

# Sales Price Lists

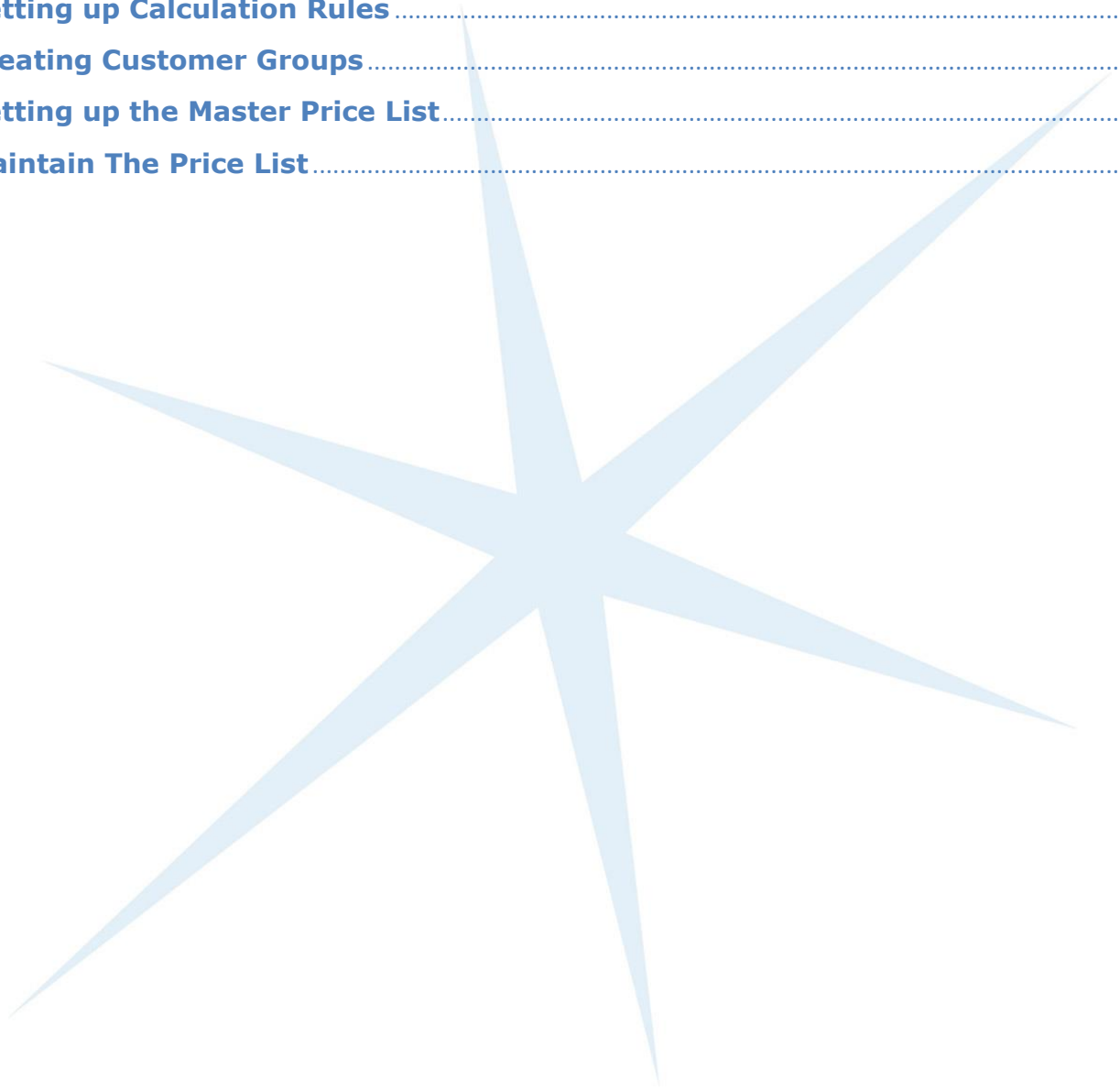
Customer Services

Sparkstone Technology Ltd



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## Introduction

This document outlines the workflow for the creation of price lists within the Sparkstone Retail EPOS System. These notes are designed to complement the training that you will have received on the Sparkstone Retail EPOS from a Sparkstone training consultant or system administrator. They are not intended to be a complete overview of the software but are designed to assist you at a later stage when you are away from the training session.

These notes have been compiled to reflect the configuration of the Sparkstone EPOS system at your site and as such may only contain information pertinent to the operations that you require. If additional modules are purchased at a later date, training notes will be provided as appropriate on completion of the associated training course.

## Objectives

To provide an overview of the processes involved in setting up calculation rules, setting up customer groups, master price lists and maintaining the price list.

## Conventions Used

Menu paths will be indicated throughout this training manual in bold.

For example:

### **Back Office | Product file | Stock Records**

Indicates that you should access Stock Records window from the Back Office using the Product File on the drop down navigation menu.

# Setting up Price Lists

The workflow for setting up Price lists is as follows:

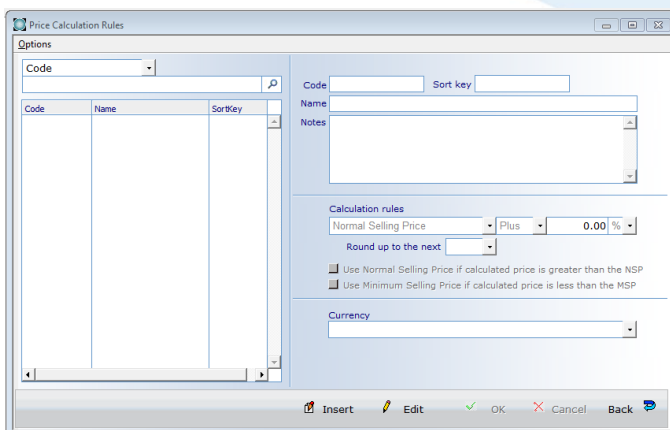
1. Setup the Calculation Rules
2. Setup the Customer Groups
3. Setup the Master Price Lists
4. Maintain the Price List.

The first three steps will be done when setting up the Price list and the fourth step will need to be done on a regular basis to ensure that the system is up-to-date.

## Setting up Calculation Rules

Price calculation rules enable you to setup some rules which will be linked to a customer group at a later stage. There is no limit on the number of rules that can be setup.

To create a new rule, go to **Back Office | Sales Management | Sales Price Lists | Calculation Rules:**



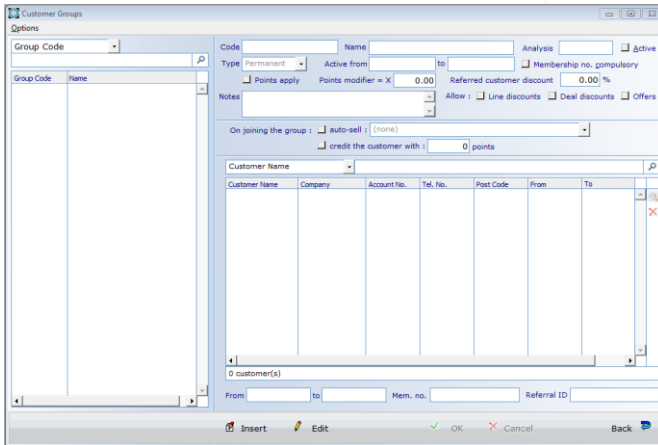
Select 'Insert', type in a code which will be unique for this rule e.g. 'Trade' and press tab to move onto the next field. Type in a short name e.g. 'Trade special rates' and press tab.

Click on 'Normal Selling Price' and select from the list of options in the drop down menu, then click on 'Plus' and this can be dropped down to 'Minus', enter the factor/percentage value that you wish to apply e.g. 10 and drop down between '%' or '£'. Select 'OK' to save the changes.

# Creating Customer Groups

Customer Groups can be created in order to group customers together and to setup price lists against them.

To create a customer group go to **Back Office | Sales Management | Customer Groups** and the following window will open:



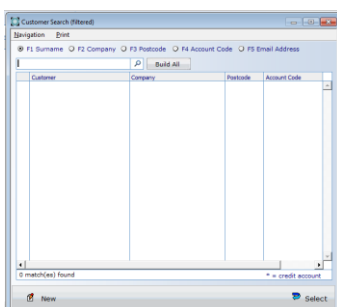
Next, press 'Insert' and the fields will become available to edit. Type in a code, for example 'Trade' and press tab, tab through the other fields. The dates can be amended and the type can be changed from 'permanent' to 'annual'. If you have the loyalty points module, the check box 'points apply' can be checked. Additionally, the membership numbers can be compulsory. Select the tick boxes against 'line discounts', 'deal discounts' and 'offers' to apply to the customer group.

It can be configured to sell specific items to customers who join this group.

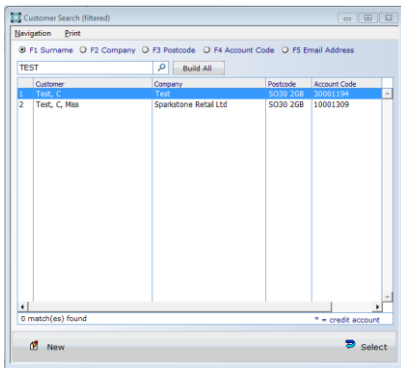
To add customers to the group, click on the magnifying glass next to the table on the right:



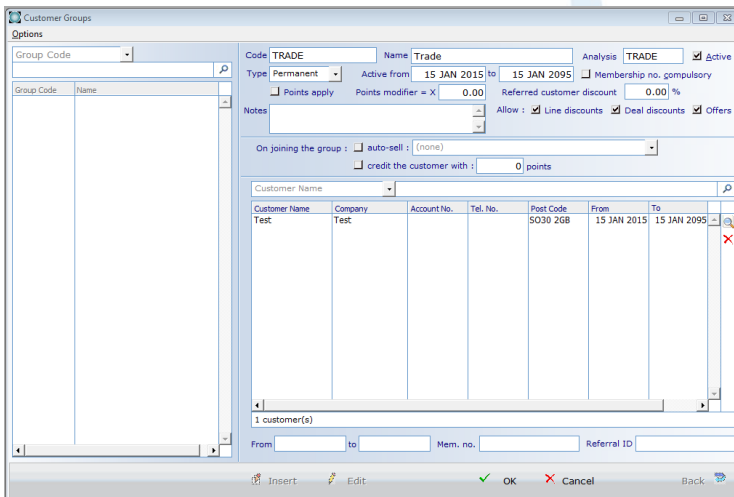
The following window will be displayed:



Type in a surname to search from, or toggle to one of the radio buttons and search by one of the other fields, select the line, then press 'Select' at the bottom of the screen:



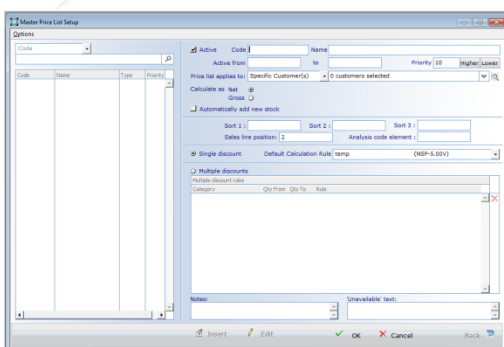
The customer will then be listed in the table under the headings:



When all of the customers have been added, press 'OK'.

## Setting up the Master Price List

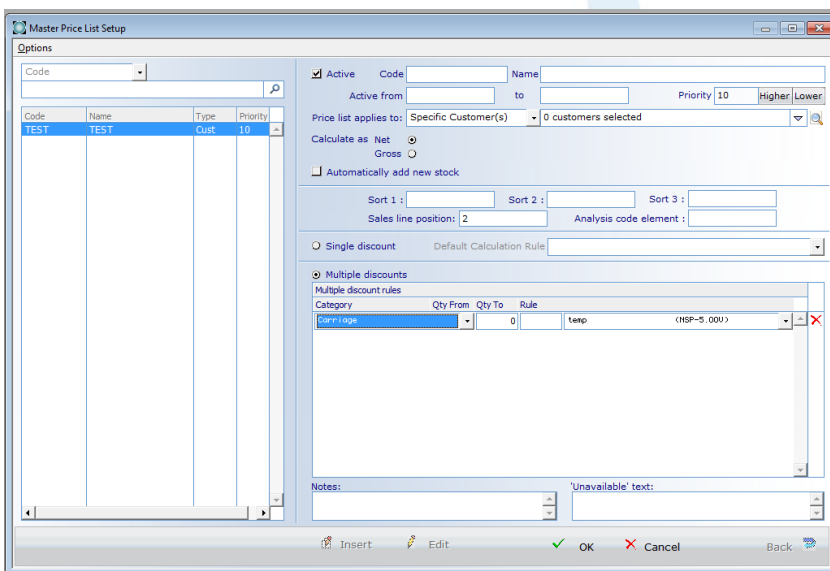
From the Customer Group window go to **Options | Master Price List** and the below window will open:



The master price list links a rule to a group. However, it does *not* need to be linked to a customer group- it can be linked to a specific customer, group of sites or trading divisions.

Select 'Insert' to create a new master price list. Type in a code, which will be unique for this, e.g. 'Trade' for the Trade group and press the tab key to move to the next field. Then type in a short name which will be used to describe the price list- e.g. 'Trade special rates' then press tab. Select if the price list applies to a specific customer, customer groups, trading divisions or a group of sites. Then on the right hand side, press the arrow key and drop the list down to show the appropriate data that has been selected from the aforementioned field.

Determine whether the Price list will apply to Net or Gross prices. Select the calculation rule in the Main Window that was setup previously. Toggle between the single discount line and the multiple discounts to determine which discount would be given to each category:



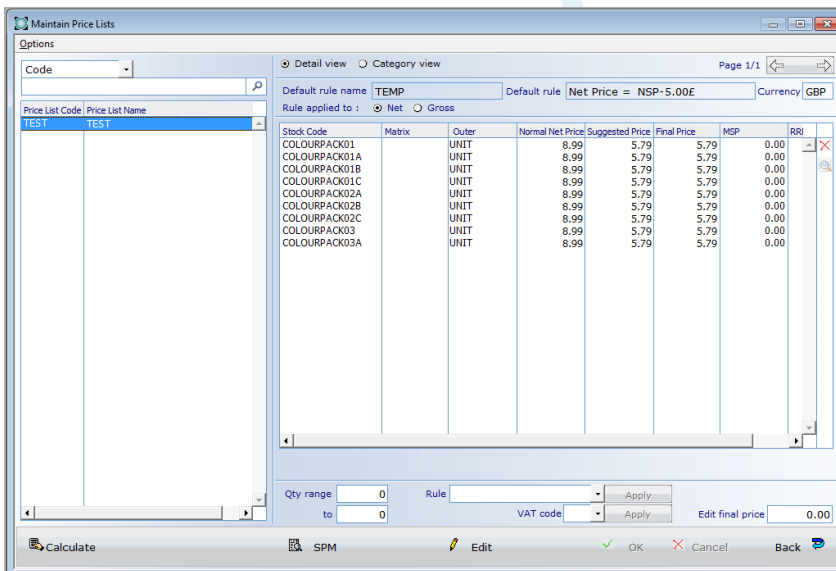
Press 'OK' to save the changes and then there will be a prompt for 'Would you like to update all records with the change?'- selecting YES will update all of the stock records will be attached to this price list, which can be maintained in the "Maintain Price List" window. Selecting 'NO' will not link any stock records to the Price List and they will need to be added manually.

The Group of customers have been linked to the Calculation Rule. The next step is to maintain the Price List.

## Maintain The Price List

It is important to maintain the price list once it has been setup, in case there are any prices that change or anything that needs to be amended.

To do this, go to **Back Office | Sales Management | Sales Price Lists | Maintain Price Lists:**



Stock Code	Matrix	Outer	Normal Net Price	Suggested Price	Final Price	MSP	RRI
COLOURPACK01		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK01A		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK01B		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK01C		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK02A		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK02B		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK02C		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK03		UNIT	8.99	5.79	5.79	0.00	
COLOURPACK03A		UNIT	8.99	5.79	5.79	0.00	

When the window opens, nothing will be selected. For the price lists to recalculate, double click on the price list and the prices will recalculate and they will show in the right hand side of the window.

If you would like to edit the rule or the final price of the item, click 'Edit' and highlight the line to change, drop the rule down to select from another one and click 'apply' on the right. The prices in the columns in the table should recalculate according to the rule. To edit the final price, put the cursor in the box next to 'Edit final Price' and enter the price to change it to, then press 'tab' and the price will change accordingly. When you are happy with the changes, press 'OK' to save them down.

Please note: The 'Calculate' button will recalculate the price list in accordance to the rules that are setup, and they will not take into account any edits to final prices.