

HOW TO CREATE A LOT ON A SALES ORDER

PRICE CALCULATOR

The Price Calculator allows for two uses:

1. Create a Lot and Price a group of items so that the customer will see a single “Lot Price” instead of individual line prices.
2. Price a group items together without creating a lot. The customer will see individual line prices for each item in the group.

To create a Lot or use the Calculator to price items click the Calculator icon.

REMOVE ITEMS

1. Remove any items that should not be part of the lot/priced scheme. To remove an item from being lot priced, select the Remove checkbox for the item and click the Remove Items button



Ximple Solutions 2
Price Calculator

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 User Guide

Line#	Item	Order Qty	Order Price					New Price					Rmv	
			Price	Cust Price	Disc%	Ext Total	GM%	Sys GM%	New Price	New Cust Prc	New Disc%	New Ext Total		New GM%
1	AE AE10002 Ceiling Lamp 10002-B35	1 EA	50.56 /EA		0.00	50.56	10.02	10.00	52.20		0.00	52.20	12.84	<input type="checkbox"/>
2	AE AE10005 AE 1-5	1 EA	120.00 /EA		0.00	120.00	16.67	10.00	123.90		0.00	123.90	19.29	<input type="checkbox"/>
3	AE AE10003 Desk Lamp 10003-B35	1 EA	120.00 /EA		0.00	120.00	37.08	15.00	123.90		0.00	123.90	39.06	<input type="checkbox"/>
Sub Total						290.56	23.94					300.00	26.33	

My Total
OR My GM %

Calculate
Update Price
Close Window
Remove Items

Create Lot ☒
Lot Item Name

LOT PRICED ORDER – SINGLE PRICE FOR A GROUP OF ITEMS

Grouping items together into a ‘LOT’ and pricing the ‘Lot’ results in the individual line prices to go up or down accordingly. The customer will only see a single price for the group of items. **Note:** Lot prices can only be changed at the Lot level.

1. Click the Create Lot checkbox
2. Enter a Name for the Lot. (This name will appear on the Sales Acknowledgement and the Customer Invoice.)
3. Enter the amount to charge the customer for the ‘Lot’ in the My Total field. OR price the lot by a GM%.
4. Click the Calculate button. (The system will pro-rate each line. In the case where the GM or Ext Total is decreasing, the system will calculate the decrease in price as a discount percentage. This percentage must meet the sales person’s discount allowance in order for the lot to be saved/updated.)
5. Click the Update Price button when done. You will be returned to the Order Items page.

PRICING A GROUP OF ITEMS WITHOUT CREATING A LOT

Pricing a group of items without creating a lot results in the individual line prices to go up or down accordingly without grouping the items into a lot. The user will still be able to edit individual lines and change the price.

1. To price a group of items without creating a 'Lot', choose one of the following:
 - To price the Lot to a specific extended amount, enter the total you want to charge for the lot in the **Total Amount** field.
- OR**
- To price the Lot so that your total GM hits a specific percentage, enter the GM% you want to make on the sale in the **GM%** field.
2. Click the Calculate button. (The system will pro-rate each line. In the case where the GM or Ext Total is decreasing, the system will calculate the decrease in price as a discount percentage. This percentage must meet the sales person's discount allowance in order for the lot to be saved/updated.)
3. Click the Update Price button when done. You will be returned to the Order Items page.