



## Promotional Pricing

Software Development  
RIMSS Business Systems Technology

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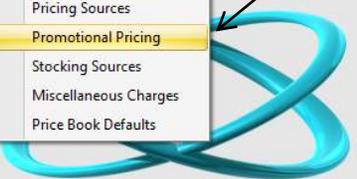
WinNetStar includes features that provide for the set up and maintenance of special promotional pricing programs. Users can create lists of Customer's that qualify for special pricing for certain Inventory Items. Promotional pricing scenarios are created with a start date and end date. Using the system's various Customer data elements you can create a filtered list of Customers that qualify for the promotion by using one or many different attributes. Using the same filtering concept, you can create a custom list of Inventory Items that qualify for the promotion. Promotional Pricing scenarios are Location specific so must be set up and maintained for each location separately. The following screen shots illustrate these features.

RIMSS.WinNetStar v7.0.0.750 Enterprise:The Enterprise Company:ABC Sales and Service (320) Location:San Antonio (321)

File View **Company** CRM Suppliers Employees Banking Fixed Assets Inventory Service Wholegoods Rental Reports Web Links Windows Help

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- Location Support Lists**
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  - 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

User: carl Role: Administrator Workstation: SUPPORT2 Server: V3Test Database: WinNetStarApp Key Stroke Entry

RIMSS WinNetStar v7.0.0.750 Enterprise: The Enterprise Company: ABC Sales and Service (320) Location: San Antonio (321)

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RIMSS WinNetStar Promotional Pricing

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
TEST MATRIX	TEST MATRIX		TEST ITEM FILTER		11/3/2010	11/3/2010	travis	11/3/2010
NAV Parts Pricing	NAV Parts Pricing	Filter on Credit Limit	NAV Parts Only	NAV Pricing on Major Fleet	11/8/2010	7/1/2011	carl	5/3/2011
PROMO1	PROMO1	CUSTOMER FILTER 1	NAV Parts Only	PROMO TEST	12/14/2001	4/1/2011	carl	4/29/2011
PROMO2	PROMO2	CUSTOMER FILTER 2	NAV Parts Only	PROMO TEST	12/14/2000	3/1/2011	carl	5/3/2011
TRAV PROMO	TRAV PROMO	TRAV FILTER	NAV Parts Only	TRAV FILTER	7/4/2011	7/30/2011	travis	7/20/2011
Rick Carlson	Cost + 10 % for Rick th...	Rick Carlson	All Parts	Cost+10	1/11/2012	12/31/2019	SuperUser	1/11/2012

Opening Promotional Pricing will show a list of existing Promotions 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 NAV Parts purchased across the parts counter for all customers labeled as Retail – Truck customer type in their customer master.

User: carl Role: Administrator Workstation: SUPPORT2 Server: V3Test Database: WinNetStarApp Key Stroke Entry

Parts Lookup

Item Filter  
 Name: Nav Parts  Inactive

Description: Nav Parts

Price Book: All Price Books  Item Number: OEM Vendor: ALL OEM Division: Item Description:

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

Drag a column header here to group by that column

Inactive	Has Associations	Data Source	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOH	Committed	AFS	Com. On Order	Average Cost
<input type="checkbox"/>	<input type="checkbox"/>	nav											
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	10019Z10B	100	NAVISTR	FILTER	88.0	2.0	86.0	0.0	30.2900
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	10200130901	185	NAVISTR	FILTER A	82.0	5.0	77.0	0.0	157.9743
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Location	Racine	NAV	1516037C92	100	NAVISTR	PUMP	98.0	0.0	98.0	0.0	359.9010
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Location	Racine	NAV	1516828C91	100	NAVISTR	PUMP	14.0	10.0	4.0	0.0	550.6250
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	3132921X	174	NAVISTR	PUMP&GAS	95.0	0.0	95.0	0.0	232.5000
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	3111G3881	152	NAVISTR	STEER KN	10.0	0.0	10.0	0.0	777.1020
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	ZZRG78131X	166	NAVISTR	STEERING	9.0	0.0	9.0	0.0	600.0000
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Location	Racine	NAV	100069R1	100	NAVISTR	GEAR	14.0	0.0	14.0	0.0	132.1429
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	100069R1	100	NAVISTR	GEAR	6.0	0.0	6.0	0.0	257.3000
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	FF228	253	NAVISTR	FUELFILT	53.0	5.0	48.0	0.0	15.1900
<input type="checkbox"/>	<input type="checkbox"/>	Location	Racine	NAV	PROMO TE...	071		PROMO TES...	9.0	0.0	9.0	0.0	75.0000
									43,3...	148.00	43,1...	1.00	206.11

Starts with([Price Book], 'nav')

User: dale Role: Administrator Workstation: DALE-PC Server: V3Test Database: WinNetStarApp Key Stroke Entry

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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. The Inventory Item list will initially open with all Item Master Records. You will then create a filter to include only those items you want to include in the promotion. In this example, we have filtered the Price Book column to create a list of Navistar items. You could also further filter the list to include only certain Navistar Items. Using the column chooser feature you can customize this list with a variety of columns that can be used for filtering purposes.

Customer Lookup

Customer Filter

Name:   Inactive

Description:

System ID:  Ref ID:  Name:

Drag a column header here to group by that column

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Primary Contact	Primary Contact Phone
			retail - truck			
35	JDC Enterprises	False	Retail - Truck	Trade	,	
588	Caley Teague	False	Retail - Truck	Trade	,	
816	Mountain Trucking	False	Retail - Truck	Trade	,	
825	Jack Black	False	Retail - Truck	Trade	,	
826	Jane Doe	False	Retail - Truck	Trade	,	
827	Jake Smith	False	Retail - Truck	Trade	,	

To create a new Customer Filter, click on the Customer Filters tab and click on Add New. Give this list a Name. In this case we have named it Retail Truck Customers. The list will initially open with all customers. You will then filter the list to include only those customers that qualify for the promotion. In this example we have used the Customer Type column to filter the list for Retail – Truck customers. Using the column chooser feature you can customize this list with a variety of columns that can be used for filtering purposes.

[Inactive] = 'False' And Starts with([Customer Type], 'retail - truck')

User: dale    Role: Administrator    Workstation: DALE-PC    Server: V3Test    Database: WinNetStarApp    Key Stroke Entry

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**Pricing Scenario**

Name:   Inactive

Description:

	<input checked="" type="checkbox"/> Invoice	<input type="checkbox"/> WG Invoice	<input type="checkbox"/> Service Invoice
Price Level Override	List		
Pricing Source Override			
Discount Override	10.00 %	0.00 %	0.00 %
Fixed Price	0	0	0

The Next step to setting up Promotional Pricing is the creation of the Pricing Scenario. Click on the Pricing Scenarios tab and click on Add New. In this scenario, I have created a 10% Discount on the List Price for a part. As indicated by a check mark, this scenario is only applicable to the Invoice type document and will not be applicable on a Wholegood document or Service document. To also include this discount on those document types you would check the appropriate boxes and complete the necessary columns as we have done in the Invoice column.

In addition to Price Level and Discount Overrides, you can create new Pricing Sources that can override the existing pricing source. You can also set a fixed price.

**Pricing Matrix** ◀▶ 📄

Name:

Description:

Customer Filter:

Item Filter:

Pricing Scenario:

Start Date:

End Date:

The final step in creating a Promotional Pricing scenario is joining all the newly created scenarios. To accomplish this, click on the Matrix tab and click on Add New. Give your Pricing Scenario a name and description (they often times will be the same). 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 month of January 2012. For promotions with no effective end date, select an End Date far into the future.

RIMSS.WinNetStar v7.0.0.751 Enterprise:The Enterprise Company:CSS Enterprises (222) Location:Racine (223)

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RIMSS WinNetStar Promotional Pricing

Add New Refresh Print Copy From Generate Filter Data

Matrix Item Filters Customer Filters Pricing Scenarios

Drag a column header here to group by that column

Name	Description	Inactive	Last Modified By	Last Modified Date	Filter
> KUBOTA OWNERS	CUSTOMERS WHO PURCHASED A KUBOTA TRACTOR	<input type="checkbox"/>	dale	11/10/2010 4:10 PM	[UDF7] = 'kubota' Or [UDF15] = 'kubota' Or [Inactive] = False And [UDF14] = 'Yes'
LIST PRICE RETAIL CUSTOMERS	RETAIL TYPE CUSTOMERS WITH PRICE LEVEL OF LIST	<input type="checkbox"/>	dale	10/26/2010 3:19 PM	[Inactive] = False And [CCustomerType] = 'Retail' And [LPriceLevel] = 'List'
Customers with AAA Credit		<input type="checkbox"/>	dale	10/26/2010 5:48 PM	[Inactive] = False And [ECreditRating] = 'AAA'
School Districts		<input checked="" type="checkbox"/>	dale	11/2/2010 10:38 AM	[Inactive] = False And [CCustomerType] = 'SCHOOL DISTRICT'
ZIP Code 78258	Customer's in Zip Code 48258	<input type="checkbox"/>	SuperUser	11/4/2010 11:00 AM	[Inactive] = False And [BilltoaddressPostalcode] = '78258'
price level list		<input type="checkbox"/>	dale	11/3/2010 11:18 AM	[LPriceLevel] = 'List'
Trade and Special 1		<input type="checkbox"/>	dale	11/3/2010 11:45 AM	[Inactive] = False And ([LPriceLevel] = 'Special 1' Or [LPriceLevel] = 'Trade')
list and special 3		<input type="checkbox"/>	dale	11/3/2010 11:46 AM	[Inactive] = False And ([LPriceLevel] = 'List' Or [LPriceLevel] = 'Special 3')
National Fleet Customers		<input type="checkbox"/>	dale	4/26/2011 4:26 PM	[Inactive] = False And [UDF16] = 'National'
ALL CUSTOMERS		<input type="checkbox"/>	SuperUser	11/10/2010 12:29 PM	[Inactive] = False
Contract Trainers					
School District Customers					
Customer with Credit Bal					
LIVINGSTON MACH					
CPM 81					
RETAIL - TRUCK CUSTOM					
JOHNNY'S PROMO					

Or [CReferenceId] = '85'

When you add new Customer Master Records or new Inventory Item Master Records the system will automatically add those that qualify to the appropriate lists within your various Promotional Pricing scenarios. However, this automatic process runs each night so if you add a new Retail – Truck customer to the system on any given day, that Customer will not receive the Promotional Pricing until the system runs it's nightly routine to update the list. If you need to add a new Customer Record or a new Item Record and immediately create a related invoice, you can click on the Generate Filter Data menu option and the system will immediately update all lists with the new data and you will be able to sell an item at its promotional price. This process can consume a significant amount of server resources and may temporarily slow down the performance of the system for other users.

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