

Chapter 2.14: Multi-Unit Pricing

Introduction

The *Multi-Unit Pricing* feature is a unique pricing option that allows you to establish a relationship between various units of sale, such as a logical hierarchy similar to the following:

- ▶ Single Unit
- ▶ 6-pack
- ▶ Case
- ▶ Pallet

Once these units of sale are created, you can choose which unit type you will sell to each customer on the handheld.

NOTE: If you are using the barcode scanning feature, each *Multi-Unit* item scanned will allow you to choose any of the associated units (i.e., a '6-pack' is scanned, and a 'Case' can be selected).

This chapter will guide you through setting up and using this option on the desktop and handheld.

Overview

To illustrate the *Multi-Unit Pricing* feature in this document, we have created an example scenario using trays of apples as our product.

Assume that we sell apples in the following quantities:

- ▶ **Trays** (9 individual apples)
- ▶ **Cases** (5 trays)
- ▶ **Pallets** (10 cases)

We will need to add three new product codes to the system that will represent each quantity option:

- ▶ **101** - Apple Tray
- ▶ **102** - Apple Case
- ▶ **103** - Apple Pallet

One of the products added will be the *Base Unit*. All other products associated with the *Base Unit* are considered *Base Relation Units*.

NOTE: In most cases, the *Base Unit* will be the smallest unit quantity being sold.

In this example, the *Base Unit* will be the 'Apple Tray,' and the *Base Relation Units* are the 'Apple Case' and 'Apple Pallet' items.

Continue to the next section to be guided through the set up process.

Desktop Setup

This section will guide you through all of the desktop set up steps required before you can begin using the *Multi-Unit Pricing* feature. The example scenario detailed in the *Overview* section will be used throughout the remainder of this document for reference.

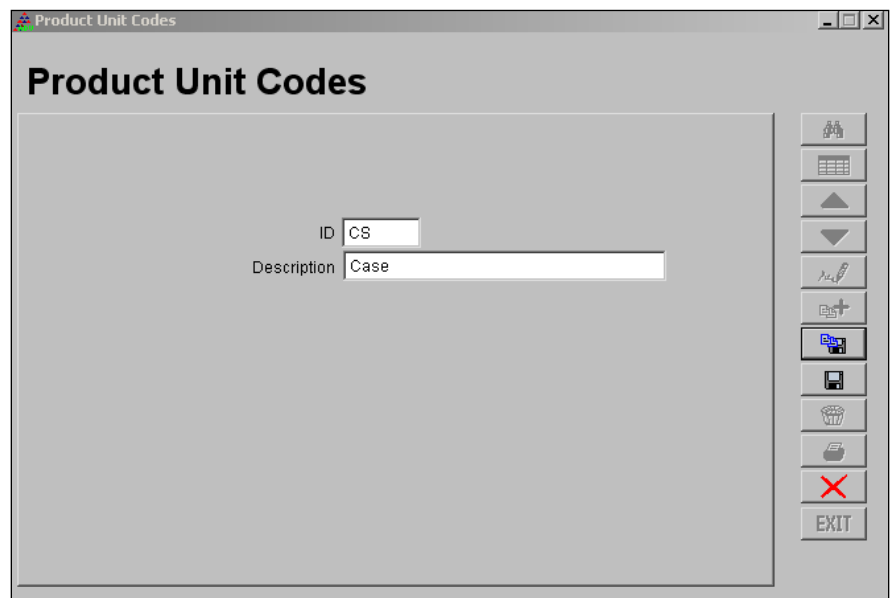
Product Unit Codes

A series of *Product Unit Codes* will need to be added to RMA that represent the quantities of units that you sell.

Navigate to *Lists > Product Codes > Product Unit Codes*. Using the example established earlier, three unit codes are created:

- ▶ Tray – TR
- ▶ Case – CS
- ▶ Pallet – PLT

Add all of the *Product Unit Codes* that will be used in your company.



The screenshot shows a software window titled "Product Unit Codes". The window has a title bar with standard minimize, maximize, and close buttons. The main content area is titled "Product Unit Codes" and contains two input fields: "ID" with the value "CS" and "Description" with the value "Case". To the right of the main area is a vertical toolbar with several icons: a grid, up and down arrows, a pencil, a plus sign, a blue square with a plus sign, a floppy disk, a trash can, a printer, a red X, and an "EXIT" button.

Continue to the next section to add *Multi-Unit* items to RMA.

Product Charge Codes

A *Product Charge Code* will need to be added for each unit quantity that you will be selling.

Continuing to use the example started earlier, three items are added:

- ▶ **101:** Apple Tray
- ▶ **102:** Apple Case
- ▶ **103:** Apple Pallet

Follow the steps below to add the new items to the program.

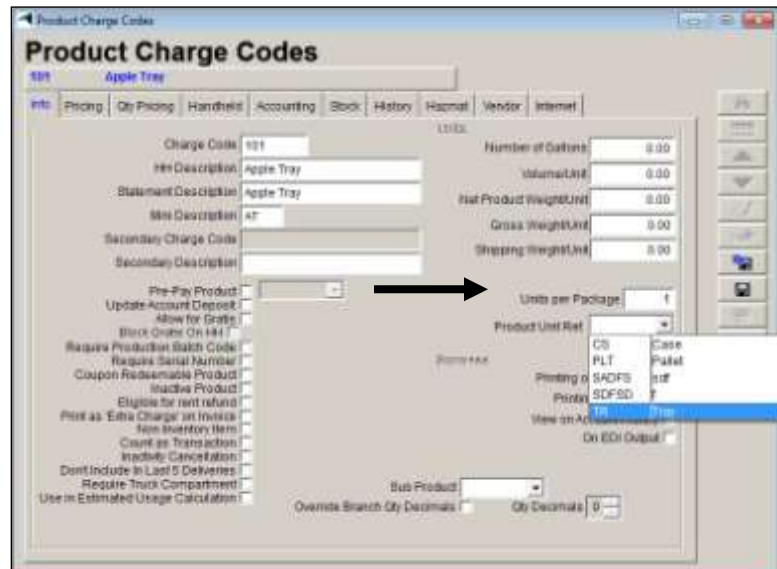
Base Unit

The first unit added will function as the “base unit” for the *Multi-Unit* items. Generally, this is the smallest quantity sold of the item (in this example: *Apple Tray*).

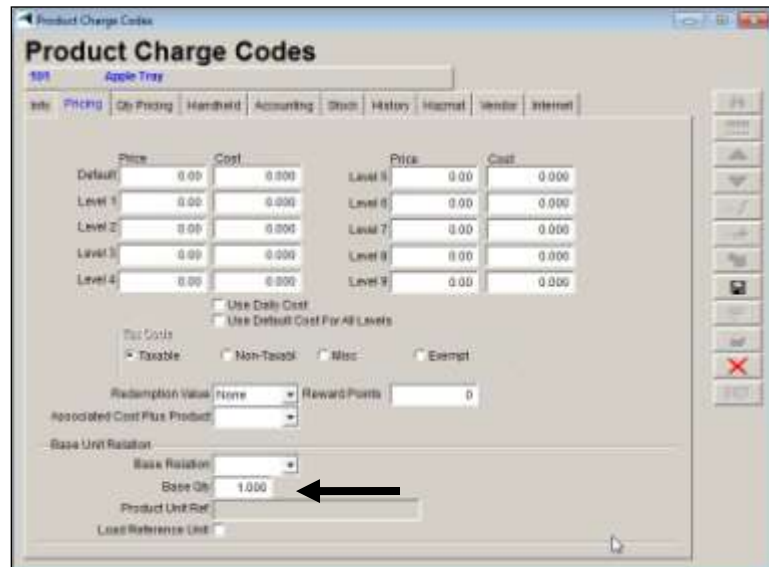
NOTE: This section focuses on the options related to *Multi-Unit Pricing*, and does not cover all of the steps related to adding a product code to RMA.

Navigate to *Lists > Product Codes > Product Charge Codes*.

1. Click the **Add** key to create the *Base Unit* item, or modify an existing item.
2. On the *Info* tab, select the related *Product Unit Code* for the item within the ‘Product Unit Ref.’ field drop-down list.



- On the *Pricing* tab, enter a '1' within the 'Base Qty' field.



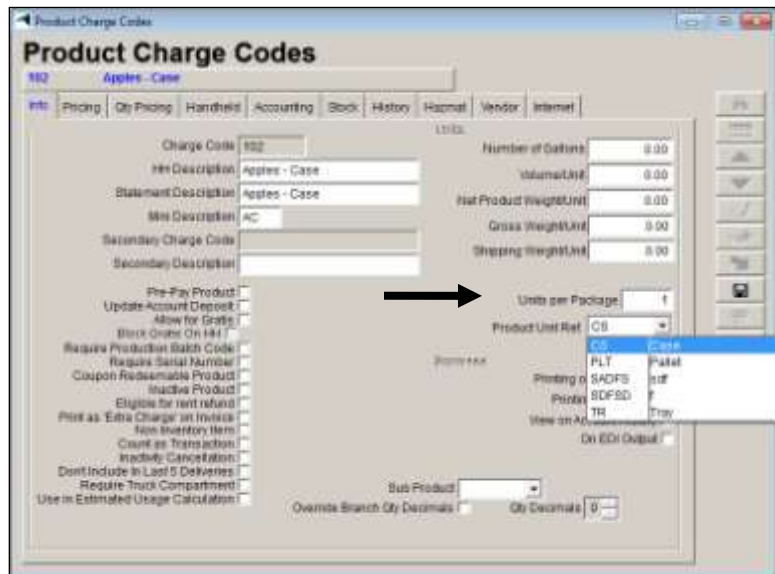
- Complete all of the remaining steps required to add the product to RMA, and save your changes.

NOTE: You will need to refresh the *Product Charge Codes* screen by exiting and returning to the screen before continuing to the next section.

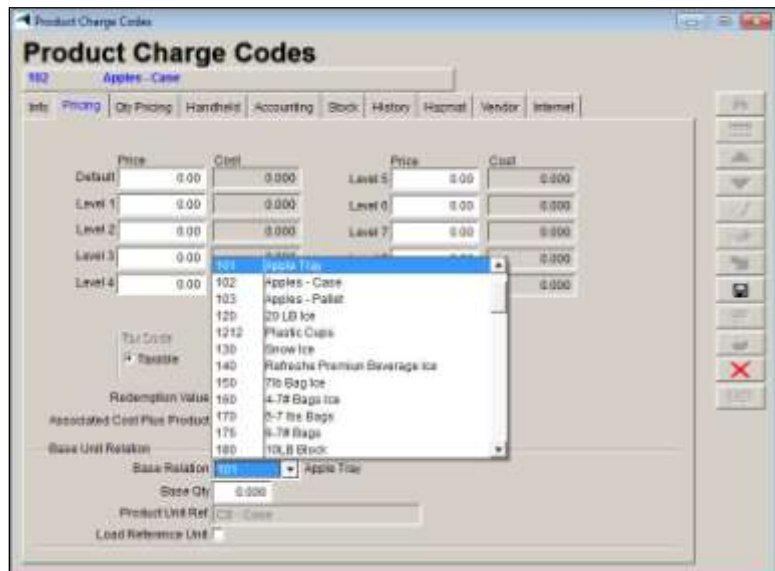
Base Relation Units

After the *Base Unit* has been established, the *Base Relation Units* will need to be added.

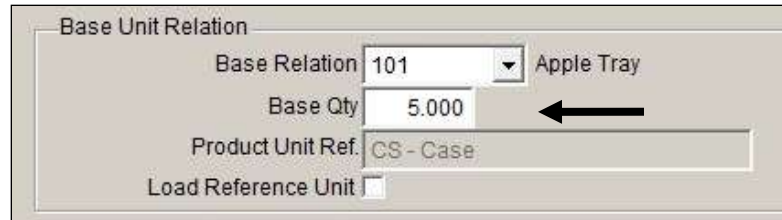
1. Click the **Add** key to create the *Base Relation Unit*, or modify an existing item.
2. On the *Info* tab, select the related *Product Unit Code* for the item within the 'Product Unit Ref.' field drop-down list.



3. On the *Pricing* tab, select the related *Base Unit* for the item (in this example: *Apple Trays*) within the *Base Relation* field drop-down list.



4. Enter the quantity of *Base Units* that should be used when the *Base Relation Unit* is sold to the customer within the 'Base Qty' field. In this example, there are '5' *Apple Trays* per case.



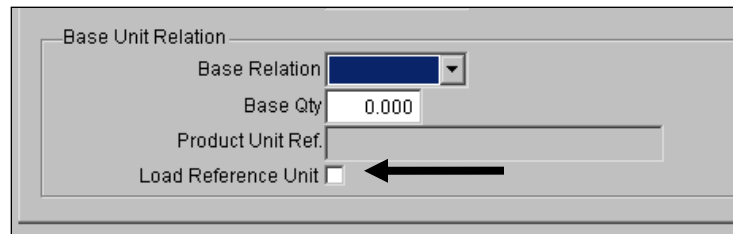
5. **Save** your changes and repeat these steps for each *Base Relation Unit*.

NOTE: Each *Base Relation Unit* quantity must always relate to the *Base Unit*.

Repeat the steps within this section for all of the *Multi-Unit* items that your company will use.

Load Reference Unit (Optional)

If you would like to override the *Base Unit* quantity rule and reference a *Base Relation Unit* for quantity information on reports and certain areas of the handheld, select the 'Load Reference Unit' option on the *Pricing* tab of the *Product Charge Code* screen.

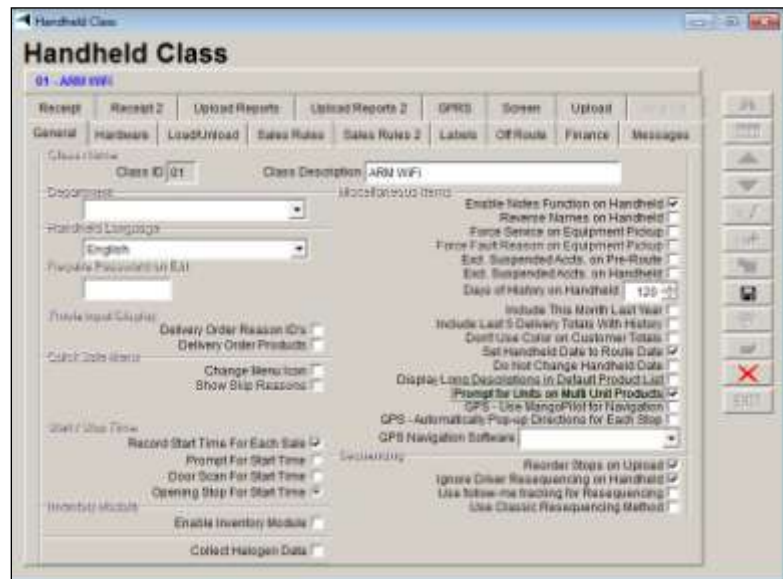


For example, if the 'Load Reference Unit' option is selected on the *Base Relation Unit* 'Apples – Cases' and you have '60' of the *Base Unit* 'Apple Trays' remaining on the delivery vehicle, all inventory related screens and reports will convert the quantities to reflect the number of 'Apples – Cases' remaining, sold, etc. Any remaining quantities will be listed as the *Base Unit* product.

Handheld Class (Optional)

Within each *Handheld Class*, you can determine whether the *Multi-Unit* item selected will always be used, or if the driver will be prompted to select from a list of all associated *Multi-Unit* items.

Navigate to *Lists > Routes > Handheld Class*, and choose the *General* tab. Select the option 'Prompt for Units on Case Prices' to enable a pop-up dialog screen that will be displayed when a *Multi-Unit* item is selected from within the *Misc. Items* screen on the handheld (and *Invoices and Adjustments* on the desktop).



The screenshot shows the 'Handheld Class' configuration window. The title bar indicates 'Handheld Class' and '01 - ARM WiFi'. The window is divided into several sections:

- General:** Class ID (01), Class Description (ARM WiFi), and Class Name (Miscellaneous Items).
- Hardware:** Handheld Language (English), Physical Password (in EA), and Physical Device (Delivery Order Reason IDs, Delivery Order Products).
- Load/Unload:** Delivery Order Products, Change Reasons, Show Stop Reasons.
- Sales Rules:** Record Start Time For Each Sale, Prompt For Start Time, Door Scan For Start Time, Opening Stop For Start Time.
- Labels:** Enable Labels Function on Handheld, Reverse Names on Handheld, Force Generate on Equipment Pickup, Print Fuel Receipt on Equipment Pickup, Ext. Suspended Accts. on Pre-Route, Ext. Suspended Accts. on Handheld, Days of History on Handheld (120).
- Off-Route:** Include This Month Last Year, Include Last 5 Delivery Totals With History, Don't Use Color on Customer Totals, Set Handheld Date to Route Date, Do Not Change Handheld Date, Display Loss Descriptions in Default Product List, Prompt for Units on Multi-Unit Products.
- Finance:** GPS - Use Waze/Map for Navigation, GPS - Automatically Provide Directions for Each Stop, GPS Navigation Software.
- Messages:** Reorder Stops on Upload, Ignore Driver Resequencing on Handheld, Use follow-me tracking for Resequencing, Use Classic Resequencing Method.

An example of this option is included on the next page.

EXAMPLE


With the option 'Prompt for Units on Case Prices' selected, the following screen will be available on the handheld when a *Multi-Unit* item is selected:

The 'Apples – Cases' item is selected from within the *Misc. Items* screen:

CHOOSE AN ITEM

* ALL

Code	Desc	Price
101	Apple Tray ...	3.00
102	Apples - Case ...	15.00
103	Apples - Pallet...	150.00
1030	7 Gallon Propa...	0.00
200	Cherry Cola ...	1.00
201	Cherry Cola - C...	8.00
300	RMA Corporate...	4995.00
301	RMA Enterpris...	20000.00
302	Symbol Truck ...	1475.00
303	HP Truck HH K...	1250.00
304	Multiple User L...	700.00
305	Service Plan R...	995.00
306	Service Plan P...	1000.00

EXIT  DEFAULTS

The 'Choose Unit Type' dialog screen will be displayed automatically:

Choose Unit Type for Sale

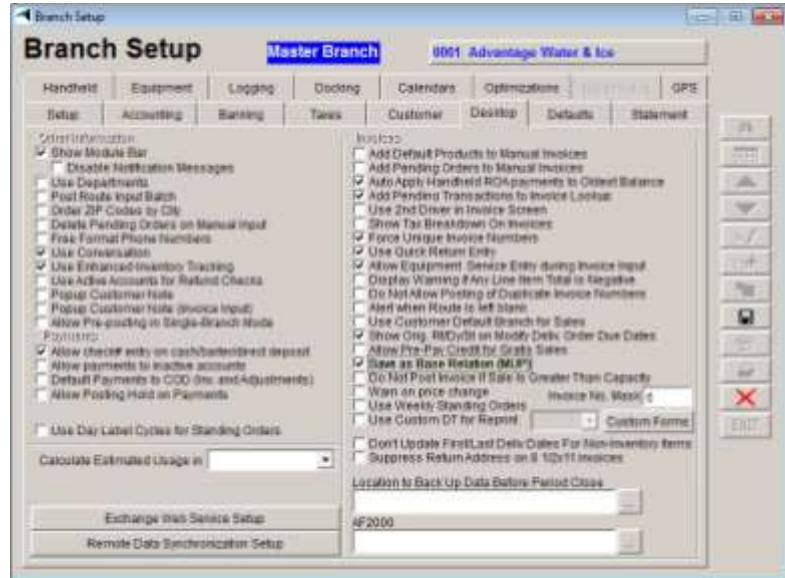
Code	Description	Units	Avail.
101	Apple Tray ...		0
102	Apples - Case ...	CS	
103	Apples - Pallets ...	PLT	

The driver will select the desired unit type to continue. This option can speed up the data entry process for *Multi-Unit* items.

Branch Setup (Optional)

Within *Branch Setup*, you can determine whether the "Base" *Multi-Unit* item will always be used. Instead of the specific item the driver entered. Locate the *Save as Base Relation in Invoices & Adjustments (MUP)* checkbox located on the *Desktop* tab. By selecting this

option, the driver can choose a product within any level of the Multi Unit Pricing (ie. the Case, Pallet, etc), and upon saving the invoice it will automatically convert the sale to use the *Base Unit* as defined in *Product Charge Code* setup.



For example, If a driver sold a customer 1 Case of Apples (as we previously determined, a case is 5 Trays). Upon saving the invoice the invoice would print out that the driver sold 5 Trays of Apples.

NOTE: If the driver was to override the default price of the Case of Apples, the system will automatically calculate the Per Unit Price of each Tray, and print that value on the receipt.

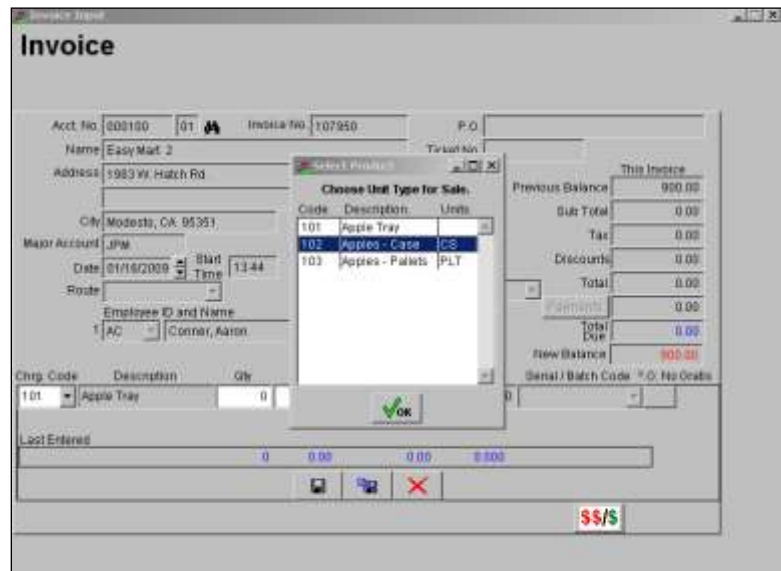
Daily Processing - Desktop

The *Multi-Unit Pricing* option can be used during desktop data entry within the *Invoices and Adjustments* and *Route Settlement Entry* screens. Both options are detailed within this section.

Invoices and Adjustments

Products associated with *Multi-Unit Pricing* can be keyed into the *Invoices & Adjustments* screen following the standard entry process.

Alternatively, if the 'Prompt for Units on Case Prices' option (covered in the previous section) is enabled within the *Handheld Class* associated with the current route driver, you will be prompted for the unit type upon entry of any *Multi-Unit* product.

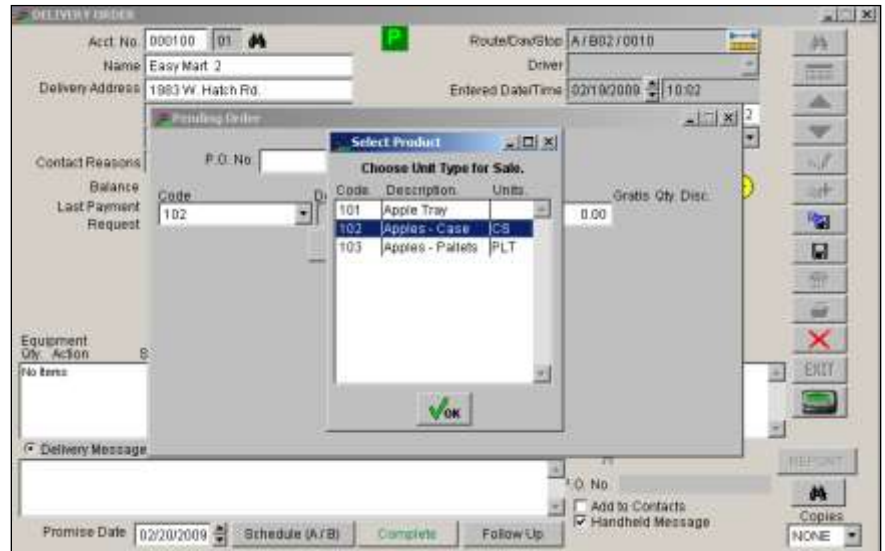


NOTE: The employee ID assigned to the invoice must be assigned to a *Handheld Class* with the 'Prompt for Units on Case Prices' option enabled in order for this screen to be displayed.

Delivery Order Entry

Products associated with *Multi-Unit Pricing* can be keyed into the *Delivery Order* screen following the standard entry process.

Alternatively, if the 'Prompt for Units on Case Prices' option (covered in the previous section) is enabled within the *Handheld Class* associated with the current route driver, you will be prompted for the unit type upon entry of any *Multi-Unit* product.



NOTE: The employee ID assigned to the invoice must be assigned to a *Handheld Class* with the 'Prompt for Units on Case Prices' option enabled in order for this screen to be displayed.

Route Settlement Entry

During the afternoon process, it may be necessary to manually key invoice, payment, and route data into the system. If your company uses this feature, the *Multi-Unit* pricing option functions in the same fashion as the *Invoices and Adjustments* screen (discussed previously).

Daily processing – Handheld

Two key areas of the handheld program utilize the *Multi-Unit Pricing* feature:

- ▶ Load/Unload Truck
- ▶ Misc. Items

Each option is discussed within this section.

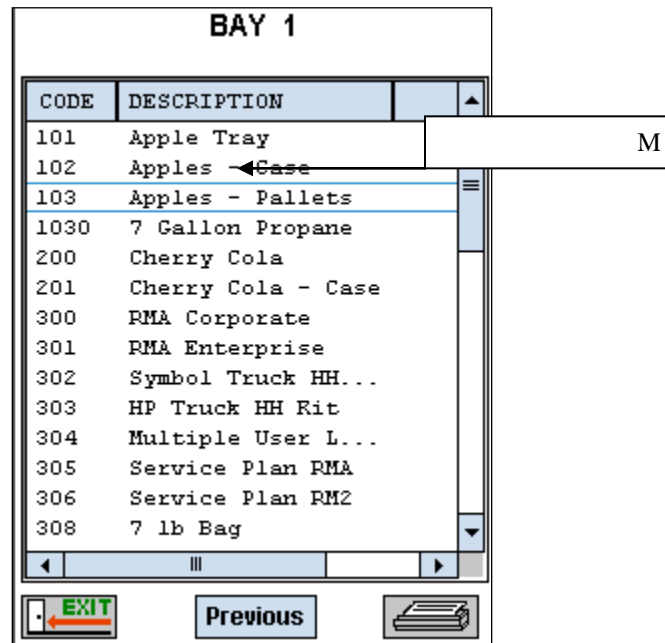
Load Truck

The *Load Truck* option is part of the standard daily process on the handheld. When loading a *Multi-Unit* item onto the truck, the quantity entered will always be converted to *Base Unit* quantities automatically.

EXAMPLE

If '3' cases of apples are loaded, simply choose product code '102' and enter a quantity of '3.' Doing so will add '15' *Apple Trays* (Base Unit) to the truck.

Alternatively, if you are loading '50' *Apple Trays* (Base Unit) onto the truck — this equals '1' pallet according to our example items — you can choose product code '103' and simply key in a quantity of '1.'




The *Truck Status* screen will always reflect the *Base Unit* quantity for the *Multi-Unit* items. In this example, when a *Base Relation Unit* is loaded (i.e., *Case* or *Pallet*), the quantities added to the truck will reflect product code '101' *Apple Trays*.

Truck Status	
Truck Number	001
Control Number	0
Starting Mileage	111500
Product Inventory	
Product	Quantity
5 Gallon Returned	0
3 Gallon Returned	0
Apple Tray	15
Cherry Cola	-24
5 Gallon Distille	30
5 Gallon Spring	50
Equipment Rent	-2

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EXIT

DTR
Equipment

NOTE: If the option *Load Reference Unit* (discussed previously) is selected on any of the *Base Relation Units*, the description and quantity will be converted and displayed accordingly.

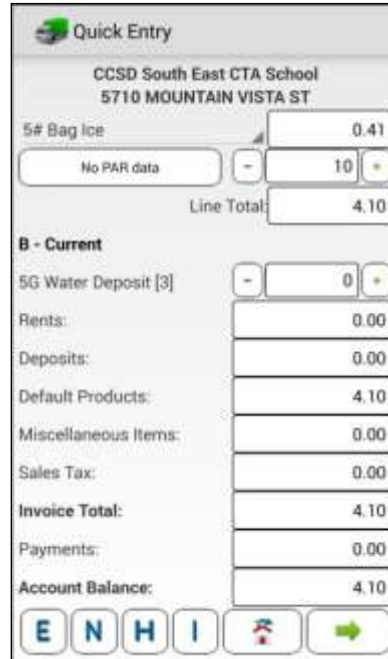
Unload Truck

The *Unload Truck* process is modified when dealing with *Multi-Unit* items. The driver can unload the truck using any of the *Multi-Unit* items.

For example, if there are '5' *Apple Cases* coming off of the truck, the driver can enter product code '101' for *Apple Trays*, and a quantity of '25' ('5' trays per case) during the unload process. Alternatively, the driver can simply choose product code '102' for *Apple Cases*, and enter a quantity of '5.'

Product Entry - Misc. Items

Adding *Multi-Unit* products to an invoice is done through the 'Misc. Items' option located on the *Quick Entry* screen.



Quick Entry
CCSD South East CTA School
5710 MOUNTAIN VISTA ST

5# Bag Ice 0.41
No PAR data - 10 =
Line Total: 4.10


B - Current

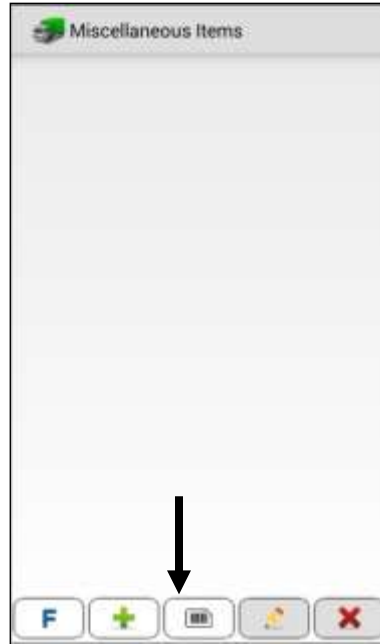
5G Water Deposit [3]	-	0	=
Rents:		0.00	
Deposits:		0.00	
Default Products:		4.10	
Miscellaneous Items:		0.00	
Sales Tax:		0.00	
Invoice Total:		4.10	
Payments:		0.00	
Account Balance:		4.10	

E N H I [Home] [Next]



NOTE: You can add *Multi-Unit* items from the *Default Product* list of the *Quick Entry* screen, but you can only use the 'Prompt for Units on Case Prices' option from within the *Misc. Items* screen.

Tap on the *Misc. Items* option and choose the  button on the screen.




Touch the product unit type being sold to the customer.

CHOOSE AN ITEM

* ▼ ALL

Code	Desc	Price
101	Apple Tray ...	3.00
102	Apples - Case ...	15.00
103	Apples - Pallet...	150.00
1030	7 Gallon Propa...	0.00
200	Cherry Cola ...	1.00
201	Cherry Cola - C...	8.00
300	RMA Corporate...	4995.00
301	RMA Enterpris...	20000.00
302	Symbol Truck ...	1475.00
303	HP Truck HH K...	1250.00
304	Multiple User L...	700.00
305	Service Plan R...	995.00
306	Service Plan P...	1999.00

← EXIT

DEFAULTS

If the option 'Prompt for Units on Case Prices' is selected within the current driver's *Handheld Class*, you will be prompted for the unit type:

Choose Unit Type for Sale


Code	Description	Units	Avail.
101	Apple Tray ...		0
102	Apples - Case ...	CS	
103	Apples - Pallets ...	PLT	

Make your selection and enter the quantity:

Miscellaneous Item Pricing:
102 Apples - Case

No Par Data

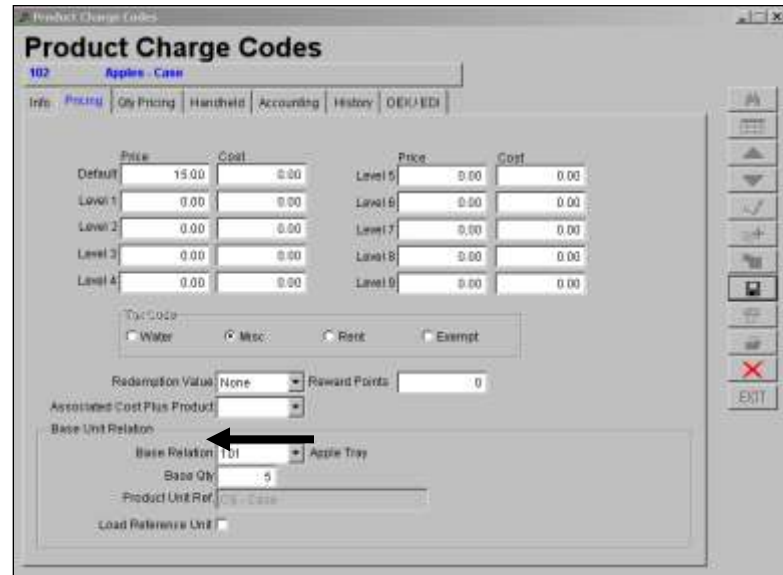
Quantity	Price	Total
1	15.00	15.00

7	8	9	←
4	5	6	→
1	2	3	+ →
X	0	-	CLR 

Complete the sale or repeat this step as needed.

Inventory

Inventory totals are only updated on *Base Unit* items. When a *Base Relation Unit* is sold (i.e., *Apple Case* or *Pallet*), inventory will be adjusted on the *Base Unit* only (*Apple Tray*). The quantity reduced from inventory on the *Base Unit* is determined by the 'Base Qty' field of each *Base Relation Unit*.



Product Charge Codes
102 Apple Case

Info Pricing Qty Pricing Handheld Accounting History OER/EDI

	Price	Cost		Price	Cost
Default	15.00	0.00	Level 5	0.00	0.00
Level 1	0.00	0.00	Level 6	0.00	0.00
Level 2	0.00	0.00	Level 7	0.00	0.00
Level 3	0.00	0.00	Level 8	0.00	0.00
Level 4	0.00	0.00	Level 9	0.00	0.00

Tax Code
 Water Misc Rest Exempt

Redemption Value: None Reward Points: 0

Associated Cost Plus Product:

Base Unit Relation
 Base Relation: 101 Apple Tray
 Base Qty: 5
 Product Unit Ref: CS - Case
 Load Reference Unit:

Conclusion

The *Multi-Unit Pricing* feature is a powerful addition to our pricing options in RMA. As new pricing methods are adopted within each business, we will continue to enhance our software to work for you. If you have any questions regarding this feature or its usage, please contact Advantage Route Systems.