

Customer Price Manager

- Understanding Pricing (What price will my customer pay?)
- Customer vs Pricing Class
- Contracts, Policies and Customer Products (3 different databases!!!)
- Pricing Options (S,s,B,b,D,d,M,m,P,p,I,i)
- By: Item, Sub-Cat, Category, Supplier
- Market Catalog
- Customer Default
- Yikes...Does your brain hurt yet?

Contracts:

- Contract Header
- Contract Detail (prices and renewal)

Modify CPM Price Contract

BIN030602-7: Setech Mops Save Cancel

Main | NPN Options | Contract Memo

Contract Info

CPM Contract Number: **1001**

Contract Code:

Contract Description:

Contract Type: Customer Contract Class Contract

Customer:

Contract Renewal Options

Renewal Date:

Renewal Frequency: Yearly Quarterly Monthly Enter Next Renewal Date

Ready for Renewal? (This will lock renewal prices until renewed, and stop sending renewal alerts)

Send Renewal Email Alert? Renewal Alert Days:

Renewal Alert Address:

Last Renewal:

Contract Start Date:

Contract Expire Date: (Date when Contract will no longer be renewed)
(Leave Blank or 12/31/2099 if No Expiration Date)

Always Non-Comm? (All Items included in this Contract will be Non-Commissionable)

Modify CPM Price Contract

BIN030602-7: Setech Mops Save Cancel

Main | NPN Options | Contract Memo

New Price Notification (NPN) Options

NPN Required? NPN Notify Date: **31-Mar-2014**

NPN Sent for Next Renewal? Contract Renewal Date: **31-Mar-2014**
(Will also mark contract as 'Ready for Renewal' to lock prices) Notify Days:

Notify Method: (P/E/F = Print/Email/Fax)

Last NPN Sent: Last NPN Sent By:

NPN Sent To:

NPN Print Options

Show Prices Changes Only? Show Current Prices? Show NPN Comments?

NPN Comments (7 lines max)

Modify CPM Contract Prices

File Search

BIN030602-7: Setech Mops Customer Status Check **Exit**

Contract Prices | Contract Memo

Contract Info

Contract Code: **ID1001** CPM Contract Number: **1001** NPN Required? Sent?

Customer: **Semtech, Inc** NPN Notify Date:

Renewal Date: 31-Mar-2014 Renewal Frequency: **Yearly** Start Date: **1-Apr-2015** Expire: **31-Dec-2101**

Ready for Renewal? (Will lock renewal prices until renewed, and stop sending renewal alert emails)

ItemCode	Item Description	Contract Price	Active?	Renewal Price	Active?	CalcRenewalPrice
A430120	Go Go Blue Blend Mop,20oz	3.09	Y		Y	3.09

Modify Contract Price

Add New Contract Prices

Delete Contract Price

Set Blank Renewal Prices to Calc Renewal Price

Set Blank Renewal Prices to Current Contract Price

Clear All Renewal Prices

Refresh ContractPrice List

Print/SaveToFile

1 Contract Prices

Modify CPM Contract Price

Item Status Check **Save** **Cancel**

Contract Number: **1001**

Contract: **BIN030602-7: Setech Mops**

Customer: **Semtech, Inc**

Item Code: **A430120**
Go Go Blue Blend Mop,20oz

Contract Price: Active? Contract Price Margin: **-8.4013%**
Rebate? **N** Cost: **3.3496**

Renewal Date: **31-Mar-2014**

Renewal Price: Active? Renewal Price Margin:
Rebate? **Y** Cost: **2.968**

Calc Renewal Price: **3.09** Set Renewal Price = Calc Renewal Price
(Leave Renewal Price Blank to let Auto-Renew Calc it)

Price Calc Control: (Y/N/+)

Price Calc Margin: **-8.3495%** Reset Price Calc Margin to Contract Price Margin
Reset Price Calc Margin to Renewal Price Margin

Policies

Customer Price Manager * V737Demo Supply Co.

File Search SavedQueries Help

Customer Price Mgr | Rebate Mgr | Items | Data Checks

Customers | CPM Policies | CPM Contracts | Pricing Classes | Market Price Plans | Market Groups

Cust/Class/Market	Item/SubCat/Cat/Supplier	Dpt	Price	Cust/Class/Market	Item/SubCat/Cat/Supplier
Class TLC	Item YH307-08	s	0.00	TLC Nursing Homes	2000ml Prestige Dispenser,Gray
Class TLC	Sub-Cat 10-AEROS	b8		TLC Nursing Homes	CHEM: Aerosols
Class TLC	Sub-Cat 10-AIRFRES	b8		TLC Nursing Homes	CHEM: Air Fresheners
Class TLC	Sub-Cat 10-ALLPU	b4		TLC Nursing Homes	CHEM: All Purpose Cleaners
Class TLC	Sub-Cat 10-CARPE	b6		TLC Nursing Homes	CHEM: Carpet Care
Class TLC	Sub-Cat 10-CONCE	b5		TLC Nursing Homes	CHEM: Concentrate
Class TLC	Sub-Cat 10-DEODD	b7		TLC Nursing Homes	CHEM: Deodorizers
Class TLC	Sub-Cat 10-FLOOR	b6		TLC Nursing Homes	CHEM: Finish/Clnr/Seal/Strip
Class TLC	Sub-Cat 10-GLASS	b7		TLC Nursing Homes	CHEM: Glass Cleaners
Class TLC	Sub-Cat 10-HANDS	b8		TLC Nursing Homes	CHEM: Hand Soaps
Class TLC	Sub-Cat 10-LAUND	b6		TLC Nursing Homes	CHEM: Laundry
Class TLC	Sub-Cat 10-RESTR	b7		TLC Nursing Homes	CHEM: Restroom Cleaners
Class TLC	Sub-Cat 20-AUNTI	b7		TLC Nursing Homes	PAPER: Universal Tissues
Class TLC	Sub-Cat 20-AUNTO	b7		TLC Nursing Homes	PAPER: Universal Towels
Class TLC	Sub-Cat 20-AXFEM	b7		TLC Nursing Homes	PAPER: Feminine Products
Class TLC	Sub-Cat 20-AXFOO	b3		TLC Nursing Homes	PAPER: Food Service Items
Class TLC	Sub-Cat 25-LHIGH	b8		TLC Nursing Homes	LINER: Hi-Density
Class TLC	Sub-Cat 25-LLOW	b8		TLC Nursing Homes	LINER: Linear Low Density
Class TLC	Sub-Cat 25-LROLL	b8		TLC Nursing Homes	LINER: Roll Liners
Class TLC	Sub-Cat 25-LWAST	b8		TLC Nursing Homes	LINER: Infectious Waste
Class TLC	Sub-Cat 25-MISC	b8		TLC Nursing Homes	LINER: Miscellaneous
Class TLC	Sub-Cat 40-DUSTE	b4		TLC Nursing Homes	TOOLS: Dusters
Class TLC	Sub-Cat 40-DUSTM	b5		TLC Nursing Homes	TOOLS: Dust Mops & Frames
Class TLC	Sub-Cat 40-HANDB	b4		TLC Nursing Homes	TOOLS: Handles - Brooms & Misc

Connected to Server | STEP1 Software v7.3756 | Sanibel | CMS (Admin)

Customer Products

Pricing Options (S,s,B,b,D,d,M,m,P,p,I,i)

By: Item, Sub-Cat, Category, Supplier

Review Customer Pricing

File Edit Search View

Lincolnshire Health/TLC

Modify Customer Info | Customer Status | Item Status Check | Exit

CPM Policies | CPM Contract Prices | Rebate Contracts

Item/SubCat/Cat/Supplier	Dpt	Price	Cust/Class/Market	Item/SubCat/Cat/Supplier
Item YH307-08	s	0.00	TLC Nursing Homes	2000ml Prestige Di
Item MH307	s	34.02	TLC Nursing Homes	Antiseptic Hand Cl
Item 5121	b7		TLC Nursing Homes	Citrus Gel Air Fresh
Item A859	b7		TLC Nursing Homes	Formula X Gel Strip
Item 8620XL	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620L	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620M	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620S	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 301	b5		TLC Nursing Homes	Neutral Cleaner
Item 2166-04	s	29.07	TLC Nursing Homes	NXT FC Hand San
Item 8625L	s	52.80	TLC Nursing Homes	PF Latex Gloves,L

Customer Price Mgr Info

Pricing Class: **TLC**

Market Group: **MEDICAL**

Sales Class: **D**

Market Price Plan:

49 CPM Policies

Customer Products | Inventory Items | Sale Items

ItemCode	T/C	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	CustomerPartNum
VARIE TY	I	Metered Aerosol Variety Kit	43.08	B5 CProd	43.08	7-Mar-2016	1	10-AIRFRES	
LEMONQUATCOND	I	LemonQuat Germ Clnr-ConD	16.88	b5 Cls/Sub	16.88	7-Mar-2016	6	10-CONCE	
1080-01	I	Citrus 100 Degreaser	40.64	i Cust	40.64	7-Mar-2016	6	10-DEGRE	
0103	I	Tutti Frutti Odor Counteract.	15.87	S CProd	15.87	7-Mar-2016	6	10-DEODD	
103	I	Equinox Coating	67.05	S CProd	67.05	7-Mar-2016	4	10-FLOOR	
351	I	Ultra Scrub	34.58	b6 Cls/Sub	34.58	7-Mar-2016	2	10-FLOOR	
353	I	Nu-Tra Shine	31.36	b6 Cls/Sub	31.36	7-Mar-2016	3	10-FLOOR	
551	I	Formula 55 Stripper	59.34	S CProd	46.77	21-Jan-2014	1	10-FLOOR	
KIM21400	I	Kleenex Facial Tissue	37.78	b7 Cls/Sub	37.78	3-Mar-2016	5	20-AUNTI	
REL444268	I	2 Ply Toilet Tissue	28.01	b7 Cls/Sub	28.01	3-Mar-2016	10	20-AUNTI	
KIM1890	I	Multifold Towel,White	28.12	b7 Cls/Sub	28.12	3-Mar-2016	10	20-AUNTO	
SN082433	I	16 Gal. Hi-D 8 MIC Liners	24.46	b8 Cls/Sub	24.46	3-Mar-2016	5	25-LHIGH	
SN104048	I	45 Gal. Hi-D 10MIC LIners	17.05	b8 Cls/Sub	17.05	3-Mar-2016	5	25-LHIGH	
801364	M	Model 2150 HD 20"Floor Machine	1,229.00	i Cust	1,229.00	21-Feb-2016	1	30-FLOOR	
M252	I	Snap On Frame 5x18	3.89	B3 CProd	3.52	21-Jan-2014	1	40-DUSTM	

Refresh CPM Policy List

Refresh CProd List

18 CProds

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How to get Cprods copied into an account from another account?

1. Create order with Qty and correct price
2. Invoice and Post that order
3. Copy that order into the Customer that you want to add to Customer Products

Resetting Cprods to Default

Review Customer Pricing
Lincolnshire Health/TLC

CPM Policies | CPM Contract Prices | Rebate Contracts

Item/SubCat/Cat/Supplier	Opt	Price	Cust/Class/Market	Item/SubCat/Cat/Supplier
Item YH307-08	s	0.00	TLC Nursing Homes	2000ml Prestige Di
Item MH307	s	34.02	TLC Nursing Homes	Antiseptic Hand Cl
Item 5121	b7		TLC Nursing Homes	Citrus Gel Air Fresh
Item A859	b7		TLC Nursing Homes	Formula X Gel Strip
Item 8620-L	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620L	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620M	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620S	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 301	b5		TLC Nursing Homes	Neutral Cleaner
Item 2166-04	s	29.07	TLC Nursing Homes	NXT FC Hand San
Item 8625L	s	52.80	TLC Nursing Homes	PF Latex Gloves L

Customer Price Mgr Info
Pricing Class: **TLC**
Market Group: **MEDICAL**
Sales Class: **D**
Market Price Plan:

49 CPM Policies

Customer Product | Inventory Items | Sale Items

ItemCode	TC	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	CustomerPartNum
VARIETY	I	Metered Aerosol Variety Kit	43.08	B5 CProd	43.08	7-Mar-2016	1	110-AIRFRES	
LEMONQUATCOND	I	LemonQuat Germ Clnr-ConD	16.88	b5 Ctr/Sub	16.88	7-Mar-2016	6	10-CONDCE	
1080-01	I	Citrus 100 Degreaser	40.64	i Cust	40.64	7-Mar-2016	6	10-DEGRE	
0103	I	Tutti Frutti Odor Counteract.	15.87	S CProd	15.87	7-Mar-2016	6	10-DEODD	
103	I	Equinox Coating	67.05	S CProd	67.05	7-Mar-2016	4	10-FLOOR	
351	I	Ultra Scrub	34.58	b6 Ctr/Sub	34.58	7-Mar-2016	2	10-FLOOR	
353	I	Nu-Tra Shine	31.36	b6 Ctr/Sub	31.36	7-Mar-2016	3	10-FLOOR	
551	I	Formula 55 Stripper	59.34	S CProd	46.77	21-Jan-2014	1	10-FLOOR	
KIM21400	I	Kleenex Facial Tissue	37.78	b7 Ctr/Sub	37.78	3-Mar-2016	5	20-AJNTI	
REL444268	I	2 Ply Toilet Tissue	28.01	b7 Ctr/Sub	28.01	3-Mar-2016	10	20-AJNTI	
KIM1890	I	Multifold Towel/White	28.12	b7 Ctr/Sub	28.12	3-Mar-2016	10	20-AJNTI	
SN082433	I	16 Gal. Hi-D 8 MIC Liners	24.46	b8 Ctr/Sub	24.46	3-Mar-2016	5	25-LHIGH	
SN104048	I	45 Gal. Hi-D 10MIC Liners	17.05	b8 Ctr/Sub	17.05	3-Mar-2016	5	25-LHIGH	
801364	M	Model 2150 HD 20"Floor Machine	1,229.00	i Cust	1,229.00	21-Feb-2016	1	30-FLOOR	
M252	I	Snap On Frame 5x18	3.89	B3 CProd	3.52	21-Jan-2014	1	40-DUSTM	

18 CProds

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To sum it all up:

How do I know what price STEP1 will come up with when I enter an order??

Review Customer Pricing
Lincolnshire Health/TLC

CPM Policies | CPM Contract Prices | Rebate Contracts

Item/SubCat/Cat/Supplier	Opt	Price	Cust/Class/Market	Item/SubCat/Cat/Supplier
Item YH307-08	s	0.00	TLC Nursing Homes	2000ml Prestige Di
Item MH307	s	34.02	TLC Nursing Homes	Antiseptic Hand Cl
Item 5121	b7		TLC Nursing Homes	Citrus Gel Air Fresh
Item A859	b7		TLC Nursing Homes	Formula X Gel Strip
Item 8620-L	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620L	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620M	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 8620S	s	4.29	TLC Nursing Homes	Latex Exam Gloves
Item 301	b5		TLC Nursing Homes	Neutral Cleaner
Item 2166-04	s	29.07	TLC Nursing Homes	NXT FC Hand San
Item 8625L	s	52.80	TLC Nursing Homes	PF Latex Gloves L

Customer Price Mgr Info
Pricing Class: **TLC**
Market Group: **MEDICAL**
Sales Class: **D**
Market Price Plan:

49 CPM Policies

Customer Product | Inventory Items | Sale Items

ItemCode	TC	CPDescription	CurrentPrice	PriceSource	Last Price	LastSaleDate	Last Qty	SubCatCode	CustomerPartNum
VARIETY	I	Metered Aerosol Variety Kit	43.08	B5 CProd	43.08	7-Mar-2016	1	110-AIRFRES	
LEMONQUATCOND	I	LemonQuat Germ Clnr-ConD	16.88	b5 Ctr/Sub	16.88	7-Mar-2016	6	10-CONDCE	
1080-01	I	Citrus 100 Degreaser	40.64	i Cust	40.64	7-Mar-2016	6	10-DEGRE	
0103	I	Tutti Frutti Odor Counteract.	15.87	S CProd	15.87	7-Mar-2016	6	10-DEODD	
103	I	Equinox Coating	67.05	S CProd	67.05	7-Mar-2016	4	10-FLOOR	
351	I	Ultra Scrub	34.58	b6 Ctr/Sub	34.58	7-Mar-2016	2	10-FLOOR	
353	I	Nu-Tra Shine	31.36	b6 Ctr/Sub	31.36	7-Mar-2016	3	10-FLOOR	
551	I	Formula 55 Stripper	59.34	S CProd	46.77	21-Jan-2014	1	10-FLOOR	
KIM21400	I	Kleenex Facial Tissue	37.78	b7 Ctr/Sub	37.78	3-Mar-2016	5	20-AJNTI	
REL444268	I	2 Ply Toilet Tissue	28.01	b7 Ctr/Sub	28.01	3-Mar-2016	10	20-AJNTI	
KIM1890	I	Multifold Towel/White	28.12	b7 Ctr/Sub	28.12	3-Mar-2016	10	20-AJNTI	
SN082433	I	16 Gal. Hi-D 8 MIC Liners	24.46	b8 Ctr/Sub	24.46	3-Mar-2016	5	25-LHIGH	
SN104048	I	45 Gal. Hi-D 10MIC Liners	17.05	b8 Ctr/Sub	17.05	3-Mar-2016	5	25-LHIGH	
801364	M	Model 2150 HD 20"Floor Machine	1,229.00	i Cust	1,229.00	21-Feb-2016	1	30-FLOOR	
M252	I	Snap On Frame 5x18	3.89	B3 CProd	3.52	21-Jan-2014	1	40-DUSTM	

18 CProds

Connected to Server | STEP1 Software v7.3756 | CMS

CPM Contract Renewal

Modify CPM Contract Price

Item Status Check | **Save** | Cancel

Contract Number: **1001**
 Contract: **BIN030602-7: Setech Mops**
 Customer: **Semtech, Inc**
 Item Code: **A430120**
 Go Go Blue Blend Mop,20oz

Contract Price: Active? Contract Price Margin: **-8.4013%**
 Rebate? **N** Cost: **3.3496**

Renewal Date: **31-Mar-2014**

Renewal Price: Active? Renewal Price Margin: **3.9482%**
 Rebate? **Y** Cost: **2.968**

Calc Renewal Price: **3.09**
 (Leave Renewal Price Blank to let Auto-Renew Calc it)

Price Calc Control: (Y/N/+)

Price Calc Margin: **-8.3495%**

Modify CPM Contract Prices

File Search

BIN030602-7: Setech Mops Customer Status Check | **Exit**

Contract Prices | Contract Memo

Contract Info

Contract Code: **ID1001** CPM Contract Number: **1001** NPN Required? Sent?
 Customer: **Semtech, Inc** NPN Notify Date:
Renewal Date: 31-Mar-2014 Renewal Frequency: **Yearly** Start Date: **1-Apr-2016** Expire: **31-Dec-2102**

Ready for Renewal? (Will lock renewal prices until renewed, and stop sending renewal alert emails)

ItemCode	Item Description	Contract Price	Active?	Renewal Price	Active?	CalcRenewalPrice
A430120	Go Go Blue Blend Mop,20oz	3.09	Y	3.25	Y	3.09

1 Contract Prices

Modify CPM Price Contract

BIN030602-7: Setech Mops Save Cancel

Main | NPN Options | Contract Memo

Contract Info

CPM Contract Number: **1001**

Contract Code: ID1001

Contract Description: BIN030602-7: Setech Mops

Contract Type: Customer Contract Class Contract

Customer: **Semtech, Inc**

Contract Renewal Options

Renewal Date: 1-Jun-2017

Renewal Frequency: Yearly Quarterly Monthly Enter Next Renewal Date

Ready for Renewal? (This will lock renewal prices until renewed, and stop sending renewal alerts)

Send Renewal Email Alert? Renewal Alert Days: 15

Renewal Alert Address: CMcIntire@Step1Supply.com

Last Renewal:

Contract Start Date: 1-Apr-2016

Contract Expire Date: 31-Dec-2102 (Date when Contract will no longer be renewed)
(Leave Blank or 12/31/2099 if No Expiration Date)

Always Non-Comm? (All Items included in this Contract will be Non-Commissionable)

Rebates

Customer Price Manager * V737Demo Supply Co.

File Search SavedQueries Help

Customer Price Mgr **Rebate Mgr** Items Data Checks

Rebate Contracts

Supplier Acct	Contract Code	Contract Number	Start Date	Expire Date	Contract Description	Exp?
ABC100			1-Jan-1999	31-Dec-2099		N

View Rebate Contract

Modify Rebate Contract

Setup New Rebate Contract

Delete Rebate Contract

Hide Expired Contracts?

Refresh Contract List

Print/SaveToFile

1 Contracts

Connected to Server | STEP1 Software v7.3761 | Sanibel | CMS (Admin)

Modify Rebate Contract

File Search

ABC Schools of Newbury Park ABC SCHOOLS Save Cancel

Contract Info | Rebate Items | Contract Groups/Customers | Notes (0)

Contract Supplier: ABC Compounding

Contract Code: ABC SCHOOLS

Contract Description: ABC Schools of Newbury Park

Contract Number:

Contract Start Date: Jun-2017

Contract Expire Date: 31-Dec-2099 (Leave Blank if no Expiration Date)

Modify Rebate Contract

File Search

ABC Schools of Newbury Park ABC SCHOOLS Save Cancel

Contract Info | **Rebate Items** | Contract Groups/Customers | Notes (0)

Item Code	Item Description	Supplier Part Number	Unit	Rebate Cost
ITM600	Boiler Treatment	ITM600	Drum	375.00

Window Snip

Add New Rebate Items

Delete Rebate Item

Item Status Check

Modify Rebate Costs

Print/Save To File

1 Rebate Items

Modify Rebate Contract

File Search

ABC Schools of Newbury Park ABC SCHOOLS Save Cancel

Contract Info | Rebate Items | **Contract Groups/Customers** | Notes (0)

Group Type	Code/Acct	Description/Name
PricingCls	CUSD	Chicago Unified Schools
MarketGrp	CHURCH	Churches
MarketGrp	HEALTH	Healthcare
Customer	AGNOS100	Agnes's Cleaning Services
Customer	ALABA100	Absolute Flooring

View Group/Cust Info

Add Market Group

Add Pricing Class

Add Customer

Delete Group/Cust

Delete ALL Groups/Custs for this Rebate Contract

Print/Save To File

5 Contract Groups