Setting Up Price Levels — Version CB2004-05

Step 1

Group your customers by type and give them a level.

Level 1 Plumbers
Level 2 Electricians

Level 3 General Contractors

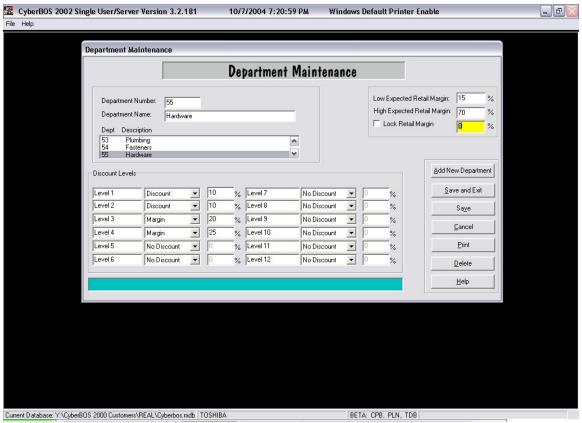
Level 4 Handyman

And so on.....

You can have up to 12 Levels.

Step 2

Got to Inventory Control and Select Department Setup

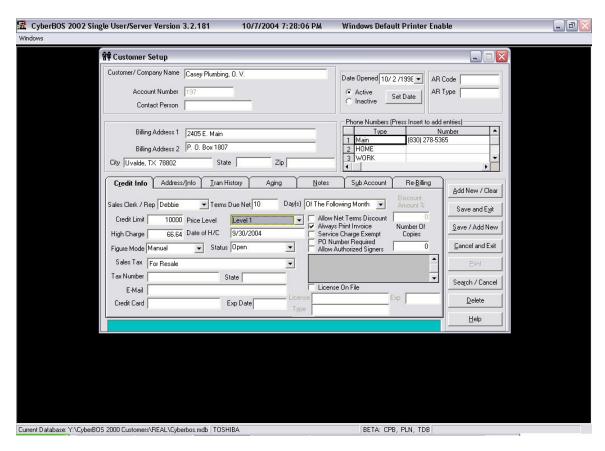


Select the department you want to give a discounts on. In my example I am going to give Level 1 which is Plumbers and I'm going to give them 10% off of retail for all items in the Hardware Department, Level 2, Electricians, get the same. But Level 3 General Contractors they get 20% GPM. Because in hardware I normally make 32% to 45% GPM. But if some of the Hardware have low margins, I don't want take a risk of selling to low. That's why I chose Margin. For Handy Man I gave them Level 4 which is 25% GPM. Other choices are No Discount at all or Mark Up for those that don't know the difference between Mark Up and Margin.

Repeat this in each Department. When I get to the Electrical Dept. I will give deeper discounts to Level 2, Electricians, and smaller ones to Levels 1,3, 4. Electricians deserve a better discount in that department only. I'll do the same for the Plumbing Department for Plumbers.

Step 3

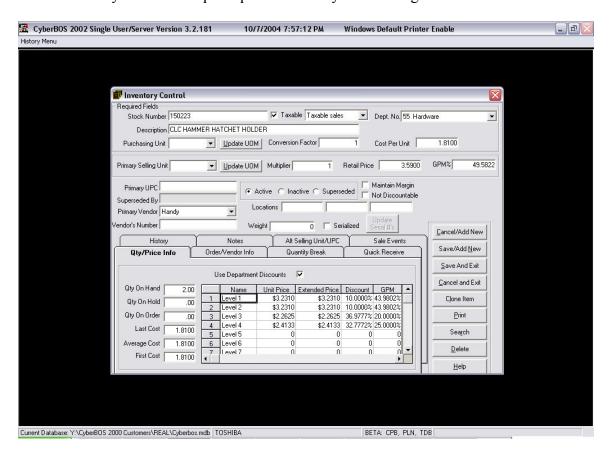
Go to the Customer Maintenance and pull up each customer one at a time and change their Price Level to their according Discount or Price Level.



In this example I chose my first customer that does Plumbing. I put him on Level 1. I'll do that until I'm done with all the Plumbers. I will then Pull up all the Electricians and put them on Level 2 and so on.

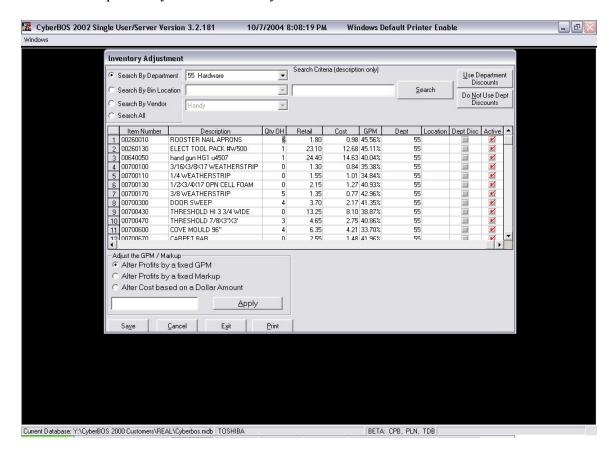
Step 4

Now you need to go to the items and tell the items to use the Department Discount feature. There are two ways to do that. Fast and Slow. I will show you the slow way first. Go to Inventory Control and pull up an item that you want to give a discount on.



In this example I pulled in an item from the Hardware Department. I checked the box that says "Use Department Discounts" When I did, It pulled in the discount Levels for that item. Now when Plumbers that are on Discount or Price Level 1 buy this Hammer Holder, they will pay \$3.23 versus \$3.59, retail. Unchecking the box will allow you to edit each Level. If you choose to put them back to Retail, simply clear out the boxes, and they will go to 0. Levels with 0 will charge retail.

Now for the quick way. Go to Inventory Control and Select Utilities.



Click on Search By Department, select the Department you want to "Use Department Discount" on. Then click on Search. It will bring all the items in that department, into the grid. If you want to, you can enter a search word to narrow your search. You can use your mouse to click on individual items (Dept Disc) or Click on the "Use Department Discounts" button. That will check all the items to Use Department Discount. Click on save and answer yes to update prices.

Be sure to go to Point Of Sale and test it.