

# Standard Operating Procedure

## Making a Price Class, or Building a Contract

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Implementation Date: 08/28/2023

**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)

Table ID:	PRCL	Table Desc:	Price Class Code
Code:	GC	Desc:	GOURMET CATERERS

**Table Fields**

1.	Convert to Each?:	<input type="checkbox"/>
2.	Update Base Price?:	<input type="checkbox"/>
3.	Related Prc Classes:	<input type="text"/>
4.	Mark up Percentage:	<input type="text"/>
5.	Group Base Price:	<input checked="" type="checkbox"/>
6.	Dflt Slspns Code:	<input type="text"/>
7.	Sub UM 1 Up Charge:	<input type="text" value=".000"/>
8.	Sub UM 2 Up Charge:	<input type="text" value=".000"/>
9.	Contract Prices:	<input checked="" type="checkbox"/>
10.	Dont Print Pick:	<input type="checkbox"/>
11.	Price Factors - Use:	<input type="checkbox"/>

- 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.

Customer Code: 25016 Last Maintained: 07/17/23

Name: GOURMET CATERERS AT MATHWORKS Check Name:

1 General Information	2 A/R Sales Information	3. Credit Information	4. Parameters	5. Custom Data
Ship Via Code: OT	Price Class Flag: PriceClass	Outside Salesperson: 18	Days to Keep Guide: 0	
Truck Route: 24	Price Class Code: GC	Inside Salesperson: 18	Customer Priority:	
Stop Number: 0	Price Cls Customer:	Account Manager: NO	Auto Misc. Charge:	
Delivery Time:	Order Type: N	Default Ship-to Code:	Minimum Item Markup: .00	
FOB Code: DLVD	Region Code:	Price Sheet Format:	— Customer Classification —	
No. of Invoices: 2		Chain Store Code:	Customer Type: 08	
Status Code: Active	<input type="checkbox"/> Update Local	Step Price Code:	Sub-Category:	
Invoice Cycle: 0			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