Standard Operating Procedure

Making a Price Class, or Building a Contract

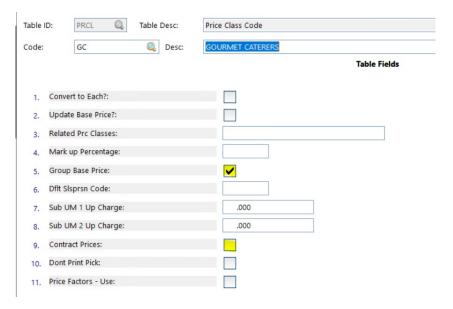
Dole & Bailey, Inc.

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PURPOSE: to show how to build set pricing for individual or groups of customers

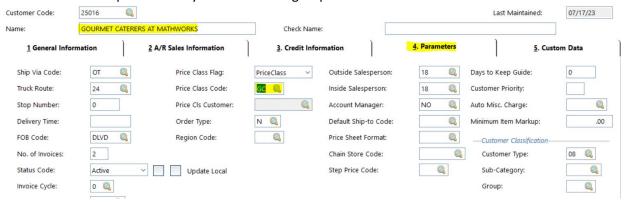
How to create a new price class (multiple accounts with same pricing structure)

- Will need access to General Table File
- Under Table ID search PRCL
- Create your price class code (example Gourmet Caterers = GC)



- Check off Group Base Price
- Only check off Contract Prices if you want this group to be separated out from street sales totals (should only be for large groups like Compass, Sodexo, Avendra)

• In the Customer Master File, under the Parameters tab, select the Price Class code that you just created. Repeat on every account in this group.



How to create/edit a new contract by customer or price class –

- Sales menu
- Sales maintenance menu
- Price formulas by customer/ attribute
- Enter your customer code you want to create or edit a contract for, or the price class code you want to edit (example GC)
- Under Costing Type select Market (unless you are working in a contracted pricing structure like Compass, then select Market Price)
- Check the box on the bottom of the screen priced by attribute, then select commodity code
- Select a grouping of commodity codes
- In the percentage field at the bottom of the page type the margin % you are looking for 15.00 = 15% margin
- Select WRITE at the top of the page
- All items within these commodity codes will fall within margin %

How to add select item numbers to a contract by customer or price class –

- Sales menu
- Sales maintenance menu
- Price formulas by customer/ price class
- Enter your customer code you want to create or edit a contract for, or the price class code you want to edit
- Under Costing Type select Market (unless you are working in a contracted pricing structure like Compass, then select Market Price)
- Enter your item code
- In the percentage field at the bottom of the page type the margin % you are looking for 15.00 = 15% margin
- If you have a target price you are looking for enter that in the target price field
- Select WRITE at the top of the page