# Ximple Customer Pricing

Pricing in Ximple consists of the following:

1. Creating Product Pricing Categories
2. Assigning Pricing Categories to Items
3. Creating Customer Pricing Categories
4. Assigning Customers to Pricing Categories
5. Creating Pricing Lists (formulas for each of the categories)
6. Linking your Pricing Lists/Formulas to your Customer Pricing Categories

# Product Pricing Categories

1. Pricing Item Categories
   - Prior to working on Pricing, you need to create your <u>Product Categories</u> for Pricing.  When you setup your pricing formulas, you setup formulas for the Product Pricing Categories.
2. Assign Pricing Categories to individual items

# 1. Create Product Pricing Categories

- Create your Pricing Categories by going: **Catalog -> Category -> Add New**

# 2. Assign Categories to Items

- Assign each item to a pricing category by going: **Catalog -> Products -> search for your product -> Edit -> Classification tab**



Type of Category you are searching under

Category being assigned to item

# Pricing Layers in Ximple

1. Price Quote

2. SO Quote

3. Order Specific Contract

4. SPA

5. *Price List/Agreement

6. *Customer List

7. Generic Agreement

8. Store List

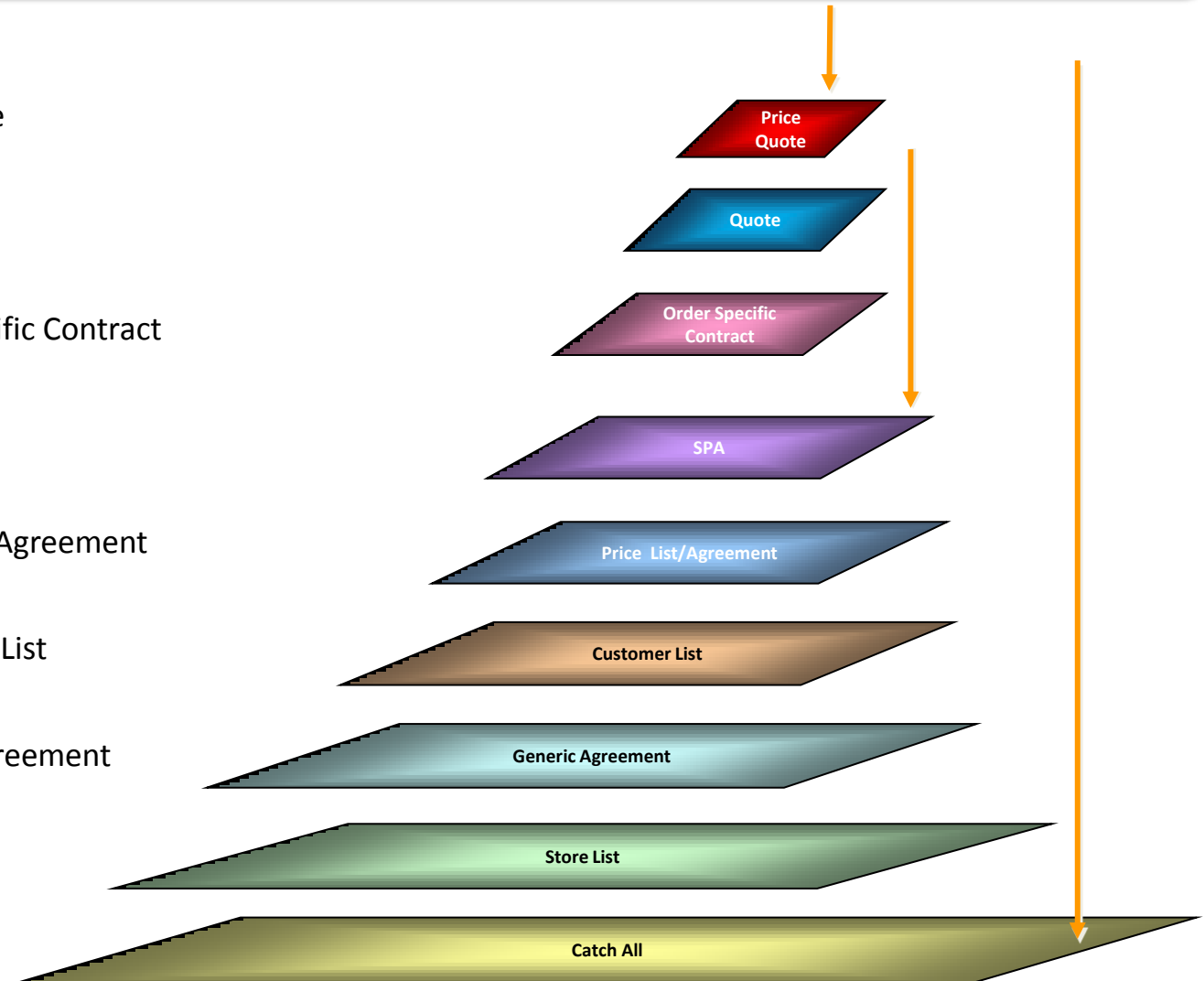9. Catch All

Price Quote

Quote

Order Specific Contract

SPA

Price List/Agreement

Customer List

Generic Agreement

Store List

Catch All

# Steps to Creating Pricing Lists

1. Create Price List

   – These are your Pricing Formulas

2. Assign Customer to their corresponding Pricing Classification

3. Link Price List and to corresponding Customer Classification

# 1. Price Lists Formulas

To open page: Sales -> Pricing -> Price List

You need a List for each of your Pricing Classifications. These lists will contain your FORMULAS FOR PRICING. The **VIEW** option on the Price List is what you need to select in order to start adding or editing formulas.

When you setup you formulas you want to start at the top (step 1) and work your way through the exceptions:

1. ALL ITEMS – 30%
2. Then do Exceptions:
   1. By Category
   2. By Individual Items

This is what you want to ALWAYS set the formula like



Ximple Solutions
**New Price Formula**
12/18/2014
13:21:09
**User's Guide**

**New Price Formula**

| Price Formula | |
|---|---|
| **Description** | Price Level 2 |

**Category** ⌄ V
OR
**Product** V ☑ All Products
**Contract Qty**
**Annual Issues**
**Lock Price** ☐

| Formula Type | Cost / Price | Cost Type | Price Type | |
|---|---|---|---|---|
| Gross Margin % ⌄ | Price ⌄ | ⌄ | Distributor Cost Price ⌄ | ☑ Use Base Market Factor |

| Plus / Minus | Fixed Amount / Percent % | Currency | Rounding Decimal |
|---|---|---|---|
| + ◉  - ○ | 35 | US ⌄ | 2 ⌄ |

Save   Reset   Cancel

# 2. Customer Setup

- Customer -> Customer List -> Classification Option
  - Assign Customer to correct Pricing Classification
- Customer -> Customer List -> Edit
  - Assign Customer to correct default Price List
    - In the case that you ever accidentally un-enroll customer from a Classification, this is were the system will then look for Sale Pricing (for the customer).

| Ximple Solutions | 12/18/2014 |
| **Assign Customer Classifications** | 13:44:24 |
| | **User's Guide** |

| **Assign Customer Classifications(P0185)** |
| **Custar Incorporated** |
| ⓘ No Data was found |

| **Assign A Classification to Custar Incorporated** |
| *Classification | Pricing ∨ | Level 2 | v |

Save   Reset   Cancel

# 3. Link Price List to Customers

- Link Price List to Classification of Customers (Price Agreements)
  - Sales -> Pricing -> Price Agreement

This is what you want to ALWAYS set the Agreement to look like *(aside from the dates that is... those are up to you)*

# For Individual Items – Price Quote

- For those items that you want to setup pricing for so that price doesn't change even though even though your Into Stock price may change, you want to create **Price Quote** *(that's the upper layer in the Pricing structure).*

  - Sales -> Order Management -> Quote -> Add New:

    1. When you are entering the items, make certain that the system retrieves price for you first, then click **Cust Price** checkbox and enter in price you will sell at.
    2. You need to **Approve** the quote and select to Make it a Price Quote (radio button appears at time you approve quote)
    3. To enroll Customers into the Quote select the **Setup Customer** option from the quote's popup and search for the customer you wish to add (or you can select to add a group of customers or all customers)