

Chapter 2.01: Pricing Schemes in RMA

Overview

The Route Manager software provides several ways you can customize product prices for your customers.

This chapter will cover the following pricing methods:

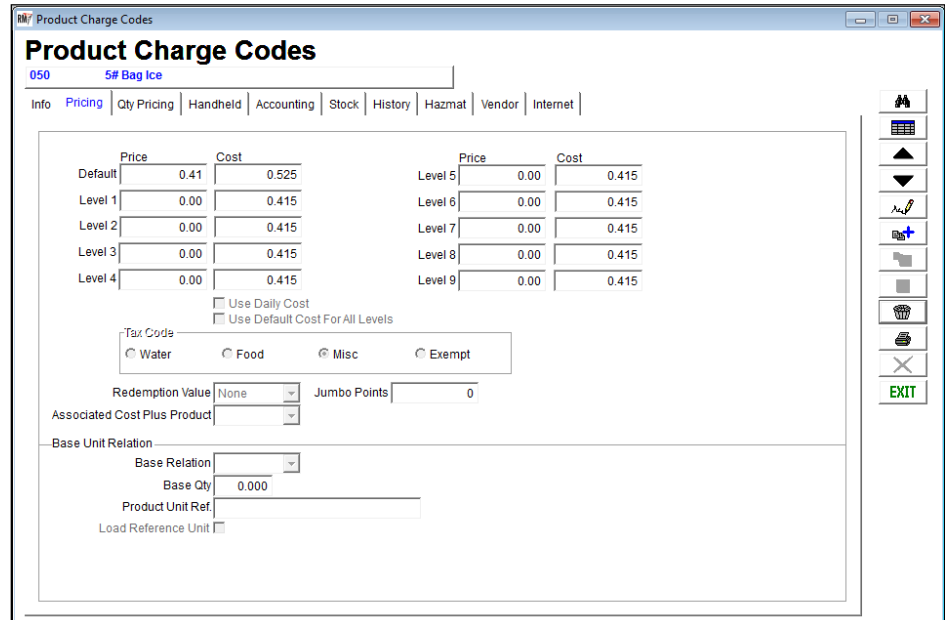
- ▶ Standard Price
- ▶ Price Levels
- ▶ Default Product Pricing
- ▶ Cost Plus Pricing
- ▶ Price Lists
 - Promotional Price Lists
- ▶ Quantity Pricing
 - Customer Level
 - Product Level
 - List Level
- ▶ Product Group Discounts

As these pricing methods work together to provide you with a flexible program, it is important that you understand the various methods and their priority when determining the proper price for your customers as you sell your products.

Standard Price

Every product you enter into Route Manager will have a *Standard Price* associated with it. Typically, this is the highest price you charge for the item. If the customer is not assigned to any of the alternate pricing options, the *Standard Price* will be used.

The *Standard Price* is entered under *Lists > Product Codes > Product Charge Codes*, on the *Pricing* tab. Enter the price in the 'Default' box.



Product Charge Codes

050 5# Bag Ice

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

	Price	Cost		Price	Cost
Default	0.41	0.525	Level 5	0.00	0.415
Level 1	0.00	0.415	Level 6	0.00	0.415
Level 2	0.00	0.415	Level 7	0.00	0.415
Level 3	0.00	0.415	Level 8	0.00	0.415
Level 4	0.00	0.415	Level 9	0.00	0.415

Use Daily Cost
 Use Default Cost For All Levels

Tax Code: Water Food Misc Exempt

Redemption Value: None Jumbo Points: 0

Associated Cost Plus Product: [Dropdown]

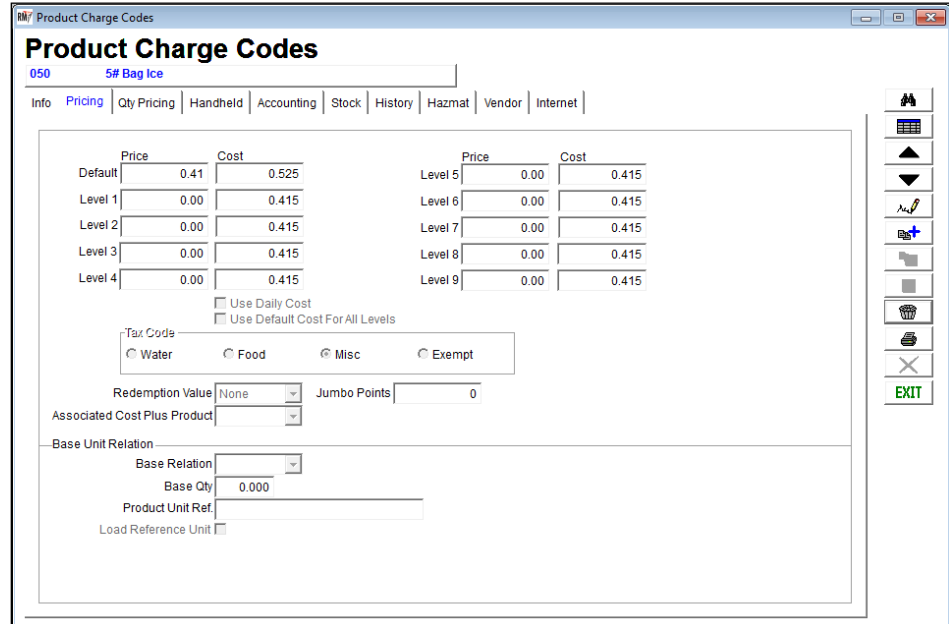
Base Unit Relation: [Dropdown]

Base Relation: [Dropdown]
 Base Qty: 0.000
 Product Unit Ref.: [Text Box]
 Load Reference Unit:

When you add a product to an invoice, the *Default* price will be assumed unless any of the additional pricing methods discussed in this document are being used.

Price Levels

As products are entered in the *Product Charge Codes* screen, you may establish up to ten different prices for each product. In addition to the *Standard Price* (Default) for the item, nine additional price 'levels' can be established.



Product Charge Codes
050 5# Bag Ice

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

	Price	Cost		Price	Cost
Default	0.41	0.525	Level 5	0.00	0.415
Level 1	0.00	0.415	Level 6	0.00	0.415
Level 2	0.00	0.415	Level 7	0.00	0.415
Level 3	0.00	0.415	Level 8	0.00	0.415
Level 4	0.00	0.415	Level 9	0.00	0.415

Use Daily Cost
 Use Default Cost For All Levels

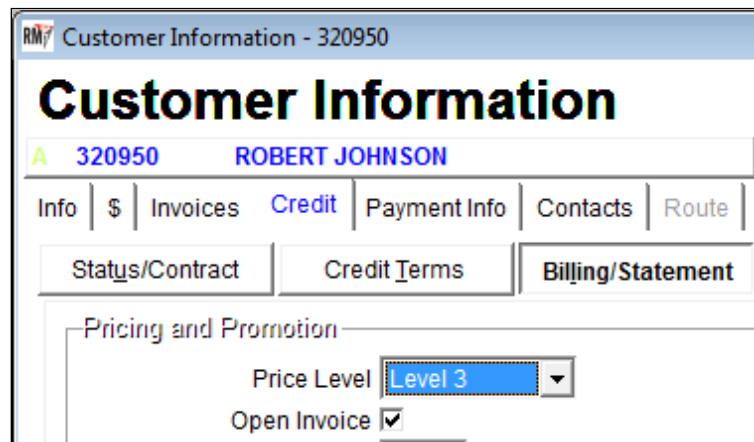
Tax Code
 Water Food Misc Exempt

Redemption Value: None Jumbo Points: 0

Associated Cost Plus Product: [dropdown]

Base Unit Relation
 Base Relation: [dropdown]
 Base Qty: 0.000
 Product Unit Ref: [text]
 Load Reference Unit:

To assign a customer to one of the *Price Levels* established, select the appropriate *Price Level* on the *Credit* tab of the *Customer Information* screen (example below). This is displayed by clicking the *Billing/Statement* tab in the lower right corner of the screen.



Customer Information - 320950

Customer Information

A 320950 ROBERT JOHNSON

Info \$ Invoices Credit Payment Info Contacts Route

Status/Contract Credit Terms Billing/Statement

Pricing and Promotion
 Price Level: Level 3
 Open Invoice:

Once the account is assigned to a *Price Level*, all product prices on the account will be based on that level.

For example, if the customer is assigned to *Price Level* '3', they will receive the level three price entered on each item.

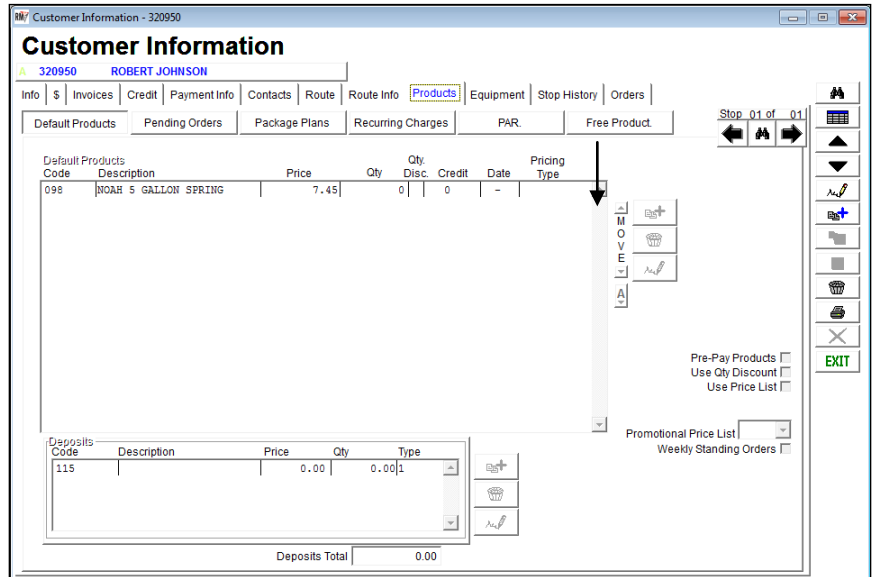
	Price	Cost
Default	0.41	0.525
Level 1	0.00	0.415
Level 2	0.00	0.415
Level 3	0.00	0.415
Level 4	0.00	0.415

NOTE: If you are using *Price Levels*, a price must be assigned to each level being used in Route Manager. If a price is left at 0.00 for any level in use, then it is assumed to be a no-charge item.

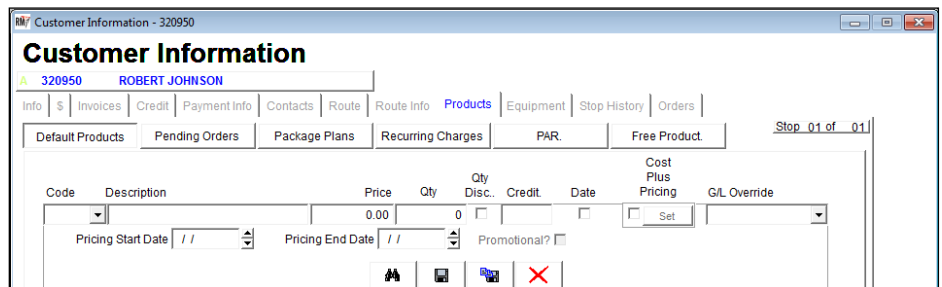
Default Product Pricing

Products can be assigned to each account directly at an agreed upon price with the customer. This will override any *Standard* and *Price Level* price established, and will only change if the item is removed or modified on the account.

Assign products directly to an account under *Lists > Customer Information*, on the *Products* tab. In modify mode, select the **Add** key next to the *Default Products* section to add products to the account manually.



Select the product that you would like to add to the customer's account, and enter the price and quantity that will be used. Click **OK** and repeat this process until all of the desired items have been added to the account.



Once all of the items have been entered, click **Save**.

Customer Information - 320950

Customer Information

320950 ROBERT JOHNSON

Info | \$ | Invoices | Credit | Payment Info | Contacts | Route | Route Info | **Products** | Equipment | Stop History | Orders

Default Products | Pending Orders | Package Plans | Recurring Charges | PAR | Free Product. Stop 01 of 01

Default Products Code	Description	Price	Qty	Qty. Disc.	Credit	Date	Pricing Type
098	NOAH 5 GALLON SPRING	7.45	0	0	-		
050	5# Bag Ice	0.41	2		-		

Cost Plus Pricing

This pricing method allows you to adjust prices for products based on changes to the wholesale price. This option is typically used within, but not limited to, the propane industry.

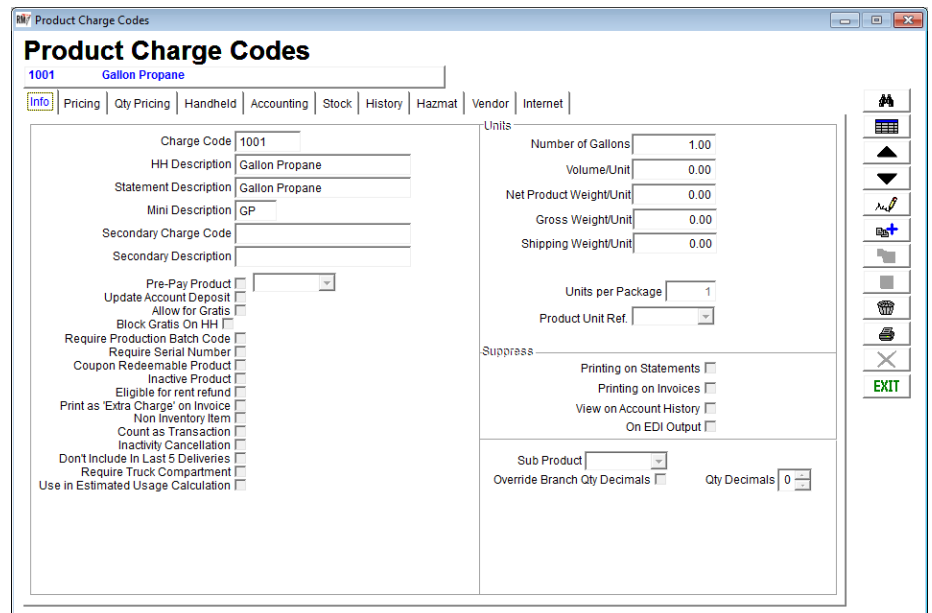
Setting up the Base Cost Code

The first step in establishing *Cost Plus Pricing* is to create the *Product Code* that will be used for providing the 'base' cost.

In the example below, the *Product Code* being used is 1001 for *Gallon Propane* — this base product must exist even if the district does not sell one gallon propane products.

NOTE: Ensure that the 'Number of Gallons' field is set to 1.00, as shown in the graphic below.

Enter all of the default information required to enter a new product code (leave price information at 0.00) and click **Save**.



Product Charge Codes

1001 Gallon Propane

info | Pricing | Qty Pricing | Handheld | Accounting | Stock | History | Hazmat | Vendor | Internet

Charge Code: 1001
 HH Description: Gallon Propane
 Statement Description: Gallon Propane
 Mini Description: GP
 Secondary Charge Code:
 Secondary Description:

Pre-Pay Product
 Update Account Deposit
 Allow for Gratis
 Block Gratis On HH
 Require Production Batch Code
 Require Serial Number
 Coupon Redeemable Product
 Inactive Product
 Eligible for rent refund
 Print as 'Extra Charge' on Invoice
 Non Inventory Item
 Count as Transaction
 Inactivity Cancellation
 Don't Include In Last 5 Deliveries
 Require Truck Compartment
 Use in Estimated Usage Calculation

Units
 Number of Gallons: 1.00
 Volume/Unit: 0.00
 Net Product Weight/Unit: 0.00
 Gross Weight/Unit: 0.00
 Shipping Weight/Unit: 0.00
 Units per Package: 1
 Product Unit Ref:

Suppress
 Printing on Statements
 Printing on Invoices
 View on Account History
 On EDI Output

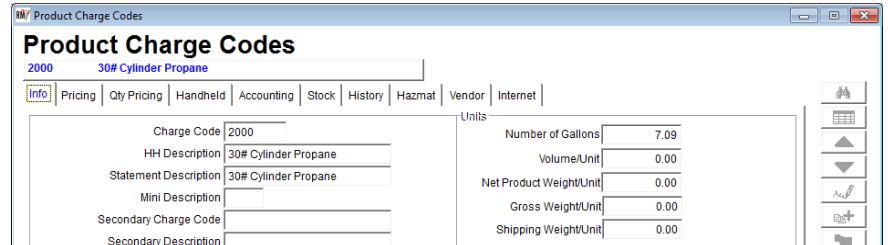
Sub Product:
 Override Branch Qty Decimals Qty Decimals: 0

EXIT

Continue to the next section to assign the new *Base Product* to an item.

Assigning the Base Cost Code

Browse to one of the products that will utilize *Cost Plus Pricing* and ensure that the 'Number of Gallons' field accurately represents the number of gallons included in the container (substitute *Gallons* for *Pounds, Units*, etc., if necessary); for example, the product below contains 7.09 gallons.

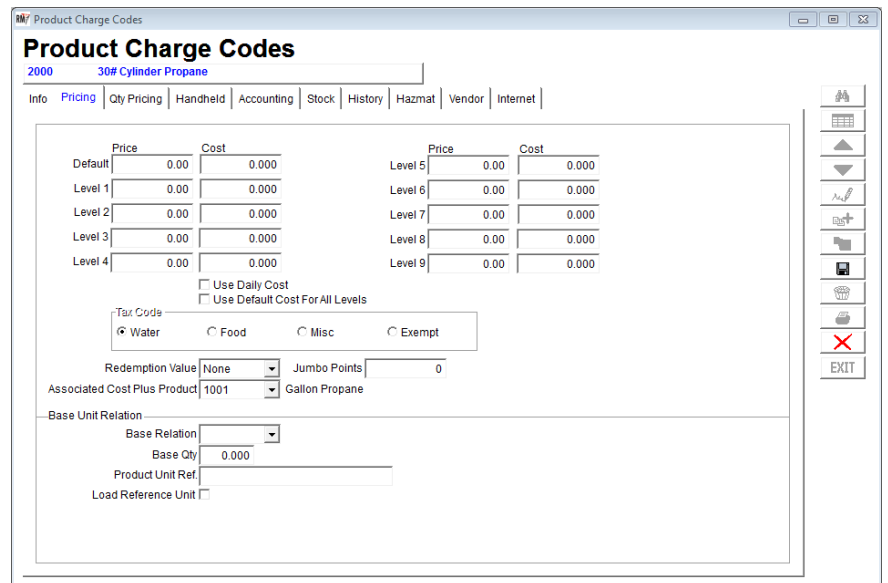


Product Charge Codes
2000 30# Cylinder Propane

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

Units	
Charge Code	2000
HH Description	30# Cylinder Propane
Statement Description	30# Cylinder Propane
Mini Description	
Secondary Charge Code	
Secondary Description	
Number of Gallons	7.09
Volume/Unit	0.00
Net Product Weight/Unit	0.00
Gross Weight/Unit	0.00
Shipping Weight/Unit	0.00

Next, click on the *Pricing* tab and select the *Base Code* created earlier within the 'Associated Cost Plus Product' drop-down list. Repeat this step for all of the products that will use *Cost Plus Pricing*.



Product Charge Codes
2000 30# Cylinder Propane

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

Price	Cost	Price	Cost
Default	0.00	0.000	0.000
Level 1	0.00	0.000	0.000
Level 2	0.00	0.000	0.000
Level 3	0.00	0.000	0.000
Level 4	0.00	0.000	0.000
Level 5	0.00	0.000	0.000
Level 6	0.00	0.000	0.000
Level 7	0.00	0.000	0.000
Level 8	0.00	0.000	0.000
Level 9	0.00	0.000	0.000

Use Daily Cost
 Use Default Cost For All Levels

Tax Code: Water Food Misc Exempt

Redemption Value: None Jumbo Points: 0

Associated Cost Plus Product: 1001 Gallon Propane

Base Unit Relation:
Base Relation:
Base Qty: 0.000
Product Unit Ref:
Load Reference Unit:

NOTE: When using *Cost Plus Pricing*, all price levels will be ignored.

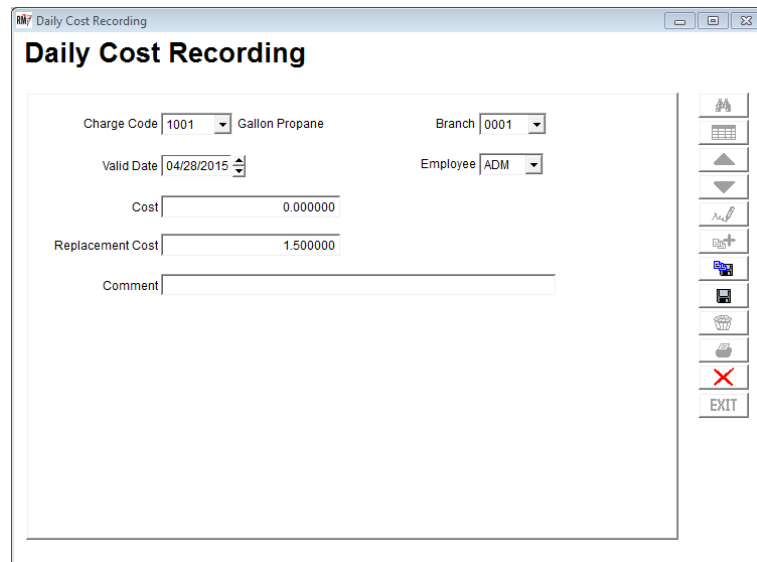
Daily Cost Recording

To update the cost from day-to-day, you will use the 'Daily Cost Recording' option under *Lists > Product Codes*.

1. Choose the **Add** option to create a new entry within the *Daily Cost Recording* screen.
2. In the *Charge Code* field, select the 'Base Cost Code' assigned to the products in the previous section.
3. Enter a 'Valid Date' (when this cost will be used).
4. Enter an amount in the *Replacement Cost* field.

NOTE: The current cost and date will continue to be used until a new date and price are entered.

5. **Save** the changes made.



The screenshot shows a window titled "Daily Cost Recording" with the following fields and values:

- Charge Code: 1001 (Dropdown menu)
- Branch: 0001 (Dropdown menu)
- Valid Date: 04/28/2015 (Date picker)
- Employee: ADM (Dropdown menu)
- Cost: 0.000000 (Text input)
- Replacement Cost: 1.500000 (Text input)
- Comment: (Empty text area)

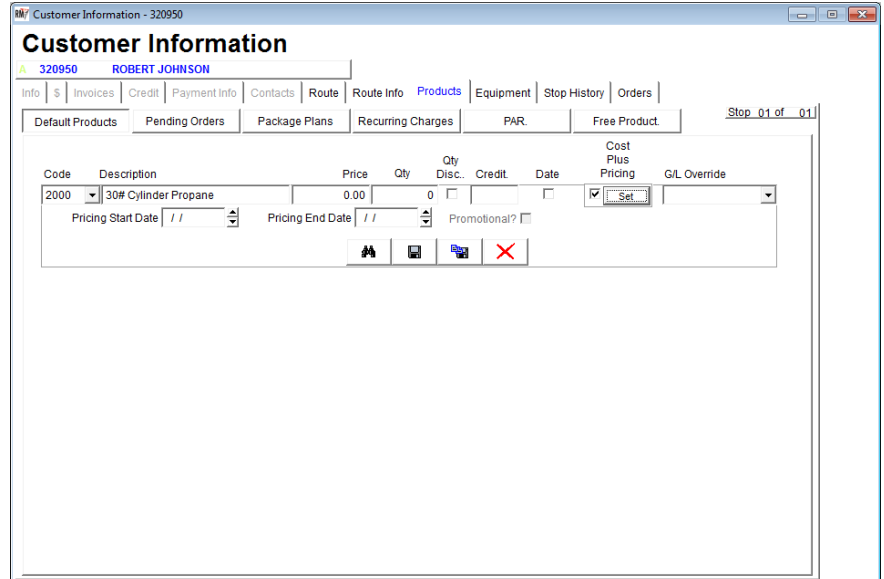
On the right side of the window, there is a vertical toolbar with icons for: Add, Edit, Print, Save, and Exit. The "EXIT" button is at the bottom of the toolbar.

Continue to the next section to assign the *Cost Plus Pricing* feature to individual customers.

Adding Cost Plus Pricing to Customers

Browse to *Lists > Customer Information*, and click on the *Products* tab.

1. Click **Modify** and add all of the *Cost Plus* items that this account will use to the *Default Products* section of the screen.



Customer Information - 320950

Customer Information

A 320950 ROBERT JOHNSON

Info | Invoices | Credit | Payment Info | Contacts | Route | Route Info | **Products** | Equipment | Stop History | Orders

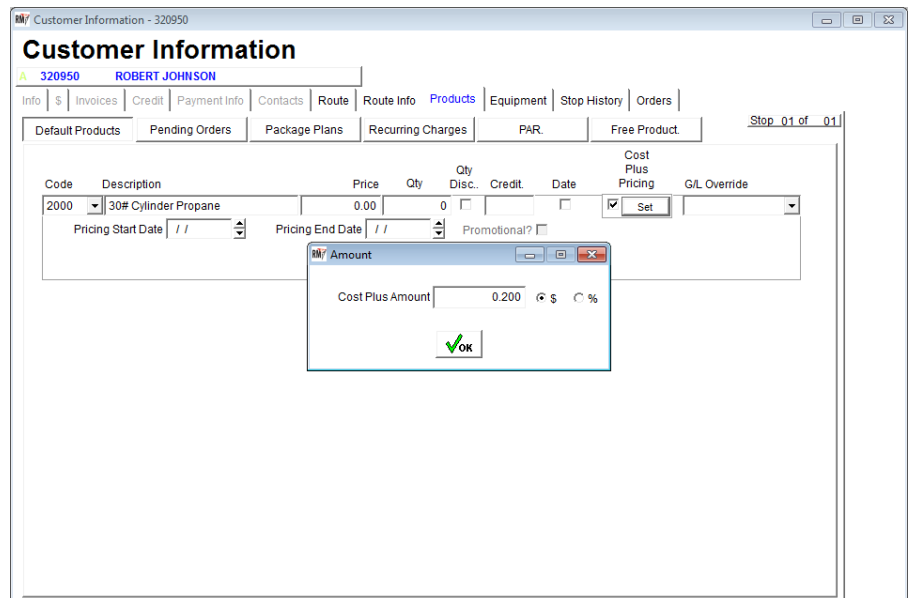
Default Products | Pending Orders | Package Plans | Recurring Charges | PAR. | Free Product. | Stop 01 of 01

Code	Description	Price	Qty	Qty Disc.	Credit	Date	Cost Plus Pricing	G/L Override
2000	30# Cylinder Propane	0.00	0				Set	

Pricing Start Date // Pricing End Date // Promotional?

Buttons: Add, Edit, Print, Delete

2. Select the **Set** button under the 'Cost Plus Pricing' label on the screen (shown below).
3. Enter the amount over cost that this customer will be charged. In this example, a 20 % mark-up will be used (below).



Customer Information - 320950

Customer Information

A 320950 ROBERT JOHNSON

Info | Invoices | Credit | Payment Info | Contacts | Route | Route Info | **Products** | Equipment | Stop History | Orders

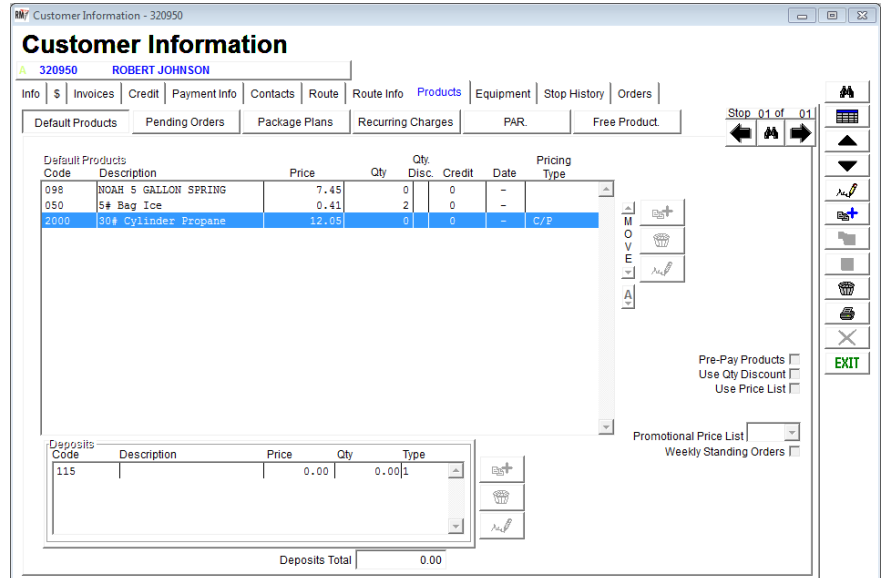
Default Products | Pending Orders | Package Plans | Recurring Charges | PAR. | Free Product. | Stop 01 of 01

Code	Description	Price	Qty	Qty Disc.	Credit	Date	Cost Plus Pricing	G/L Override
2000	30# Cylinder Propane	0.00	0				Set	

Pricing Start Date // Pricing End Date // Promotional?

Amount dialog box: Cost Plus Amount 0.200 % OK

- Click **OK and Save** to close the dialog screen. *Note: The cost plus price may not take effect until you hit **Save** on the right hand toolbar.*



- Repeat these steps for each *Cost Plus* product.

Based on the entry made within the *Daily Cost Recording* screen and the price over cost entered, this customer's price will be 85.72.

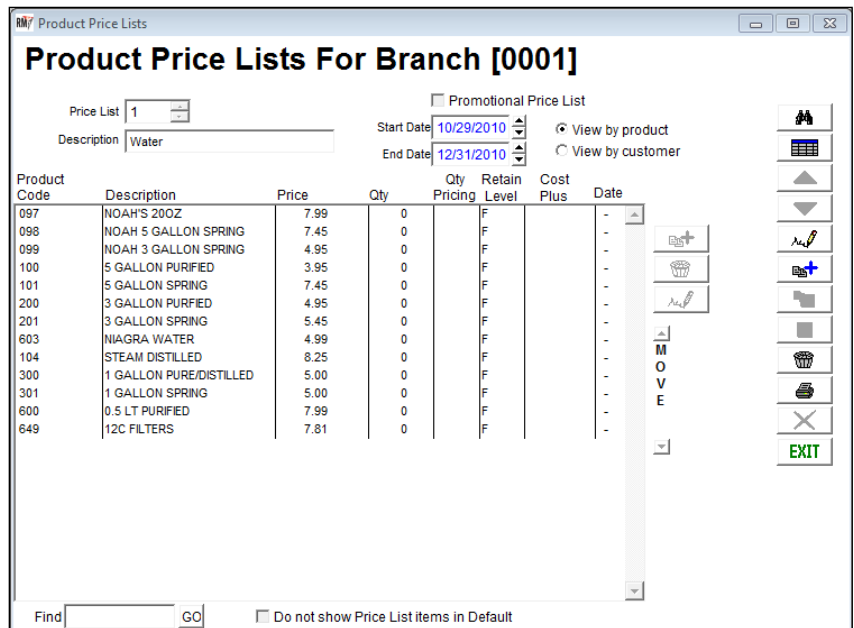
Repeat all of the steps above on each account that will utilize the *Cost Plus Pricing* option. Once the accounts have been set up properly, you can simply update the cost within the *Daily Cost Recording* screen to update the prices on each account globally.

Price Lists

Price Lists offer you a way of customizing prices for groups of customers. For example, if you deliver to 35 stores in a chain that all receive the same products and prices, you can create a *Price List* of items that you typically sell to the chain, with any combination of prices.

NOTE: When you sell products to your *Price List* customers that are not included in their assigned *Price List*, then the price will depend on the customer's *Standard Price* or *Price Level*.

Navigate to *Lists > Product Codes > Product Price Lists*. Create a new *Price List* by selecting the **Add** key and entering an 'ID' and 'Description'.



Product Price Lists For Branch [0001]

Price List: 1
 Description: Water
 Start Date: 10/29/2010
 End Date: 12/31/2010
 Promotional Price List:
 View by product:
 View by customer:

Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus	Date
097	NOAH'S 20OZ	7.99	0		F		-
098	NOAH 5 GALLON SPRING	7.45	0		F		-
099	NOAH 3 GALLON SPRING	4.95	0		F		-
100	5 GALLON PURIFIED	3.95	0		F		-
101	5 GALLON SPRING	7.45	0		F		-
200	3 GALLON PURIFIED	4.95	0		F		-
201	3 GALLON SPRING	5.45	0		F		-
603	NIAGRA WATER	4.99	0		F		-
104	STEAM DISTILLED	8.25	0		F		-
300	1 GALLON PURE/DISTILLED	5.00	0		F		-
301	1 GALLON SPRING	5.00	0		F		-
600	0.5 LT PURIFIED	7.99	0		F		-
649	12C FILTERS	7.81	0		F		-

Find: GO Do not show Price List items in Default

Add all of the items to the *Price List*, at the price and quantity desired.

NOTE: The additional pricing methods listed (*Qty Pricing* and *Cost Plus*) can be incorporated into each *Price List*; refer to the sections of this document that discuss each item for further information. The 'Retain Level' option allows you to add the item to the list, but retain the customer's *Price Level* price.

Product Price Lists

Product Price Lists For Branch [0001]

Price List: 1
Description: Price List #1

Promotional Price List
Start Date: 10/29/2010
End Date: 12/31/2010

Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus
050	5# Bag Ice	0.41	0	<input type="checkbox"/>	<input type="checkbox"/>	Set

Pricing Start Date: // Pricing End Date: // Promotional?

Add all of the desired items to the list, and click **Save** or **More** to continue.

Product Price Lists

Product Price Lists For Branch [0001]

Price List: 1
Description: Price List #1

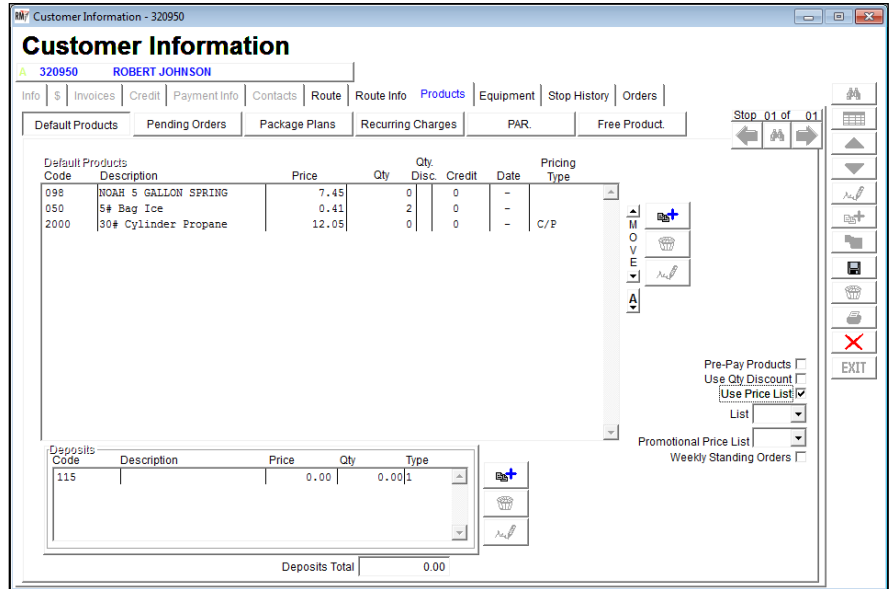
Promotional Price List
Start Date: 10/29/2010
End Date: 12/31/2010

Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus	Date
050	5# Bag Ice	0.41	0	F			-
1001	Gallon Propane	0.60	0	F			-

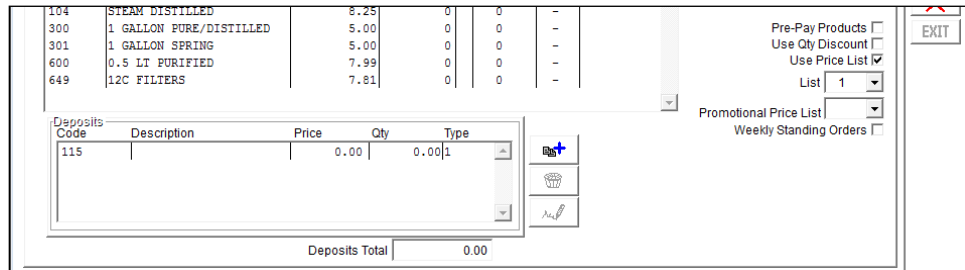
Find: GO Do not show Price List items in Default

M O V E

To add a *Price List* to a customer's account, navigate to *Lists > Customer Information*, and select the *Products* tab. Click **Modify**, and select the 'Use Price List' option.



Select the *Price List* desired from the drop-down list. The products assigned to the *Price List* will be automatically added to the customer's *Default Products* screen.



Click **Save** to complete the process.

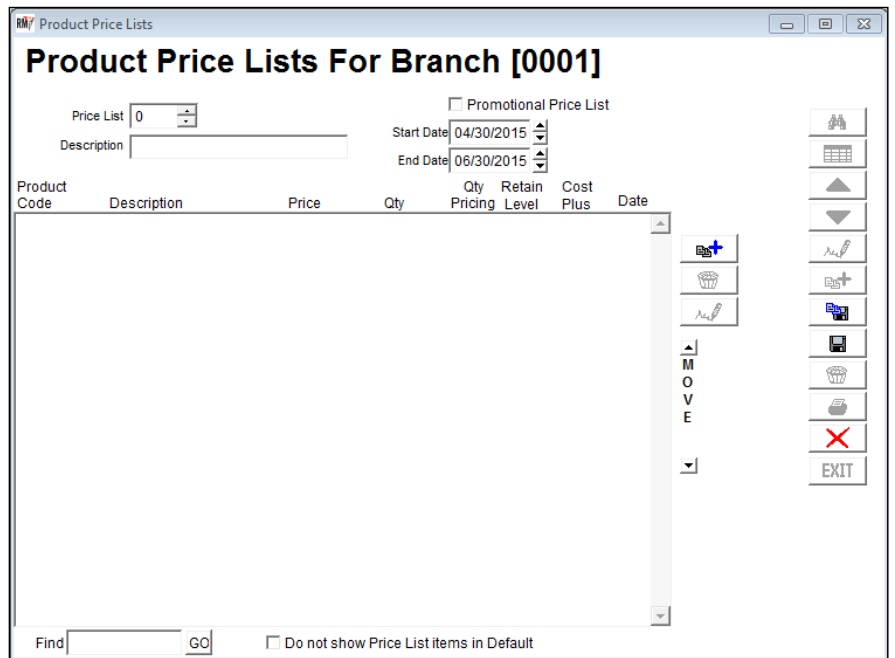
NOTE: It is possible to override the *Price List* price by adding products directly to the *Default Products* section after assigning the customer to a *Price List*.

Promotional Price Lists

This pricing method allows you to offer promotional prices for a specific length of time. This is helpful if the customer will only qualify for a promotion temporarily.

Creating Promotional Price Lists

Each *Promotional Price List* can be established under *Lists > Product Codes > Product Price Lists*. Select the **Add** key to create a new *Price List*.



Product Price Lists For Branch [0001]

Price List: 0 Promotional Price List

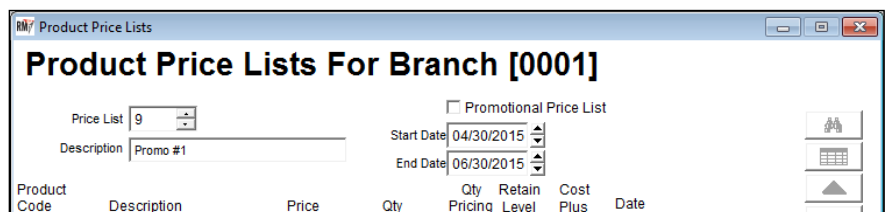
Description:

Start Date: 04/30/2015 End Date: 06/30/2015

Product Code	Description	Price	Qty	Retain Pricing Level	Cost Plus	Date

Find: GO Do not show Price List items in Default

Enter a code and description for the *Price List*.



Product Price Lists For Branch [0001]

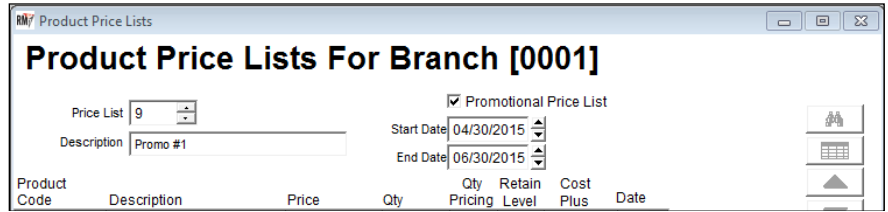
Price List: 9 Promotional Price List

Description: Promo #1

Start Date: 04/30/2015 End Date: 06/30/2015

Product Code	Description	Price	Qty	Retain Pricing Level	Cost Plus	Date

Select the **Promotional Price List** option and enter the active dates for the promotion.

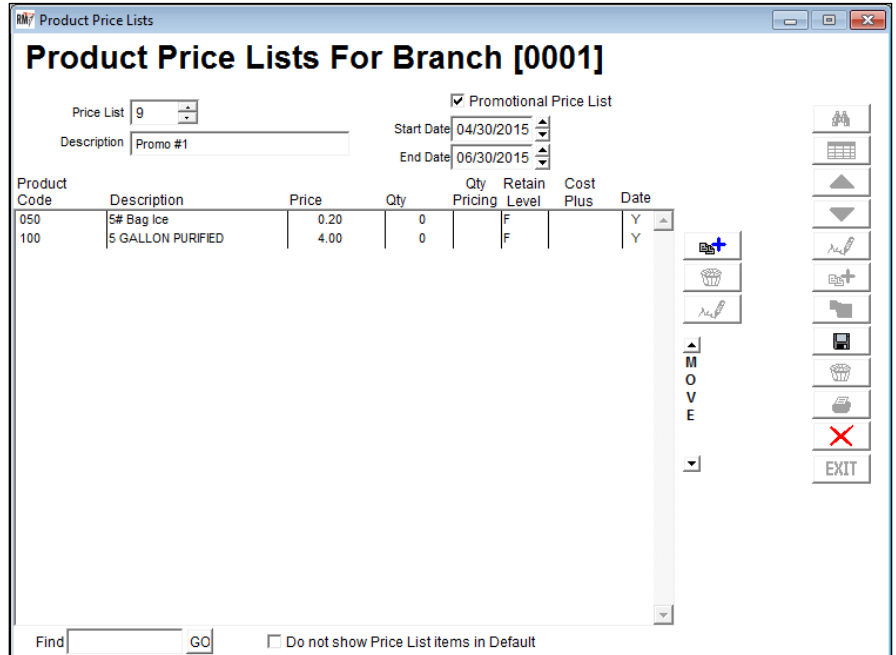


Product Price Lists For Branch [0001]

Price List: 9
 Description: Promo #1
 Promotional Price List
 Start Date: 04/30/2015
 End Date: 06/30/2015

Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus	Date
--------------	-------------	-------	-----	-------------	--------------	-----------	------

Add the items to the *Price List* at the desired price and quantity.



Product Price Lists For Branch [0001]

Price List: 9
 Description: Promo #1
 Promotional Price List
 Start Date: 04/30/2015
 End Date: 06/30/2015

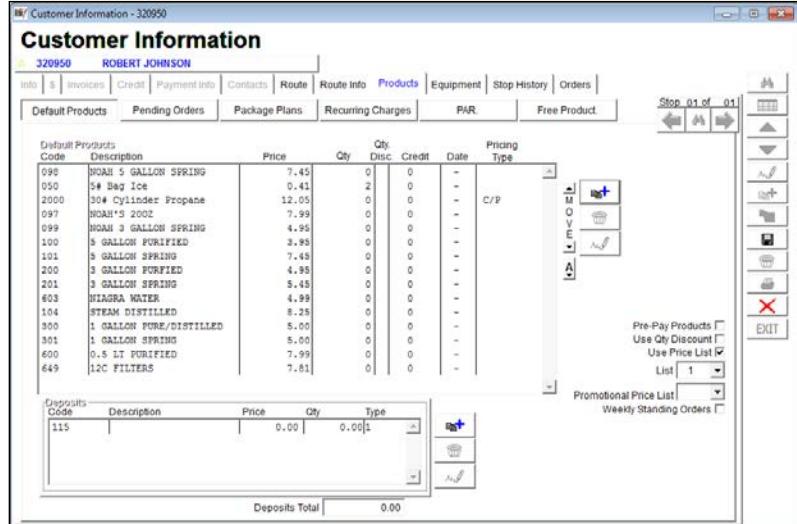
Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus	Date
050	S# Bag Ice	0.20	0		F		Y
100	5 GALLON PURIFIED	4.00	0		F		Y

Find: GO Do not show Price List items in Default

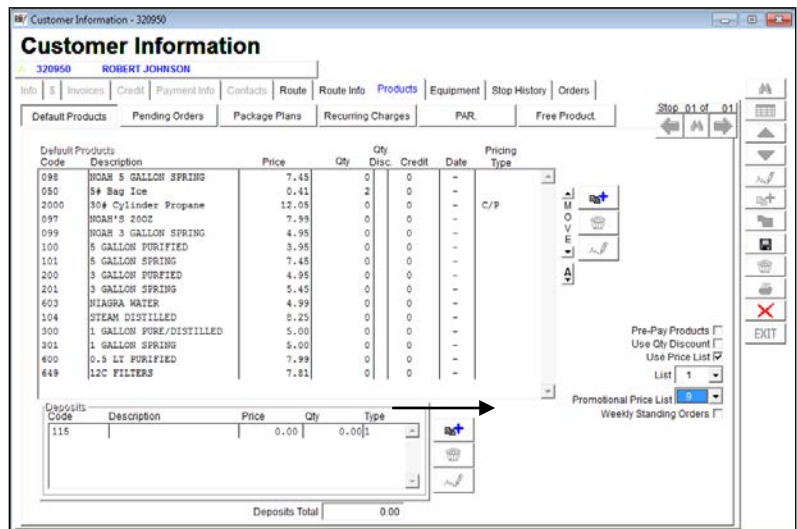
Click **Save** or **More** to complete the process. Repeat these steps for each *Promotional Price List* desired.

Assigning to Customers

After you have created your *Promotional Price Lists*, navigate to *Lists > Customer Information*, and select the *Products* tab.



Click **Modify**, and select the 'Promotional Price List' desired from the drop-down list in the lower right corner of the screen.



Click **Save** to complete the process.

NOTE: *Promotional Price Lists* will override standard *Price List* pricing for the duration of the promotion, but will not override *Default Product* prices.

Quantity Pricing

This pricing method allows you to provide your customers with discounted prices when they purchase a preset quantity of a single item. The higher the quantity of items that the customer purchases: the lower the unit price will be.

Quantity Pricing can be established in three separate areas of Route Manager:

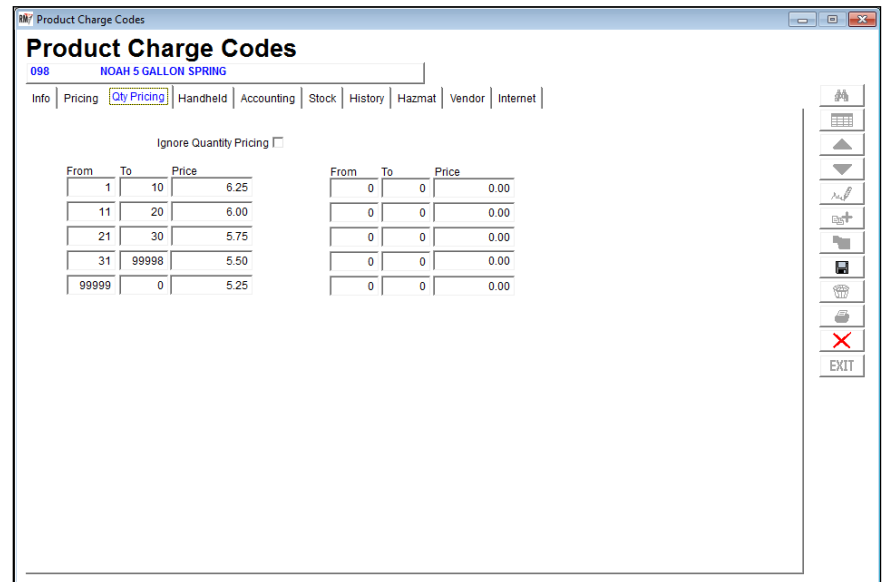
- ▶ Product Level
- ▶ Customer Level
- ▶ Price List Level

Each method is covered below.

Product Level

Navigate to *Lists > Product Codes > Product Charge Codes*, and select the *Qty Pricing* tab. This option allows you to enter a range of quantities and prices to be used when invoicing customers.

Enter the quantity and price on each level that will be used. When you have reached the last level of discounts desired, enter '99999' in the 'To' field (refer to the example below):



Product Charge Codes

098 NOAH 5 GALLON SPRING

Info Pricing Qty Pricing Handheld Accounting Stock History Hazmat Vendor Internet

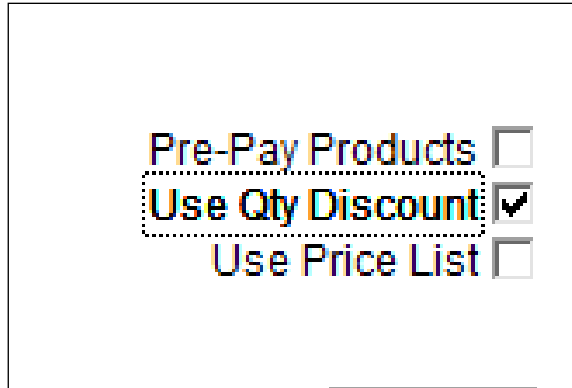
Ignore Quantity Pricing

From	To	Price
1	10	6.25
11	20	6.00
21	30	5.75
31	99998	5.50
99999	0	5.25

From	To	Price
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00
0	0	0.00

Save your changes and repeat these steps on each product that will use *Quantity Discount Pricing*.

Next, the *Quantity Discount* option needs to be enabled per account from within *Lists > Customer Information*, on the *Products* tab. Select the option 'Use Qty Discount' on each account that will use this pricing method.

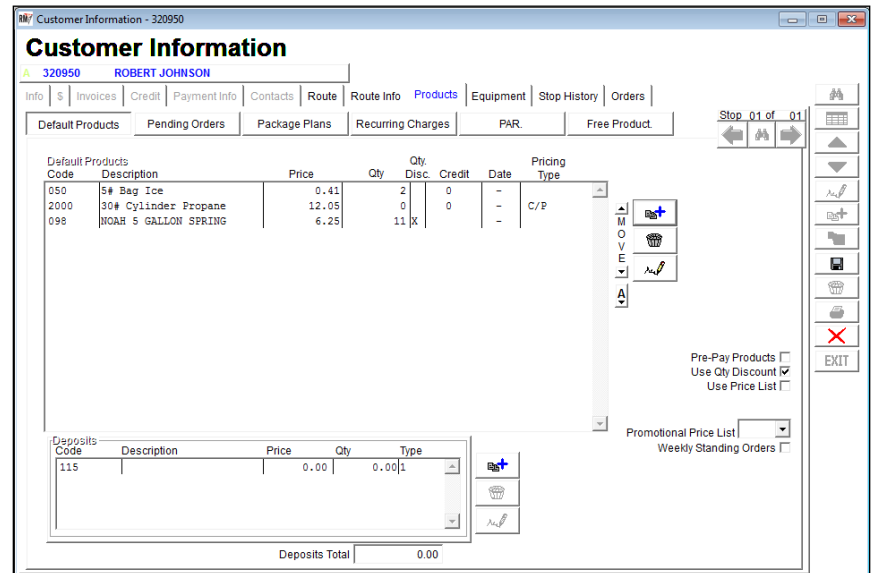


NOTE: *Default Product* prices assigned to the account override the *Qty Discount* rates.

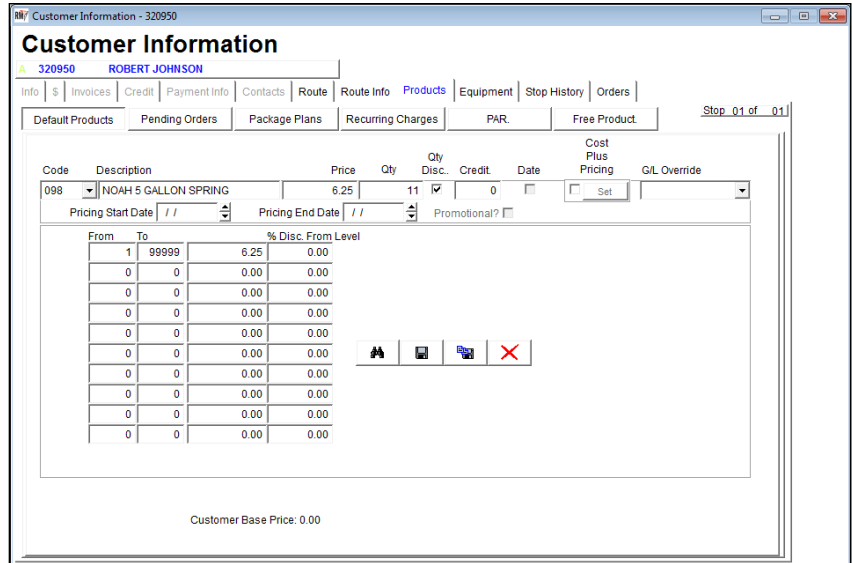
Customer Level Override

You have the ability to override the established *Quantity Discount* rate per product by manually adding the discount parameters on the customer's account.

In *Modify* mode, select the **Add** key in the *Default Products* section of the screen.



Add a product to the *Default Products* section and choose the 'Qty Disc' option after selecting the item (below).

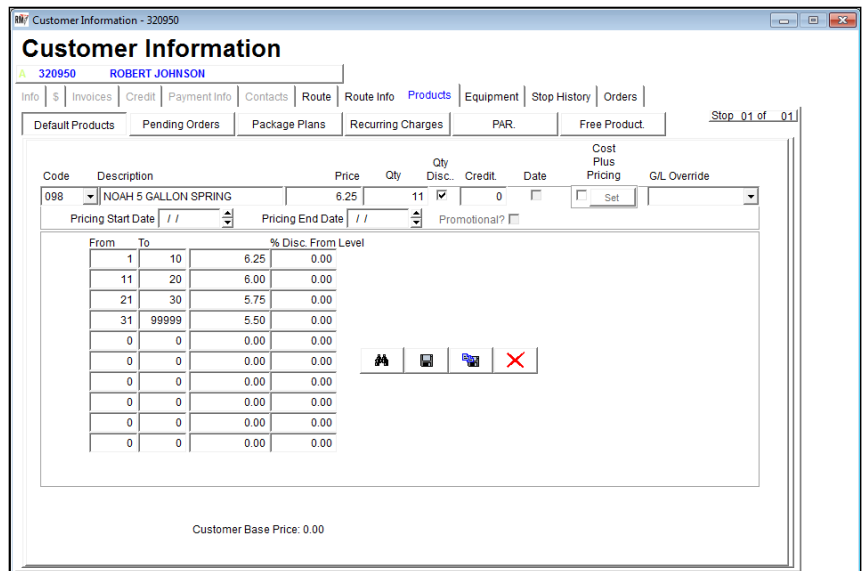


Code	Description	Price	Qty	Qty Disc.	Credit	Date	Cost Plus Pricing	GL Override
098	NOAH 5 GALLON SPRING	6.25	11	<input checked="" type="checkbox"/>	0		<input type="checkbox"/> Set	

From	To	% Disc	From Level
1	99999	6.25	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00

Customer Base Price: 0.00

Enter the quantity and price on each level needed. When you have reached the last level of discounts desired, enter '99999' in the 'To' field (refer to the example below):



Code	Description	Price	Qty	Qty Disc.	Credit	Date	Cost Plus Pricing	GL Override
098	NOAH 5 GALLON SPRING	6.25	11	<input checked="" type="checkbox"/>	0		<input type="checkbox"/> Set	

From	To	% Disc	From Level
1	10	6.25	0.00
11	20	6.00	0.00
21	30	5.75	0.00
31	99999	5.50	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00
0	0	0.00	0.00

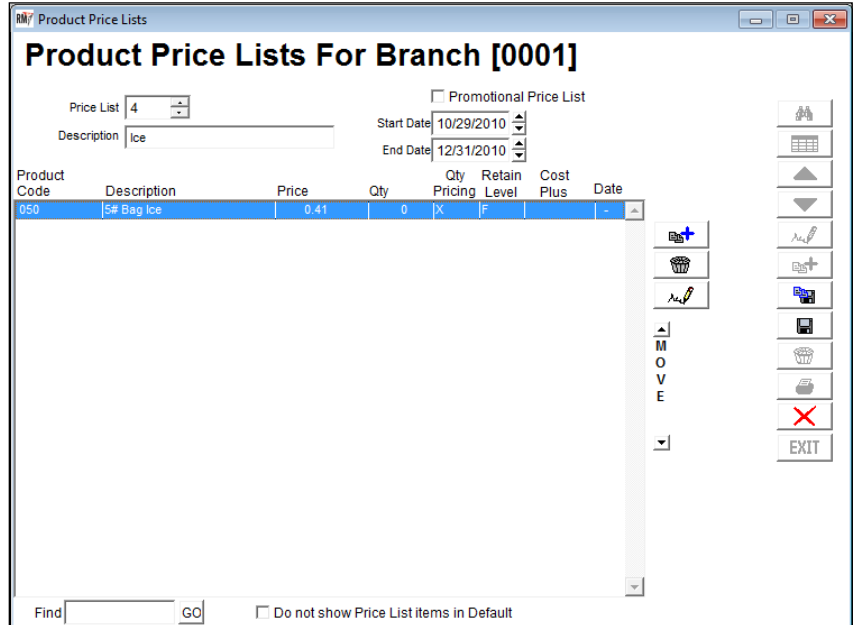
Customer Base Price: 0.00

Click **OK** and repeat these steps for each product needed. **Save** your changes to complete the process.

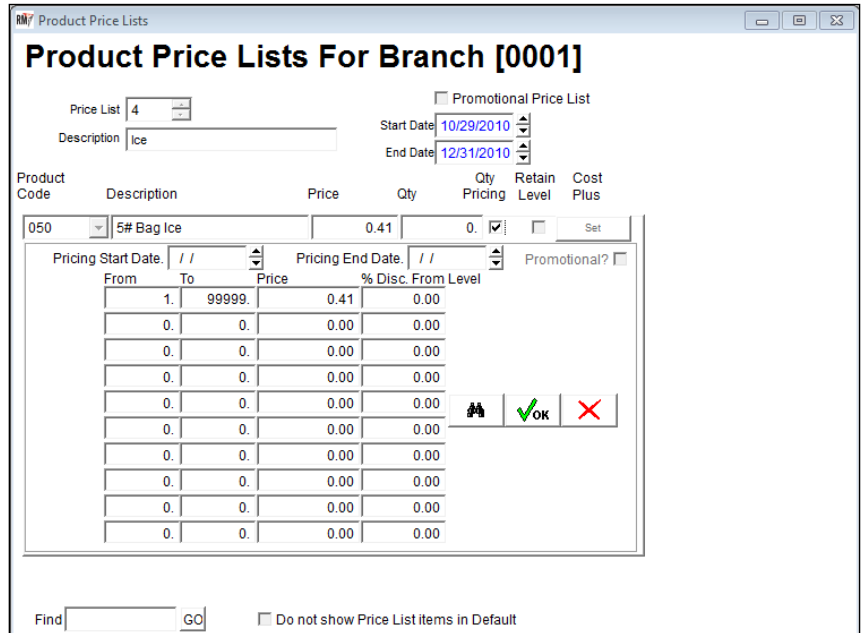
Product Price List Level

Quantity Discount Pricing can be established within each individual *Product Price List* in Route Manager.

Browse to *Lists > Product Codes > Product Price Lists*, and modify or create a new *Price List*.



When adding or modifying an item, select the 'Qty. Pricing' option to establish the *Discount Quantity Pricing* parameters.



Pricing Start Date	Pricing End Date	Promotional?	From	To	Price	% Disc.	From Level
//	//	<input type="checkbox"/>	1	99999	0.41	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00
			0	0	0.00	0.00	0.00

Enter the quantity and price on each level needed. When you have reached the last level of discounts

desired, enter '99999' in the 'To' field (refer to the example below):

Product Price Lists For Branch [0001]

Price List: 4
Description: Ice

Promotional Price List
Start Date: 10/29/2010
End Date: 12/31/2010

Product Code	Description	Price	Qty	Qty Pricing	Retain Level	Cost Plus
050	5# Bag Ice	0.41	0.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Set

Pricing Start Date. / /		Pricing End Date. / /		Promotional?
From	To	Price	% Disc. From Level	
1.	10.	0.41	0.00	
11.	30.	0.31	24.39	
31.	40.	0.21	48.78	
41.	99999.	0.11	73.17	
0.	0.	0.00	0.00	<input type="checkbox"/>
0.	0.	0.00	0.00	<input type="checkbox"/>
0.	0.	0.00	0.00	<input type="checkbox"/>
0.	0.	0.00	0.00	<input type="checkbox"/>
0.	0.	0.00	0.00	<input type="checkbox"/>
0.	0.	0.00	0.00	<input type="checkbox"/>

Find: GO Do not show Price List items in Default

Click **OK** and repeat this process for each item desired.

Product Group Discounts

Product Group Discounts allows you to discount the price for products purchased by your customers. This option differs from the *Quantity Discount Pricing* option, as the discounts are based on combined products purchased as a group, not per product.

EXAMPLE: *Product Group 'X'* is assigned to all of your coffee products. At the time of delivery, if the customer purchases more than 15 items assigned to this group, they will receive a 10% discount on the items — only items assigned to *Product Group 'X'* will qualify for a discount.

To set up *Product Group Discounts*, four areas of the program need to be updated:

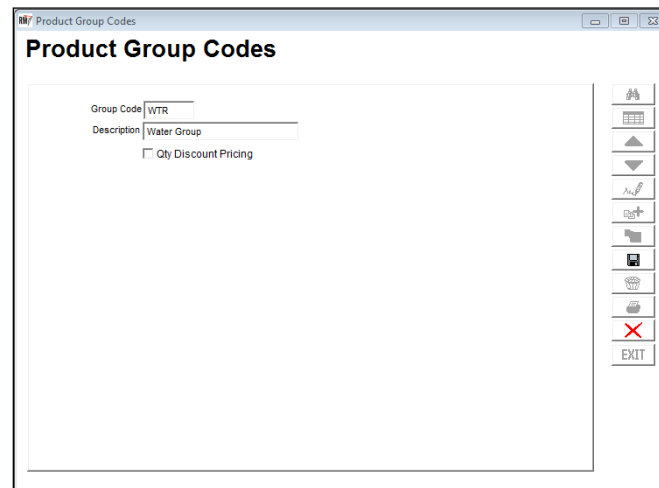
1. Product Group Codes
2. Product Charge Codes
3. Route Master
4. Handheld Class

Each item is covered in detail within this section.

Product Group Codes

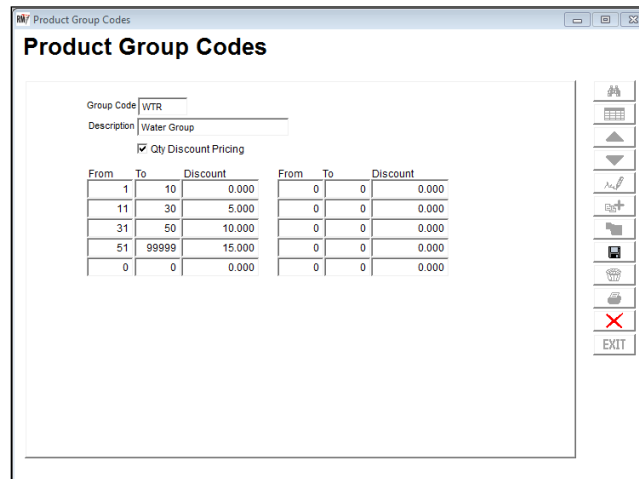
Product Group Codes are generally used for filtering products. This option will also be used for *Product Group Discounts* and can be found under *Lists > Product Codes > Product Group Codes*.

1. Create at least one *Product Group Code* that will be assigned to your products.



The screenshot shows a software window titled "Product Group Codes". Inside the window, there are two input fields: "Group Code" with the value "WTR" and "Description" with the value "Water Group". Below these fields is a checkbox labeled "Qty Discount Pricing" which is currently unchecked. On the right side of the window, there is a vertical toolbar containing several icons for navigation and actions, including a home icon, a list icon, up and down arrows, a search icon, a refresh icon, a print icon, a trash icon, a red X icon, and an "EXIT" button.

2. Select the option 'Qty Discount Pricing' and enter the desired quantity and discount (%) information.



The screenshot shows a window titled 'Product Group Codes' with the following fields and table:

Group Code: WTR
Description: Water Group
 Qty Discount Pricing

From	To	Discount	From	To	Discount
1	10	0.000	0	0	0.000
11	30	5.000	0	0	0.000
31	50	10.000	0	0	0.000
51	99999	15.000	0	0	0.000
0	0	0.000	0	0	0.000

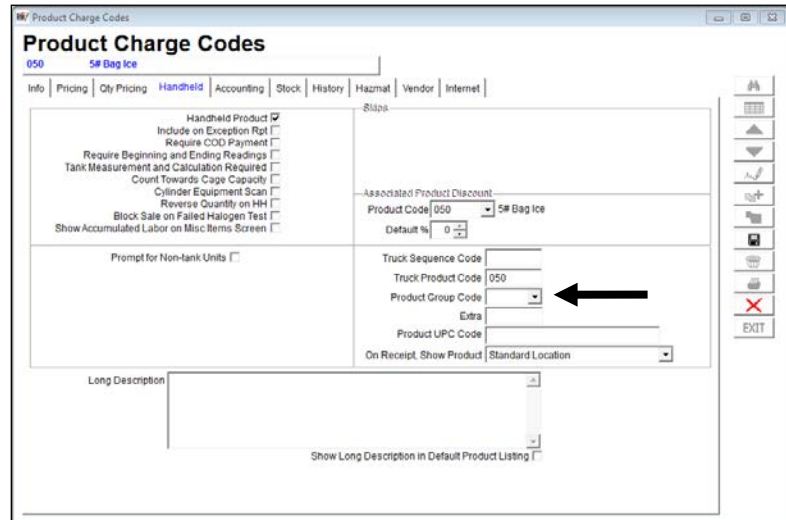
In the example above, 'Water Group' has been created, and the discount and quantity information is entered as:

- ▶ **1-10 products** = standard rates.
 - ▶ **11-30 products** = 5% discount.
 - ▶ **31-50 products** = 10% discount.
 - ▶ **51 and above** = 15% discount.
3. **Save** your changes and repeat these steps if you would like to use more than one *Product Group Discount*.

Product Charge Codes

In order to use *Product Group Discounts*, the group(s) created will need to be assigned to the individual products that qualify for a discount.

1. Navigate to *Lists > Product Codes > Product Charge Codes*, and select the *Handheld* tab.
2. Click **Modify** and assign the new *Product Group* to each product that will be included in the current discount.

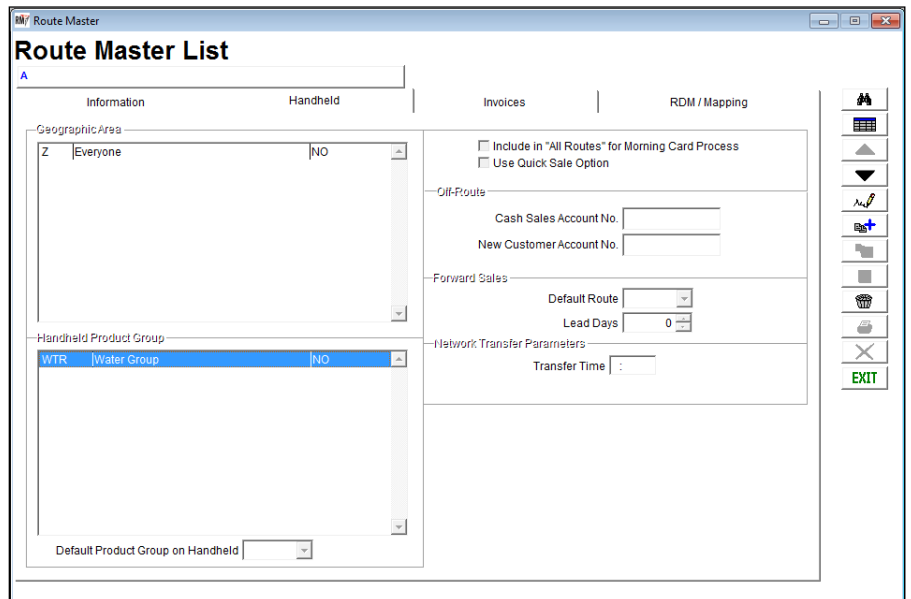


The screenshot shows the 'Product Charge Codes' window for product '050 5# Bag Ice'. The 'Handheld' tab is active. The interface includes various checkboxes for product settings, such as 'Handheld Product' (checked), 'Include on Exception Rpt', 'Require COD Payment', 'Require Beginning and Ending Readings', 'Tank Measurement and Calculation Required', 'Count Towards Cage Capacity', 'Cylinder Equipment Scan', 'Reverse Quantity on HH', 'Stock Sale on Failed Halogen Test', and 'Show Accumulated Labor on Misc Items Screen'. There are also fields for 'Associated Product Discount' (Product Code: 050, Default %: 0), 'Truck Sequence Code', 'Truck Product Code' (050), 'Product Group Code' (Extra, with a black arrow pointing to it), 'Product UPC Code', and 'On Receipt Show Product' (Standard Location). A 'Long Description' field is at the bottom, and a 'Show Long Description in Default Product Listing' checkbox is at the bottom right.

Route Master

The *Route Master* screen controls the *Product Group Codes* that are sent to the handheld. Navigate to *Lists > Routes > Route Master*, and select the *Handheld* tab.

If you are using the *Handheld Product Group* option for filtering products currently, make sure that any new *Product Group Codes* created are set to 'Yes.' If you are not using the *Product Group Codes* for anything other than discounts, you can leave all of the *Product Group* filters defaulted to 'No.'



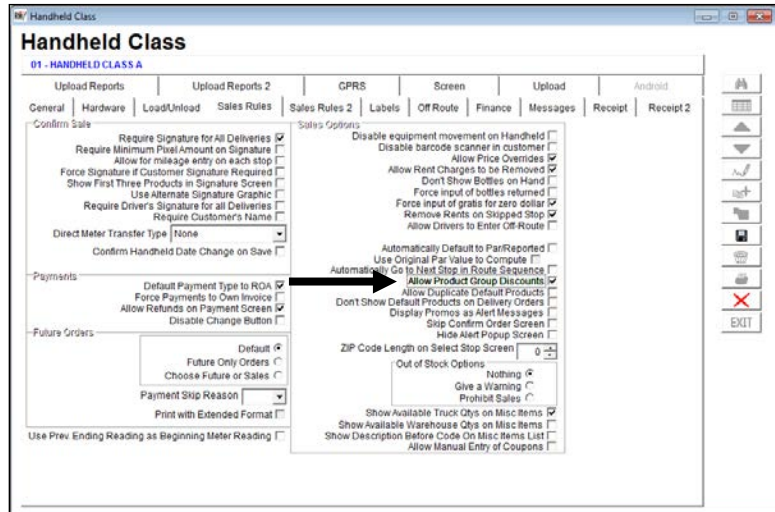
NOTE: In most cases, you should leave all of your *Product Groups* defaulted to 'No,' this allows you to use the discount feature without filtering products out of your handheld.

Handheld Class

For each *Handheld Class* in Route Manager, a new option will need to be enabled in order to use *Product Group Discounts* on the handheld.

Browse to *Lists > Routes > Handheld Class*, and choose the *Sales Rules* tab.

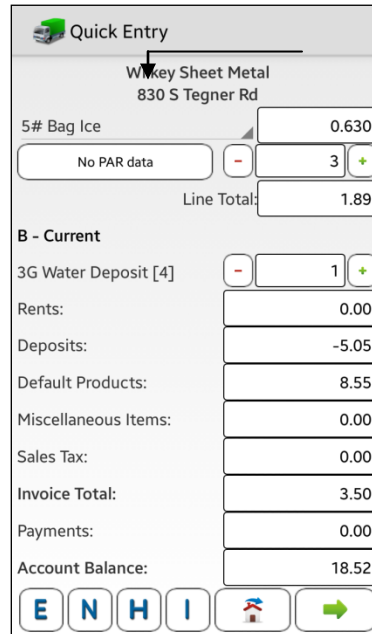
Click **Modify** and select the option 'Allow Product Group Discounts'.



Repeat this step for each *Handheld Class* that will use *Product Group Discounts*.

Daily Processing – Handheld

When the driver enters a quantity that qualifies for a discount on the handheld, the amount being discounted will be displayed on the *Deposits/Discounts* line of the *Quick Entry* screen:



Quick Entry

Wilkey Sheet Metal
830 S Tegner Rd

5# Bag Ice 0.630

No PAR data - 3 +

Line Total: 1.89

B - Current

3G Water Deposit [4] - 1 +

Rents: 0.00

Deposits: -5.05

Default Products: 8.55

Miscellaneous Items: 0.00

Sales Tax: 0.00

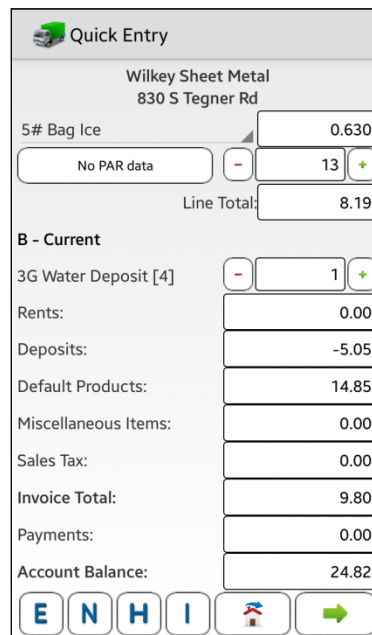
Invoice Total: 3.50

Payments: 0.00

Account Balance: 18.52

E N H I [Home] [Next]

A customer will also qualify for a discount when the combined quantity of more than one item (assigned to the same *Product Group Code*) meets the required quantity:



Quick Entry

Wilkey Sheet Metal
830 S Tegner Rd

5# Bag Ice 0.630

No PAR data - 13 +

Line Total: 8.19

B - Current

3G Water Deposit [4] - 1 +

Rents: 0.00

Deposits: -5.05

Default Products: 14.85

Miscellaneous Items: 0.00

Sales Tax: 0.00

Invoice Total: 9.80

Payments: 0.00

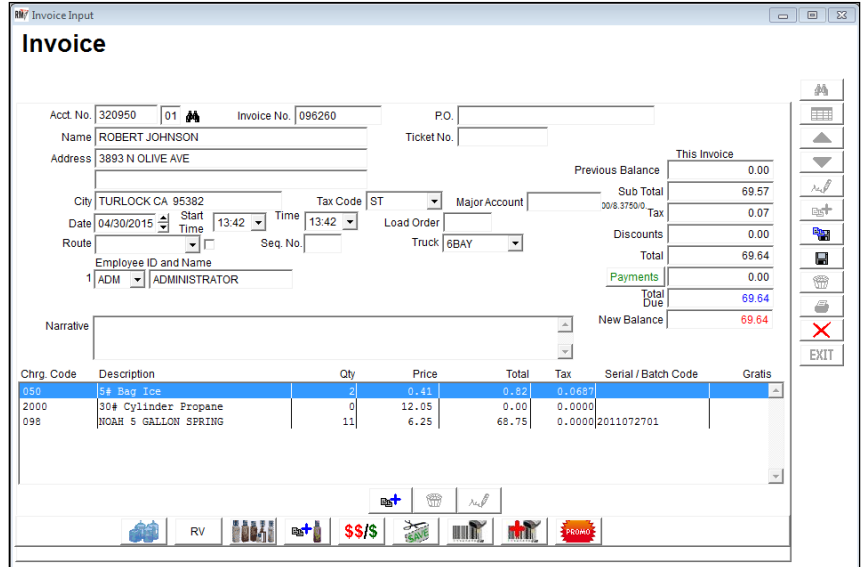
Account Balance: 24.82

E N H I [Home] [Next]

Daily Processing – Desktop

When a new invoice is created that qualifies for a discounted rate on the desktop, the amount being discounted will be calculated when the invoice is saved.

A standard invoice is displayed below; the combined quantity (13) of both items qualifies for a discount.



Invoice

Acct. No. 320950 01 Invoice No. 096260 P.O. _____
 Name ROBERT JOHNSON Ticket No. _____
 Address 3893 N OLIVE AVE

City TURLOCK CA 95382 Tax Code ST Major Account _____
 Date 04/30/2015 Start Time 13:42 Time 13:42 Load Order _____
 Route _____ Seq. No. _____ Truck 6BAY

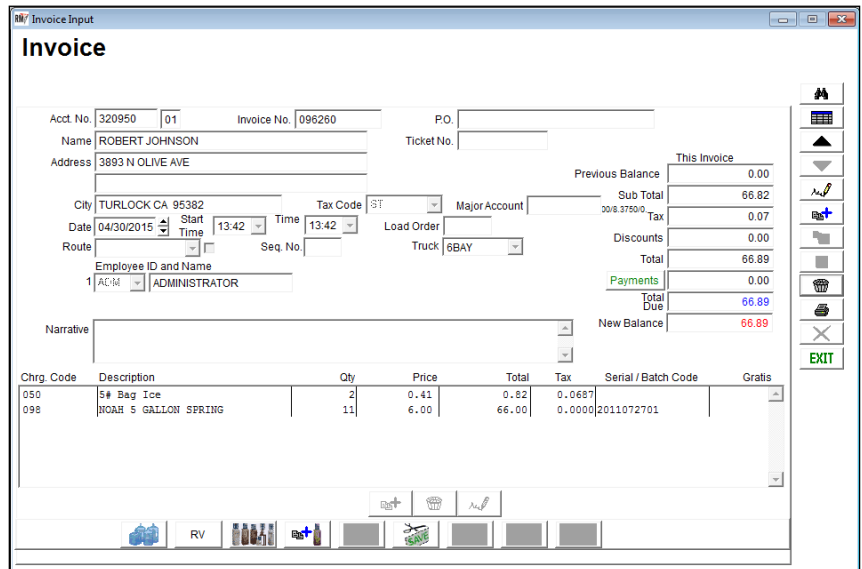
Employee ID and Name
 1 ADM ADMINISTRATOR

Narrative _____

Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Gratis
050	5# Bag Ice	2	0.41	0.82	0.0687		
2000	90# Cylinder Propane	0	12.05	0.00	0.0000		
098	NOAH 5 GALLON SPRING	11	6.25	68.75	0.0000	2011072701	

Previous Balance 0.00
 This Invoice Sub Total 69.57
 Tax 0.07
 Discounts 0.00
 Total 69.64
 Payments 0.00
 Total Due 69.64
 New Balance 69.64

Once **Save** is selected, the amounts are recalculated at the discounted rate:



Invoice

Acct. No. 320950 01 Invoice No. 096260 P.O. _____
 Name ROBERT JOHNSON Ticket No. _____
 Address 3893 N OLIVE AVE

City TURLOCK CA 95382 Tax Code ST Major Account _____
 Date 04/30/2015 Start Time 13:42 Time 13:42 Load Order _____
 Route _____ Seq. No. _____ Truck 6BAY

Employee ID and Name
 1 ADM ADMINISTRATOR

Narrative _____

Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	Gratis
050	5# Bag Ice	2	0.41	0.82	0.0687		
098	NOAH 5 GALLON SPRING	11	6.00	66.00	0.0000	2011072701	

Previous Balance 0.00
 This Invoice Sub Total 66.82
 Tax 0.07
 Discounts 0.00
 Total 66.89
 Payments 0.00
 Total Due 66.89
 New Balance 66.89

Summary

The pricing options available in Route Manager allow you to offer your customers a number of choices in a competitive market. If you have any questions regarding any of these features, please contact your reseller or Advantage Route Systems.

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