

Ignite Your Margin

Pricing Plans

The power and flexibility Fuse5 brings to your pricing is unlike anything that has ever been available in the Automotive Aftermarket industry. It can be as simple or as complex as you desire, but to get the most out of the Fuse5 pricing system, there is a bit of a learning curve. We recommend that you start with a simple set-up, something similar to how your old system worked, and then branch out from there as you become more comfortable. There is extensive embedded help within Fuse5 to help you set up your pricing, and you will probably find the video tutorials very helpful. **(Videos are located under the “Personal & Admin” tab of your Fuse5 homepage)**

One of the major pricing concepts that you will need to become comfortable with is that, in Fuse5, prices are not set by WHAT you are selling (at least not directly), but rather WHO you are selling it to. A Fuse5 product file has many price fields in it that you can reference through price plans that are then assigned to accounts. This allows the system to automatically and seamlessly charge a different amount for a specific product to a walk-in customer versus a garage that purchases a high volume from you.

Using the Fuse5 price plans, you can have a level of price control that eclipses anything you have had in the past. You can break products down by line, subline, division, sales rank, price range, and even down to specific product numbers. You can then assign pricing strategies at every level and maximize your bottom line. Customers who have taken the time to understand and implement price plans see immediate and significant increases in their profitability.

The pricing steps that follow provide a general guideline for how you can create pricing within Fuse5. The detail that follows these pricing steps offer more detailed explanations of each section.

Pricing Plans

Pricing Plans are what populate the product prices on your sales orders. You can (and should) have multiple pricing plans that you assign to different types of accounts. There are two types of price plans, Sell Price and List Price, and Fuse5 requires that you have at least one of each. The Sell Price Plan outputs the price to the Sales Order that you are charging for the products. The List Price Plan is what generates the list price that you display on the Sales Order for comparative purposes.

You can also add exceptions and sales promotions to the plans that can override their pricing output. For example, you may want to give the Speedy Lube a special discount on oil filters while still maintaining an overall Price Plan for other things.

One important thing to understand is that when you add a part to a sales order, the price plans, exceptions, and sales/promotions are *all* used to calculate the price. The *lowest price calculated among the three wins*, and that price is used unless you override this behavior in the Exceptions to Plans. That will be covered in exceptions.

Pricing Steps

1. Create a Sell Price Plan (basic) under “Ignite Your Margin” > Pricing Plans > Sell Price Plan.

Sell Price Plans

Within Fuse5 you will set up at least one, but probably several, Sell Price Plans that you can assign to different customer accounts. For example, you might have a Sell Price Plan called “Walk-In Customers” that you will use for all walk-in customers. However, you may have another Sell Price Plan called “Shop Discount” that gives a highly discounted price to your repair shop customers that use you frequently. There is no limit to the number of Sell Price Plans you can have. Each one can have a different pricing strategy to match different customer types you have.

The thing to remember is that *the Sell Price Plan does NOT have prices in it*, but instead has *formulas* that are used to calculate the price at the time the sales order is created. A simple example is that the “Walk-In” customer might pay suggested retail minus 5%, while the “Shop Discount” might pay your cost plus 15%. However, Fuse5 goes much further than this. It allows you to change the pricing formulas on different product lines, or you can treat different priced items within a line (more/less expensive) differently. Essentially you will have 100% control of the pricing from top to bottom on a part-by-part and account-by-account basis. Also, it allows you to change a single price in the product record that will automatically flow through to every price plan but still maintain the same pricing formulas. This saves you the trouble of updating all price plans when you want to change the base price of a single product.

To create a new plan use the orange + button at the top right of the Sell Price Plans listings page.



The Create Sell Price Plan box will open up and you are prompted to give the plan a name and description. Use a naming convention that will allow you to recognize later which accounts you will want to assign this plan to.

A screenshot of the 'Create Sell Price Plan' form. The title 'Create Sell Price Plan' is in orange at the top right. Below the title are 'Save' and 'Cancel' buttons. The form is divided into two main sections: 'Price Plan Information' and 'Description Information'. Under 'Price Plan Information', there is a field for 'Price Plan Name' with the value 'Retail Customers' highlighted in yellow. Under 'Description Information', there is a field for 'Price Plan Description' with the value 'Plan to be assigned to all retail customers' highlighted in yellow. At the bottom right, there are 'Save' and 'Cancel' buttons.

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Once you have named the plan and given it a description you can save the plan by clicking the save button. You will then be taken to the Sell Price listings page. You can access your plan by either clicking on the Price Plan name or using the edit button under the action column.

Sell Price Plans	
<div><div>Search</div><div>Go to Advanced Search</div><div>Search for <input type="text"/></div><div>In <div>Price Plan</div></div><div><div>A</div><div>B</div><div>C</div><div>D</div><div>E</div><div>F</div><div>G</div><div>H</div><div>I</div><div>J</div><div>K</div><div>L</div><div>M</div><div>N</div><div>O</div><div>P</div></div></div>	
<div>delete</div>	<div>Make Default</div>
<div>GP % Color Code Setting</div>	<div>Add Accounts</div>
Showing 1 - 20 of 40	
<div>1 2</div>	
Price Plan	Price Plan Description
Wholesale/Installers PREMIUM *	pricebooklevel_desc
Test Import	pricebooklevel_desc
Test 1713	pricebooklevel_desc
test 14	pricebooklevel_desc
Test	Test
temp alpha pp	temp alpha pp/temp alpha ep/dave c acct/...
Store Transfer Rate	Price Plan attached to Store Transfers (...)
SP 0 Plan	SP 0 Plan
Sell Price Tutorial	Learning to use Sell Price Plans
Sell Price Test	pricebooklevel_desc
Retail Customers	Plan to be assigned to all retail custom...

Now that you have accessed the Sell Price Plan you are working on you need to begin the work of adding products and selecting price points. You add a rule to the price plan using the ADD RULE button that can be found above and below the price plan Rules Details section.

The “****” line code is a catch all for any products that do not meet some other criteria in the Price Plan. If you don't have this, the price for these “unpriced” products will populate as \$0 during Point of Sale, and you will be required to manually enter it. This actually may be useful if you have one-off items marked manually. Actually, a Sell Plan with a single “****” line is the simplest one you can have (although using the exact same formula “on every part is probably a bad idea).

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	IF / AND Fields (SELECT ONE OR MORE)				
<input type="checkbox"/>	Line Code	Subline	Product Division	Product #	Sales Rank
<input type="checkbox"/>	***				
<input type="button" value="Delete"/> <input type="button" value="Duplicate"/> <input type="button" value="Add Rule"/> <input type="button" value="Edit Rules"/> <input type="button" value="Sort By Latest Modified"/> <input type="button" value="Bring Uned"/>					

Lets look at a more complex price plan. As you can see the pricing can be defined differently for each line code. Using the options for Line Code, Subline, Product Division, and Product # you can define either broadly or very specifically what product(s) you are setting pricing for. The price plan will draw the price for a given product from the most specific rule in the plan.

<input type="checkbox"/>	Line Code	Subline	Product Division	Product #
<input type="checkbox"/>	***			
<input type="checkbox"/>	WIX			
<input type="checkbox"/>	WIX	515		
<input type="checkbox"/>	WIX	515	Heavy	
<input type="checkbox"/>	WIX	515	Heavy	51515R

We will review Sales Rank, Price Code, and PC\$ later in the is module. For now let's look at the Price Level column. Once you have broken your products down the the level appropriate for your pricing strategy, you must choose the price level to base your margins on. This can be based on either CC (Current Cost) or one of the M Fields in your product records. An M Field may represent your current Jobber, Retail, Commercial Fleet, or some other pricing that you have either previously established or get directly from the manufacturer. You can choose to do all pricing using one price level, or use a variety throughout your pricing plan.

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Line Code	Subline	Product Division	Product #	Sales Rank	Code / Product Count / Last 12 SH	PC \$ Range	Price Level
WIX	515	Heavy			/  / 0		M3
WIX	515	Heavy	51515R		/  / 0		M2
WIX					/  / 0		M1
WIX	515				/  / 0		CC
***					/  / 0		CC

Now that we have chose the price level from which to build the plan, it's time to set up the margins. You do this using one of the AND EITHER options.

Times – takes the price level and multiplies it by the number entered in this column.

GP% - takes the price level and builds a gross profit % based on that original price level. The formula for GP% is (Sell Price-Current Cost) / (Sell Price).

MU% - enter the % mark up you want to add to the chosen price level

Let's look at how the three interact. If you have a CC of \$100. Taking it times 1.3, you would get a sell price of \$130. If you were to do a MU% of 30%, you would get a sell price of \$130. If you do a GP% of 23.08% you would get a sell price of \$130.

Price Level	Times	GP %	MU %
CC	1.1	9.09	10.00
CC	1.1	9.09	10.00
CC	1.3	23.08	30.00

When setting up the margins, you only interact with one of the three of these. The other two will automatically populate based on what you have chosen in one of the three columns. This allows you to use the margin formula that is most comfortable for you.

There are two other options for setting up your pricing, you can use either ADD/SUBTRACT or NET PRICE under the “AND EITHER (SELECT ONE) column.

Add / Subtract – adds or subtracts a specific dollar amount to the chosen price level. In the example



















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below \$3 will be added to the CC (Current Cost).

Net Price – allows you to set a hard price for the product with no interaction with the selected price level.

THEN TAKE THIS	AND EITHER (SELECT ONE)				
Price Level	Times	GP %	MU %	Add / Subtract	Net Price
CC	0	0.00	0.00	0	7.99
CC	0	0.00	0.00	3	0

Once you have set up the margin strategy it is time to consider Penny Rounding. Under the ACTION column you see that you can choose penny rounding for each rule in your plan.

Default Penny Round Up: <input type="text" value="No Penny Rounding"/> ?						
ACTION						
Net Price	Created From	Penny Round	Delete	Duplicate	Split	
0	PB	49/99				
7.99	PB	25/50/75/100				
0	PB	09/19/29 /39/49....				
0	PB	05/10/15 /20/25/30....				
0	PB	Use Default				
0	PB	Use Default				

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You can set the penny rounding on each additional line or rule by hovering over the cell and choosing the level of rounding you want to use. Additionally, you can set each rule to use the default penny rounding which is set directly above the action column.

Other options available in the Action column include:

Created From: Will either be PB(Price Book), which means it was created in the plan itself, or PCB(Price Code Book), which means it was created using Price Code Book functionality....which is discussed later in this module.

Delete – allows you to delete an individual rule

Duplicate – allows you to create an exact duplicate of an individual rule within the same sell price plan

Split – allows you to split a rule to multiple lines and set up additional pricing based on Sales Rank. If I were to Split the rule that just had line code WIX it would look like this.....

Line Code	Subline	Product Division	Product #	Sales Rank
WIX				A
WIX		Edit		B
WIX				C
WIX				D
WIX				W
WIX				N
WIX				X

Additional Tips (That make creating price plans more efficient):

Use the Default Price Level and Default Markup Multiplier from the header if you intend to use something other than CC or intend to have a consistent multiplier.

Default:	CC	▼	Default Markup Multiplier:	0.00
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Use the buttons available above and below the Rules Details section to take other action that might be necessary or efficient.

Delete	Duplicate	Add Rule	Edit Rules	Sort By Latest Modified	Bring Unedited Rules to Top	Show Product Count
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Delete – By using the boxes next to the rules you can choose one, multiple, or all of the rules and delete them using this button

Duplicate – allows you to duplicate a rule (s) either within the current price plan or to another price

plan. Once you have chosen the rules to be duplicated you get a pop up box that allows you to choose the plan to duplicate to. You can also select to duplicate at the same mark up or margin by selecting 0 (Zero) in the No. of Times: line. If you want to add or subtract a times parameter you can enter a number here. If you were to choose Add and .10 for example, the lines will be duplicated to the new sell price plan with a times or mark up of .1 or 10% higher than in the current plan. To change the margin by 28% you would enter a .28.

Duplicate PB Rule

Select Sell Price (100 Level) Book(s)

Select All | Unselect All

100
101
102
103
112
12
12OCT Test

Select Book(s):

Times Parmater: ☒ Add ☐ Subtract

No. of times:

Duplicate to Selected Price Book Cancel

Add Rule – creates a blank rule in the current pricing plan.

Sort By Latest Modified – sorts the rules in such a way that the most recently modified is at the top of the plan

Bring Unedited Rules to Top – will sort in such a way that any unedited rules will go to the top of the plan.

Show Product Count – When pushed it will display the number of products that meet a specific rule within the Price Code/Product Count/Last 12 SH column.

2. Assign the appropriate accounts to the sell price plan (through the account under Sales Management)

This can be done in a couple of ways. The first would be on the Sell Price (IGNITE YOUR MARGIN >PRICING PLANS>SELL PRICE PLANS) listings page. You can select the plan with the box to the left of it, then click the ADD ACCOUNTS.

The second way to add sell price plans to an account would be to go to the account record (SALES MANAGEMENT>ACCOUNTS), select your record from the listings page, then using the drop down under CUSTOM INFORMATION > SELL PRICE to select the sell price plan.

The third way to add sell price plans to accounts is with the MASS UPDATE button on the Accounts listing page. Click the mass update button.....

.....choose the account (s) you want to update at the top, then using the check box next to sell price, click the item and choose the sell price you want to add to the selected accounts. Once done hit the UPDATE SELECTED ACCOUNTS button at the bottom of the screen to save the changes.

Custom Information		
<input type="checkbox"/>	Sell Price	<input type="text"/>
<input type="checkbox"/>	Account Exceptions	<div> <div>14DEC12 Exception with r</div> <div>24JAN13 Duplicate Testin</div> <div>3m 10% off retail</div> <div>asdf</div> </div>
<input type="checkbox"/>	Sales and Promotions	<div> <div>12OCT12 Test</div> <div>19DEC12 Test Plan</div> <div>6FEBtest</div> <div>aatest</div> </div>
<input type="checkbox"/>	List Price	<input type="text"/>

The fourth method would be to use Fuse5's import functionality (see the IMPORT training module for more details)

3. Create a List Price Plan (basic) under “Ignite Your Margin” > Pricing Plans > List Price.

On your Sales Orders you will list 2 prices. Selling price, which is the price you are charging, and List Price, which is the “feel good” price you display to the customer as a reference. Again, the process is essentially the same as for Sell Price plans. One big difference is that you have the option to base your list price off of Sell Price or List Price, not just the M# fields in the product. Whether or not you go into a lot of effort creating a complicated List Price Plan is up to you. The first priority is the Sell Price Plan. You can hedge all of that work put into your Sell Price Plan by setting up a simple List Price Plan that calculates a percentage of Sell Price with one rule in the List Price Plan. It's up to you. Another big difference from the Sell Price is that you need to put a blank as a linecode (instead of “****”) to create a catch all list price rule.

4. Create Exceptions Plans if required

Exceptions to plans are simply Price Plans that are exceptions to the Sell Price Plans. Go to “Ignite Your Margin” > Pricing Plans > Exceptions to Plans. They are set up exactly the same way, but usually for a small subset of products. When Fuse5 calculates the price on a product, it uses the Exceptions price if it calculates to price LOWER than the Sell Price Plan price. Otherwise the Sell Price is used (lowest price wins). Exceptions are assigned to accounts, just like Sell Price Plans. So, if you only want to give Jiffy Lube special pricing on oil and filters, but charge them walk-in price for everything else, you would assign their account the same Sell Price Plan as walk-ins and also the exception you create for them for oil and filter pricing.

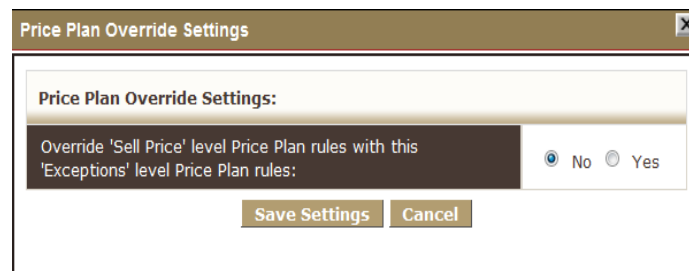
Also, an account can have more than one exception. You assign exceptions to accounts through the account setup screen (under customer information).

Final thought on exceptions. As previously mentioned the price you sell to the customer defaults at the lowest sell price from your Sell Price Plan, the Exceptions, or from Sales and Promotions. The lone exception to this is that you can actually put in an exception for an account and sell at a higher price

even if the Sell Price Plan or Sale and Promotion is lower. To do this, go to IGNITE YOUR MARGINS>PRICING PLANS>EXCEPTIONS TO THE PLANS. You will get a list of all the exceptions. On the far right of the screen under the “Action” buttons is what looks like a double file folder...it's the first “Action” button.



When you click on that you will get a pop up box for Price Plan Override Settings. It defaults at “NO” meaning it won't default to a higher price. If you want to ensure that an exception for one of your accounts is not over ridden by a Sale and Promotion, you would want to change this to “YES”. This allows the exception to actually over ride other price options with a higher price.



5. Create Sales and Promotions if required

Sales and Promotions are essentially identical to Exceptions. To get to them go to IGNITE YOUR MARGINS >PRICING PLANS>SALES & PROMOTIONS. Sales and promotions tend to be short lived exceptions, so they are managed in a different area of Fuse5 to keep the interface cleaner. Refer to the prior Exceptions section to understand how to set up Sales & Promotions. This module works the same way.

There are a few differences worth noting in the Sales & Promotions option.

1. You can put start and end dates on the pricing.
2. You can do volume discounts in Sales & Promotions (not available in Exceptions)
IMPORTANT: When doing a volume discount you **MUST** change the **RULE TYPE** in column 1 of the Sale & Promo to “Bulk Discount” rather than the default setting of “None”.
IMPORTANT: When doing a volume discount ensure that you enter a comment that is detailed enough that the person making a sale can use the comment as direction for upselling the customer as it will be displayed on the sales order.

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There are three types of Sales & Promotions (select from the Price Plan Type drop down):

Default – if a customer meets any of the rules in the Sale and Promotion they get the discounted price.

Mix & Match - There is a type of 'Sales & Promotion' available in Fuse5 called Mix & Match. This new function will allow you to give your customers a discount based on the purchase of different lines, sublines or products in combination.

Simply create a new 'Sales & Promotion' and change the 'Price Plan Type' to 'mixmatch' in the drop-down. After you've done this go into your newly created promotion and click 'Add Rule' at least twice (this requires two lines, sublines or product numbers). Now go in to your rules, change the dates as necessary, and choose your line codes, sublines and/or product numbers. Now choose the quantity required, 'equals' or 'equals or greater' in the 'Operator' field, and what field you'll be basing your discount on. The last step is to choose the 'Discount %' or 'Markup' and the new Mix & Match promotion is ready to go.

Now, when you sell both of the items in the Qty indicated on an SO, the discount will automatically be applied to all of the parts.

Combined Quantity Discount - We have a category of 'Sales & Promotions' called 'Combined Quantity Discounts'.

This S&P will allow you to add rules that apply by linecode, subline, product division or individual product that provide a discount to all of the products as long as a combined quantity threshold is met. The discounted price can be applied either as a percentage discount or based on an M-field.

6. Create a Price Code Book (PCB) under the “Ignite Your Margin” tab.

Fuse5 can have as many as 26 Price Code Books (PCB). They are named letters A-Z. A Price Code Book does one thing, but can do that one thing to many product lines. What a PCB does is create pricing levels within a product line (a line code) at price breakpoints you define in the PCB. This is accomplished by first creating the Price Code Book with the pricing breakpoints you desire. Then, once that is done, you assign product line codes to that Price Code Book.

To access Price Code Books go to **IGNITE YOUR MARGIN>PRICE CODE BOOK**. Once on the listing page you can either select a current PCB to edit using the edit button under actions, or create a new one using the orange + button.

Once in the PCB you can edit by adjusting the max price and the min prices adjust automatically. The last one always goes to infinite. Once you have set your price LEVELS you will save you PCB with the

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save button at the bottom of the screen.

B - Edit Pricecode Books Information
Updated 69 days ago (19 Dec 2012)

Save

Cancel

Pricecode Book

Pricecode Book Name

B

Pricecode Book Description

Description

For Dennis Testing

Add Level

Pricecode Book Level Details

Code By: M1

Level	Min. Price	Max. Price	Delete
1	0.00	50.00	
2	50.01	100.00	
3	100.01	INFINITE	<div>Delete Level</div>

Save

Cancel

Once this is saved the way you like it, you will now use it to “code” as many (or as few) product lines as you want with these price breakpoints. Also, the “Code By” option on this page is extremely important, since it indicates which “M#” field is used when assigning pricing levels. What ends up happening at the end of the Price Plan setup process is that you get lines automatically inserted into your Price Plans that match the price breakpoints of your Price Code Book.

7. Select Products to push into your Price Code Book.

On this page (IGNITE YOUR MARGINS>PRICECODE BOOK>PRODUCT TO PCB) you can either select all of the line codes or individual line codes you want to assign to a PCB. Use the box to the left of the line codes to select them individually or all at once.

A

B

C

D

E

F

Merge Mapping

Assign to PCB

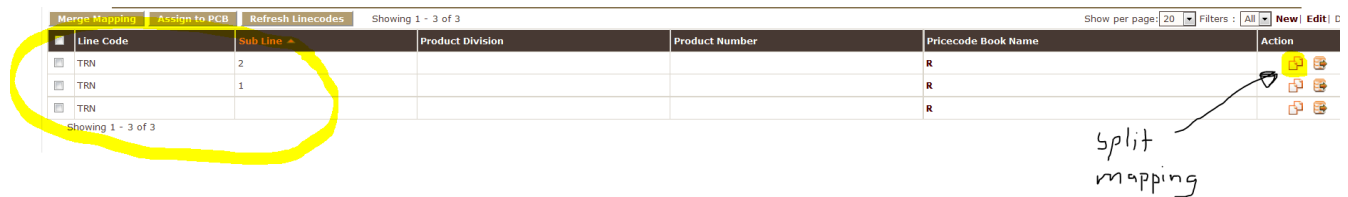
Refresh Linecodes

<input checked="" type="checkbox"/>	Line Code	Sub Line
<input checked="" type="checkbox"/>	VIS	
<input checked="" type="checkbox"/>	DOC	

Showing 1 - 2 of 2

If you want to break a line code down to the subline, use the “Split Mapping” button under the action column and you will be able to break an individual line code down to the subline level in order to do pricing.

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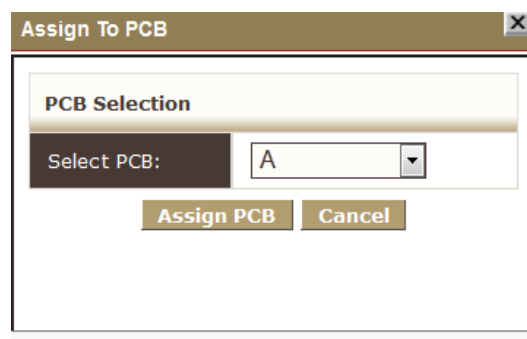


Line Code	Sub Line	Product Division	Product Number	Pricecode Book Name	Action
<input type="checkbox"/> TRN	2			R	
<input type="checkbox"/> TRN	1			R	
<input type="checkbox"/> TRN				R	

Showing 1 - 3 of 3

split mapping

Once you have selected the the line codes to put in the PCB to push the product to click “Assign to PCB” at the top. You will end up with the Assign To PCB selection box window.. Here you select the PCB you want to assign to the line codes you chose.



Assign To PCB

PCB Selection

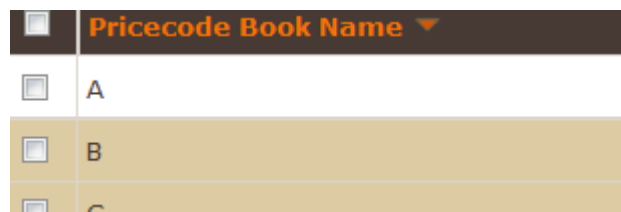
Select PCB: A

Assign PCB Cancel

Once you have selected the appropriate PCB with the drop down hit ASSIGN PCB.

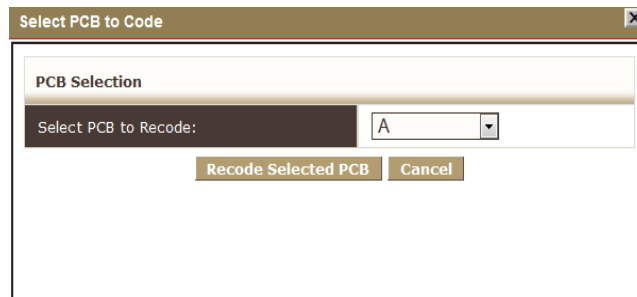
8. Code your PRICE CODE BOOK to accept the new products

Now that you have your line codes assigned to PCBs, you still need to push them into the Price Plans. Assigning PCBs to line codes is a preliminary exercise to get the system configured before inserting the resulting rule details into a price plan. Select the PCB you are updating by selecting the appropriate plan with the check box to the left of the PCB.



	Pricecode Book Name
<input type="checkbox"/>	A
<input type="checkbox"/>	B
<input type="checkbox"/>	C

Next, press “Code 'em”. You will get a pop up box that asks you to select the PCB.

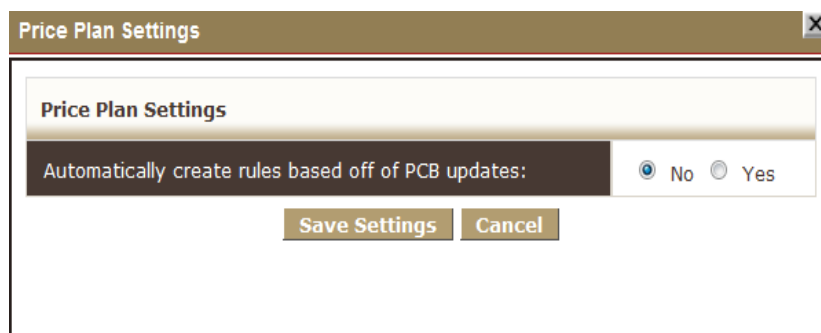


9. Determine which Sell Price and List Price plans you want to push your PCB in to.

On the listings page for both sell and list price plans, under the Action column is a symbol that looks like a lock. It defaults to RED. RED means it will NOT accept a new PCB. To make the plan willing to accept a new PCB push the lock symbol.

	Action
	  
	  
	  
	  
	  
	  

You want to change the setting to YES in order for the plan to create rules based off of PCB updates. Ensure that all sell and list price plans that you want to update have a green lock and all that you do NOT want to update have a red lock.



10. Choose the appropriate PCB and hit “Assign PCB” button.

Go back to the PCB listing page and choose the PCB you want to push to your plans using the check box to the left. Once you have selected a book, and you can only select one at a time, hit the Push to Price Plans button at the top.

<input type="checkbox"/>	Pricecode Book Name ▼
<input type="checkbox"/>	A
<input type="checkbox"/>	B
<input checked="" type="checkbox"/>	C

You will again be prompted with a pop up to push PCB Updates to Price Plans. At this point you can choose multiple PCBs to push if you have the need.

Push PCB Updates to Price Plans

PCB Selection

Select PCB:

Select All | Unselect All

V

W

X

Y

Z

Push to Price Plans

Cancel

Once you have pushed your PCB to the pricing plans go to the price plan to verify that it has pushed correctly. You should now see that the PRICE CODE and PC\$ Range columns have populated with the information set up in the PCB. Additionally, the CREATED FROM code should have changed from PB to PCB.

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<input type="checkbox"/>	BAL					B1 / <input checked="" type="checkbox"/> / 0	0.00 to 2.00
<input type="checkbox"/>	BAL					B2 / <input checked="" type="checkbox"/> / 0	2.01 to 10.00
<input type="checkbox"/>	BAL					B3 / <input checked="" type="checkbox"/> / 0	10.01 to 25.00
<input type="checkbox"/>	BAL					B4 / <input checked="" type="checkbox"/> / 0	25.01 to INFINITE

Once you have completed all of the Price Code Book steps you will want to take the time to ensure that you set up pricing for the new rules in your price plan. It's also a good idea to go to the listings page and change the lock from Green to Red to ensure you don't accidentally push PCBs to the wrong price plans.

Summing It Up:

From a pricing standpoint you are looking at two things. How do I price based on the account / customer and how do I price based on the cost / quantity of sales of an item? Simple Sell Price Plans with no Price Code Books can be used to just charge based on account / customer type. To sell based on product cost you will need to use Price Code Books.

Adding Price Plans to Accounts:

1. On the appropriate price plan listing page, you can check the box to the left of the price plan (only one at a time), then hit the “ADD ACCOUNTS” button just above the listing of accounts. This will allow you to choose single, multiple, or all accounts to attach the plan to.
2. On the accounts listing page you can use the “MASS UPDATE” button in white with orange writing at the top of the page.
3. In an individual account record you can choose price plans in their appropriate line (see account record module for location)
4. Export / Import – you can export accounts, put the appropriate price plans in the spreadsheet, and import them back into fuse5 (see the Import/Export module for details)

AU Pricing (Automatic Update):

The AU PF (Automatic Update Price Field) logic allows you to create rules that update one price field

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based on another one. The rules usually cover entire lines at a time. To access AU PF go to PRODUCT MANAGMENT > PRODUCTS > AU PRICE FIELDS (button, top center, orange text on white background).

Once in the AU PF module, you have access to some notes at the top left.....


Note:

- You can click column headings to change sorting.
- "Multiply it by this" and "VUOM" column is alternate option. if VUOM > 1 then in that case, divide by the value in VUOM for each related rule.
- If the "Take This Field" field has a value of 0.00 we will NOT apply the rule.
- If you put a *** in the line code of the rule, the rule will apply to all line codes.
- By running *** linecode with "Update Now" button will take time to update whole inventory. "

Automatically generate price fields off of another pricefield

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 **Update Now** **Cancel**

.....and also an orange ? Near the Update Now button that give some directions for use.....

When multiple rules are applied by ""Update Now"" or automatically by Fuse5 due to the green indicator, they are applied from the top down.

So, if more than one rule applies to a product, the higher (lower numbered) one in the list is applied first followed by the lower ones.

"Rules can be execute 3 ways.

- 1) Using ""Update Now"" button to apply the logic immediately to the rules that are checked on the left.
- 2) By putting a date in the ""ON THIS DATE" column. This will execute the rule ONCE at midnight (the morning of) the date you specify. This is indicated by an orange colored lock.
- 3) If you change the lock to green (by clicking on it), the rule runs once every hour all day long. So the rules will automatically make changes to fields when another field changes.

A rule with a red lock does not execute automatically for any reason. You can still do it manually by clicking ""Update Now"". "

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CLOSE

Fuse5 Training Materials

To create a new rule, hit the Create Rule button. A new, blank line will be created at the bottom of the list. Now you will need to update all or only the applicable lines within the rule.

Rule # - Automatically populated by Fuse5

Line Code – Line Code of the product

Subline – Subline of the product (if applicable)

Take This Field – Which price field from the product record should be used as the basis for establishing the automatically updated cost?

\$ Range – can set a specific range or \$0-Infinity if you want it to apply to all products

Multiply it by this – do you want to increase or decrease the price and by how much (ex. 1.0 = 110%, .86 = 86%)

And copy it here – Which price field do you want to put the new price in (CC, ALC, M1-M10, Alt.1-3)

On This Date - By putting a date in the ""ON THIS DATE" column. This will execute the rule ONCE at midnight (the morning of) the date you specify. This is indicated by an orange colored lock.

Comment – comment is for user information only

Action – You can delete a rule. Additionally the lock colors are as follows:

RED – price changes whenever “Update Now” button is pushed

GREEN- price updates once every hour (if a change is made to “Take This Field”)

ORANGE- price changes once at midnight on the “On This Date” field date