## How to Add Pricing Levels

- Log in as Admin user
   On user's menu panel, go to System Manager folder then click Company Configuration
- 3. Click the Pricing Level tab on System Manager module
- 4. Click the Add button to add a blank row

| Company Configuration |   | ŕ           | ^ | x |
|-----------------------|---|-------------|---|---|
| OK Cancel             |   |             |   |   |
| System Manager        | System Manager Keyboard Shortcuts Audit Log (42) Attachment (9) |             |   | • |
| General Ledger        | Details Pricing Level Multi Currency                            |             |   |   |
| Credit Card Recon     | + Add × Remove △ Up マ Down ⊞ View Filter (F3)                   | К.Л.<br>2 У |   |   |
| Inventory             | Pricing Description*  | Level 🔺     |   |   |
| Purchasing            |   |             |   |   |
| Sales                 |   |             |   |   |
| Payroll               |   |             |   |   |
| Notes Receivable      |   |             |   |   |
| Ticket Management     |   |             |   |   |
| Contract Management   |   |             |   |   |
| Risk Management       |   |             |   |   |

5. The Level automatically increments as user adds more Pricing Descriptions

| System Manager     | Keyboard Shortcuts  | Audit Log (42) | Attachment (9) |         |
|--------------------|---------------------|----------------|----------------|---------|
| Details Pricing    | Level Multi Currenc | у              |                |         |
| + Add × Rer        | move △Up ▽Do        | wn 🔠 View      | Filter (F3)    | トン      |
| Pricing Descriptio | n*                  |                |                | Level 🔺 |
| Level 1            |                     |                |                | 1       |
| Level 2            |                     |                |                | 2       |
| Level 3            |                     |                |                | 3       |
|                    |                     |                |                |         |

- 6. Click the OK button to save the changes
- The next step is to add the price levels in each company location.
   a. Click Company Locations in Common Info.
- 8. Select each company and add the price levels manually. You may click the Default button and this will insert all price levels.

| Company Location - 01   | ^ □ ×                |
|---|----------------------|
| New Save Search Delete Undo Duplicate Close   |                      |
| + Detail Setup GL Accounts Sales Grain Point of Sale Pricing Cash Deposit Storage Location Purchase Logistics | Contract Managemen 🕈 |
| Price Descriptions  |                      |
| × Remove △ Up マ Down ⑦ Default Export • 믬 View • Filter (F3)  | スマン                  |
| Name  | Level 📥              |
| Level 1 (1-10 Users)  | 1                    |
| Level 2 (11-20 Users)   | 2                    |
| Level 3 (21-50 Users)   | 3                    |
|   | 0                    |

9. In Inventory menu, click Items and select an item to update.

10. Click the Pricing tab. Insert the price level for each location in Pricing Level tab.

| ltem - 20                                   |                                   |           |             |            |             |             |                    |          |                |               | □ ×            |
|---|-----------------------------------|-----------|-------------|------------|-------------|-------------|--------------------|----------|----------------|---------------|----------------|
| New Save Search Delete Undo Duplicate Close |                                   |           |             |            |             |             |                    |          |                |               |                |
| Details Setup                               | Pricing                           | Add-On    | Substitute  | Activities | Attachments | Audit Log   |                    |          |                |               |                |
| Export • 🔠 View                             | Filter (                          | (F3)      |             |            |             |             |                    |          |                |               | 5 7<br>2 3     |
| Location*                                   |                                   |           | Last Cost   | Standar    | d Cost*     | Average Co: | st Pricing Method* | Amount   | /Percent Ret   | tail Price*   | MSRP           |
| 01  |                                   |           | 0.00        |            | 0.00        | c           | 0.00 None          |          | 0.00           | 0.00          | 0.00           |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
|   |                                   |           |             |            |             |             |                    |          |                |               |                |
| Pricing Level Pr                            | Pricing Level Promotional Pricing |           |             |            |             |             |                    |          |                |               |                |
| + Insert X Rer                              | move Exp                          | oort - 🔡  | View - Filt | er (F3)    |             |             |                    |          |                |               | к. л<br>2 У    |
| Location*                                   | Price I                           | Level*    | UOM*        | UPC        | Min Qty     | Max Qty Pr  | icing Method *     | Currency | Amount/Percent | Retail Price* | Effective Date |
| LOB - Ag/Grain                              | Level                             | 1 (1-10 U | Each        |            | 0.00        | 0.00 Fb     | ed Dollar Amount   | USD      | 1,000.00       | 1,000         | 12/15/2017     |
|   |                                   |           |             |            | 0.00        | 0.00        |                    |          | 0.00           | 0.00          |                |

- 11. You may also Import the pricing level in mass using a csv format. This can only be used with an admin user role.
  a. System Manager > Imports and Conversions > Inventory.
  b. Click the Download Template and select the template you wish to download.

Cash Management Inventory

| ь. | Click the Download Templa      | ate and select the te | mplate you wis        | in to download.                  |           |   |  |  |  |  |  |
|----|--------------------------------|-----------------------|-----------------------|----------------------------------|-----------|---|--|--|--|--|--|
|    | Imports and Conver             | sions                 |                       |                                  |           |   |  |  |  |  |  |
|    | Close                          |                       |                       |                                  |           |   |  |  |  |  |  |
|    | Details                        |                       |                       |                                  |           |   |  |  |  |  |  |
|    | System Manager                 |                       | Download              | CSV Template 👻 View Log          | 5         |   |  |  |  |  |  |
|    | General Ledger                 |                       | Inventory Data Import |                                  |           |   |  |  |  |  |  |
| c. | To import the file, select the | e Import Item Pricing | Levels in the         | same screen by scrolling down    | the list. |   |  |  |  |  |  |
|    | Imports and Conversions        |                       | , <u> </u>            |                                  | ^         | × |  |  |  |  |  |
|    | Close                          |                       |                       |                                  |           |   |  |  |  |  |  |
|    | Details                        |                       |                       |                                  |           |   |  |  |  |  |  |
|    | System Manager                 | Import Iten           | n GL Accounts         | Import Item GL Accounts from CSV |           |   |  |  |  |  |  |
|    | General Ledger                 | Import It             | em Location           | Import Item Location from CSV    |           |   |  |  |  |  |  |
|    | Financial Report Designer      |                       |                       |                                  |           |   |  |  |  |  |  |
|    | Cash Management                | Import I              | tem Pricing           | Import Item Pricing from CSV     |           |   |  |  |  |  |  |

Import Item Pricing Levels

Import Item Pricing Levels from CSV