – Version CB2004-05

Step 1

Group your customers by type and give them a level.

Level 1 Plumbers
Level 2 Electricians
Level 3 General Contractors
Level 4 Handyman
And so on.....

You can have up to 12 Levels.

Step 2

Got to Inventory Control and Select **Department Setup**

Department Maintenance

Department Number: 55
Department Name: Hardware

Dept	Description
53	Plumbing
54	Fasteners
55	Hardware

Discount Levels:

Level	Type	Value	Unit
Level 1	Discount	10	%
Level 2	Discount	10	%
Level 3	Margin	20	%
Level 4	Margin	25	%
Level 5	No Discount	0	%
Level 6	No Discount	0	%
Level 7	No Discount	0	%
Level 8	No Discount	0	%
Level 9	No Discount	0	%
Level 10	No Discount	0	%
Level 11	No Discount	0	%
Level 12	No Discount	0	%

Low Expected Retail Margin: 15 %
High Expected Retail Margin: 70 %
 Lock Retail Margin: 0 %

Buttons: Add New Department, Save and Exit, Save, Cancel, Print, Delete, Help

Select the department you want to give a discounts on. In my example I am going to give Level 1 which is Plumbers and I'm going to give them 10% off of retail for all items in the Hardware Department, Level 2, Electricians, get the same. But Level 3 General Contractors they get 20% GPM. Because in hardware I normally make 32% to 45% GPM. But if some of the Hardware have low margins, I don't want take a risk of selling to low. That's why I chose Margin. For Handy Man I gave them Level 4 which is 25% GPM. Other choices are No Discount at all or Mark Up for those that don't know the difference between Mark Up and Margin.

Repeat this in each Department. When I get to the Electrical Dept. I will give deeper discounts to Level 2, Electricians, and smaller ones to Levels 1,3, 4. Electricians deserve a better discount in that department only. I'll do the same for the Plumbing Department for Plumbers.

Step 3

Go to the Customer Maintenance and pull up each customer one at a time and change their Price Level to their according Discount or Price Level.

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Customer Setup

Customer/ Company Name Casey Plumbing, O. V. Date Opened 10/2/1996 AR Code AR Type

Account Number 197 Active Inactive Set Date

Contact Person

Billing Address 1 2405 E. Main

Billing Address 2 P. O. Box 1807

City Uvalde, TX 78802 State Zip

Phone Numbers (Press Insert to add entries)

	Type	Number
1	Main	(830) 278-5365
2	HOME	
3	WORK	

Credit Info Address/Info Iran History Aging Notes Sub Account Re-Billing

Sales Clerk / Rep Debbie Terms Due Net 10 Days Of The Following Month Discount Amount %

Credit Limit 10000 Price Level Level 1 Allow Net Terms Discount

High Charge 66.64 Date of H/C 9/30/2004 Always Print Invoice

Figure Mode Manual Status Open Service Charge Exempt

Sales Tax For Resale PO Number Required

Tax Number State Allow Authorized Signers

E-Mail License On File

Credit Card Exp Date License Type Exp

Add New / Clear

Save and Exit

Save / Add New

Cancel and Exit

Print

Search / Cancel

Delete

Help

Current Database: Y:\CyberBOS 2000 Customers\REAL\Cyberbos.mdb | TOSHIBA BETA: CPB, PLN, TDB

In this example I chose my first customer that does Plumbing. I put him on Level 1. I'll do that until I'm done with all the Plumbers. I will then Pull up all the Electricians and put them on Level 2 and so on.

Step 4

Now you need to go to the items and tell the items to use the Department Discount feature. There are two ways to do that. Fast and Slow. I will show you the slow way first. Go to Inventory Control and pull up an item that you want to give a discount on.

The screenshot shows the 'Inventory Control' window with the following details:

- Stock Number: 150223
- Description: CLC HAMMER HATCHET HOLDER
- Dept. No.: 55 Hardware
- Cost Per Unit: 1.8100
- Retail Price: 3.5900
- GPM%: 49.5822
- Primary Vendor: Handy
- Weight: 0
- Serialized:
- Use Department Discounts:

Qty On Hand	Qty On Hold	Qty On Order	Last Cost	Average Cost	First Cost
2.00	.00	.00	1.8100	1.8100	1.8100

Name	Unit Price	Extended Price	Discount	GPM
Level 1	\$3.2310	\$3.2310	10.0000%	43.9802%
Level 2	\$3.2310	\$3.2310	10.0000%	43.9802%
Level 3	\$2.2625	\$2.2625	36.9777%	20.0000%
Level 4	\$2.4133	\$2.4133	32.7772%	25.0000%
Level 5	0	0	0	0
Level 6	0	0	0	0
Level 7	0	0	0	0

In this example I pulled in an item from the Hardware Department. I checked the box that says “Use Department Discounts” When I did, It pulled in the discount Levels for that item. Now when Plumbers that are on Discount or Price Level 1 buy this Hammer Holder, they will pay \$3.23 versus \$3.59, retail. Unchecking the box will allow you to edit each Level. If you choose to put them back to Retail, simply clear out the boxes, and they will go to 0. Levels with 0 will charge retail.

Now for the quick way. Go to Inventory Control and Select Utilities.

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Windows

Inventory Adjustment

Search By Department: 55 Hardware Search Criteria (description only)

Search By Bin Location:

Search By Vendor: Handy

Search All

	Item Number	Description	Qty OH	Retail	Cost	GPM	Dept	Location	Dept Disc	Active
1	00260010	ROOSTER NAIL APRONS	8	1.80	0.98	45.56%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	00260130	ELECT TOOL PACK #w500	1	23.10	12.68	45.11%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	00640050	hand gun HG1 w4507	1	24.40	14.63	40.04%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	00700100	3/16x3/8x17 WEATHERSTRIP	0	1.30	0.84	35.38%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
5	00700110	1/4 WEATHERSTRIP	0	1.55	1.01	34.84%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	00700130	1/2x3/4x17 OPN CELL FOAM	0	2.15	1.27	40.93%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	00700170	3/8 WEATHERSTRIP	5	1.35	0.77	42.96%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	00700300	DOOR SWEEP	4	3.70	2.17	41.35%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
9	00700430	THRESHOLD HI 3 3/4 WIDE	0	13.25	8.10	38.87%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
10	00700470	THRESHOLD 7/8x3"x3"	3	4.65	2.75	40.86%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
11	00700600	COVE MOULD 96"	4	6.35	4.21	33.70%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>
12	00700670	GARPET R&R	0	2.55	1.48	41.96%	55		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Adjust the GPM / Markup

Alter Profits by a fixed GPM
 Alter Profits by a fixed Markup
 Alter Cost based on a Dollar Amount

Current Database: Y:\CyberBOS 2000 Customers\REAL\Cyberbos.mdb | TOSHIBA BETA: CPB, PLN, TDB

Click on Search By Department, select the Department you want to “Use Department Discount” on. Then click on Search. It will bring all the items in that department, into the grid. If you want to, you can enter a search word to narrow your search. You can use your mouse to click on individual items (Dept Disc) or Click on the “Use Department Discounts” button. That will check all the items to Use Department Discount. Click on save and answer yes to update prices.

Be sure to go to Point Of Sale and test it .