

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 Product Categories 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**



Ximple Solutions
Category List

12/18/2014
13:29:19
User's Guide

Category Type	Category Name	External Code
Electrical Pricing	* 0000-Wire Cords & Cables	0000
	0100-Building Wire & Cable	0100
	Copper Building Wire	0110
	Non-Metallic Cable	0120
	Armored Cable - BX - AC - MC	0130
	Service Entrance Cable	0140
	Aluminum Building Wire	0150
	0200-Portable Cords & Cables	0200



Ximple Solutions
New Category

12/18/2014
13:30:18
User's Guide

*Category Type	Electrical Pricing ▼
*Name	Portable Cords & Cables
Code	
Is Last Level	<input checked="" type="radio"/> Yes <input type="radio"/> No

Save Reset Cancel

2. Assign Categories to Items

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

Ximple Solutions
Edit Product

12/18/2014
13:41:11
User's Guide

Product Info (P0281)

Name	Arctic S-Lamp 1-9 [CA] AEC	Short Description	Floor Lamp -
Type	Material	Generic	No
Manufacturer	Arctic Electric, Inc.	Stock Item	Yes
Brand	Arctic	Inventory Item	Yes
Product Line	MICHSHIFF	Active	Yes
		Obsolete	No

Long Description
To add or make changes to the vendor's address, phone number or email, from the Vendors List page select the View option from the vendor's popup menu. The View Vendor page is divided into two panels: 1. Vendor Information (Top): Displays the vendor information (Name, Purchasing and Credit Info). 2. Address Book (Bottom): At the bottom of the View Vendor page there are three links: Address, Phone and Email; click on a link to change the information being viewed in that section. By

[Close Window](#)

Product Identification UOM **Classification** Storage Feature Association Packaging Memo Vendor Disc. Multimedia OP P.O. Purch Param lx

*Manufacturer Arctic Electric, Inc. [v]

*Brand Arctic [v]

Product Line MICHSHIFF [v]

Category Electrical Pricing [v] Lighting>>Lamps [v]

[Add More Lines](#) [Save](#) [Reset](#)

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

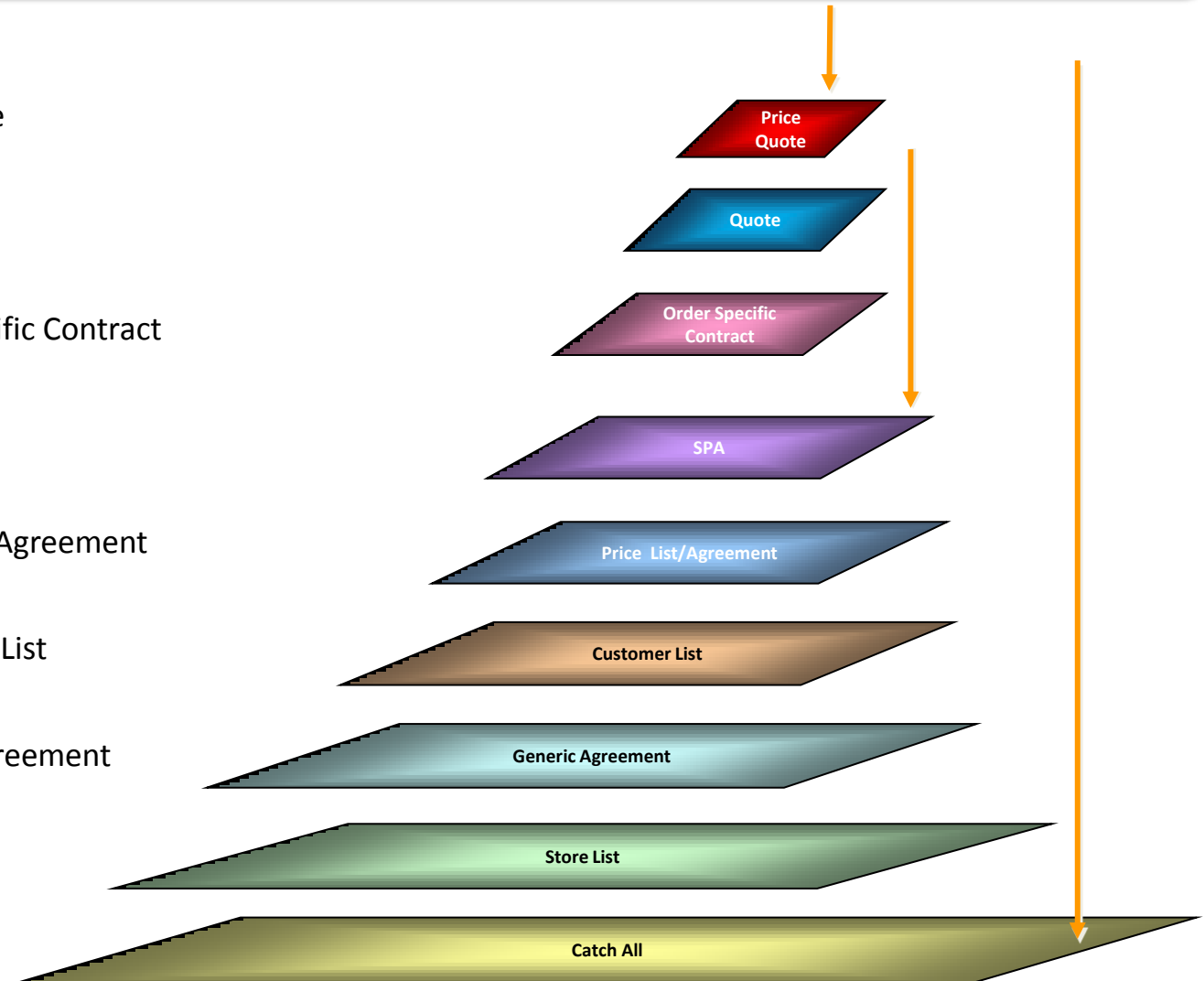
5. *Price List/Agreement

6. *Customer List

7. Generic Agreement

8. Store List

9. Catch All



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

Description Price Level 2

Price Formula

Category

OR

Product ☒ 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 where the system will then look for Sale Pricing (for the customer).

Ximple Solutions 12/18/2014 13:44:24 User's Guide

Assign Customer Classifications

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

Xs Ximple Solutions, LLC **Ximple Solutions**
Add Price Agreement 12/18/2014 13:22:45
User's Guide

Add New Price Agreement

*Agreement Name	Price Level 2 Agreement		
*Price List Type	Price Agreement		
Sale Price List	Price Level 2		
Payment Term			
*Classification	Pricing	Level 2	
OR			
*Customer			<input type="checkbox"/> Apply To Related Cust.
	<input type="checkbox"/> All Customers <input type="checkbox"/> One Time Customers		
*Effective Date	12/01/2014		
*Expiration Date	01/01/2050		
Affect OP For Branch			
Review Date			
Hold Price Increase in Days			
Order Point Calculate	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Comments			

255characters remaining on your input limit

Save **Reset** **Cancel**

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 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)