



## Modulus Technical Note #36 - *Price Matrix Basic Facts*

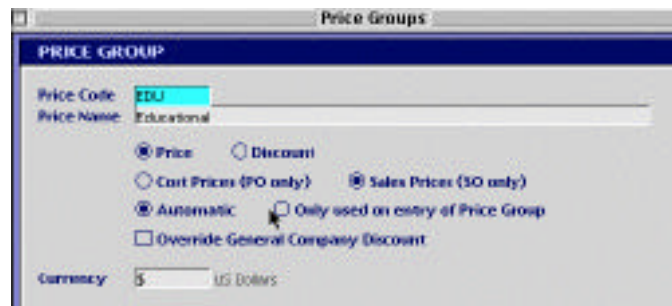
(Amended 17/2/99)

The Price Matrix companion permits the building of complex price structures, perhaps involving quantity discounts, educational pricing and multiple currencies, with different prices being available for different types of client. It applies to both retail and cost prices.

Below are listed the basic requirements needed to set up Price Tables and Groups - further information may be found in the Core Data manual.

### Price Groups Entry.

'Price Group' is the term given by Modulus to the overall type of pricing being represented. Each Price Group will contain pricing information applicable to several Products. A typical example is educational pricing. The educational Price Group will contain several Products on which an educational discount is available, and it will be available to several clients, although probably not all. An alternative system might permit the using of different prices for different types of Client, for example, those with and without accounts, or those located abroad. For each type of Client, a different Price Group would be set up. Use the 'Price Groups' menu item in the Products section of the Core menu in the Data Manager.



Switch on the Price radio button if you wish to set a specific price for each Product when the Price Group is applied. If you want a percentage discount or uplift to be imposed, use the Discount radio button.

The Sales Price radio button should be on if you wish the Price Group to apply to your sales prices (ie in the Sales Order Processing module), while the Cost Price radio button would be used if the Price Group is to apply to the Products you are purchasing (for example, if you have multiple cost prices from various suppliers).

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Leave the Automatic radio button selected if you always want Modulus to apply this price.

The currency field is only applicable if you have the Multi-currency module and is used to determine the currency to be used when dealing with certain Companies. For example, for Clients in the USA, this field might be set to \$, the currency you wish to be used on Invoices to those Client.

The Override General Company Discount check box should be used if you wish this Price Group to override the General Company Price Group as specified in the Sales Orders & Ledger section of Preferences. If you do not switch this check box on, this Price Group will be used in addition to the General Company Price Group.

### Creating the Price Table

You will need to create a Price Table entry for each price change you require. The Price Table are used to relate the Products and Companies to the Price Groups. For example, you can attach a particular Product to a Price Group representing educational pricing. This would require a separate Price Table entry for each Product with special educational prices. Alternatively, you can create a single Price Table entry for a whole Group or Brand (if, for example, all Products made by a specific manufacturer carried a fixed percentage educational discount). So, specify a Group, Brand or Product as appropriate.

PRICE TABLE	
Table Code	X1076
Price Group	MSPTA Silver Plus Triplecore Annual Sales Prices ISO r/n/d
Group	MSE Modulus Silver Duo
Brand	
Product	
NB: Leave Group and Brand blank if allocating a specific Product Code	
Company	
Currency	
Sales Price	200.00
Qty From/To	0 0

Select a Price Group from those that you have just set up, using a wildcard if

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necessary.

The Sales Price field is used to set the special price for this Product to be applied by this Price Table and appears if you have selected the Sales Price radio button for the Price Group. If you had selected the Discount radio button, a field where the discount percentage could be specified would appear here. If you have specified a single Product, the normal Retail and Standard Prices for that Product appear alongside as reminders.

Below this is a facility for applying quantity discounts. If this is required, simply enter here the quantity range between which the discount is to be applied.

You can create specific Price Table entries to apply only to a single Company, that whose Code you enter in the Company field. You could, of course, create separate Price Table records for each of your clients (just as you could for each of your Products) and would do so at this screen. If you wish to allocate a Price Group to a set of Companies, you would do so from the Companies or Business Types screens, described below.

### **Applying the Price Groups to your Companies file**

The Price Groups now need to be applied to your Companies (the information is visible on Page 3 of the Company screen). This can most quickly be achieved by selecting, for example, all Clients of a certain type, then using the [Global Change] button to apply a particular Price Group to the SO Price Group field.

Alternatively, you can allocate a Price Group to a specific Business Type when setting them up in the Data Manager. For example, you might have 'Schools' and 'Universities' Business Types, both of which are eligible for educational pricing.

### **Creating the Products**

Your individual Products now need to be created, in the usual way. The normal, or selling price should be entered into the Actual Sales Price field.

### **Using the Price Matrix**

In most cases, the application of the Price Matrix is automatic. When entering an Order Item to a Sales or Purchase Order, Modulus will search for Price Table entries that apply to that Product/Client or Product/Supplier combination. It will

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then apply the specified change to the Sales or Cost Price as appropriate. The Price Group used will appear as part of the Order Item record.

Since you can allocate a Price Group to a Product and/or a Company, there is a possibility of more than one Price Table being applicable to each Order Item. Therefore, there is a specific order of preference as to which Price Table is used. First, the specific Company Price Group takes precedence over that entered for the Business Type if both are specified. When Price Table entries are found for the relevant Price Group, the order of precedence is as follows: Product Code match; Product Group and Brand match; Product Group match, Product Brand match, no Product, Group or Brand and the same Company as the client; and, finally, no Product and no Company.

Note that when you are allocating Price Groups to Companies and Products you are performing a more general action than the allocation of a single Company in a Price Table record. It can still be logical to allocate Companies to Price Table entries, despite the fact that it appears to be duplicating the allocation of a Price Group on the Company screen, because if you have entered a very general discount (for example, by Business Type) as just described, you could override it for a given Company with a specific Price Table entry.