



2015 WinNetStar Training Classes

Promotional Pricing

Software Development-M6
RIMSS Business Systems Technology

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RIMSS WinNetStar v7.0.0.1433 Enterprise: The Enterprise Company: RIMSS TRACTOR AND EQUIPMENT (2) Location: SAN ANTONIO (3)

File View Company Customer CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

- New
- Find
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- Company Preferences
- Switch Company/Location Ctrl+Z
- Location Profile
- Location Support Lists**
 - Credit Card Sales
 - Mfg. Credit Programs
 - Stock Class
 - Bin Locations
 - Accounting Sources
 - Pricing Sources
 - Promotional Pricing**
 - Stocking Sources
 - Miscellaneous Charges
 - Price Book Defaults
- Company Support Lists
- Enterprise Support Lists
- Sales Tax

Creating or editing Promotional Pricing can be found in Company > Location Support Lists > Promotional Pricing. This is a permission based option. Please contact your system administrator for access.



RIMSS WinNetStar
Advanced Enterprise System

Company: RIMSS TRACTOR AND EQUIPMENT (2)
Location: SAN ANTONIO (3)

English (United States) Client Desktop User: carl (RIMSS:carl) Role: Administrator Workstation: CARL-LAPTOP Server: Y3TRADESHOW Database: WinNetStarApp

RIMSS WinNetStar Service Appointments Promotional Pricing Pricing Source List

Add New Refresh Print Generate Filter Data

Matrix Item Filters Customer Filters Pricing Scenarios

Drag a column header here to group by that column

Name	Description	Customer Filter	Item Filter	Pricing Scenario	Start Date	End Date	Last Modified By	Last Modified Date
------	-------------	-----------------	-------------	------------------	------------	----------	------------------	--------------------

Opening Promotional Pricing will show a list of existing Promos that have been setup. Promotions are managed by creating Item, Customer and Pricing Filters. If you are creating a new promotional pricing structure filling in all three types of filters is required.

In this scenario we are going to create a 10% discount on all filters from the KUB Price Book purchased across the parts counter for all customers labeled as WG Customer customer type in their customer master.

Creating an Item Filter

Parts Lookup
E

Item Filter

Name: Inactive Save Cancel Print

Description:

Price Book: Item Number: OEM Vendor: OEM Division: Item Description: Fetch

Category: Group: Class: Pricing Source: Stock Class:

Drag a column header here to group by that column

Associations	Inactive	Has Associations	Data Source	Location	Price Book	Oem Vendor	Item Number	Description	QOH	Committed	AFS	Com. On Order	Average Cost	
*FILTER														
⊕ D	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	04816-00100	O-RING, FIL...	3.0	0.0	3.0	0.0	0.2800	
⊕ D	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	04816-00390	O RING, FU...	1.0	0.0	1.0	0.0	1.4000	
⊕ D	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	12361-43130	FUEL FILTER	3.0	0.0	3.0	0.0	2.8767	
⊕ D	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	12454-43130	POT, FILTER	0.0	0.0	0.0	0.0	3.7800	
⊕ D	False	<input type="checkbox"/>												
⊕ D	False	<input type="checkbox"/>												
⊕ D	False	<input type="checkbox"/>												
⊕ D	False	<input type="checkbox"/>												
⊕ D	False	<input type="checkbox"/>												
⊕ U	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	15231-43560	FILTER, FUE...	1.0	0.0	1.0	0.0	2.2700	
⊕ U	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	15241-32090	CARTRIDGE...	0.0	0.0	0.0	0.0	6.9900	
⊕	False	<input type="checkbox"/>	Location	RIMSS T...	KUB	620	15287-11490	FILTER, INN...	0.0	0.0	0.0	0.0	35.7200	
⊕ U	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	15393-43017	ASSY FILTE...	0.0	0.0	0.0	0.0	27.9800	
⊕ U	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	15393-43580	CUP, FUEL F...	0.0	0.0	0.0	0.0	7.5200	
⊕ D	False	<input checked="" type="checkbox"/>	Location	RIMSS T...	KUB	620	15402-33430	FILTER, OIL	2.0	0.0	2.0	0.0	12.7400	
									232	1,21...	30.00	1,18...	0.00	24.44

✖ [Price Book] = 'KUB' And Contains([Description], 'FILTER')

Edit Filter

To create a new Item Filter, click on the Item Filters tab and click on Add New. In this scenario, I have named the Item Filter and given it a description. Next, I added in some information into the post-fetch filter bar. First, was the KUB Price Book and second was a description of “*filter.” The bottom portion of the window will show the filter that you are creating. Once you have created a parts list click on Save. Other filter criteria may be used to create a list of parts that you would like to be included in a promotion.

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Creating a Customer Filter

Customer Lookup ⌵

Customer Filter

Name: Inactive Save Cancel Print

Description:

System ID Ref ID Name Fetch

Drag a column header here to group by that column

	Customer Id	Customer Name	Inactive	Customer Type	Price Level	Primary Contact	Primary Contact Work Phone	Primary Contact	Tax Exemption Expiration
⌵									
<input checked="" type="checkbox"/>	AR00300	A & R PISTACHIO	False	WG Customer	List	,			
<input checked="" type="checkbox"/>	AN01900	ANA BELLE FARMS LLC	False	WG Customer	List	,			
<input checked="" type="checkbox"/>	AR02650	ARNOLD & WIGGINS	False	WG Customer	List	,			
<input checked="" type="checkbox"/>	BA03450	BADGER FARMING CO	False	WG Customer	List	,			
<input checked="" type="checkbox"/>	AL2405	ALAN G. LENHART	False	WG Customer	List	,			

To create a new Customer Filter, click on the Customer Filters tab and click on Add New. In the Customer Filter list I have named it WG Customer. In this filtered list, I have selected Customer Type "WG Customer." To create a filtered list, you can use the filter row and column chooser to create a list of customers that suits your needs.

[Inactive] = 'False' And [Customer Type] = 'WG Customer' Edit Filter

Creating a Pricing Scenario

Pricing Scenario

Name: Inactive

Description:

Invoice
 WG Invoice
 Service Invoice

Price Level Override:

Pricing Source Override:

Discount Override:

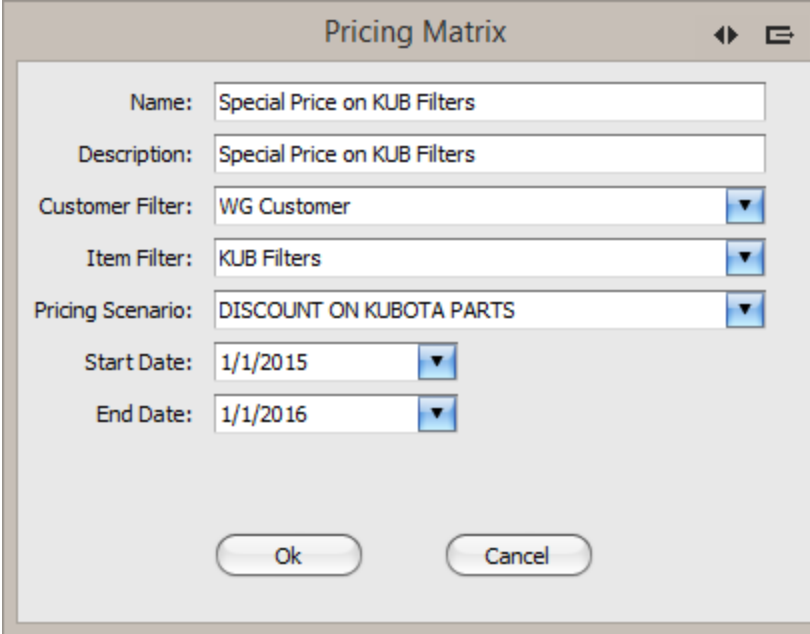
Fixed Price:

Lookup Description	Number	Description
625 - KUBOTA BATTERIES -- Conversion: YN 1...	625	KUBOTA BATTERIES -- Con...
803 - MISC SOURCE -- Conversion: YN 1:NN_...	803	MISC SOURCE -- Conversio...
804 - BUSH HOG -- Conversion: YN 1:NN_1@1...	804	BUSH HOG -- Conversion: Y...
940 - FLORY -- Conversion: YN 1:NN_1@100....	940	FLORY -- Conversion: YN 1:...
089 - AGCO-GILLISON	089	AGCO-GILLISON
BLU - BLUE BIRD	BLU	BLUE BIRD
HINO - HINO	HINO	HINO
CASE - CASE PARTS	CASE	CASE PARTS
SPEC KUB - SPECIAL PRICE ON KUBOTA PARTS	SPEC KUB	SPECIAL PRICE ON KUBOTA...

The last step to creating a Promotional Pricing template is the Pricing Scenario. To do so, click on the Pricing Scenarios tab and click on Add New. In this scenario, I have created a special Pricing Source for the discount I want to give a customer on Kubota filters. As indicated by a check mark, this scenario is only applicable to Parts Invoice.

In addition to using a Pricing Source, you can use Price Level and Discount Overrides to override a part's designated pricing source. Lastly, you can set a fixed selling price. The Pricing Scenario can be used for Parts Invoice, Wholegood Invoices and/or Service Invoices.

Creating the Pricing Matrix



The screenshot shows a dialog box titled "Pricing Matrix" with the following fields and values:

Name:	Special Price on KUB Filters
Description:	Special Price on KUB Filters
Customer Filter:	WG Customer
Item Filter:	KUB Filters
Pricing Scenario:	DISCOUNT ON KUBOTA PARTS
Start Date:	1/1/2015
End Date:	1/1/2016

At the bottom of the dialog box are two buttons: "Ok" and "Cancel".

To join all the newly created scenarios, click on the Matrix tab and click on Add New. Give your new matrix a Name and a Description. Select the appropriate Customer Filter, Item Filter and Pricing Scenario. Each matrix has a start and an end date. In this example, I have selected the entire year.