

## Setting Customer-Specific Pricing AV #612

### About:

On occasion, you may have certain customers that you would assign special pricing. BPOS offers several methods for handling such scenarios. The first option, Option #1, is to assign your customer a default price code other than your standard Price Code 1. Then every time they purchase anything at all, they will default to their assigned price code. The next option, Option #2, is to assign the customer EPP Pricing (Enhanced Price Profile). This method would allow you to set specific customer special pricing on a certain manufacturer, style, or a specific product number. The last option, Option #3, is a combination of both.

### Option #1- Customer Default Pricing:

1. Go to **Views** → **Sales Counter**.
2. Click on the **Customers** drop-down menu and select **View/Edit**.
3. Click on the binoculars beside the **Customer #** field to find your customer and double-click to make them the active customer:

**Customer View & Edit**

Contact Info Account Info Other Info Pricing A/R Info Misc

Customer #  

**Name** LN CASH ACCOUNT

Short Name LN CASH

Address

Address2

City  State  Zip

Contact Name

Type	Phone/Email	EXT	Text Domain	Comments	Priority
PHONE	(772) 342-6933				Primary

\*\*\* Right-Click Table To Add/Edit/Delete Customer Contact Info (Phone, Email, Etc.)... \*\*\*

Track VSR Yes

Send VSR Postcards Yes

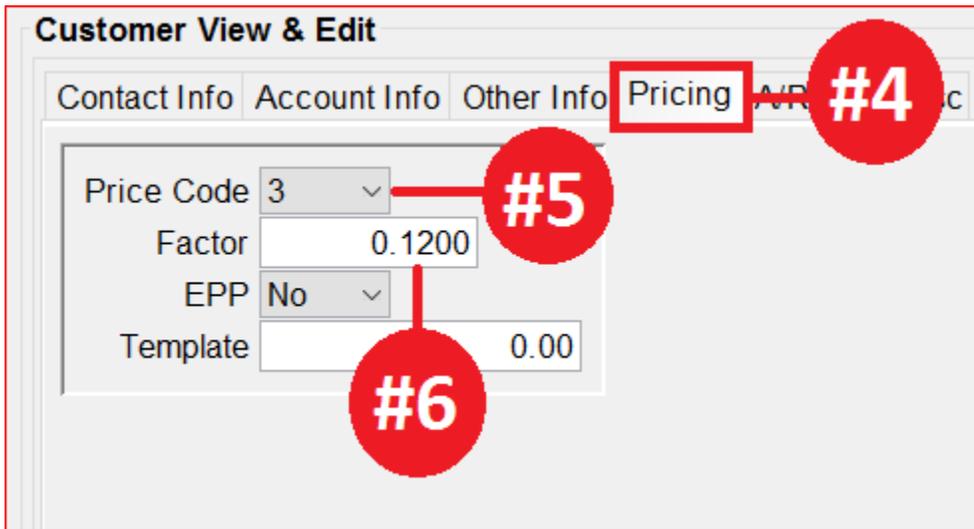
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4. On the Customer View/Edit screen (shown below), click on the **Pricing** tab.
5. Choose the **Price Level** for you customer.
6. You can add a factor to give them an additional discount on the price level. For example, change them to Price Code 3 and give them a factor .12 which would discount Price Code 3 for them by 12%. Please note: If you choose Price Code 0, Price Code 0 is cost. Adding a factor to Price Code 0 means you are selling at cost + your factor.
7. Click **Save** at the bottom (not pictured) to save your changes:



**Customer View & Edit**

Contact Info Account Info Other Info **Pricing** **#4**

Price Code 3 **#5**

Factor 0.1200

EPP No **#6**

Template 0.00

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**Option #2 – Enhanced Price Profiling:**

1. 1<sup>st</sup>, your customer in question must be set to EPP = YES. Go to **Views** → **Sales Counter**.
2. Click on the **Customers** drop-down menu and select **View/Edit**.
3. Click on the binoculars to find your customer and double-click to make them the active customer:

**Customer View & Edit**

Contact Info Account Info Other Info Pricing A/R Info Misc

Customer #  

**Name** LN CASH ACCOUNT

Short Name LN CASH

Address

Address2

City  State  Zip

Contact Name

Type	Phone/Email	EXT	Text Domain	Comments	Priority
PHONE	(772) 342-6933				Primary

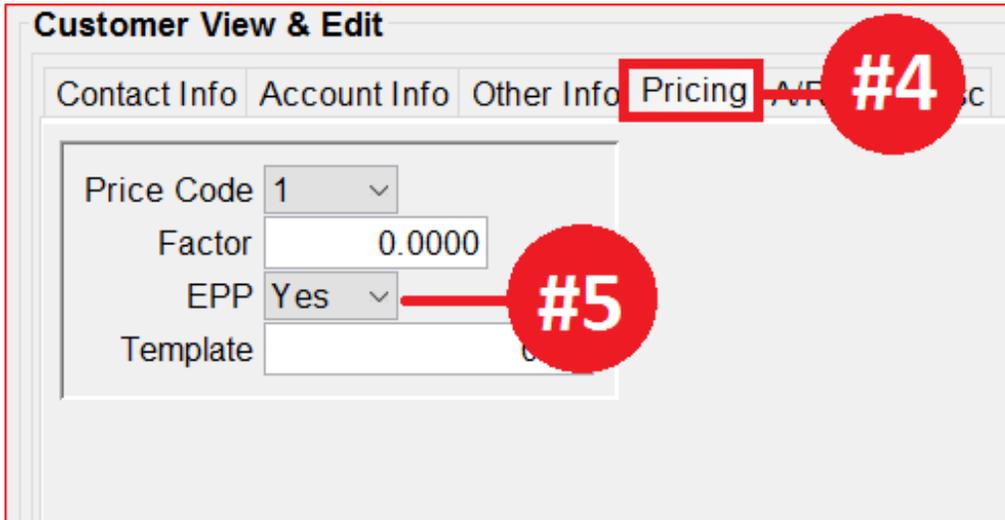
\*\*\* Right-Click Table To Add/Edit/Delete Customer Contact Info (Phone, Email, Etc.)... \*\*\*

Track VSR Yes

Send VSR Postcards Yes

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4. On the **Customer View/Edit** screen (shown below), click on the **PRICING** tab.
5. Change **EPP** dropdown box to **YES**.
6. Click on **SAVE** at the bottom of screen (not pictured):



The screenshot shows the 'Customer View & Edit' interface. At the top, there are several tabs: 'Contact Info', 'Account Info', 'Other Info', 'Pricing', and 'AF'. The 'Pricing' tab is highlighted with a red box and a red circle containing the number '#4'. Below the tabs, there is a form with the following fields: 'Price Code' (dropdown menu showing '1'), 'Factor' (text input field showing '0.0000'), 'EPP' (dropdown menu showing 'Yes'), and 'Template' (text input field). The 'EPP' dropdown menu is highlighted with a red box and a red circle containing the number '#5'.

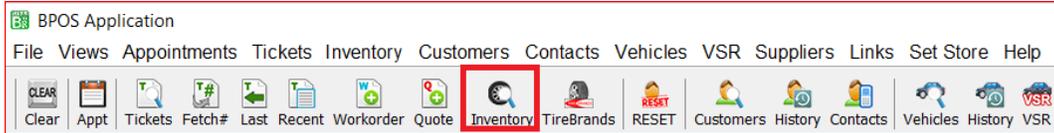
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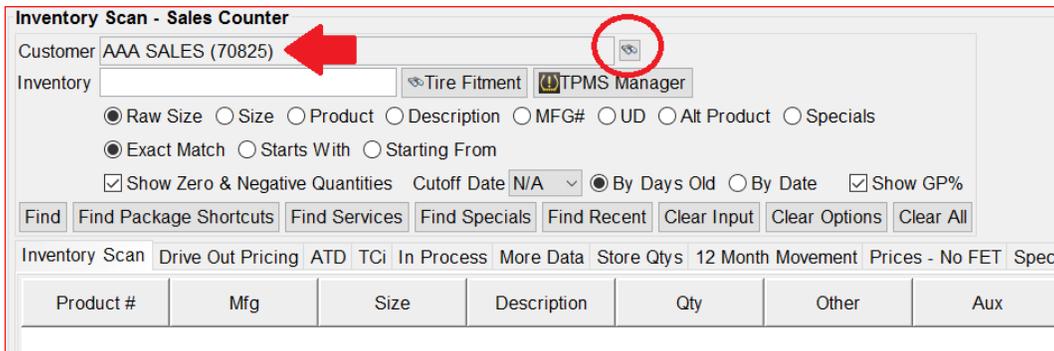
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- To give this customer a discount, etc. based on the MFG code, MFG code + Style, or MFG code + Style + Product #, click on the **Inventory** lookup icon on your toolbar:



- Make sure the customer you want to give a discount to is the **ACTIVE** customer on your Inventory Scan screen (shown below). If they are not, click on the binoculars to the right of the Customer field to find them:

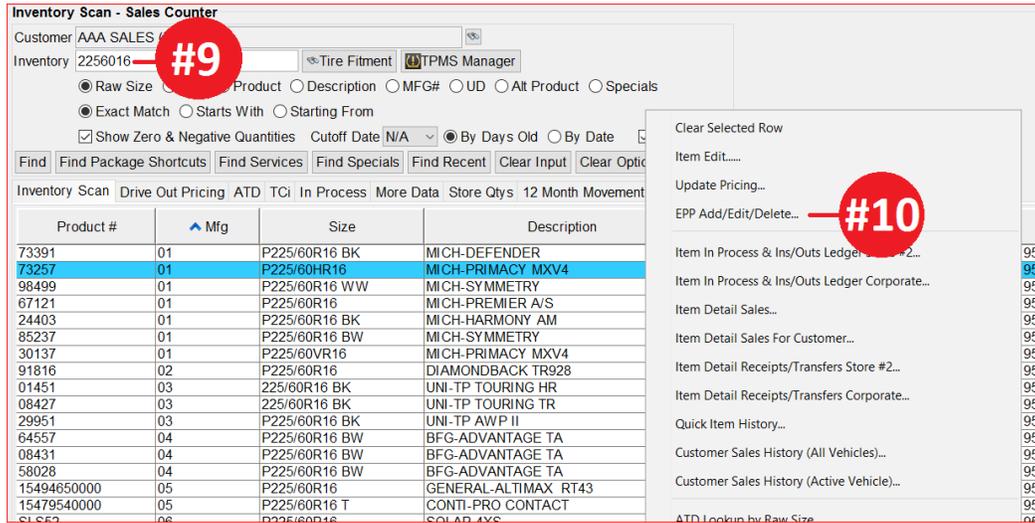


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9. On the **Inventory Scan** screen (shown below), find your Inventory item in question.
10. **Right-click** on the item and select **EPP ADD/EDIT/DELETE** from the drop-down menu:



**Inventory Scan - Sales Counter**

Customer: AAA SALES  
 Inventory: 2256016  
 Tire Fitment: TPMS Manager

Raw Size  
  Product  
  Description  
  MFG#  
  UD  
  Alt Product  
  Specials  
 Exact Match  
  Starts With  
  Starting From  
 Show Zero & Negative Quantities  
 Cutoff Date: N/A  
 By Days Old  
 By Date

Find Find Package Shortcuts Find Services Find Specials Find Recent Clear Input Clear Optic

Product #	Mfg	Size	Description	
73391	01	P225/60R16 BK	MICH-DEFENDER	
73257	01	P225/60HR16	MICH-PRIMACY MXV4	95
98499	01	P225/60R16 WW	MICH-SYMMETRY	95
67121	01	P225/60R16	MICH-PREMIER A/S	95
24403	01	P225/60R16 BK	MICH-HARMONY AM	95
85237	01	P225/60R16 BW	MICH-SYMMETRY	95
30137	01	P225/60VR16	MICH-PRIMACY MXV4	95
91816	02	P225/60R16	DIAMONDBACK TR928	95
01451	03	225/60R16 BK	UNI-TP TOURING HR	95
08427	03	225/60R16 BK	UNI-TP TOURING TR	95
29951	03	P225/60R16 BK	UNI-TP AWP II	95
64557	04	P225/60R16 BW	BFG-ADVANTAGE TA	95
08431	04	P225/60R16 BW	BFG-ADVANTAGE TA	95
58028	04	P225/60R16 BW	BFG-ADVANTAGE TA	95
15494650000	05	P225/60R16	GENERAL-ALTIMAX RT43	95
15479540000	05	P225/60R16 T	CONTI-PRO CONTACT	95
15479540000	05	P225/60R16	SOLAR AXS	95

Clear Selected Row  
 Item Edit.....  
 Update Pricing...  
**EPP Add/Edit/Delete...**  
 Item In Process & Ins/Outs Ledger... #2...  
 Item In Process & Ins/Outs Ledger Corporate...  
 Item Detail Sales...  
 Item Detail Sales For Customer...  
 Item Detail Receipts/Transfers Store #2...  
 Item Detail Receipts/Transfers Corporate...  
 Quick Item History...  
 Customer Sales History (All Vehicles)...  
 Customer Sales History (Active Vehicle)...  
 ATD Lookup by Raw Size

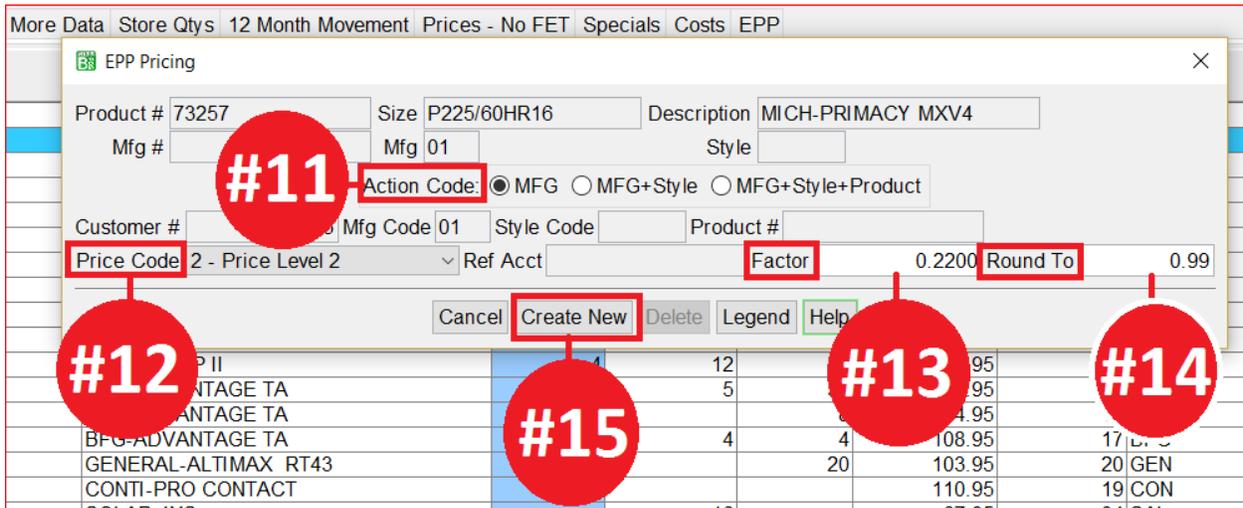
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11. On the EPP pricing screen (shown below), create your new EPP record (or EDIT your existing record) by selecting the Action Code for the MFG, MFG+STYLE or MFG+STYLE+PRODUCT. (If you choose **MFG**, all matching MFG items will have this special pricing. If you select **MFG+STYLE**, all matching MFG & STYLE codes will be included. If you select **MFG+STYLE+PRODUCT**, only this single item will have the special pricing.)
12. Click on the drop-down menu beside **Price Code** to select the Price Code you want to increase or discount.
13. Key in your **Factor** amount.
14. Key in your **Round To** amount if you round your selling prices.
15. Click on **Create New**:



The screenshot shows the 'EPP Pricing' window with the following fields and callouts:

- #11** points to the **Action Code** field, which has radio buttons for **MFG** (selected), **MFG+Style**, and **MFG+Style+Product**.
- #12** points to the **Price Code** dropdown menu, currently showing '2 - Price Level 2'.
- #13** points to the **Factor** input field, containing the value '0.2200'.
- #14** points to the **Round To** input field, containing the value '0.99'.
- #15** points to the **Create New** button.

The background shows a table with columns for Product #, Size, Description, Mfg #, Style, Price, and Quantity. The first row is highlighted in blue.

Product #	Size	Description	Mfg #	Style	Price	Quantity
73257	P225/60HR16	MICH-PRIMACY MXV4	01			
						12
						5
						4
						4
						20
						19
						19

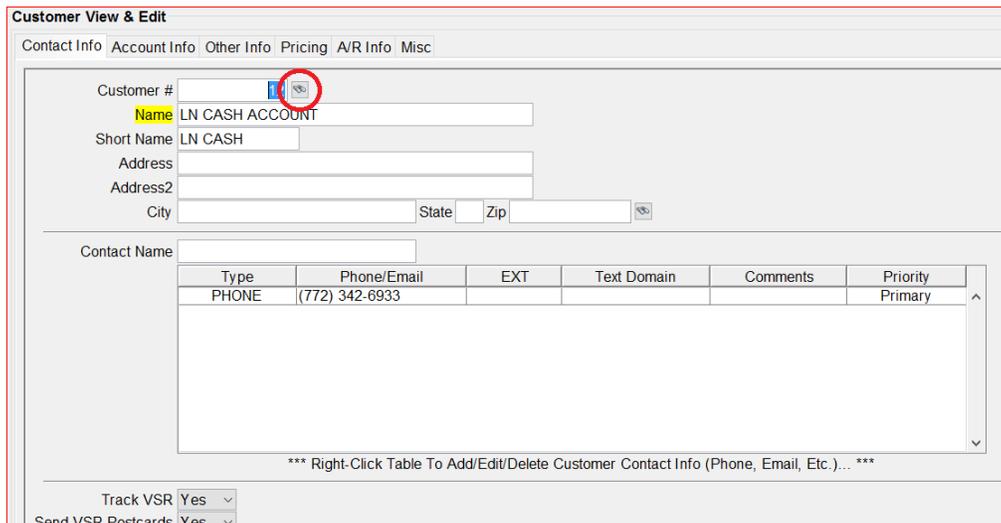
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**NOTE:** You can set a customer to mirror another account that already has EPP pricing set up so you don't have to create the same record over and over! Jot down the customer # of the account you would like to mirror or copy. Then:

1. Click on **Views** → **Sales Counter**
2. Click on the **Customers** drop-down menu and select **View/Edit**
3. Find your Customer by clicking on the binoculars beside the **Customer #** field to perform a lookup:



**Customer View & Edit**

Contact Info Account Info Other Info Pricing A/R Info Misc

Customer #  

**Name** LN CASH ACCOUNT

Short Name LN CASH

Address

Address2

City  State  Zip

Contact Name

Type	Phone/Email	EXT	Text Domain	Comments	Priority
PHONE	(772) 342-6933				Primary

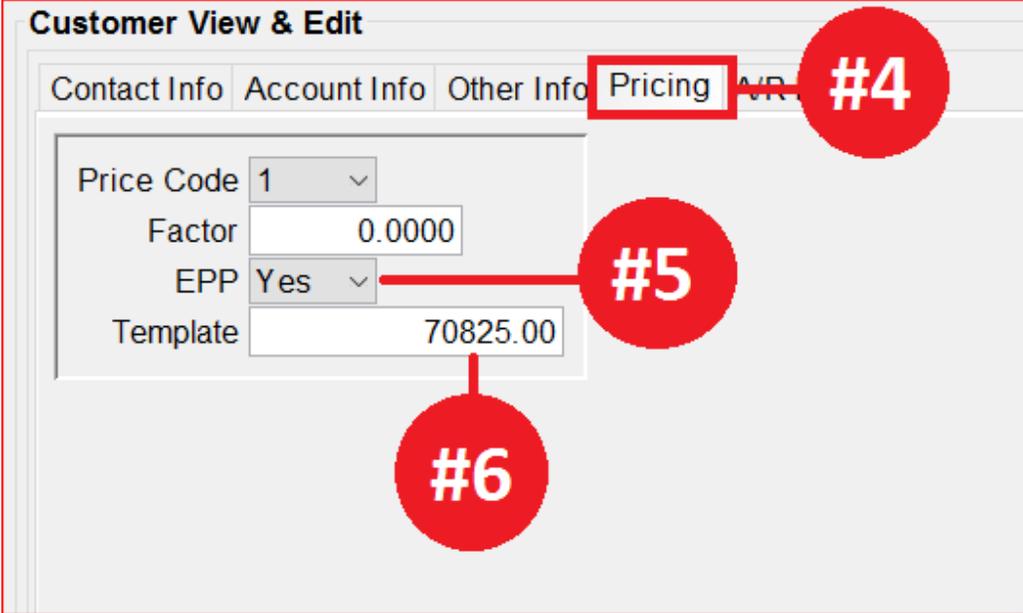
\*\*\* Right-Click Table To Add/Edit/Delete Customer Contact Info (Phone, Email, Etc.)... \*\*\*

Track VSR Yes

Send VSR Postcards Yes

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4. On the **Customer View/Edit** screen (shown below), click on **PRICING** TAB
5. Make sure **EPP** is set to **YES**
6. In the **TEMPLATE** field, you would reference the customer account # that you wish to copy.
7. Click **SAVE** (not shown) at the bottom of the screen:



**Customer View & Edit**

Contact Info Account Info Other Info **Pricing** **#4**

Price Code 1

Factor

EPP Yes  **#5**

Template  **#6**

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**Option #3 – Mixed Method:**

You can choose a mixture of the above options. For example, the customer always gets a 12% discount on PC3 UNLESS it is Michelin, in which case you have set them up with an EPP markup of 10% on average cost on all Michelins.

**Customer View & Edit**

Contact Info | Account Info | Other Info | **Pricing** | A/R Info | Misc

Price Code: 3

Factor: 0.1200

EPP: Yes

Template: 0.00

Here is how it would look on the Inventory scan screen under the EPP tab (which displays the special pricing rules in place for any customer you are performing an inventory lookup for). You can see that there is a mixture of different pricing factors for one, single customer:

Product #	Mfg	Size	Description	Mfg Code	Style Code	Price Code	Ref Acct	Factor	Round To
08431	04	P225/60R16 BW	BFG-ADVANTAGE TA			3		0.1200	
64557	04	P225/60R16 BW	BFG-ADVANTAGE TA			3		0.1200	
58028	04	P225/60R16 BW	BFG-ADVANTAGE TA			3		0.1200	
15479540000	05	P225/60R16 T	CONTI-PRO CONTACT			3		0.1200	
91816	02	P225/60R16	DIAMONDBACK TRS28			3		0.1200	
140752	13	P225/60R16	FIRESTONE-PRECSI			3		0.1200	
407715374	09	P225/60R16	GDY-ASSURANCE A/S			3		0.1200	
738407571	09	P225/60R16 H	GDY-ASSURANCE FM			3		0.1200	
786346034	09	P225/60R16	GDY-EAGLE LS			3		0.1200	
732354448	09	P225/60R16	GDY-EAGLE RS-A			3		0.1200	
732354500	09	P225/60R16	GDY-EAGLE RS-A			3		0.1200	
402314073	09	P225/60R16 GM	GDY-INTEGRITY 50K			3		0.1200	
402542073	09	P225/60R16	GDY-INTEGRITY BLK			3		0.1200	
15494650000	05	P225/60R16	GENERAL-ALTIMAX			3		0.1200	
356077026	10	P225/60R16	KELLY-EDGE A/S			3		0.1200	
2100403	07	P225/60R16	KUMHO-SOLLUS KH16			3		0.1200	
1802813	07	P225/60R16	KUMHO-SOLLUS KR21			3		0.1200	
73381	01	P225/60R16 BK	MICH-DEFENDER	01		A		0.1000	0.99
24403	01	P225/60R16 BK	MICH-HARMONY AM	01		A		0.1000	0.99
67121	01	P225/60R16	MICH-PREMIER A/S	01		A		0.1000	0.99
73257	01	P225/60R16	MICH-PRIMACY MXV4	01		A		0.1000	0.99
30137	01	P225/60R16	MICH-PRIMACY MXV4	01		A		0.1000	0.99
96499	01	P225/60R16 WW	MICH-SYMMETRY	01		A		0.1000	0.99
85237	01	P225/60R16 BW	MICH-SYMMETRY	01		A		0.1000	0.99
2002257	06	P225/60R16	SABON-ATREZZO SH			3		0.1200	
2003091	06	P225/60R16	SAILUN-ATREZZO TD			3		0.1200	
61663	06	P225/60R16	SAILUN-ATREZZO TD			3		0.1200	

**Note:** Password permission is necessary to change/edit customer pricing (P41). If you need to allow someone to make customer pricing changes, please contact your system administrator.