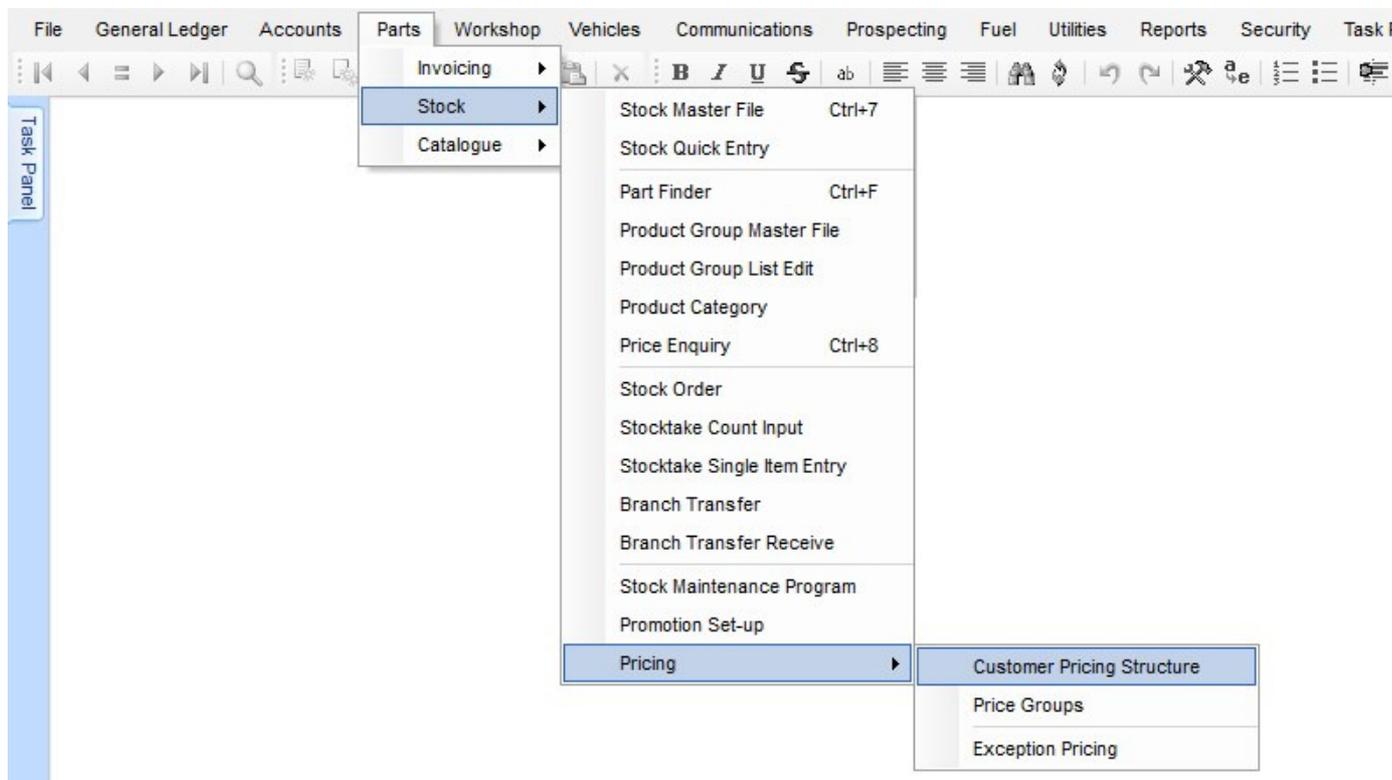
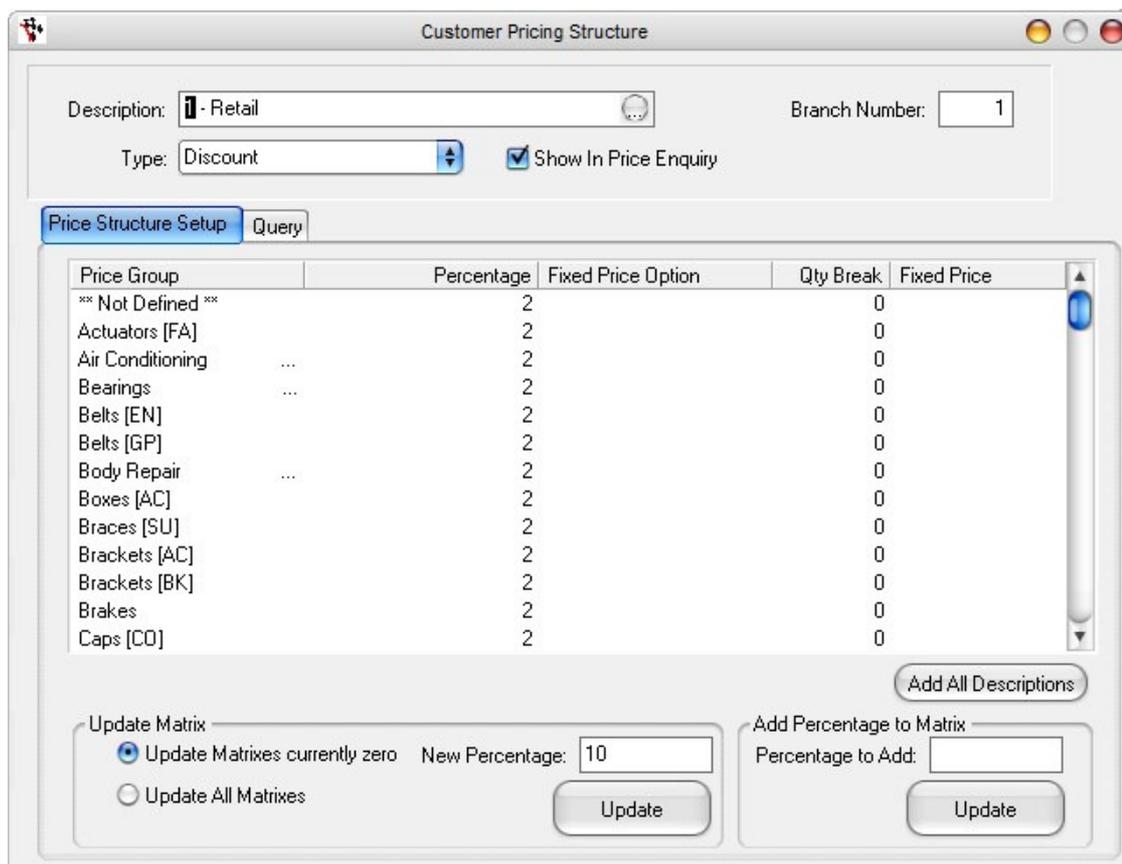




Structure (Pricing Matrix)



Price **Discounts** or **Markups** make up the pricing structure formats available in [Autosoft 5](#). The Discount pricing will generally operate as a discount from your retail - or List Price. The Markup will operate as a mark-up from your Cost Price.



The 'Customer Pricing Structure' dialog box is shown. It has a title bar with the Autosoft logo and window controls. The 'Description' field contains 'Retail' and the 'Branch Number' is '1'. The 'Type' is set to 'Discount' and the 'Show In Price Enquiry' checkbox is checked. Below the input fields are two tabs: 'Price Structure Setup' (selected) and 'Query'. The 'Price Structure Setup' tab contains a table with the following data:

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
*** Not Defined ***	2		0	
Actuators [FA]	2		0	
Air Conditioning ...	2		0	
Bearings ...	2		0	
Belts [EN]	2		0	
Belts [GP]	2		0	
Body Repair ...	2		0	
Boxes [AC]	2		0	
Braces [SU]	2		0	
Brackets [AC]	2		0	
Brackets [BK]	2		0	
Brakes	2		0	
Caps [CO]	2		0	

Below the table is an 'Add All Descriptions' button. At the bottom, there are two sections for updating the matrix. The first section, 'Update Matrix', has two radio buttons: 'Update Matrixes currently zero' (selected) and 'Update All Matrixes'. A 'New Percentage' field is set to '10' and an 'Update' button is present. The second section, 'Add Percentage to Matrix', has a 'Percentage to Add' field and an 'Update' button.

The Customer Pricing Structure consists of the following:

Description - Select the matrix description by clicking on the ellipsis or type in a new matrix description name for a new Pricing Matrix.

Type - Discount - A Pricing structure type of *Discount* subtracts the percentage off the list price in the [Stock Master File](#). The List Price is located under the Pricing tab as below.

Stock Master File

Item Code: 0132008600
 Description: Idle Speed Actuator
 Description 2:
 Brand: Bosch

Category: 01 - Parts
 Group: Actuators [FA]
 Price Group: Actuators [FA]
 Supplier: Sundry Supplier

Word Search:

Sync with PML

Stock Pricing Branch Stock Stock Options Query Promo Cross References Kits Pictures Product Information

Selling Prices

List Price: 59.00 Price2: 0.00 Price3: 0.00 Price4: 0.00

desc	Qty	Ex GST	Inc GST
1 - Retail	0	\$57.82	\$63.60
2 - Trade	0	\$55.46	\$61.01

Last Price Change: 22/07/2010

The List Price amount will be the exact price charged for a Pricing Structure that has 0 as the percentage for the Price Group **Motors [EL]**, to which this product belongs. Any Discount applied will be discounted from that List Price by the corresponding amount in the Price Structure setup.

In the Retail Price Structure, we have a 2% discount listed, so the Retail price will be $59 - (0.02 \times 59) = \mathbf{\$57.82}$. This is the price that you can see under the *Ex GST* column on the **1 - Retail** price structure listed beneath the selling prices below.

Type - Markup - Markups are created by increasing the Average Cost, Current Cost or Last Cost in the Stock Master File by the percentage listed in the Pricing Structure setup.

Stock Master File

Item Code: 0132008600
 Description: Idle Speed Actuator
 Description 2:
 Brand: Bosch

Category: 01 - Parts
 Group: Actuators [FA]
 Price Group: Actuators [FA]
 Supplier: Sundry Supplier

Sync with PML Word Search:

Stock Pricing Branch Stock Stock Options Query Promo Cross References Kits Pictures Product Information

Options
 Type: Stock
 Location1:
 Location2:
 Unit Qty: Each
 Buy Pack Qty: 1
 Sell Pack Qty: 1
 Sell Qty: 1
 Deposit Charge: \$0.00
 Franchise:
 Duty Percent: 0.00
 Weight: 0.00

Stock Holding
 Qty On Hand: 7.00
 Qty On Order: 0.00
 Qty Returned: 0.00
 Qty Reserved: 5.00
 Qty Delivered: 1.00
 Qty Backorder: 0.00
 Stock Value: \$376.00

Cost Prices
 Average Cost: 47.0000
 Last Cost: 47.00
 Current Cost: 45.00
 Landed Cost: 0.00
 Shipping Cost: 0.00
 Stock Order: 0.00
 Date Created: 15/04/2009

Supersession: 0
 Clear Supersession Create Supersession

Additionally, if you want the mark-up to be based on the highest of those three distinct costs, this can be done as well. To set the preference for the Mark-up, you will need to alter your settings in the [System File](#) to represent the cost that you want to use as the basis of your mark-up. Navigate to Utilities > System Set-up > System File and look at the [Parts](#) Tab > Parts [Options](#) 2 Sub-Tab. There you will find the Markup Type as shown below.

Remember to restart Autosoft after any changes to this option on all computers to make the changes active.

System File

General Parts Workshop Vehicles Fuel Dismantling Payroll Numbers ID Numbers Messaging Licence Branch

Parts Options Parts Options 2 Printing Options

Low Gross: 10.00
 Cash Print Option: Cash Docket
 Reorder Point: 50
 Markup Type: Average Cost
 Cr Inv Price diff % - Warn: Average Cost
 Cr Inv Price diff % - Warn: Current Cost
 Cr Inv Price diff % - Warn: Highest Cost
 Cr Inv Price diff % - Warn: Last Cost
 Cash Sale Account: Cash Sale

DO NOT change system file values unless you are certain of the consequences.

Save

NOTE: The only one of these costs that can be manually adjusted in the Stock Master File is the *Current Cost*.

Average Cost will be your average over time from ALL creditor invoices, and *Last cost* will be the cost on your LAST creditor invoice only.

For the product listed above, the Average Cost = \$47, Last Cost = \$47 and Current Cost = \$45. Using *Highest Cost* as your Markup Type will result in the \$47 price being used, as it is the highest amount that appears in any of these three cost fields. Hence all markup price structures will begin at \$47 and apply their percentages based on that \$47 amount (ie 10% mark-up will result in a Item price of \$47 + \$4.70 = \$51.70). GST is then applied to the newly adjusted price on the customer's invoice.

Tick Box

Show in Price Enquiry - Tick this box to enable the matrix price to show in the Price Enquiry screen and also the Stock Master File under the Pricing Tab.

Customer Pricing Structure

Description: 1 - Retail Branch Number: 1

Type: Discount Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
** Not Defined **	2		0	
Actuators IEA1	2		n	

Stock Master File - Pricing Tab

Stock Pricing Branch Stock Stock Options Query Promo Cross References Kits Pictures Product Information

Selling Prices

List Price: 59.00 Price2: 0.00 Price3: 0.00 Price4: 0.00

desc	Qty	Ex GST	Inc GST
1 - Retail	0	\$57.82	\$63.60
2 - Trade	0	\$55.46	\$61.01

Last Price Change: 22/07/2010

Price Enquiry

Price Enquiry

Item Code: 0132008600 Description: Idle Speed Actuator

Retail Price: \$64.90 List Price: 59.00

Debtor Name: Debtor: Debtor Inc: \$0.00 Debtor Ex: \$0.00

Pricing Branch Stock Stock Details Query Product Information

desc	Qty	Ex GST	Inc GST
1 - Retail	0	\$57.82	\$63.60
2 - Trade	0	\$55.46	\$61.01

Branch Number - The branch number for those system with multiple branches.

Price Structure Tab

Columns in Grid:

Price Group - The Price Group column has the relevant Price Group. Every stock item in the Stock MAster File must belong to a price group.

Percentage - The percentage mark-up or discount that will be applied to all products in that Price Group. Changes to these percentages can be made directly in the grid.

Fixed Price Option - Click in the column next to the corresponding Price Group and click the Down-arrow - a list of Fixed Price options will appear as below

Fixed Price Option

▼

- None
- Price 1 (List
- Price 2
- Price 3
- Price 4

These include None, Price 1 (List Price), Price 2, Price 3, Price 4. These correlate directly with the Stock Master File, under the Pricing Tab. This allows you to set 4 distinct fixed prices to charge for the item.

Stock **Pricing** Branch Stock Stock Options Query Promo Cross References Kits Pictures Product Information

Selling Prices:

List Price: Price2: Price3: Price4:

desc	Qty	Ex GST	Inc GST
1 - Retail	0	\$57.82	\$63.60
2 - Trade	0	\$55.46	\$61.01

Qty Break - The Quantity break allows for different percentage changes based upon quantity sold. Below, for the price group **Actuators [FA]**, There is a 1% discount when Quantity is 0-4, 2% discount when it is 5-9, 4% when it is 10-19 and 8% when it is 20+.

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
Actuators [FA]	2		5	
Actuators [FA]	4		10	
Actuators [FA]	1		0	
Actuators [FA] ...	8		20	

Fixed Price -

Buttons

Add All Descriptions - Click this button to add all Price Groups to the Price Structure grid. You are then able to type in the discount or markup percentage corresponding to the Price Group.

Edit - Highlight the matrix description you want to edit and click this button to edit an individual matrix description to the matrix. Make the changes and click on the [Save](#) button.

Delete - Highlight the matrix description you want to delete and click this button. Click Yes to confirm the deletion.

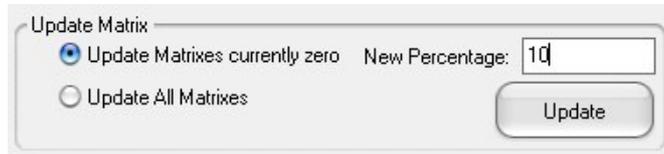
Add All Descriptions - Adds all [Price Groups \(Matrix Descriptions\)](#) setup in the [Price Groups](#) to the Pricing Matrix.

Update Matrix

This is used to enable you to quickly update the Pricing Group entries with a new percentage.

Type in the New Percentage and choose either *Update Matrixes Currently Zero* (will only update price groups with 0 in the percentage column to the new value) or *Update All Matrixes* (updates all price groups irrespective of their current percentage to the new value).

Click on the update  button.



Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Will add a percentage to the Price Group's existing percentage. Enter the amount to augment the amount by and

click on the update  button to apply the change.



Add Percentage to Matrix

Percentage to Add:

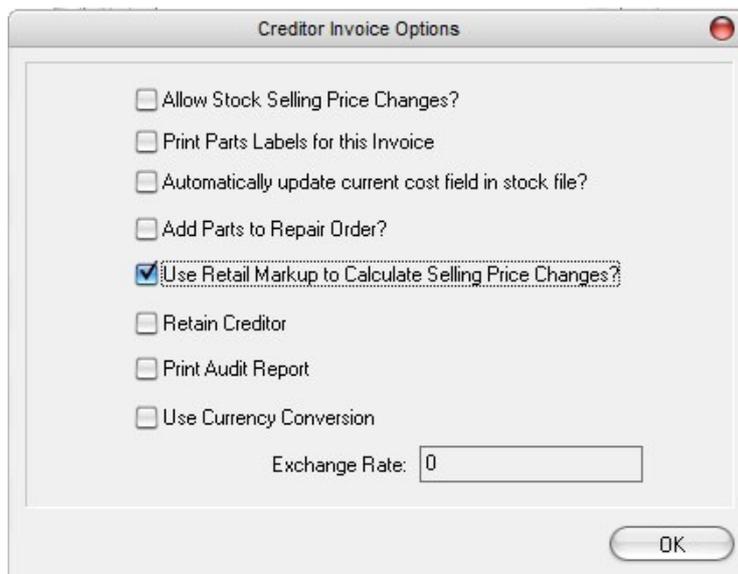
Markup Selling Price from **Creditor Invoice**

Cost Price can be marked up from the [Creditor Invoice](#) to arrive at the Selling Price in the Stock Master File by using the Retail Markup matrix.

In the Pricing Matrix program add markup percentages to the Retail Markup matrix, these will be used for creditor invoice pricing.

When processing a creditor invoice tick the box in the Options button  "Use Retail Markup to Calculate Selling Price Changes". What this will do is markup each stock item by the Retail Markup matrix percentage and enter that price in the Selling Price field in the Stock Master File.

Note: Selling and Cost prices do not include GST.



Creditor Invoice Options

Allow Stock Selling Price Changes?

Print Parts Labels for this Invoice

Automatically update current cost field in stock file?

Add Parts to Repair Order?

Use Retail Markup to Calculate Selling Price Changes?

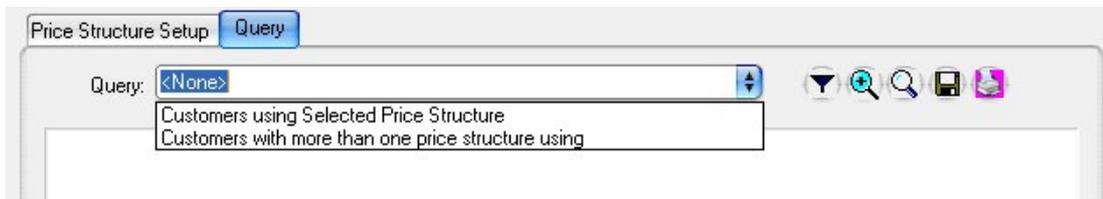
Retain Creditor

Print Audit Report

Use Currency Conversion

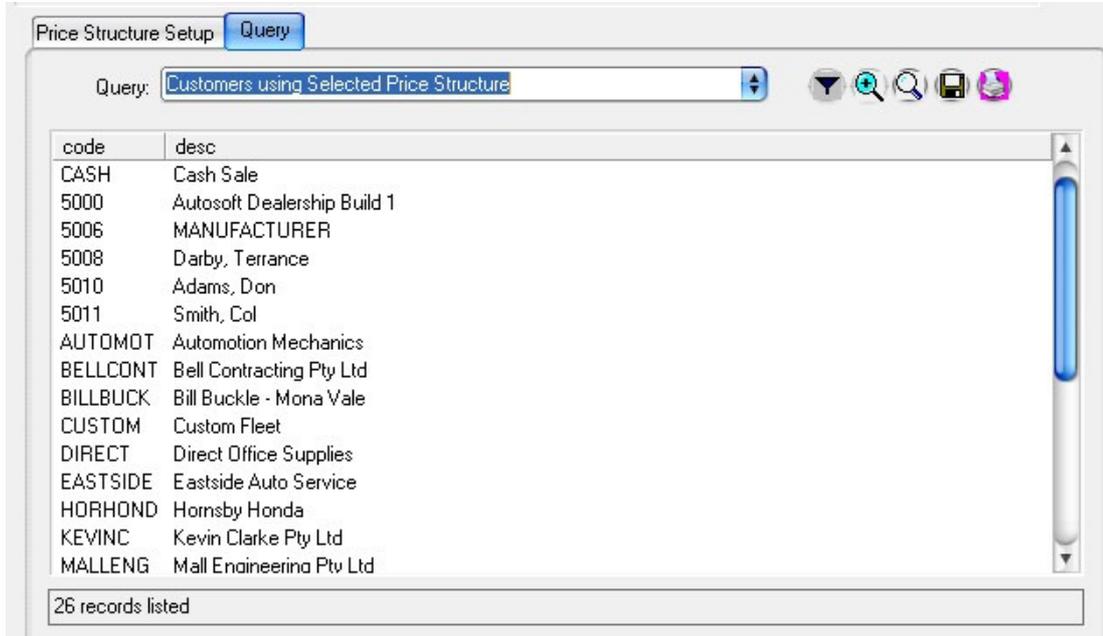
Exchange Rate:

Query Tab

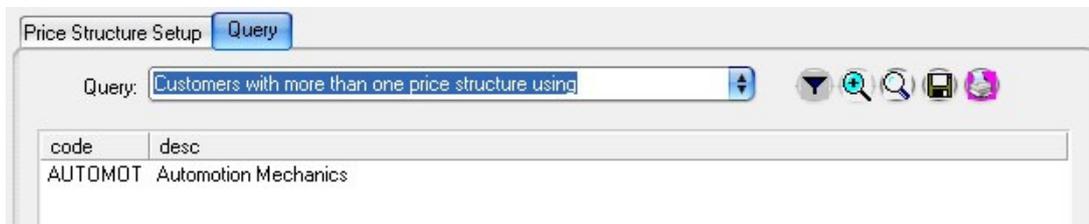


There are a couple of useful queries in the Query tab.

- Customers using Selected Matrix



- Customers with more than one matrix using selected



The second query is for customers set up with Multiple Matrixes in the [Debtor Master File](#).

Management and creation of Pricing Structures

The creation and maintenance of these pricing structures are done through four separate areas of the software:

1. Stock Master File
2. [Debtor Master File](#)
3. Customer Pricing Structure (also referred to as Price Matrix)
4. Price Groups (Also referred to as Price Matrix Descriptions)

NOTE: In previous versions of Autosoft the Price Structure was referred to as the *Price Matrix*, and a Price Group was known as a *Matrix Description*, so if you are familiar with these terms from Autosoft 5 or earlier, it is effectively the same definition for both of these terms.

Stock Master File:

In the Stock Master File, each item must have a Price Group entered into the *Price Group* field. These Price Groups are setup in the [Price Groups](#) menu option, and are selectable by hitting the ellipsis  in this field.

It is important to note that Price Groups need to exist in order for a Pricing structure to be created.

Item Code: 0132006364	Category: 01 - Parts
Description: Motor	Group: Motors [EL]
Description 2: VL600cc	Price Group: Motors [EL]
Brand: Bosch	Supplier: Sundry Supplier
Sync with PML	Word Search: Motor, Bosch, VL600cc

Options: Type: Stock, Stock Holding Qty On Hand: 3.00, Cost Prices Average Cost: 226.0819

Debtor Master File:

In the Debtor Master File click on the Options tab, and the Options Sub-Tab, and select the Price Structure. The pricing for each debtor is set individually via this field. Multiple debtors can belong to the same pricing structure, or in theory each debtor could have a separate pricing structure (although this is unlikely). The example below shows a typical setup with a *Retail* and *Trade* pricing structures, and has a couple extra in *Warranty* and *Internal*. The *Automation Mechanics* entry is a customer-specific Price Structure.

As more pricing structures are created, this list will grow. Each business can regulate and maintain their own quota of price structures - although having too many price structures can potentially be counter-productive.

Name: Advanced Automotive Services	Group: 1 Customer
Code: ADVANCED	Territory: 1 Customer
Display Name:	

Contacts | Addresses | Alternate Address | Balances | Queries | Marketing | Courier | Options | Account Information

Options | Billing to Account | Bank Account | Comments / Licence | Multiple Matrix | Word Search | Order Numbers (Service Strn) | B-Pay

Debtor Options:

Price Structure: 2 - Trade	<input type="checkbox"/> Order Number Required	Date Created: 4/06/2009
Delivery Amount: 1 - Retail	<input type="checkbox"/> Not Registered for GST	A.B.N.:
Cash or Account: 3 - Warranty	<input type="checkbox"/> Use Backorders	Retail Price Display: Retail
Dealer Licence: Automation Mechanics	<input type="checkbox"/> Inactive	Default SaleType: <None>
Cash Print Opt:	<input type="checkbox"/> Do not contact me	<input type="checkbox"/> Show Inactive Accounts
	<input type="checkbox"/> Internal A/C for Transfers	

Each Price Structure functions as a markup or discount mechanism - however in the Debtor Master file the function of the price structure is not apparent. For this you will need to look at the Customer Pricing structure option in the Part menu.

Customer Pricing Structure:

This is where the individual price structures are configured, essentially telling the system what to charge a debtor for distinct Price Groups based on the specific price structure chosen.

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price

Add All Descriptions

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

Hitting the ellipsis will bring up the available descriptions for price structures, and in this selection screen the nature of the price structure will be shown as well - whether it is a Markup (M) or a Discount (D).

desc	type
1 - Retail	D
2 - Trade	D
3 - Warranty	M
4 - Internal Sales	M
Automotion Mechanics	M

Type:

5 records listed

The Matrix Descriptions are setup by adding a description that you can then allocate a matrix percentage to in the Price Matrix.

To create a new Pricing Structure, type in the Description and select the Type (Discount or Markup) then hit F2 to save. You can tick the Show in Price Enquiry box and enter a Branch Number too where applicable (function of these are explained shortly).

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price

Add All Descriptions

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

Once you have hit F2 the description will clear, but when you click on the description ellipsis again to search for existing Pricing Structures, your new addition will be there.

Available Selections

desc	type
1 - Retail	D
2 - Trade	D
3 - Warranty	M
4 - Internal Sales	M
Automotion Mechanics	M
New Pricing Structure	M

Type:

6 records listed

Basic Pricing Structure:

Select your new pricing structure, and you can then begin to build the conditions into it that will determine pricing for debtors who are allocated to this.

The first thing to do is to bring in the various price groups which you can do by hitting the button. This automatically pulls EVERY price Group from the [Price Groups](#) menu option and lists them in the Price Structure [Setup](#) Tab, as below.

Price Groups can be deleted and added from the list (Shift + F2 to delete or click the  symbol on the toolbar when the relevant row is highlighted)

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
*** Not Defined ***	0		0	
Actuators [FA]	0		0	
Air Conditioning	0		0	
Bearings	0		0	
Belts [EN]	0		0	
Belts [GP]	0		0	
Body Repair	0		0	
Boxes [AC]	0		0	
Braces [SU]	0		0	
Brackets [AC]	0		0	
Brackets [BK]	0		0	
Brakes	0		0	
Caps [CO]	0		0	

Add All Descriptions

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

Now you have the option of individually configuring each Price Group by clicking on it in the list. Click in the Percentage column and you can manually enter in a number to correspond to the percentage change you want to apply to any product assigned to that price group.

The *Bearings* Price Group has been altered below to 10 (representing 10%) hence the price of any item that belongs to that Price Group in the Stock Master File will be 10% markup from cost for any Debtor assigned to that Pricing Structure in the Debtor Master File.

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
*** Not Defined ***	0		0	
Actuators [FA]	0		0	
Air Conditioning	0		0	
Bearings	10		0	
Belts [EN]	0		0	
Belts [GP]	0		0	
Body Repair	0		0	
Boxes [AC]	0		0	
Braces [SU]	0		0	
Brackets [AC]	0		0	
Brackets [BK]	0		0	
Brakes	0		0	
Caps [CO]	0		0	

Add All Descriptions

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

You can repeat this process for every Price Group you have in your system if you want. This is a fairly cumbersome

and time-consuming way to set this up however. There is a faster way to set percentages for all available price groups, via the **Update Matrix** and **Add Percentage to Matrix** options beneath the Price Group list.

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

These allow for changes to the percentages to be applied to an entire list in a variety of ways:

- Update Matrixes Currently Zero:

This will update all Price Groups with a percentage set to 0 to update to the New Percentage. typing 10 into that field

and hitting the button will affect all Price Groups, except for the Bearings Price Group changed just before. You will be prompted to go ahead with the changes to the matrix as per below.

Update?

Update matrixes with new percentage?

Hit to apply the changes and the list will update to the below:

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
** Not Defined **	10		0	
Actuators [FA]	10		0	
Air Conditioning ...	10		0	
Bearings	10		0	
Belts [EN]	10		0	
Belts [GP]	10		0	
Body Repair ...	10		0	
Boxes [AC]	10		0	
Braces [SU]	10		0	
Brackets [AC]	10		0	
Brackets [BK]	10		0	
Brakes	10		0	
Caps [CO]	10		0	

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

This is the most basic form of percentage change that can be applied to a product based upon the pricing structure.

Complex Pricing structure:

To add more complex conditions to a Pricing structure, you can edit each percentage manually to create a more comprehensive list of percentage mark-ups / discounts.

Customer Pricing Structure

Description: Branch Number:

Type: Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
** Not Defined **	15		0	
Actuators [FA]	10		0	
Air Conditioning	10		0	
Bearings	12		0	
Belts [EN]	10		0	
Belts [GP]	20		0	
Body Repair	20		0	
Boxes [AC]	10		0	
Braces [SU]	13		0	
Brackets [AC]	5		0	
Brackets [BK]	5		0	
Brakes	5		0	
Caps [CO]	10		0	

Add All Descriptions

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

The example above will mark-up the cost price by the corresponding percentage listed in the Percentage column, and that will be the price that appears on an invoice for a debtor assigned to that Price group.

Modifying a Price Structure:

All percentages for a particular Price Structure can be amended by using the **Update Matrix** and **Add Percentage to Matrix** options beneath the Price Group List.

Update Matrix

Update Matrixes currently zero New Percentage:

Update All Matrixes

Add Percentage to Matrix

Percentage to Add:

The *Update Matrixes currently zero* procedure was shown above, and this option amended ALL entries that had a value of zero to the New Percentage listed (which was 10). The alternative is *Update All Matrixes*. This will change

every Price Group to the percentage you type into the *New Percentage* field when you hit the button, irrespective of their current value.

To incrementally increase or decrease a percentage use the **Add percentage to Matrix** option. Type your amount in

the *Percentage to Add* field, and hit . To add 5 percent, type 5 in the *Percentage to Add* field and update. To reduce the percentage by 5%, type -5 in the *Percentage to Add* field and update. These options make changes to all the listed Price Groups, so only use this when making wholesale changes to the way a specific Price structure works.

Individual Price Group changes must be done manually.

Using Quantity Breaks:

The Quantity break allows for different percentage changes based upon quantity sold. Below, for the price group **Actuators [FA]**, There is a 1% discount when Quantity is 0-4, 2% discount when it is 5-9, 4% when it is 10-19 and 8% when it is 20+.

Customer Pricing Structure

Description: 1 - Retail Branch Number: 1

Type: Discount Show In Price Enquiry

Price Structure Setup Query

Price Group	Percentage	Fixed Price Option	Qty Break	Fixed Price
Actuators [FA]	2		5	
Actuators [FA]	4		10	
Actuators [FA]	1		0	
Actuators [FA]	8		20	

You need to have a Quantity Break greater than Zero entered next to a Price Group to be able to add it more than once to a Pricing Structure.

Using Fixed Pricing:

Click in the Fixed Price Option column next to the corresponding Price Group and click the Down-arrow - a list of Fixed Price options will appear as below. At this stage, the *Fixed Price Option* and *Fixed Price* columns are the same.

Fixed Price Option

None
Price 1 (List)
Price 2
Price 3
Price 4

These include None, Price 1 (List Price), Price 2, Price 3, Price 4. These correlate directly with the Stock Master File, under the Pricing Tab. This allows you to set 4 distinct fixed prices to charge for the item.

Stock Pricing Branch Stock Stock Options Query Promo Cross References Kits Pictures Product Information

Selling Prices

List Price: 59.00 Price2: 60.00 Price3: 61.00 Price4: 62.00

desc	Qty	Ex GST	Inc GST
1 - Retail	0	\$57.82	\$63.60
2 - Trade	0	\$55.46	\$61.01

These prices would need to be set for every product in the Price Group for this pricing mechanism to operate properly.