



DDMSPLUS[®]: Customer Price Plans

Updated March 2024

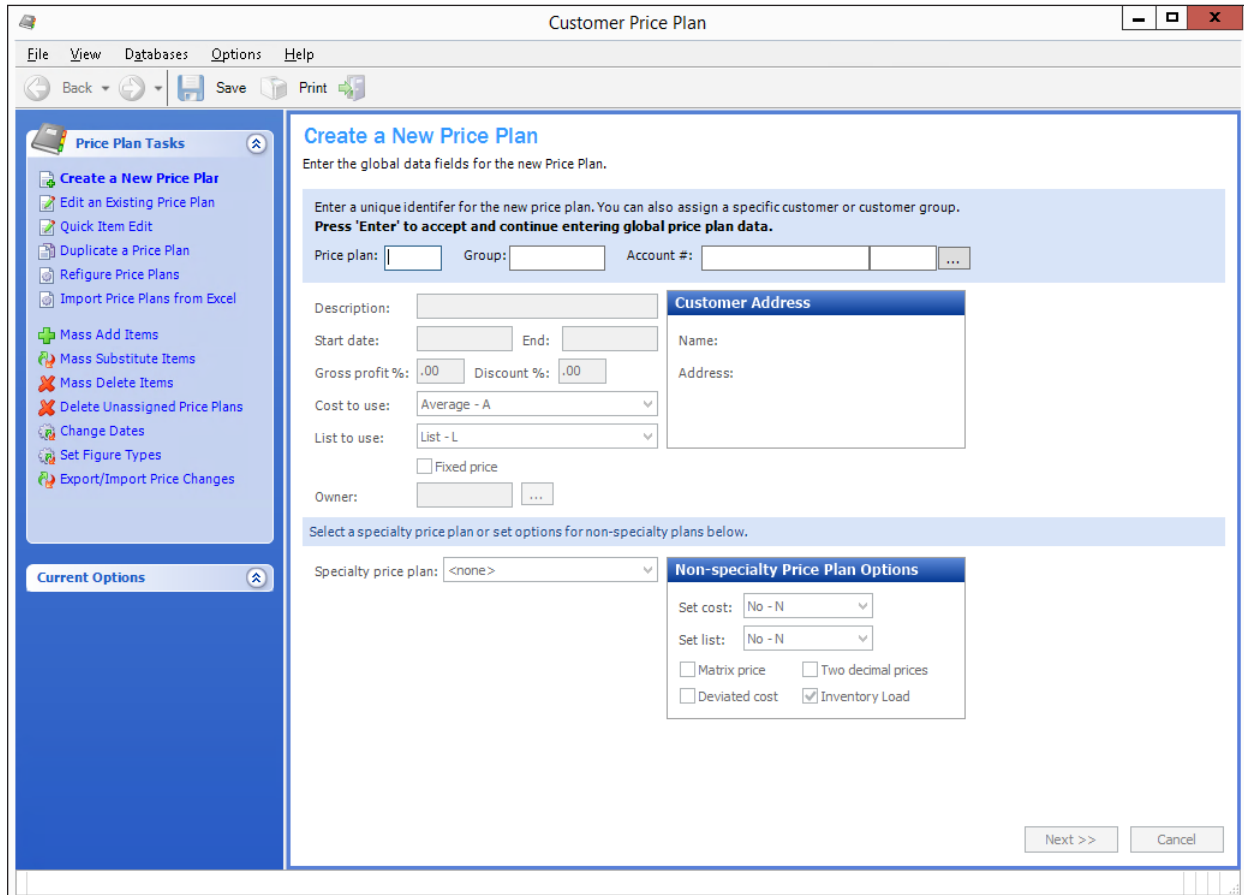


Contents

- About Customer Price Plans 3**
 - Setting Up Customer Price Plan Security 5
 - Using the Customer Price Plan Window..... 5
 - Changing Options on Customer Price Plans 6
 - Changing Viewing Options 6
 - Changing Options..... 7
- Creating a New Price Plan 8**
- Editing Existing Price Plans 10**
 - Saving Price Plan As 12
 - Editing Price Plan Global Data..... 12
 - Customers Using Price Plan..... 13
 - Setting Price Plan Limits 14
 - Deleting Price Plans 16
 - Refiguring Selected Lines 17
 - Resetting Selected Lines 17
 - Changing the Figure Type..... 17
 - Deleting Selected Lines 18
- Using Quick Item Edit..... 18**
- Duplicating Price Plans..... 20**
- Refiguring Price Plans..... 21**
- Importing Price Plans from a Spreadsheet..... 24**
 - Creating Your Spreadsheet..... 24
 - Determining Which Price to Use..... 25
 - Using the Import Function 25
- Mass Adding Items to Price Plans..... 27**
- Mass Substituting Items on Price Plans 28**
- Mass Deleting Items on Price Plans 29**
- Deleting Unassigned Price Plans..... 29**
- Changing Dates on Price Plans..... 30**
- Setting Figure Types 31**
- About Export/Import Price Changes..... 33**
 - Exporting Price Changes 34
 - Importing Price Changes 37
- Printing and Exporting Data on Price Plans..... 38**

About Customer Price Plans

The text-based (ET) Contract Maintenance screen has been reinvented. The Customer Price Plan application allows you to set up price plans for customers. After you add your items, you can place special pricing, or a discount, on an item or group of items. You can assign price plans to customers or customers to price plans.



In Price Plans, you can view usage from your sales history as related to items on price plans for specific items. You can see the following:

- Sales history for your company for a specific customer or for that price plan.
- What customers are buying on this price plan.
- Individual margins on items.
- Items with cost or price changes that affect your gross profit percentage or discount percentage appear in red.
- You can see at a glance when it's time to refigure your pricing plan. The figures are calculated automatically. They display with the original price plan data.
- You can sort the data by column to group items that need to be refigured.
- Quick item edit allows you to edit an item or items on multiple contracts at one time.

You can build what-if scenarios on screen without affecting your current price plans. You can modify costing and pricing on screen to show new pricing percentages while retaining your original pricing. You can undo and refigure until the price plan is the exactly how you need it. It becomes part of your price plan when you click Save.

Customer Price Plans is built on EBS technology. Your information is displayed in an Excel®-style grid with columns that can be fully customized. You can sort data by clicking a column. You can arrange columns as you prefer. Your changes are saved by user login, so your user preferences follow you, regardless of the machine you use.

Note: Before using any EBS program for the first time, you must import your existing data to the SQL database. For details on importing data on the DDMSPLUS® system, see [Using the EBS SQL Import Panel](#).

Price Plans can be exported to a Microsoft® Excel® spreadsheet. You can manipulate pricing as needed then easily import the updated price plan back into your system.

Previously, if you set up price plans allowing special prices for customers for a specified period of time, these prices were changed with each OPUS update. In this case, you had to remember to refigure all those price plans after the update. Another method of providing a special price to a customer for a specified period of time is to use a fixed price plan but again, you had to remember to go back later and change the price when the specified period of time expired. Now, with the Protect Date limit in Price Plans, you simply set up the price plan and select the Protect Date limit for the item. The item cost is set for the specified period of time and you don't have to remember to refigure after updates or change the price after the specified time expires. (When editing customer price plans, the Protect Data column is now visible. If you don't use protect dates, you can hide this column using the Customize Grids function.)

With Advanced Price Plans, customer price plan capabilities are expanded. You can assign a customer or a customer's departmental account as many price plans as needed. You can also assign groups of customers to a price plan number. (This feature uses the Group box in the Customer Master tab.) One of the many advantages of Advanced Price Plans is that it allows you to assign additional price plans to customers without using the Contracts boxes in the Customer Order Entry tab. For more information, see your online help.

Note: The Advanced Price Plans feature is not included in all software packages and may require authorization. For more information, contact ECI Sales.

The Customer Price Plan application has unparalleled printing capabilities. You have complete font control and header text options. You can use your regular network printer. Because it's built on .NET technology, your price plan information is fully portable. You can export your data to Adobe (.pdf), HTML (.htm), text (.txt), Excel (.xls or .xlsx), and rich text (.rtf) formats. You can also save to a C1PrintDocument to use with Reporting.

There are seven types of price plans:

- Sale price plan
- Fixed Price price plan
- Flexible price plan
- Specialty price plan
- Limit price plan
- Restrictive price plan
- Item Groups price plan.



Sale price plans, sometimes called sales flyers, are available to all customers, and they may include flyers that you load from wholesalers and those that you create yourself. To make the other types of price plans available, they must be assigned to the customer.

Item Groups price plan lets you add special groups to a specialty price plan. You can place special pricing on an item or group of items. You can specify a gross profit percentage or discount percentage for the groups of items. Setting this up does not set the price, just the percentage. Item Groups price plan saves only the items and the percent on the price plan. This means no refiguring if the item's price changes — the system automatically uses the current cost or price from the item database. For further information on the other price plans listed above, see your online help.

Setting Up Customer Price Plan Security

You can restrict who can edit price plans by setting passwords. Any passwords you had previously set up in the (LE1) Inventory Parameters (Con't) screen "ET" Passwords fields apply as well as two graphical parameters.



1. From the Main Menu, double-click  Keyop Menu, then double-click  Parameters.
2. From the Parameter Editor window, double-click Customer Price Plan then select General Configuration.
3. The Price Plans Inquiry Password box works with the Price Plans Update Password box. If you need to restrict some users to viewing only, enter a unique password in each box. When opening Customer Price Plans, you are prompted to enter either the inquire or edit password. Entering the inquire password (from this box) allows you to view price plans.
4. In the Price Plans Update Password box, enter a password to restrict who can update and create price plans. You are prompted for this password when opening Customer Price Plans.

Note: If you enter the Inquiry password, the only functions available to the user are viewing existing price plans and viewing customers using price plans. You can also set limits on which price plans to view.

5. When finished, click  to save your changes.

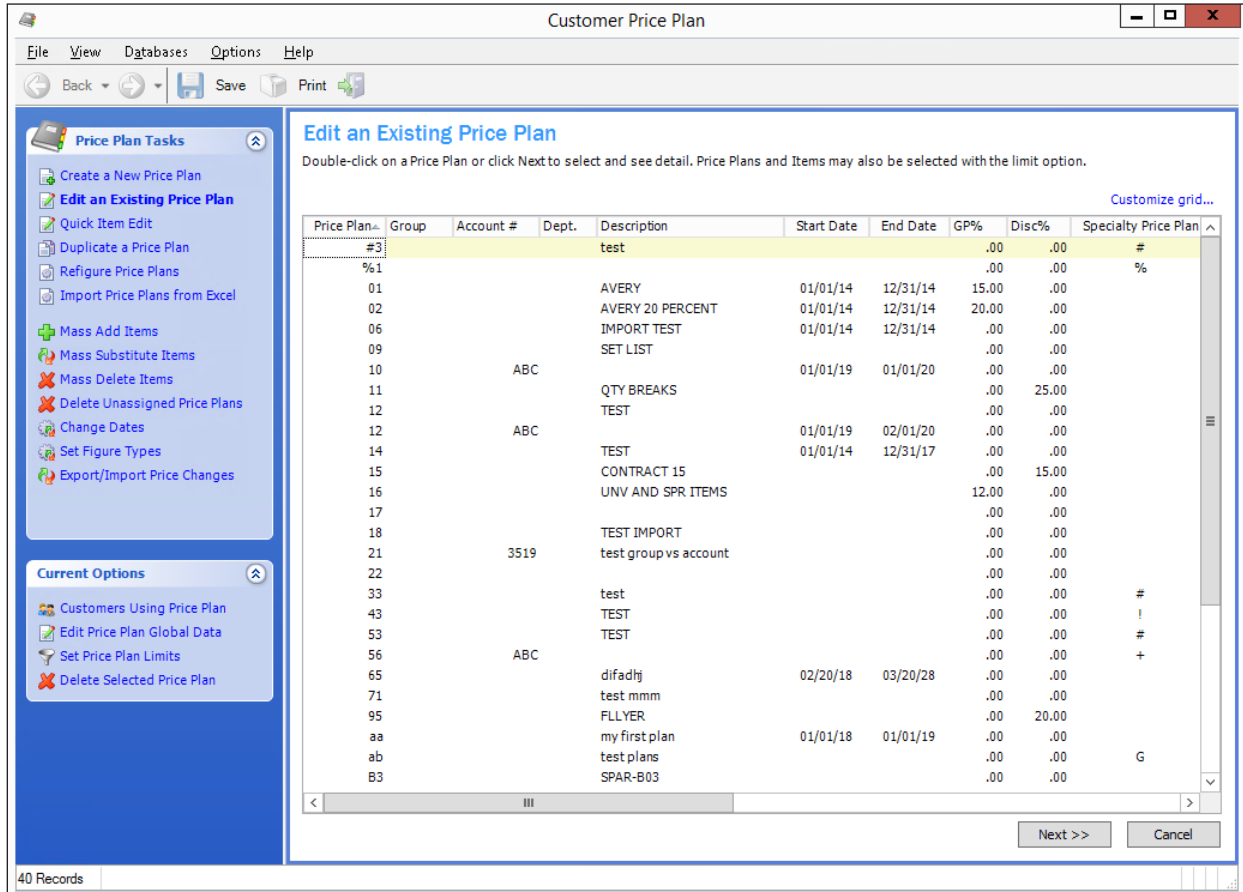
Using the Customer Price Plan Window

You use this window to view, edit, create, delete, and refigure price plans. You can also mass add items, duplicate price plans, mass substitute items, mass delete items, delete unassigned price plans, reset dates and figure types, and view assigned customers.

In this window, you can customize grids. You can sort by column, move columns, and set limits for viewing. You can make changes to single lines or groups of lines by right-clicking and choosing an option. When making changes in this window, changes are not saved until you click Save.

There are also several columns that allow you to view the original information for the lines you are changing. To do this, click Customize Grids. Select the columns to display and click OK.

When editing price plans, you can view the Original columns on the far right-hand side of the window. As you work in this window and make changes, you can scroll over to these columns to see what the original data was before you changed it. You can view original gross profit percent, original discount percent, and original price.



The Quick Item Edit feature allows you to quickly locate an item and view item detail for that item on every price plan. You can then quickly and easily make changes to that item.

When viewing price plans, you can limit by plan detail and/or item, change view options, and print or export data.

You can create price plans in Excel and then import them into the system.

You can also export price plan changes to an Excel spreadsheet, manipulate the pricing, and then import them back into the system.

Remember, no changes are saved until you click Save.

Changing Options on Customer Price Plans

You can change the information to view as well as other options.

Changing Viewing Options

You can use the Databases menu to quickly view the customer or item databases. For example, to view a customer, click Databases then select Customer. The Customer Master tab opens.

From the View menu, you can set limits for viewing. These viewing options allow you to display different types of information. To change view options, click View in the main menu at the top of the window. Your viewing choices include: Only Modified Lines, Only Lowered Prices, Vendor Price and Cost, and Vendor Cost Plan Cost (vendor contracts).

- Selecting Only Modified Lines and Only Lowered Prices allows you to only view those items that meet this criteria. Click the option to view. To not view these options, click each one to clear.
- If you select Vendor Price and Cost and Vendor Cost Plan Cost, this information is displayed at the bottom of the Edit window. Click the option to view. To not view these options, click each one to clear.
- You can also set limits for viewing by clicking Set Price Plan Limits. For more information on setting limits, refer to the heading **Setting Price Plan Limits**.

If you make a change, the new information appears in bold. You can change your view simply by clicking on the heading at the top of the grid and the information re-sorts. A small arrow appears next to the heading so that you know which view you are using.

When viewing information, be sure to look at the bottom portion of the window. More information is shown here, for example, the number of records currently displayed.

Changing Options

You can also change options. Click Options in the menu at the top of the window.

- **Save Price Changes to CHANGES File:** Click this option to save changes made here to the CHANGES file. This option works with the Prompt to Save Price Changes field in the (LE1) Inventory Parameters screen. If you have the Prompt to Save Price Changes field set to Y, you can check the Save Price Changes to CHANGES File option here to save price changes to the CHANGES file. If this parameter is set to X, the option is not available because the user cannot change it. The system automatically saves the changes. If you have the Prompt to Save Price Changes field set to N, you cannot use this option here.
- **Set Item Usage Parameters:** Click this option to view item usage totals. Click Show Usage Totals then set how many weeks for which to show usage totals. Selecting Show Usage Totals lets you include this data in your exported spreadsheet. In the Evaluate Usage Totals Across drop down box, you can select Company or Price Plan. Select Company to view item usage totals by company. Select Price Plan to view item usage totals within the selected price plan.

Set Item Usage Parameters

Set Item Usage Parameters and click OK to apply.

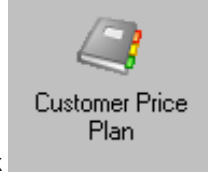
Show usage totals

Show usage totals for the last weeks

Evaluate usagetotals across Company

Creating a New Price Plan

If you have a price plan already created that is similar, you can create a new customer price plan quickly and easily when editing price plans. For more information, see the heading **Editing Customer Price Plans**.




1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.


2. In the Customer Price Plan window, click Create a New Price Plan.
3. The Create a New Price Plan window opens. In the Price Plan box, enter a two-digit alphanumeric identifier for the new price plan. (If you are not authorized for Advanced Price Plans, press Enter and go to **Step 6**. You must press Enter to move to the Description box.)

Note: When creating price plans, you may not see some of the boxes listed here. If you are not authorized for Advanced Price Plans, some of these boxes do not appear. For more information, contact ECI sales.

4. If you are using the Advanced Price Plans feature, you can assign this price plan to a customer. You can do this by entering a group code in the Group box or by selecting a customer account number. If you enter a group, press Enter to move to the Description box and go to **Step 6**. (You must press Enter to move to the Description box.)
5. If you are using the Advanced Price Plans feature, you can enter an account number in the Account # box to assign this price plan to a customer. In this box, enter the account number or click  to query. (If you entered a group in the Group box, you cannot enter an account number.) The account number displays in the first box and the department, if any, in the second box. Press Enter. (You must press Enter to move to the Description box.)
6. In the Description box, enter a description for the new price plan. Press Tab.
7. Use the Start Date/End boxes to enter starting and ending dates to apply to this price plan. (If you don't enter an ending date, the price plan never expires.) To make the price plan open-ended, leave these boxes blank. (Do not enter 99/99/99.) Press Tab.
8. In the Gross Profit % box, enter the gross profit percent for the new price plan, or in the Discount % box, enter the discount percent for the new price plan. You do not have to enter the decimal point. For example, to enter ten percent, type 10 and press Tab.
9. Use the drop down arrows in the Cost to Use and List to Use boxes to select the cost or list for this price plan.

10. To set up this price plan with a fixed price, click the Fixed Price box.

If you do not click this box, you create a flexible price plan.

11. Use the Owner box to specify the owner of this price plan, if needed. You can enter the User number or click  to query. This is an optional step; however, you can use this number as a limit when searching for price plans.

If you are creating a non-specialty price plan, go to **Step 13**.

12. You can create specialty price plans. Use the drop down arrow in the Specialty Price Plan box to select options for a specialty price plan and click Next. Go to **Step 15**.

13. If you are creating a non-specialty price plan, you can set cost, set list, select matrix price plan, or use two decimal prices, if applicable. Use the Set Cost or Set List drop down boxes to set cost or list.

To create a matrix price plan, click the Matrix Price check box.

To limit pricing to two decimal places, click the Two Decimal Prices check box.

To set deviated cost, click the Deviated Cost box.

Note: You must be authorized to use deviated cost. The deviated cost feature allows you to set the cost of an item so that the actual cost and the pricing cost are the same when purchased using this price plan. On sales orders, this line item is defined as a rebate item. When you select Deviated Cost, the Set Price box is automatically set to Y. Deviated cost can also be set on Customer Cost Plans. For more information, refer to [Customer Cost Plan](#) or [Using Deviated Cost](#) on the Customer Support Center or your online help.

To set loaded cost, click the Inventory Load box.

Note: You must be authorized to use loaded cost. The loaded cost feature allows you to use the loaded cost that you set up in the Inventory Load Costs Percent window on this price plan. For more information, refer to [Setting Up Inventory Loaded Costs](#) on the Customer Support Center.

14. When finished, click Next.

15. You can add items to the price plan or compare costs.


- To add items, click the Item Number box and type the item number to add to the price plan. You can enter part or all of the number and press Enter. A query box opens. Select the item and press Enter. (You can also query by description. Enter part or all of the description in the Description box and press Enter.) If you select an item with an alternate, go to **Step 16**.

If you are creating a specialty price plan, you can select information as needed. For example, if you selected Item Groups, you can retrieve items by the item number. If you selected Assort Code, you can enter assort codes.

- To view the Comparison Cost and List boxes, go to **Step 17**.
- To continue adding items, go to **Step 18**.

16. If you selected an item with an alternate, the Alternate Items dialog box opens, displaying the original item and the alternate. Select which item to use by clicking it. Then, click Apply.

- To view the Comparison Cost and List boxes, go to **Step 17**.

- To continue adding items, go to **Step 18**.
17. You can use the Comparison Cost and Comparison List boxes to view how different costs affect margins. Once you select the comparison cost and list to view, click Process. This lets you view a recalculation of the actual gross percentage and discount values based on the selected comparison cost and list types. (This recalculation allows for real time evaluation of applying different cost/list types.)
If you selected the option to set item usage totals, you can view item usage totals by specific customer. If you select a customer, you can view the sum of all usage records matching that item and the ten character account number, for example, the sum across departments and price plans.
 - 17.1 Select the customer as you normally would. You can type the account number or click  to query.
 - 17.2 You can use the drop down arrow in the second box to select a department for this customer.
 - 17.3 Click Refresh Usage Totals.
 - 17.4 When you finish viewing comparisons, go back to **Step 15** to add items to your price plan.
 18. Change the item information as needed. For example, if you have the Allow Contract Dates by Line field in the (LE1) screen set to Y, you can set start and end dates for each individual line item.
 19. Continue adding items on the price plan. Press Enter to move to a new line.
 20. When finished adding items, click Save. (To not save changes, click Cancel.)

Editing Existing Price Plans

In addition to creating price plans, you can edit and view price plans.

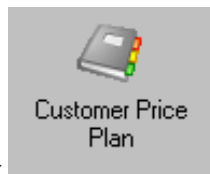
When viewing price plans, you can limit by plan and/or item, change view options, and print or export data.

When editing price plans, several options are available to you. You can edit price plan global data, set price plan detail limits, refigure selected lines, reset selected lines, delete selected lines, and change the figure type. You can also use the Customers Using Price Plan function. All of these options are explained in the following headings.

You can also view original data. The Original columns are on the far right-hand side of the window. As you work in this window and make changes, you can scroll over to these columns to see what the original data was before you changed it. You can view original gross profit percent, original discount percent, and original price. If you do not see these columns, click Customize Grids. When the Grid Column Selection dialog box opens, select the columns to display. Click Apply then OK.

You can create a new customer price plan quickly and easily when editing price plans. To do this, simply select the price plan on which to base the new price plan, make the changes, then click Save As.

Remember, when editing price plans, no changes are saved until you click Save.



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. In the Customer Price Plan window, click Edit an Existing Price Plan.
3. In this window, you can select a price plan to edit. You can edit global data, customers using price plan, set price plan limits, or delete the selected price plan.


You can select a price plan in several different ways.

- Select the price plan to edit by highlighting it.
 - Click the Price Plan column heading to re-sort the price plans then highlight the price plan.
 - Type the first letter or number of the price plan to select then highlight it.
4. To make changes to the selected plan, click Next.
 5. In this window, you can view, edit, or add new line items to the price plan. You can refigure a selected line, reset a selected line, change figure type, or delete a selected line using the Current Options or by right-clicking an item. You can also copy items or select to copy all items and paste to a spreadsheet. To do this, right-click an item and select Copy All Items or Copy Selected Items. Then you can open an Excel spreadsheet, right-click and paste.
 - To add an item, click the Item Number box. Type the item number and press Enter. Highlight the item to select and press Enter. You can now make changes to the item, as needed. Press Enter to save the changes to this item. After you make a change, the new information appears in bold. When finished making changes to the price plan, go to **Step 7**.
 - To change an existing item on the price plan, highlight the line item to change. Enter the new information over the old information and press Enter. For example, if you have the Allow Contract Dates by Line field in the (LE1) screen set to Y, you can set start and end dates for each individual line item. After you make a change, the new information appears in bold. Also, you can use the View options menu to view only modified lines, and so on. When finished making changes to the price plan, go to **Step 7**.

When making changes to a price plan, you can also enter a protect date for the price plan. Enter the date in the Protect Date box. However, if you load price plans from an external source (such as OPUS), this information will be overwritten. (The Protect Price Date is also available as a limit.)

 - To view comparison costs, go to **Step 6**.
 - When finished making changes, go to **Step 7**.
 6. You can use the Comparison Cost and Comparison List boxes to view how different costs affect margins. Once you select the comparison cost and list to view, click Process. This lets you view a recalculation of the actual gross percentage and discount values based on the selected comparison cost and list types. (This recalculation allows for realtime evaluation of applying different cost/list types.)

If you selected the option to set item usage totals, you can view item usage totals by specific customer. If you select a customer, you can view the sum of all usage records matching that item and the ten character account number, for example, the sum across departments and price plans.

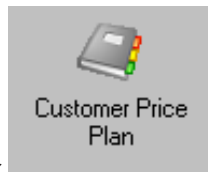
- 6.1 Select the customer as you normally would. You can type the account number or click  to query.
 - 6.2 You can use the drop down arrow in the second box to select a department for this customer.
 - 6.3 Click Refresh Usage Totals.
 - 6.4 When you finish viewing comparisons, go to **Step 7**.
7. To save the changes, click Save. To save the current price plan to a new price plan, click Save As and go to the heading **Saving Price Plan As**.

Saving Price Plan As

After editing a price plan, you can save the current price plan to a new price plan.

1. When you finish making edits, click Save As.
2. The Save Price Plan As window opens. The boxes in this window are the same as when creating a new price plan. For more information, refer back to the heading **Creating Customer Price Plans**.
3. When you finish making changes in this window, click Save.

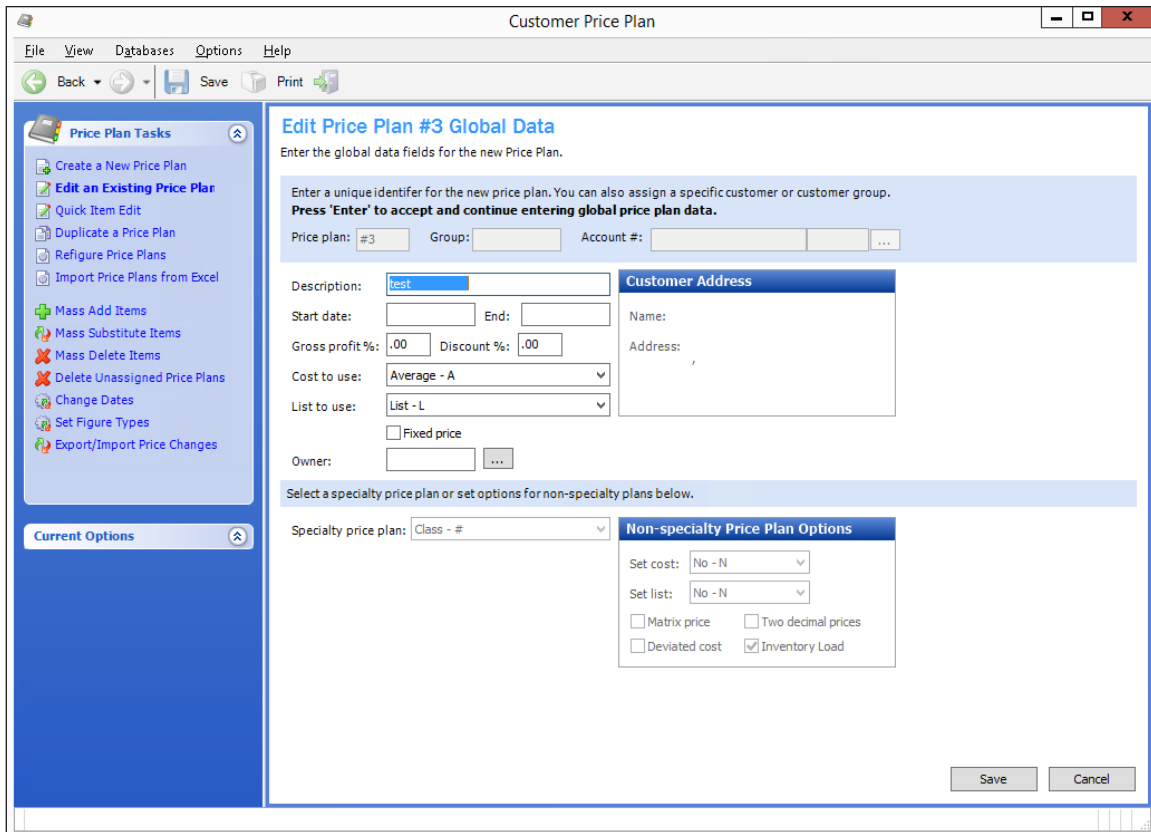
Editing Price Plan Global Data



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

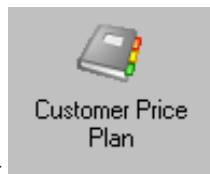
2. Select a price plan to edit. You can select a price plan in several different ways.
 - Select the price plan to edit by highlighting it.
 - Click the Price Plan column heading to re-sort the price plans then highlight the price plan.
 - Type the first letter or number of the price plan to select then highlight it.
3. Under the Current Options menu, click Edit Price Plan Global Data.



4. You can change the following information globally: description, start end/date, gross profit %, discount %, cost to use, list to use, fixed price, and non-specialty price plan options. For further information on these boxes, refer back to the heading **Creating Customer Price Plans**.
5. Click Save.

Customers Using Price Plan

You can use this function to view which customers are assigned to a particular price plan. (This function is only available when editing a price plan, duplicating a price plan, or mass adding items to a price plan.) You can also substitute a price plan or delete a price plan in this window. When substituting plans, you can also make changes to the plan. Deleting a price plan simply removes it from the customer; it does not delete the price plan from the system.



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

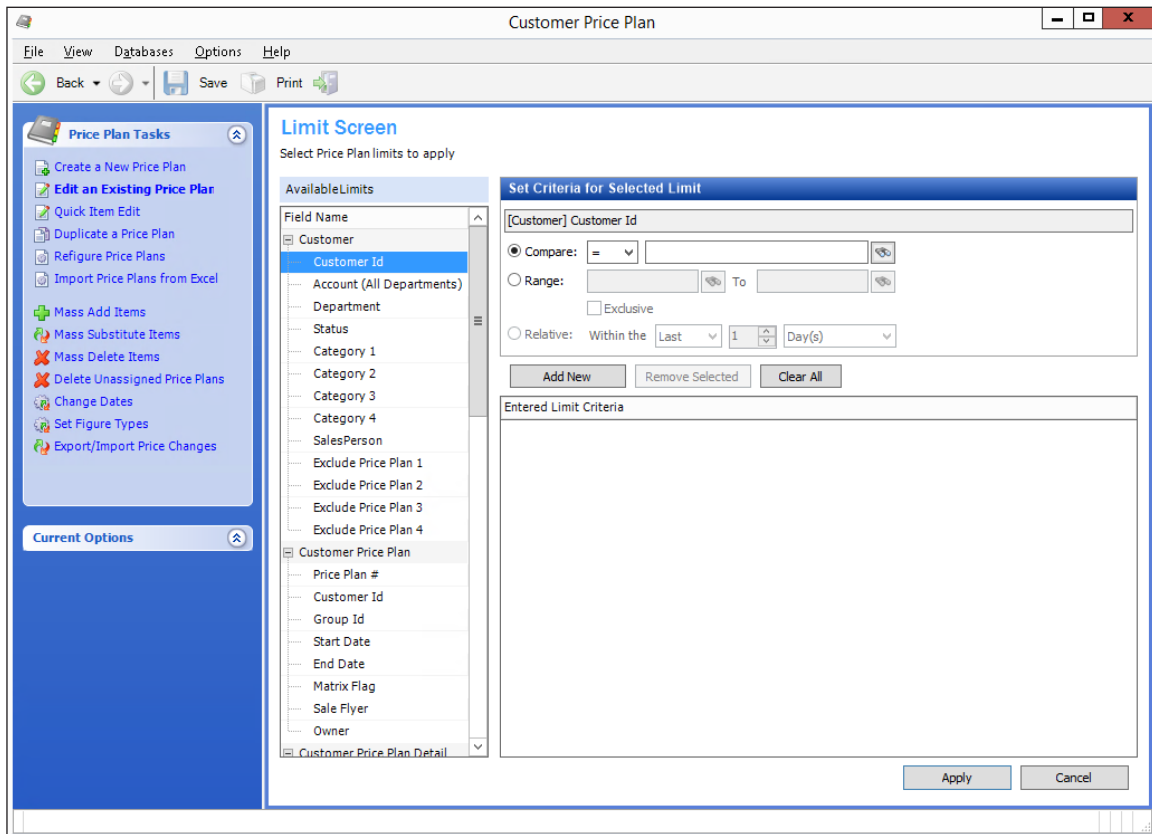
2. In the Current Options menu, click Customers Using Price Plan.
 3. Enter the price plan to view customers for in the Current Price Plan box and press Enter.
-

Note: You can also start by selecting the price plan to view then select Customers Using Price Plan.

4. Customer information displays. You can substitute a price plan or delete a price plan in this window. When substituting price plans, you can manually change the plan.
 - To substitute the price plan, click Substitute Price Plan. Enter the price plan to substitute in the New Price Plan With box. Click OK. (The price plan substitution applies to all customers shown in this window.)
 - To delete the price plan, click Delete Price Plan. (This function does not delete the price plan, it simply removes the price plan from this customer.)
5. Click OK. You are prompted to save your changes. Click Save to save your changes or click Cancel to exit without saving.

Setting Price Plan Limits

1. In the Edit an Existing Price Plan window, click Set Price Plan Detail Limits (or Set Price Plan Limits) under Current Options menu. The Limit Screen window opens.
2. Set limits in the Limit Screen window. Use this window to set up filters or limits. The boxes in this window are case sensitive. To see all the filters, click + (plus sign) in front of the field name.
Click the field name, then set the criteria for that filter. For example, to limit by a price plan number, click + (plus sign) next to Customer Price Plan. Then, click Price Plan #.





- 2.1 Use the Compare boxes to specify whether to limit by numbers that are greater than, less than, or equal to the numbers entered in these boxes. For example, if you limit by year-to-date sales, you would click Compare, then specify whether to limit by sales greater than, less than, or equal to by using the drop down arrow. Then, enter the number in the last box.

Use the following table to determine which symbol to use:

=	Equal to
<>	Not equal
>	Greater than
>=	Greater than or equal
<	Less than
<=	Less than or equal
Like	Anything that matches the entered limit

When entering limits and using the Like option, the limit search returns anything that matches what you entered. For example, if you selected to search for Pen, the search returns results such as pen, pencil, open and so on.

- 2.2 Use the Range/To boxes to enter a range of numbers, such as vendor or item numbers. Enter the beginning of the range in the Range box and the ending number in the range in the To box.

When using the Compare and Range boxes, you can also browse by clicking . For example, if you are limiting to customer account number, select Customer, then Account. Click  and the Customer Lookup dialog box opens. When using the Customer Lookup dialog box, you can search by typing in any of the provided columns. To search by two columns, type the information in each column then press Enter. Search information is sorted from left to right. For example, if you enter information in the Department box and the Name box, information is sorted by department first. To start another query and only sort by name, clear the Department box and press Enter. Once you've selected the customer to use, click Accept.

- 2.3 The Exclusive check box works with the Range/To boxes. After entering a range, click Exclusive to limit by numbers outside of the range you set.

Note: The Sales Flyer limit only lets you exclude sales flyers. You cannot include sales flyers.

- 2.4 The Relative boxes allow you to set limits by day, weeks, months, and years. For example, to limit by price plan start date, click Relative. In the Within The box, use the drop down arrow to select Last, Next or Current. In the corresponding two boxes, you can enter a number for days, weeks, months, and years. Enter a number in the first box or use the arrows to enter a number. Then use the drop down arrow in the second box to select days, weeks, months, and years.

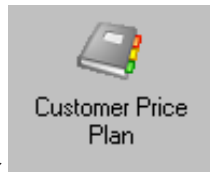
3. As you select the criteria to use:

- Click Add New to apply it.
- To remove a limit, highlight it and click Remove Selected.
- To remove all limits, click Clear All.
- To exit the Limit window, click Cancel.

4. When finished setting up limits, click Apply or Next. After you set limits, refer to the heading of the task you are doing, such as **Duplicating Customer Price Plans** or **Refiguring Customer Price Plans**.

Deleting Price Plans

You can delete price plans. However, deleting the price plan does not remove the price plan from the customer. To remove the price plan from the customer, you must go to the Customer database (Order Entry tab) and remove the price plan number from the Contracts boxes. (This is an optional step.)



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. In the Customer Price Plan window, click Edit an Existing Price Plan.
3. Select the price plan to delete. You can select a price plan in several different ways.
 - Select the price plan to edit by highlighting it.
 - Click the Price Plan column heading to re-sort the price plans then highlight the price plan.
 - Type the first letter or number of the price plan to select then highlight it.
4. Under the Current Options menu, click Delete Selected Price Plan.
5. The Delete Customer Price Plan warning message displays. To delete the plan, click OK. To not delete the plan, click Cancel.

Refiguring Selected Lines

When editing a price plan, you can refigure selected lines, reset selected lines, delete selected lines, and change figure types. Refiguring selected lines lets you update lines when costs and prices change. Refiguring calculates new values, such as gross profit or discount, based on the line's figure type (when cost or list has changed).

1. From the Edit an Existing Price Plan window, select the price plan to edit. Click Next.
2. Click the line to refigure.
3. Click Refigure Selected Lines.
4. Make the changes to the line, as needed. You can change as many lines as you need.
5. When you finish, click Save. To save the current price plan to a new price plan, click Save As and go back to the heading **Saving Price Plan As**.

Resetting Selected Lines

When editing a price plan, you can refigure selected lines, reset selected lines, delete selected lines, and change figure types. Resetting a selected line lets you make changes to the line and then reset it back to the original information.

1. After selecting the price plan to edit, click the line to which to make changes. When you are finished making changes, you can reset the line.
2. From the Current Options menu, click Reset Selected Line.
3. When you finish, click Save. To save the current price plan to a new price plan, click Save As and go back to the heading **Saving Price Plan As**.

Changing the Figure Type

When editing a price plan, you can refigure selected lines, reset selected lines, delete selected lines, and change figure types. The figure type for a price plan item determines the default method used to refigure that item. Refiguring is used to update price plans when costs and prices change.

Note: The figure type is the pricing method you specify when you create a contract: gross profit (G) , discount (%) or specified price (\$).The system uses the figure type to calculate the remaining two price fields. Suppose you specified a discount of 10 percent for a contract. This discount is the figure type (D). The system takes 10 percent from the list price to determine the contract price, and also calculates the gross profit based on this discounted price.

1. After selecting the price plan to edit, highlight the line to change then click Change Figure Type.
2. The Set Figure Type dialog box opens. Click the figure type: gross profit percent, discount percent, or price.
3. Click OK to accept or Cancel to not change the figure type.
4. When you finish, click Save. To save the current price plan to a new price plan, click Save As and go back to the heading **Saving Price Plan As**.

Deleting Selected Lines

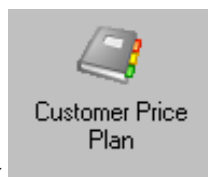
When editing a price plan, you can refigure selected lines, reset selected lines, delete selected lines, and change figure types. When deleting lines, you can delete one line or multiple lines.

1. After selecting the price plan to edit, highlight the line by clicking it or select a group of lines by clicking the first line to delete then holding down the Shift key and clicking the last line to delete. Or you can hold down the Ctrl key and select multiple non-sequential lines to delete.
2. Click Delete Selected Lines.
3. The line is automatically deleted. To save the price plan, click Save. To discard your changes, click Cancel. To save the current price plan to a new price plan, click Save As and go back to the heading **Saving Price Plan As**.

Using Quick Item Edit

Quick Item Edit lets you quickly locate an item and view item detail for that item on every price plan. You can then quickly and easily make changes to that item.

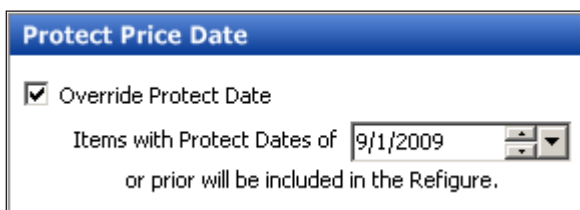
Once you select the item to view, the system displays all the price plans on which that item appears. You can then change one item on one price plan or change that one item on all price plans. After selecting an item or items, you can set a new price plan price, increase the selected items by percent, increase all prices by a dollar amount, refigure, reset selected lines, change figure type, or delete selected items. If you set a new price plan price for the item, you can then set the figure type or recalculate the percentage.



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK..

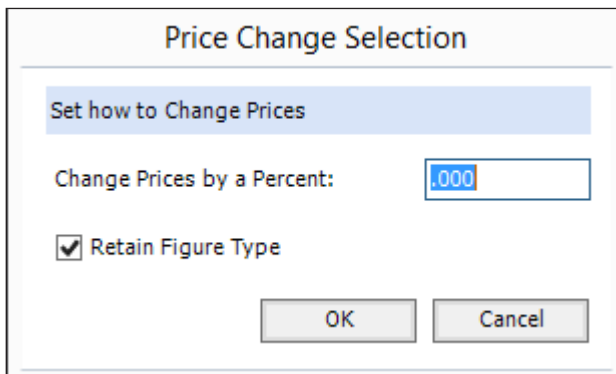
2. In the Customer Price Plan window, click Quick Item Edit.
3. You can select your item by SKU number, MAC code, description, unit, vendor information, catalog page or price. You can also select to override the protect date, if needed.
 - 3.1 Enter the item information and press Enter. (To start a new query, click Cancel and enter the information again.)
 - 3.2 Highlight the item to use. If you do not need to use the protect date feature, click Next and go to **Step 4**.
 - 3.3 To override the protect date for this item, click Override Protect Date.
 - 3.4 Use the drop down arrows in the Items with Protect Dates Of box to select a date. Items that fall in the range selected here are included in the Item Edit list. Click Next.



4. In this window, you can see the price plans for the selected item. (If you selected an item that is not on a price plan, a message stating such appears at the top of this window. Click Cancel to return to the Quick Item Edit window to select another item.)

You can select to change the item on all price plans or just change one. Once you have selected an item, you can change prices by percent, by amount, refigure selected lines, reset by selected lines, change figure types, and delete selected lines. To do this, you can right-click the item or items and select the function or select from the Current Options Menu.

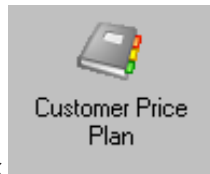
If you select to change price by a percent or dollar amount, the Price Change Selection dialog box opens.



- Click Change Prices by Percent. In the Price Change Selection dialog box, enter the percent in the Change Prices by a Percent box. For example, to up the price by ten percent, type 10.0. Go to **Step 5**.

- Click Change Prices to an Amount. In the Price Change Selection dialog box, enter the amount in the Change Prices to a Dollar Amount box. This lets you set a specific price for the item. Enter the price. Go to **Step 5**.
 - Click Change Prices by an Amount. In the Price Change Selection dialog box, enter the amount in the Change Prices by a Dollar Amount box. This lets you add or subtract by a specific dollar amount. For example, if the price of an item is \$10.00 and you need the price to be \$9.00, you enter -1.00. Go to **Step 5**.
5. The Retain Figure Type box defaults to checked. This means that no matter how you change this item, the figure type is retained on the price plan. For example, when you created a price plan with this item, you set the price by gross profit percentage (GP%). This sets the figure type to G. Using quick item edit, you changed the price of the item by a percent and left the figure type as is. The figure type is still set to G. Leaving this box selected means that when you are refiguring a price plan in the future, the system uses the new calculated percentage. In most cases, you should leave this box checked.
 6. Click OK to save changes. To discard your changes, click Cancel.
 7. If you are finished making changes in the Quick Item Edit window, click Save.
 8. You must confirm your changes. To make the changes, click Yes at the Save Changes Made to Price Plans message.

Duplicating Price Plans



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Duplicate a Price Plan.
3. Select the price plan (source) to duplicate. You can select a price plan in several different ways.
 - Select the price plan to edit by highlighting it.
 - Click the Price Plan column heading to re-sort the price plans then highlight the price plan.
 - Type the first letter or number of the price plan to select then highlight it.
4. Click Next.
5. You can create a new price plan or select an existing price plan to duplicate.
 - To create a new plan, click Create New Price Plan under the Current Options menu on the left hand side of the window. Refer back to the instructions under the heading **Creating Customer Price Plans**.

- To duplicate an existing plan, highlight the plan and go to **Step 6**.
6. Click Next.
 7. The Customer Price Plan Limit Screen window opens. You can set new limits or use the ones that are already set in the plan you are duplicating. For more information on setting limits, refer back to the heading **Setting Price Plan Limits**.
 8. After setting limits, click Next.
 9. Next, you can change line items of the plan you are duplicating.

To make changes, highlight the line to change or use the query box to retrieve an item to add.

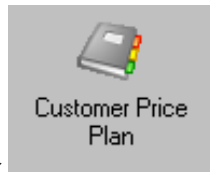
Any changes made to the price plan appear in bold.

You can use the Comparison Cost and Comparison List boxes to view how different costs affect margins. Once you select the comparison cost and list to view, click Process. This lets you view a recalculation of the actual gross percentage and discount values based on the selected comparison cost and list types. (This recalculation allows for real time evaluation of applying different cost/list types.)

10. When finished, click Save.

Refiguring Price Plans

Refiguring lets you update price plans when costs and prices change. Refiguring lets you calculate new values, such as gross profit or discount, based on the line's figure type (when cost or list has changed). You can refigure a single line or multiple lines based on the original price plan instead of refiguring the entire price plan. This section explains how to refigure an entire price plan. To refigure only selected lines, refer back to the heading **Refiguring Selected Lines**.



1. From the Main Menu, double-click

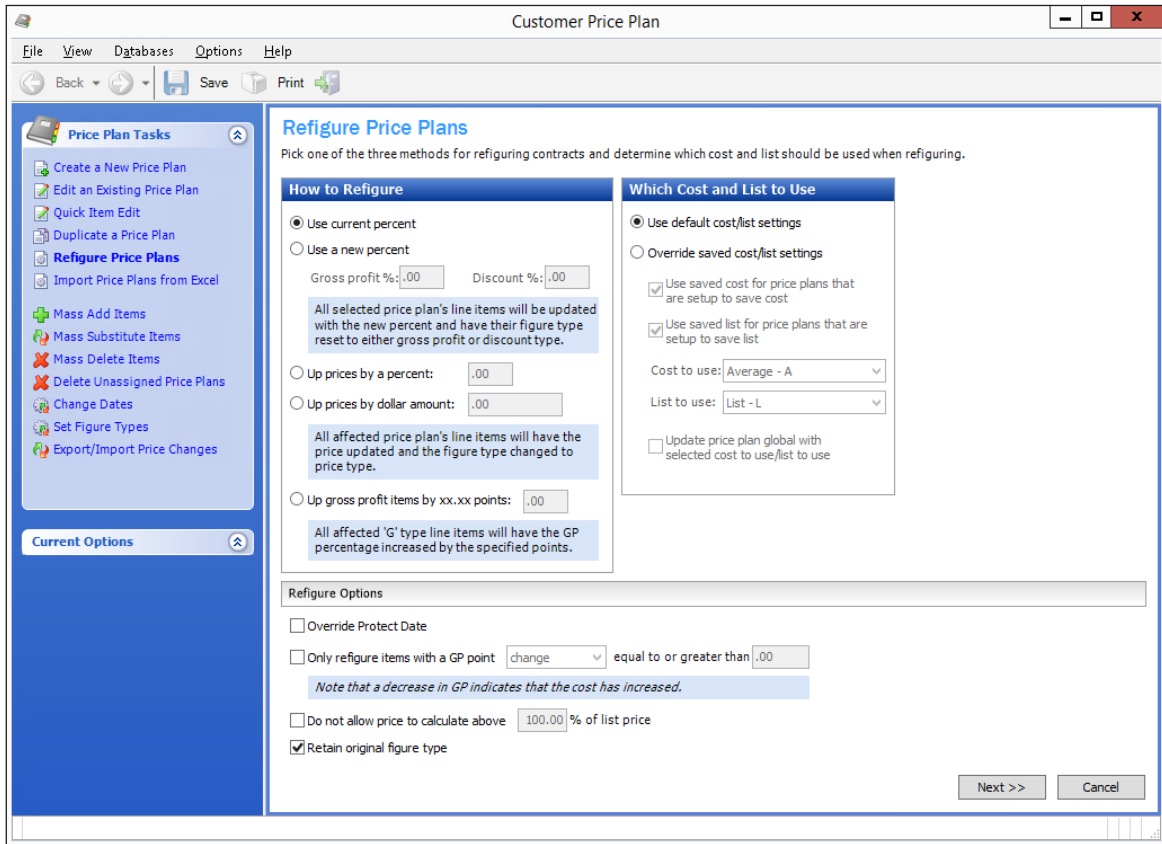
Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Refigure Price Plans.
3. Decide how to refigure, then decide which cost and list to use.
 - To use the current percent, click Use Current Percent.
 - To use a new percent, click Use a New Percent. Then enter the Gross Profit % or the Discount %. This updates all of the selected price plan's line items with the new percent and resets the figure type to either gross profit or discount percent.

- To increase the price by a percentage, click Up Prices by a Percent. Then, enter the percent in the corresponding box. All of the line items on the price plan have the updated price, and the figure type is changed to the dollar type.

Note: When entering a percent, you do not have to enter the decimal point. For example, to enter ten percent, type 10 and press Tab.

- To increase the price by a dollar amount, click Up Prices by Dollar Amount. Then, enter the dollar amount in the corresponding box. All of the line items on the price plan have the updated price and the figure type is changed to the dollar (\$) type.
 - Click the Up Gross Profit Items By xx.xx Points button for all of the G type line items to have the gross profit percentage increased by the specified points. Then enter the point percentage in the corresponding box. (Be sure to enter the decimal point.)
4. In the Which Cost and List to Use box, you can select Use Default Cost/List Settings or Override Saved Cost/List Settings.
- To select default cost or list settings, click Use Default Cost/List Settings.
 - To override saved cost or list settings, click Override Saved Cost/List Settings. You can make one of the following choices: Use Saved Cost for Price Plans That Are Setup to Save Cost or Use Saved List for Price Plans That Are Setup to Save List.
 - Use the drop down arrows to select the Cost to Use or List to Use. (In the List to Use drop-down menu, List - L is the future list field and is stored in I-MFG.)
 - To update the price plan globally, click Update Price Plan Global with Selected Cost to Use/List to Use.



5. Set the Refigure Options. You can override the protect date, if needed. Click Override Protect Date. You can use the arrows in the Items with Protect Dates Of box to change the date or select from the calendar. Items that fall in the range selected here are included in the refigure.
6. Select the Only Refigure Items with a GP Point Equal to or Greater Than check box to only refigure lines with cost increases. In the first box, use the drop-down arrow to select Change, Increase, or Decrease. Then in the next box, enter the percentage to change, increase or decrease.

The system searches the selected lines to determine if cost has changed. If so, then the option selected in the How to Refigure box is used to determine the new cost.
7. Select the Do Not Allow Price to Calculate Above % of List Price check box to not allow the system to calculate the price above a specified percentage of the list price. If you select this option, enter a percentage in the percent box. This option defaults to 100 percent. If this check box is selected and the price is the same or lower, the refigure completes as it is. If the price is higher, then the price is adjusted to the percentage indicated. If the Retain Original Figure type check box is selected, the figure type is adjusted to \$.
8. Selecting the Retain Original Figure Type check box retains the original figure type. The default for this box is checked. To allow the system to modify the figure type based on your specified settings, clear this box.

If you select either the Up Prices by a Percent or Up Prices by a Dollar Amount option, the system checks the Retain Original Figure Type check box to determine whether the figure type is set to \$ or if the original type is retained.

9. When finished making changes in this window, click Next.
10. Next, you set limits in the Customer Price Plan Limit Screen window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
11. When finished, click Next. The price plans that meet your limits display.
12. Click the check box to select the price plan to change. All price plans are automatically selected.
 - To not refigure the price plan, clear the check box on the left. The options that you selected to refigure are displayed at the top of the window.
 - To view price plan detail, click View Price Plan Detail. To go back, click Back.
13. After you select the plan to change, click Save.

Importing Price Plans from a Spreadsheet

This function allows you the flexibility of creating a price plan outside of your system. You can create a new price plan with new items in a spreadsheet and import into your system. ([Download the template.](#))

A sample spreadsheet is included in the software installation and is saved in C:\Program Files (x86)\ECI\DDMSPlus Client\Data\Templates.

If exceptions occur when importing your new price plan, the Exceptions report displays the column number from your Excel® spreadsheet so you can easily view and fix any exceptions.

Creating Your Spreadsheet

There are several points to remember when creating your Excel spreadsheet:

- Your column names must be the same as the template provided. The column names do not have to be in the same order but must exist.
- If there are several worksheets in the spreadsheet, the system pulls information from the worksheet with the lowest value. For example, Worksheet A is imported before Worksheet B.
- If you are using Advanced Contracts, that information appears in the last three columns (Account Number, Account Department, and Customer Group).
- The number of lines in your spreadsheet affects the import time.
- You can import multiple price plans in one spreadsheet.
- If the price plan already exists in the system, you are prompted whether to continue. You can select to Delete All Items from the Existing Price Plan or Replace and Append Items to the Existing Price Plan. The price plan you are importing replaces the price on your system if you select to Replace and Append Items to the Existing Price Plan.
- The spreadsheet can be created on a client or server. You can import/export from a computer that does not have Excel installed. However, if you are using Excel version 2008 or later, you must have Excel software installed on the machine that you are using. If you are using an earlier version of Excel, you do not have to have Excel installed on the machine to use this feature.
- If an item number with the same quantity appears on your spreadsheet more than once for the same price plan, the first item listed on the spreadsheet takes precedence.

- The first eight rows determine the data type for the columns. This helps the system determine the type of information being imported, numeric and alpha-numeric characters, for example. When importing, your columns of data may be defined as General by default. You must decide if the columns should be defined as General or Text. We recommend that you only change the columns if necessary. If your data cells contain leading zeros and you define the columns as General, then your leading zeros are removed. If your data cells contain leading zeros and you define the columns as Text, then your leading zeros remain intact. For example, if you are importing account numbers, general ledger numbers, or item numbers, the leading zeros should not be removed; therefore, do not define your columns as General.
- If you need to open an Excel 2007 document on a computer that does not have Microsoft Excel installed, you can download and install Microsoft data connectivity components. Doing so lets you acquire the Microsoft.ACE.OLEDB.12.0 provider so the document can be opened. For instructions, see [Microsoft Downloads](#).

Determining Which Price to Use

Your system uses the following pricing hierarchy when importing price plans from a spreadsheet.

First, the system reads the lines defined in the spreadsheet file. Then it determines the figure type to use for the line item. If only a single pricing column is populated and the Figure Type column contains a G, D, or \$, the system uses this figure type.

Note: The figure type is the pricing method you specify when you create a contract: gross profit (G) , discount (%) or specified price (\$).The system uses the figure type to calculate the remaining two price fields. Suppose you specified a discount of 10 percent for a contract. This discount is the figure type (D). The system takes 10 percent from the list price to determine the contract price, and also calculates the gross profit based on this discounted price.

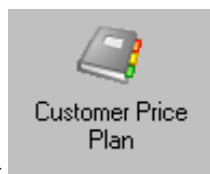
If not, the figure type is determined using the following:

- If only the Price column is populated, the figure type is set to \$.
- If only the GP% column is populated, the figure type is set to G.
- If only the Discount% column is populated, the figure type is set to D.

If more than one pricing column is populated, the system uses this order:

- The Price column is checked first. If it is populated, it is used and the figure type is set to \$.
- The GP% column is checked next. If it is populated, the figure type is set to G.
- The Discount % column is checked last. If it is populated, the figure type is set to D.

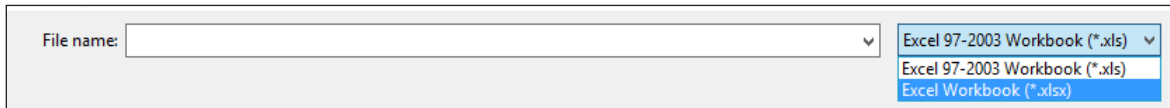
Using the Import Function



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

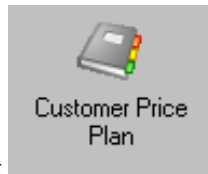
2. Click Import Price Plans from Excel.
3. The Import Price Plans from Excel - Select File window opens. In the Price Plan File box, you can click Browse to select the spreadsheet.
4. You can select the spreadsheet to import in the Select a File to Open dialog box. Select the file as you normally would. If you don't see the spreadsheet you need, check the Excel workbook file extension. Next to the File Name box, you can click the drop down to select either a *.xls file or a *.xlsx file. Select the Excel file to import and click Open.



5. In the Import Price Plans from Excel - Select File window, you can select how to match on items. You can select to item match on Prefix/Item or Item Number & Mfg.
If you are finished selecting options, go to **Step 7**.
6. Click the Append to Existing Price Plans Only box to append (not overwrite) to existing price plans.
The Update Existing Items box works with the Append to Existing Price Plans Only box. If you check the Append to Existing Price Plans Only box, you can update existing items on the imported price plan. Click the Update Existing Items box to override any existing items that you changed in the spreadsheet. Clear this box to leave the items on the existing price plans as is.
7. Click Next.
 - If an exceptions error appears, go to **Step 8**.
 - If the Price Plans Already Exists in the system message appears, go to **Step 9**.
 - If you are creating a new price plan, the Price Plan Header Information dialog box opens. Go to **Step 10**.
8. If there are exceptions, a dialog box appears with the Open Exception Report message. If you select Yes to open the Exception Report, you can see which lines on the spreadsheet are exceptions. You can go back to the spreadsheet and make changes and try the import again.
If you select No, the Excel Import Errors message appears. To continue, click Yes.
9. If the price plan already exists in the system, the Price Plan Exists dialog box appears. You can select to Delete All Items from the Existing Price Plan or Replace and Append Items to the Existing Price Plan.
To continue the import, select the option to use then click Apply. If you are using customer group codes, you are prompted to select Delete All Items from the Existing Price Plan or Replace and Append Items to the Existing Price Plan.

- If you select to Delete All Lines from the Existing Price Plan, go to **Step 10. Warning: Checking this box deletes ALL items on the existing price plan.**
 - If you select to Replace and Append Items to the Existing Price Plan, go to **Step 11.**
 - To cancel the import, click Cancel Import.
10. If you are creating a new price plan, the Price Plan Header Information dialog box opens. In this dialog box, you can enter unique information for this price plan. For more information on each box, refer back to the heading **Creating Customer Price Plans**. When finished entering information, click Apply.
- You can also cancel the import at this time by clicking Cancel Import.
11. The Price Plan List window opens. The check boxes on the left hand side of the window show each price plan that is checked.
- To view price plan detail by line, click View Price Plan Detail.
 - To not save the price plan, clear the box.
 - To continue saving the new price plan, click Save.

Mass Adding Items to Price Plans




1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

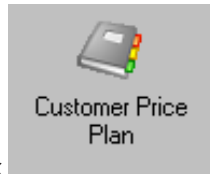
2. Click Mass Add Items.
3. Select the price plan for which to add items. You can select a price plan in several different ways.
 - Select the price plan to edit by highlighting it.
 - Click the Price Plan column heading to re-sort the price plans then highlight the price plan.
 - Type the first letter or number of the price plan to select then highlight it.
4. Click Next.
5. Set limits in the Customer Price Plan Limit Screen window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
6. When finished, click Next.

7. The items matching the limits you set appear in bold. You can add items by entering the item number or querying. After you select or enter an item, press Enter.
8. You can use the Comparison Cost and Comparison List boxes to view how different costs affect margins. Once you select the comparison cost and list to view, click Process. This lets you view a recalculation of the actual gross percentage and discount values based on the selected comparison cost and list types. (This recalculation allows for real time evaluation of applying different cost/list types.)

If you selected the option to set item usage totals, you can view item usage totals by specific customer. If you select a customer, you can view the sum of all usage records matching that item and the ten character account number, for example, the sum across departments and price plans.



- 8.1 Select the customer. You can type the account number or click  to query.
 - 8.2 You can use the drop-down arrow in the second box to select a department for this customer.
 - 8.3 Click Refresh Usage Totals.
 - 8.4 When you finish viewing comparisons, go to **Step 9**.
9. Any changes made to the price plan appear in bold. Click Save.

Mass Substituting Items on Price Plans



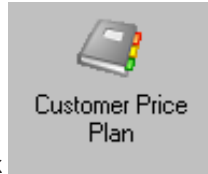
1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Mass Substitute Items.
3. Enter the item to be substituted and verify which price plans are affected. Enter the item number to remove from the price plan in the From Item box. You can enter the item number or click  to query.
4. Enter the item number to put on the price plan in the To Item box. You can enter the item number or click  to query.
5. Use the Deviated Cost box to select whether to include or exclude deviated cost price plans when mass substituting items. Select Include Deviated Cost Contracts, Exclude Deviated Cost Contracts, or Deviated Cost Contracts Only.
6. Click Next. The system automatically highlights all price plans that apply.

7. To select only the price plans for which to substitute items, clear the check boxes next to the selected price plans. You can view price plan detail by clicking the View Price Plan Detail button.
8. Click Save.

Mass Deleting Items on Price Plans

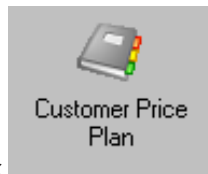


1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plan General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue.

2. To mass delete items on a price plan, click Mass Delete Items.
3. Set limits in the Customer Price Plan Limit Screen window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
4. When finished setting limits, click Next.
5. The system automatically highlights all price plans that apply. To select only the price plans for which to delete items, clear the check boxes next to the selected price plans. You can view price plan detail by clicking the View Price Plan Detail button.
6. Click Save.

Deleting Unassigned Price Plans

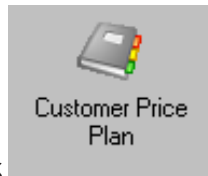


1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plan General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue.

2. To delete unassigned price plans, click Delete Unassigned Price Plans. The Delete Unassigned Price Plans window opens with all the unassigned price plans displayed and checked.
3. You can clear the check box to not delete a price plan.
Double-click a price plan or click View Price Plan Detail to see line item detail before deleting.
4. When ready to delete, click Save to delete all checked price plans.

Changing Dates on Price Plans



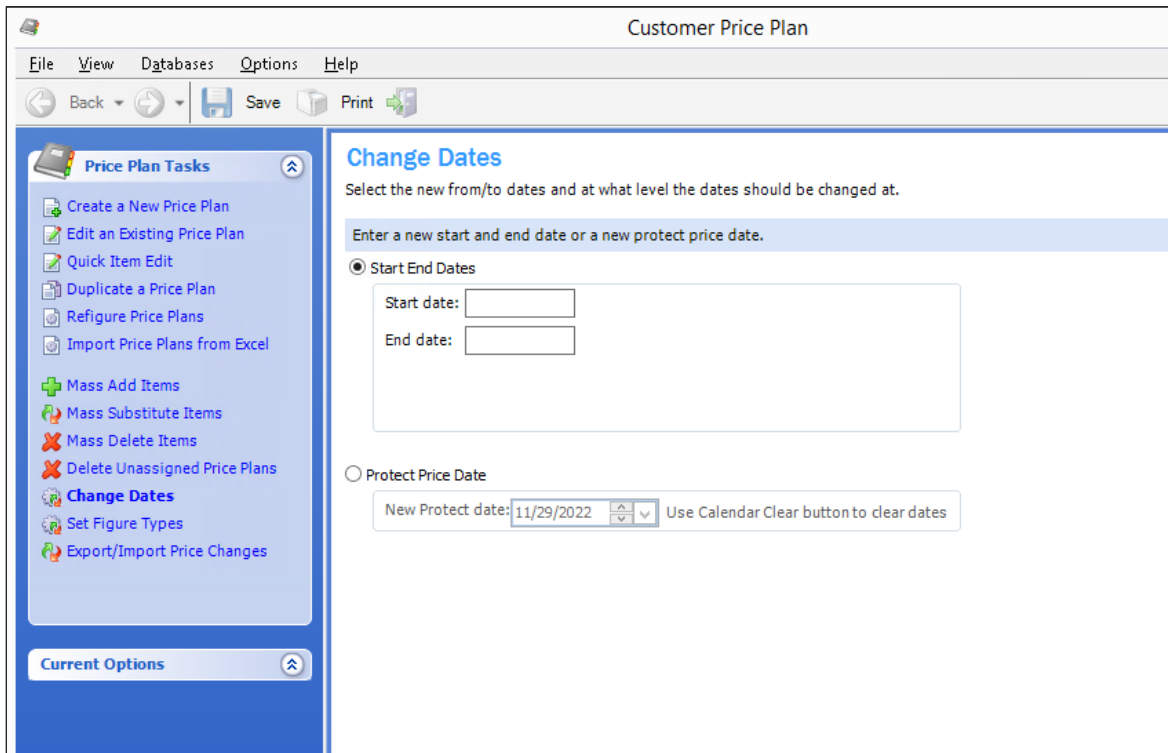
1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Change Dates.
3. You can enter a new start date and new ending date. In the Start Date box, enter the new starting date for the price plan.
4. Enter the new ending date for the price plan in the End Date box.

Note: If you have the Allow Contract Dates by Line field in the (LE1) screen set to N, the date levels do not appear. You can only set the Start and End dates. Go to **Step 6**.

5. Select which date level to update.
 - To change the date globally, click Update Global Date.
 - To change the line item date, click Update Line Item Date.
 - To change both the global and line item dates, click Update Both Global and Line Item Dates.
6. You can enter a new protect date, if needed. Click Protect Price Date.
7. Enter the new protect date in the New Protect Date box. You can use the up and down arrows to select a new date or use the Clear button on the calendar to clear the date.

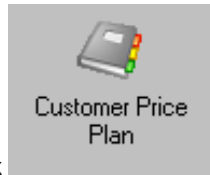


8. When finished, click Next.
9. Set limits in the Customer Price Plan Limit Screen window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
10. When finished, click Next. The price plans that meet your limits display.
11. Select the price plan for which to change dates. To select one price plan, clear the check boxes to remove the other price plans.
12. Click Save.

Setting Figure Types

You can select a new figure type for changing price plans. The figure type for a price plan item determines the default method used to refigure that item. The figure type selected is saved to checked price plan detail lines. You can select gross profit percentage, discount percent, or price.

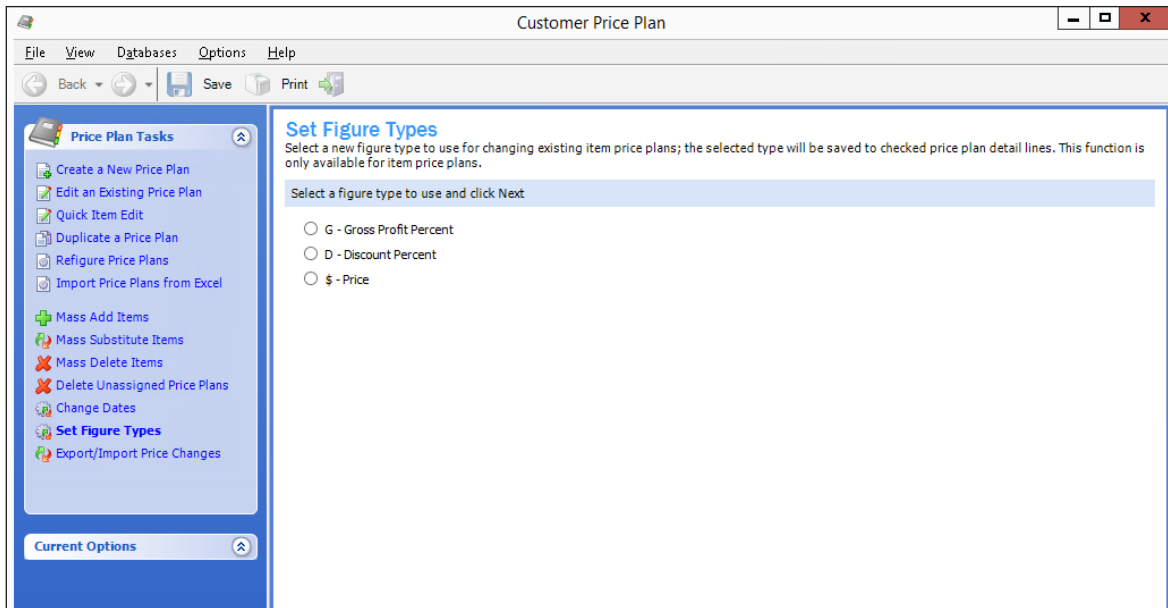
Note: The figure type is the pricing method you specify when you create a contract: gross profit (G) , discount (%) or specified price (\$). The system uses the figure type to calculate the remaining two price fields. Suppose you specified a discount of 10 percent for a contract. This discount is the figure type (D). The system takes 10 percent from the list price to determine the contract price, and also calculates the gross profit based on this discounted price.



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Set Figure Types. The Set Figure Types window opens.
3. In this window, you can select a new figure type for changing price plans. The figure type selected is saved to checked price plan detail lines. You can select gross profit percentage, discount percent, or price.



4. When finished, click Next.
5. Next, you set limits in the Customer Price Plan Limit window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
6. When finished, click Next.
7. The price plans that meet your limits display. Select the price plan for which to set figure types. To select one price plan, clear the check boxes to remove the other price plans.
8. Click Save.

About Export/Import Price Changes

You can export and import price changes. This feature allows you to update prices on multiple items on multiple price plans by a percent, dollar change, or new dollar amount. To do this, the user must create a list of price plans to be changed and items to be changed. This can be done by creating an Excel® spreadsheet meeting the following requirements.

- The spreadsheet must be created with specific column names and in a specific order. The system looks at the columns in order from left to right.
- The spreadsheet must consist of two worksheets. With more than one worksheet in the spreadsheet, the system pulls information from the worksheet with the lowest value. For example, Worksheet A is imported before Worksheet B. So make sure you name your worksheets according to the order you need the information to import.

The columns within the worksheets must be created as follows:

- In the first worksheet, the first column must be Price Plan. If you are authorized for Advanced Price Plans, you could have columns named Group, Customer Account #, and Customer Department.

Price Plan	Group	Cust Account #	Cust Dept
98			
AA			
F1			
F4			
CC			

- The second worksheet must have these columns: Item Number, Mfg, Change Price by %, Change Price by Amt, and New Price.

Item Number	Mfg	Change Price by %	Change Price by Amt	New Price
1	ESS	-10.000		
3	WLJ	1.5000		
03500	SPR		0.230	
10	ANG			1.900

The first column that is populated is the price that is imported into the price plan. When importing this worksheet data, the system first looks at the Price Plan IDs then the Item Numbers then the pricing columns.

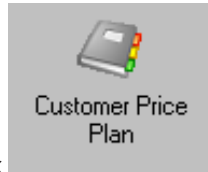
For example, using the worksheets shown above, Item Number 1 ESS price will be lowered by ten percent on all the price plans listed in the Price Plan column. This item’s price is not affected on any other price plans. To change the item by amount, you would populate the Change Price by Amt column. Or to simply import a new price altogether, you would populate the New Price column. (The item number and manufacturer in the spread sheet must match the item number and manufacturer in the price plan exactly.)

Once you’ve finished manipulating the data in this worksheet, you can import your changes into Price Plans. You can review and save your changes in Price Plans as you normally would. For instructions on importing, go to **Importing Price Changes**.

Exporting Price Changes

This function allows you to export a price plan to an Excel spreadsheet, make price changes then import those price changes back into DDMSPLUS. (To create price plans in Excel, refer back to the heading **Importing Price Plans from a Spreadsheet.**)

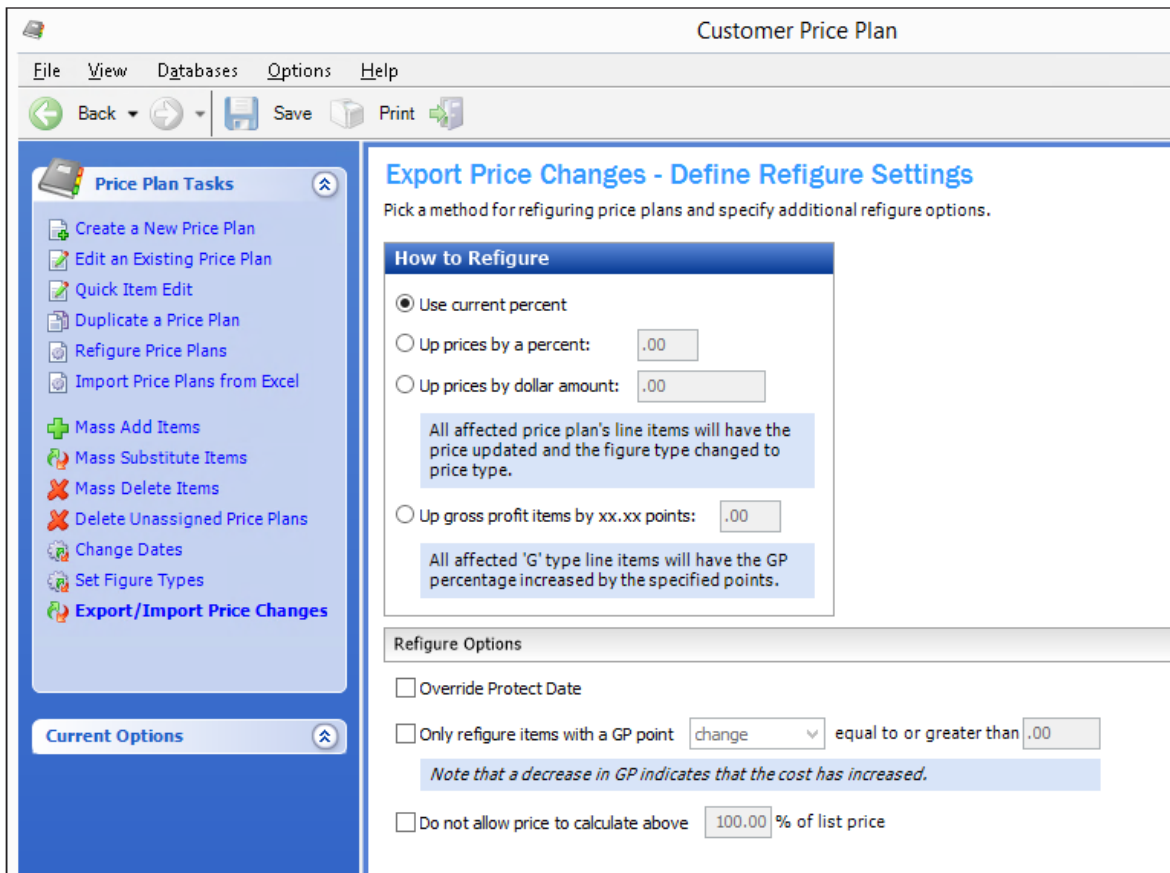
This function allows you and your salespeople flexibility in changing pricing. When manipulating the data in Excel, do not delete or change the headers. You can modify lines in the price plan but you cannot add lines. When importing the price plan, the system reads the New Price and ItemIdentifier columns. For more information about the Excel spreadsheet, refer back to the heading **About Export/Import Price Changes.**



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Export/Import Price Changes. The Export/Import Price Changes window open.
3. In this window, you can select to either export or import an item price plan to and from Excel. To export an item price plan to Excel, click Export Price Changes.
4. Define refigure settings.
 - To use the current percent, click Use Current Percent.



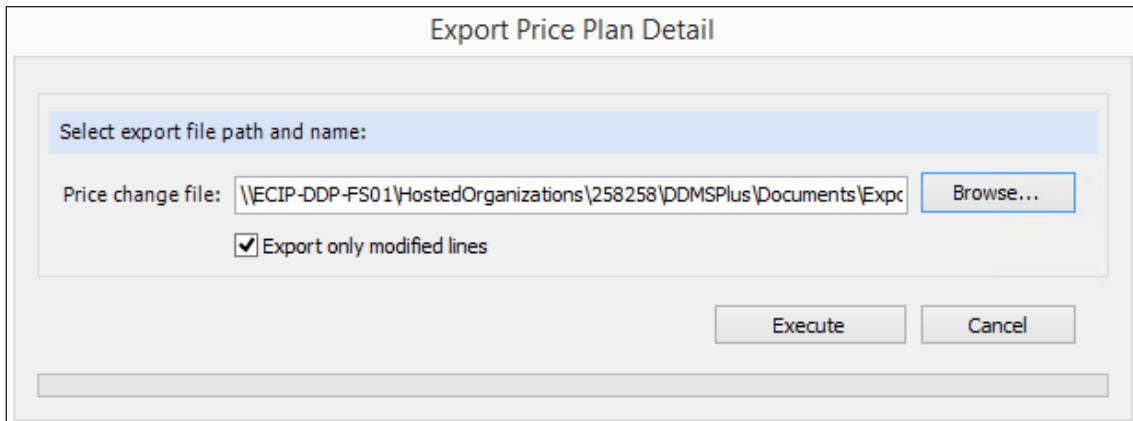
- To increase the price by a percentage, click Up Prices by a Percent. Then, enter the percent in the corresponding box. All of the line items on the price plan have the updated price, and the figure type is changed to the dollar type.

Note: When entering a percent, you do not have to enter the decimal point. For example, to enter ten percent, type 10 and press Tab.

- To increase the price by a dollar amount, click Up Prices by Dollar Amount. Then, enter the dollar amount in the corresponding box. All of the line items on the price plan have the updated price and the figure type is changed to the price type.
 - Click the Up Gross Profit Items By xx.xx Points button for all of the G type line items to have the gross profit percentage increased by the specified points. Then enter the point percentage in the corresponding box. (Be sure to enter the decimal point.)
5. Set the Refigure Options. You can override the protect date, if needed. Click Override Protect Date. You can use the arrows in the Items with Protect Dates Of box to change the date or select from the calendar. Items that fall in the range selected here are included in the refigure.
 6. Select the Only Refigure Items with a GP Point Equal to or Greater Than check box to only refigure lines with cost increases. In the first box, use the drop down arrow to select Change, Increase, or Decrease. Then in the next box, enter the percentage to change, increase or decrease.

The system searches the selected lines to determine if cost has changed. If so, then the option selected in the How to Refigure box is used to determine the new cost.

7. Select the Do Not Allow Price to Calculate Above % of List Price check box to not allow the system to calculate the price above a specified percentage of the list price. If you select this option, enter a percentage in the percent box. This option defaults to 100 percent. If this check box is selected and the price is the same or lower, the refigure completes as it is. If the price is higher, then the price is adjusted to the percentage indicated. If the Retain Original Figure type check box is selected, the figure type is adjusted to \$.
8. When finished making changes in this window, click Next.
9. Set limits in the Customer Price Plan Limit Screen window. Use this window to set up filters or limits. Highlight the filter on the left, then set the criteria for that filter. For more information, refer back to the heading **Setting Price Plan Limits**.
10. When finished, click Next.
11. In the Export Price Changes - Price Plan List window, you can select multiple price plans to export to the spreadsheet. In this window, all the check boxes to the left are selected. You can clear the check boxes to not export all the price plans.
12. The Export Price Plan Detail dialog box opens. Click Browse to select an Excel file.
13. The Select a Destination File dialog box opens. Select a file as you normally would or type the path and file into the File Name box. You can use the Save As Type to specify either the .xls or .xlsx file extension.
14. After you've selected the file to Export, click Save.
15. The Export Price Plan Detail dialog box reopens. The Export Only Modified Lines box is checked by default. This allows you to export only lines with different or changed prices. (The lines that were modified during the last refigure process.) To export all lines on the price plan, clear this box.

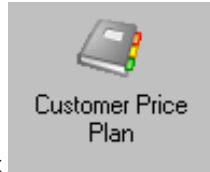


16. Click Execute. The price plan is exported to the path you specified.

Note: When manipulating the data in the spreadsheet, do not delete or change the headers. You can modify lines in the price plan but you cannot add lines. When importing the price plan, the system reads the New Price and ItemIdentifier columns.

Importing Price Changes

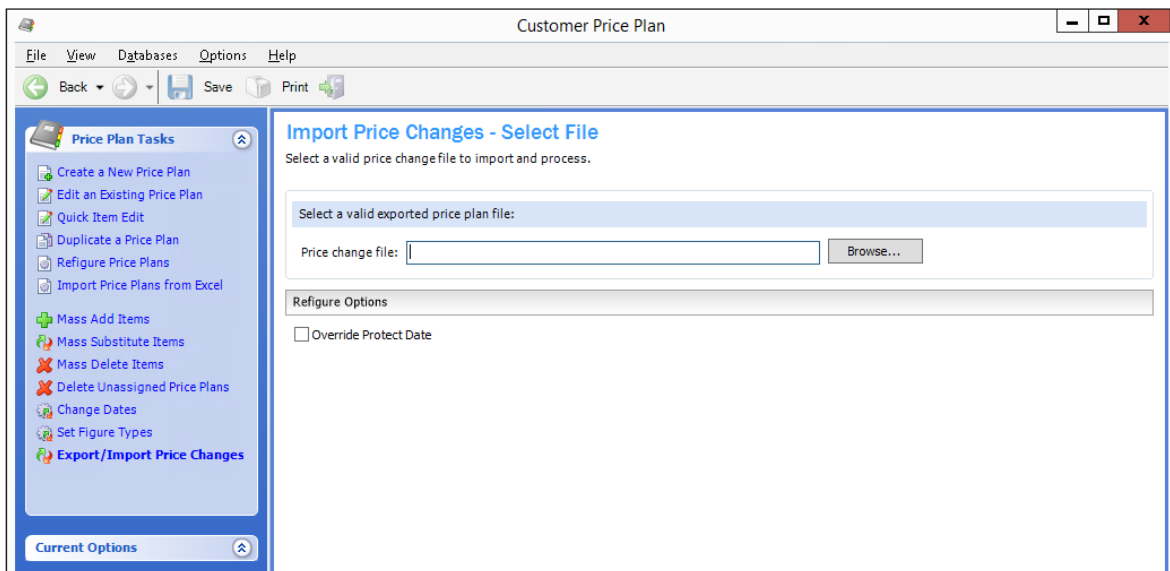
You can easily import price plans from a spreadsheet back into your DDMSPLUS system. This function is only for price plans that were previously exported from the DDMSPLUS system. For more information about the Excel spreadsheet, refer back to the heading **About Export/Import Price Changes**.



1. From the Main Menu, double-click

Note: If you set a password in the Update field in the (LE1) screen, the Enter Price Plan Password dialog box opens. Enter the password and click OK. If you set a password in the Price Plans Inquiry Password or Price Plans Update Password boxes in the Customer Price Plans General Configuration parameters, you must enter the password in the Price Plans Update Password box to continue. If you have a password set in the Set Cost/List field in the (LE1) screen, the Enter Cost/List Editing Password dialog box opens. Enter the passwords and click OK.

2. Click Export/Import Price Changes.
3. The Export/Import Price Changes window open. In this window, you can select to either export or import an item price plan to and from Excel. To import the price plan from Excel, click Import Price Changes.
4. The Import Price Changes - Select File window opens. Click Browse to select the file to import.
5. You can select the spreadsheet to import in the Select a File to Open dialog box. Select the file as you normally would. If you don't see the spreadsheet you need, check the Excel workbook file extension. Next to the File Name box, you can click the drop down to select either a *.xls file or a *.xlsx file. Select the Excel file to import and click Open.
6. In the Import Price Changes - Select File window, click the Override Protect Date box, if needed.



- Click Next. The Excel spreadsheet is imported back into Price Plans.

At this point, you can click view and change price plan details. Select the price plan and click View Price Plan Details.

- In the Import Price Plans window, you can view or change detail and save it. You can see the previous or next price plans.

Printing and Exporting Data on Price Plans


You can create reports for your Customer Price Plans quickly and easily. You can perform any of the following functions:

- Change header information
- Set up your page just like you would in any other program, such as portrait or landscape
- Use the Find function to search for text
- Move through the pages using the arrow keys
- Print price plan data or export to a file.



- Click

- In the Print Preview window, you can change headers and print or you can save to a file.


- To change header information, click . Then enter header information and click Apply when finished.



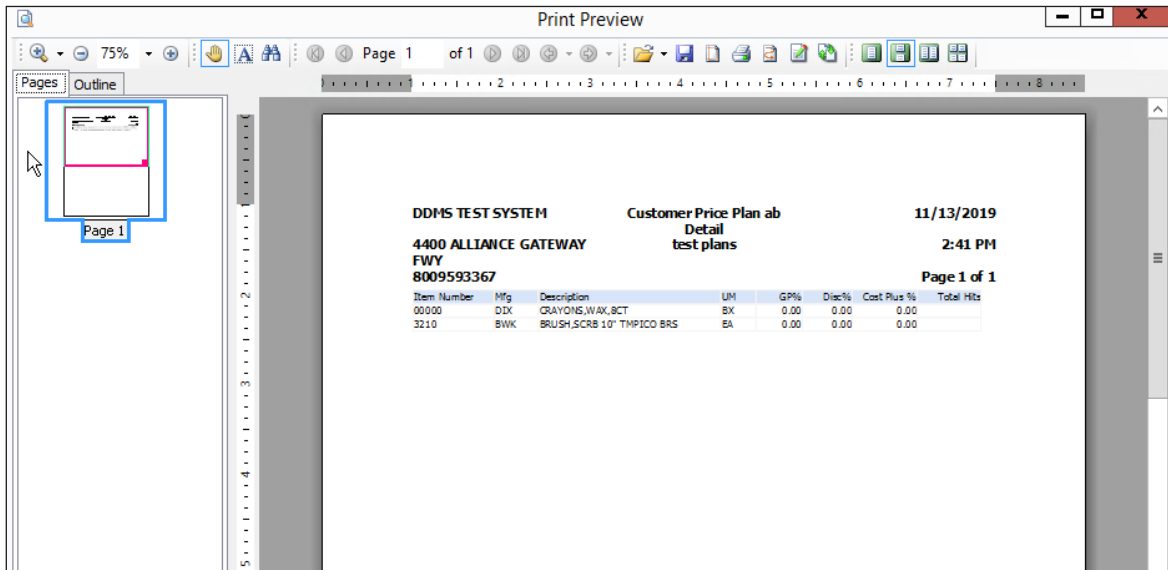
- To print, click



- To export to a file, click. You can save the file as a pdf, htm, rtf, xls or xlsx, or emf. You can also save to a C1PrintDocument to use with SQL Reporting.

- You can manually refresh data by clicking .

- Once you save a report to one of these formats, you can manipulate data and print as you normally would.



3. When finished, click the X in the upper right corner to close the window.