

Price List Master

The *Price List Master* screen lets you create a price list which would be added as a search option on the *Price Search Order* screen. You have the option of creating a price list that can be applied on the *Ship To, Customer, Salesperson, and Territory Master* screens. The *Price List Master* screen lets you classify desired items under one price list and define their applicable prices.

This screen gives you the option of rounding off the list price with desired precedence alternatives or updating the list price by a desired percentage in a single action. You can also choose to import price list data maintained in Excel directly to the *Price List* screen. As soon as you hit the *Import From Excel* button, the values are defaulted to this screen under the current price list key.

The *Price List* option is listed in the *Price Search* order screen as one of the options for setting the pricing source precedence.

Go To: Sales → Sales Master Data → Price List Master.

Price List Master – Dashboard

You can manage and create a Price Lists from this dashboard. By default, the system displays all the existing Price Lists as maintained for your business / company. You can double click on any of the Price List record to view its details.

Action	Price List key	Description	RecUserId	RecDate
Copy	EXPORT		A	07/01/20
Copy	PL01	Water Base Coatings for South America Customer	A	07/01/20
Copy	PL02	Solvent Base Coatings for South Africa Customers	A	07/01/20

The *Price List Master* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

Using the *Action* button from the dashboard you can:

- Copy an existing record to create new one
- Delete

After you select all the columns of the *Price List Master* dashboard, the middle grid displays the selected columns.

Action	Price List key	Description	Expiry Date	RecUserId	RecDate
Copy	EXPORT		04/15/21	A	07/01/20
Copy	PL01	Water Base Coatings for South America Customer	06/22/21	A	07/01/20
Copy	PL02	Solvent Base Coatings for South Africa Customers	06/22/21	A	07/01/20

The *Price List Master* dashboard provides a clear vision of the created records in a read-only mode. You can view the Price List Master records as per the number of pages provided per page.

Price List Master – Add Mode

To add a new Price List Master to your BatchMaster Online database, click on the *+Add Price List* button. The system displays the *Price List Master* Screen form, where you can create a new price list.

Price List Master

Price List key * Description

Currency * Currency Description

Expiry Date

Increase By %

Rounding Option

Action	Item Key	Description	Location	List Price	Sales Unit	Base Price
	ICC ORNG 200 LT	C Luxury Coating Orange - 200 L	01	800.000000	EACH	700.00
	ICC ORNG 50 KGS	C Luxury Coating Orange - 50 K	01	300.000000	EACH	300.00
	ICC WHITE 306- 50	C Luxury Coating White - 50 KG	01	300.000000	EACH	300.00

Price List Key: This is the unique identification code for the Price List to be defined. This key can be associated at various screens, namely, *Ship To*, *Customer*, *Salesperson*, *Territory* and *Price Search Order* screen of BatchMaster Online. It is a mandatory field and shouldn't be duplicated.

Price List Description: This field displays the description associated with the Price List Key. This is a read-only field.

Currency: This field specifies the currency for this Price List Key. If the currency selected is the Home currency, than the system would fetch the Base Price of the item from the Item Location. Whereas, selecting any other currency, the Base Price column displays the converted value as per the defined conversion.

Currency Description: This field displays the description associated with the Currency. This is a read-only field.

Expiry Date: This is the date up to which the Sales Commission key remains effective for this item.

Increase By %: It is the desired percentage amount by which user can update list price in a single shot. The increased percentage can be Positive or Negative integer value. Clicking the button again and again reflects the changes on the List Price column of the *Price List Master Details* grid.

Calculate List Price Button: Click this button to view the updated List Price within the *Price List Master Details* grid.

Rounding Option:

List Price Round Off With .00: Rounds fraction up if fractional value is greater than 0.50 else rounds fraction down if fractional value is less than 0.50.

List Price Round Off With 0.50: Round fraction to up by or down by 0.50.

Say for example:

1. If the value is 16.18 i.e. less than 0.25 the rounded value will be 16.00.
2. If the value is 16.38 i.e. greater than 0.25 and less than 0.50 than the rounded value would be 16.50.
3. If the value is 16.63 i.e. less than 0.75 the rounded value will be 16.50.
4. If the value is 16.88 i.e. greater than 0.75 and less than 17.00 than the rounded value would be 17.00.



List Price Round Off With Quarter: Round fraction to up by or down by 0.25.

Say for Example:

1. If the value is 10.11 i.e. less than 0.12 than the rounded value will be 10.00.
2. If the value is 10.20 i.e. greater than 0.13 and less than 0.25 than the rounded value will be 10.25.
3. If the value is 16.33 i.e. greater than 0.25 and less than 0.37 than the rounded value would be 16.25.
4. If the value is 16.45 i.e. greater than 0.37 and less than 0.50 than the rounded value would be 16.25. And so on.

Round Off List Price Button: Clicking the button returns the rounded value of the specified precision (number of digits after the decimal point).

Grid Fields

Action	Item Key	Description	Location	List Price	Sales Unit	Base Price
	#1	 USA	USA	4.000000	LT	30.00

Item Key: This field specifies the Item Key for which user needs to maintain the Price List. When user click the lookup attached to the field, it displays the list of Items maintained in BatchMaster, user can choose from.

Description: This field value gets defaulted with the description in sequence to the selected Item Key.

Location: This field value gets defaulted with the location in sequence to the selected Item Key.

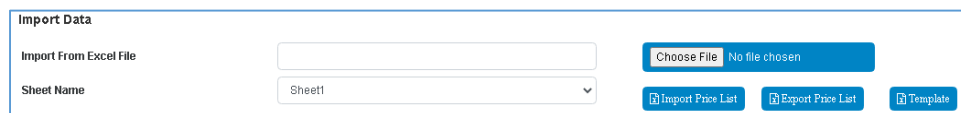
List Price: This field value gets defaulted with the List Price in sequence to the selected Item Key.

Sales Unit: This field value gets defaulted with the Sales Unit in sequence to the selected Item Key.

Base Price: Field value gets defaulted with the Base Price in sequence to the selected Item Key.

Add Line: Click this button to add a line within the grid.

Import Data Section:



The screenshot shows a form titled "Import Data". It contains two input fields: "Import From Excel File" and "Sheet Name". The "Import From Excel File" field has a "Choose File" button next to it, which currently displays "No file chosen". The "Sheet Name" field has a dropdown menu showing "Sheet1". Below these fields are three buttons: "Import Price List", "Export Price List", and "Template".

Import From Excel File: This field is used to locate the excel file from which price list data needs to be imported.

Browse Button: Click this button to browse the path of the excel file which is to be imported.

Sheet Name: This field is used to specify the name on the sheet in the Excel file from which data needs to be imported.

Import Price List Button: Clicking this button allows user to import Price lists data maintained in excel format.

Export Price List Button: Clicking this button allows user to export Price lists in excel format.

Template Button: Click this button to download the pricelist template.

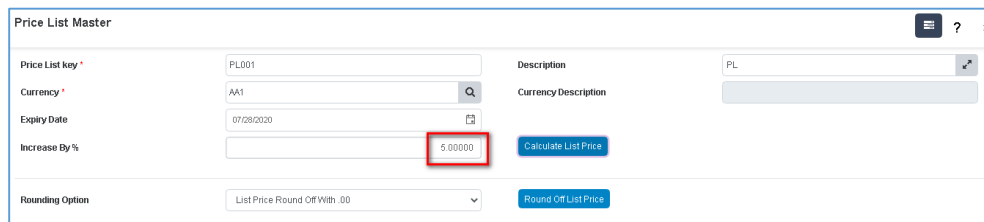
Maintaining a Price List

1. Open the *Price List Master dashboard*.

2. Click on the **+Add Price List** button to open the *Price List Master* screen.
3. To identify this price list, enter a price list key, associated currency, and description in the respective fields.
4. Click the **Add Item** button to add items to the *Price List Master Details* grid. The lookup is linked to the *Item Location* table.
5. When an item is added to the grid, the *Description*, *Location*, *Sales Unit*, and *Base Price* values are all defaulted from the *Item Location* record. These values cannot be modified.
6. Enter a value for the sales UOM in the *List Price* field for this item/location.
7. When all items have been added, click the **Save** button to save the record.

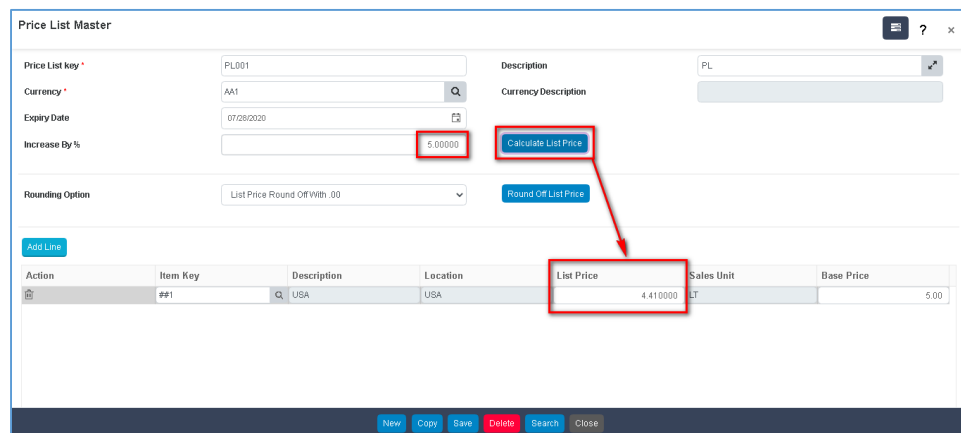
Adjusting a Price List

1. Price list prices can be adjusted up or down by entering a value in the *Increase By %* field.



The screenshot shows the 'Price List Master' form. The 'Price List key' is 'PL001', 'Currency' is 'AA1', and 'Expiry Date' is '07/28/2020'. The 'Description' is 'PL'. The 'Increase By %' field is highlighted with a red box and contains the value '5.00000'. There are buttons for 'Calculate List Price' and 'Round Off List Price'.

2. In the example above, we have entered '5' as the percentage. This is entered by typing '-5', (i.e., the minus sign is entered before the numeral).
3. Click the **Calculate List Price** button. The prices in the *Price List Master* grid are adjusted accordingly.



The screenshot shows the 'Price List Master' form after clicking the 'Calculate List Price' button. The 'Increase By %' field is still '5.00000'. The 'Calculate List Price' button is highlighted with a red box. Below the form, there is a table with the following data:

Action	Item Key	Description	Location	List Price	Sales Unit	Base Price
	#1	USA	USA	4.410000	LT	5.00

The 'List Price' field is highlighted with a red box. At the bottom of the form, there are buttons for 'New', 'Copy', 'Save', 'Delete', 'Search', and 'Close'.

- If you wish to round the prices, select one of the option in the *Rounding Option* field.. Options are *.00* (whole dollars only), *.50* (to the nearest half-dollar), or *Quarter* (to the nearest 25 cents). Here we have selected '*.00*'.
- The prices in the grid are now rounded per your selection.

Exporting a Price List

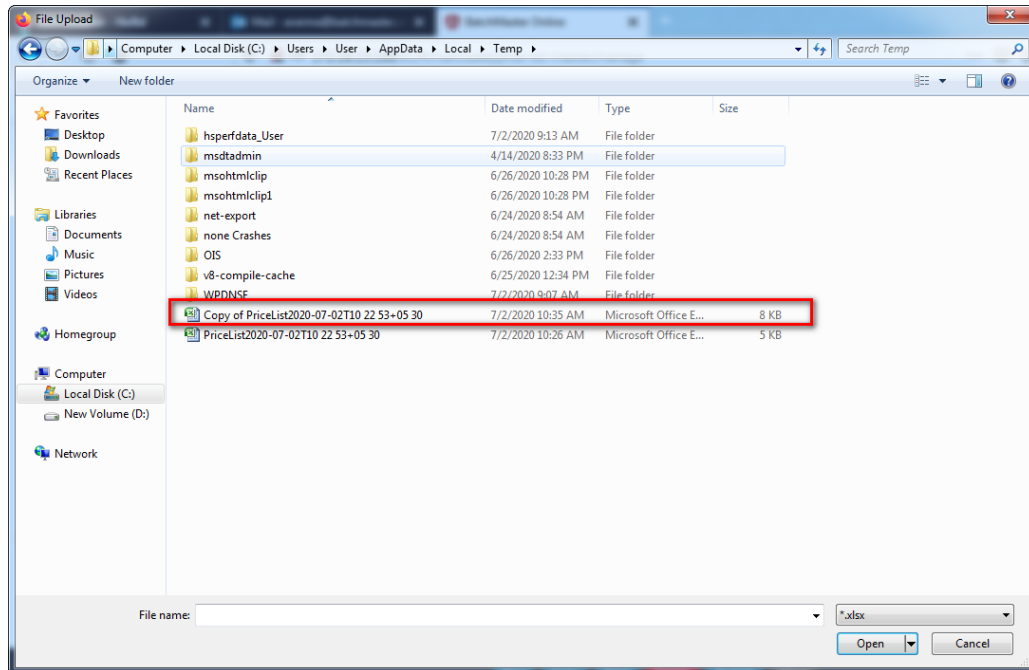
- Maintain a price list as explained above.
- Click on the *Export Price List* button.

The screenshot shows the 'Price List Master' interface. At the top, there's a 'Rounding Option' dropdown set to 'List Price Round Off With .00' and a 'Round Off List Price' button. Below this is a table with columns: Action, Item Key, Description, Location, List Price, Sales Unit, and Base Price. The table contains one row with Item Key '#1', Description 'USA', Location 'USA', List Price '4.000000', Sales Unit 'LT', and Base Price '5.00'. At the bottom, there's an 'Import Data' section with 'Import From Excel File' and 'Sheet Name' (Sheet1). To the right of these are buttons: 'Choose File' (No file chosen), 'Import Price List', 'Export Price List' (highlighted with a red box), and 'Template'. At the very bottom, a file explorer shows a file named 'PriceList2020-07-2...xlsx' (highlighted with a red box and an arrow pointing from the 'Export Price List' button).

- The Price list file is downloaded in the *Downloads* folder of the browser.

Importing a Price List

- Open the *Price List Master dashboard*.
- Click on the *+Add Price List button* to open the *Price List Master screen*.
- To identify this price list, enter a price list key, associated currency, and description in the respective fields.
- In order to import the Price List click the *Choose File* button. The system displays the Open Network window to locate\browse the required file to be imported.
- Select the required sheet of the excel file in the *Sheet Name* field. Click the *Open* button.



6. The system will display the path in the *Import From Excel File* field and the name of the active sheet within the excel workbook in the *Sheet Name* field.
7. Click the *Import* button. The items with their defined prices appear in the grid.