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Multi-Dimensional Price Book - Add Pricing Rules

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1.0 Introduction

The Autocount Multi-Dimensional Price Book Module is a specialized feature within the Autocount Accounting software that allows businesses to maintain and manage price books with multiple dimensions. This module provides a comprehensive solution for setting and controlling pricing based on various dimensions, such as customer types, product categories, pricing tiers, geographic regions, or any other relevant criteria. This module is used to maintain multi-dimensional price books.



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2.0 Features

2.1 Adding Pricing Rules

Go to **Sales > Multi-Dimensional Price Book**

Multi-Dimensional Price Book - MOBILE PHONE TRADING 2014 [v2 testing] - AutoCount Accounting (Ver: 2.0) (Rev: 55)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help

Multi-Dimensional Price Book

Hint: In this window, you can define Price Book Rules which can be applied to control your Sales Document Unit Price and Discount.

Price Book Matrix

1. Click on '+' to add new rules.

3. Click on Save Changes.

5. Click on 'Options' to set the weightage of the criteria.

4. Rule No. will be assigned.

2. Define the rule's criteria.

Rule No.	From Date	To Date	From Item Type	To Item Type	From Item ...	To Item Br...	From Item ...	To Item Ca...	From Item ...	To Item Class	From Item Group	To Item Group
1	01-11-2017	15-11-2017	APPLE	APPLE								
2	16-11-2017	30-11-2017	CELCOM	CELCOM								

Record 1 of 2

List of price rule's criteria:

select **Date** From... To...

select **Item Type** From... To...

select **Location** From... To...

select **Sales Agent** From... To...

select **Item Brand** From... To...

select **Project** From... To...

select **Item Group** From... To...

select **Price Category** From... To...

select **Display Term**



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select **Item Category**

select **Department**

select **Item Code** From... To...

select **Debtor Type** From... To...

select **Debtor Code** From... To...

select **Item Class** From... To...

select **Currency Code**

select **UOM**

select **Area Code** From... To...

select **Quantity**

key in **>= Qty**

key in **Unit Price**

key in **Discount**

key in **Priority**

check **Active?**

To create a rule, you may select more than one criteria and set the minimum quantity and/or unit price and/or discount (in value or in %).

Example:

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Price Book Matrix

New Price Book Matrix

Edit Price Book Matrix

Save Changes Cancel Changes Options

Drag a column header here to group by that column

Rule No.	From Date	To Date	From Item Type	To Item Type	From Item Code	To Item Code	From Debtor Type	To Debtor Type	Credit Term	>= Qty	Unit Price	Discount	Priority	Active?
1	01-11-2017	15-11-2017	APPLE	APPLE					C.O.D.	10		5%		☒
2	16-11-2017	30-11-2017	CELCOM	CELCOM					C.O.D.	10		10%		☒
3	01-12-2017	15-12-2017			DIGI10	DIGI50				10	200.00	2%		☒
4	16-12-2017	31-12-2017										15%		☒

Record 1 of 4



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Click on **Option** button:

Weight							
Date:	1	Project:	1	Department:	1	Currency:	1
Item Type:	1	Item Group:	1	Item Code:	3	UOM:	1
Location:	1	Price Category:	1	Debtor Type:	1	Area Code:	1
Sales Agent:	1	Display Term:	1	Debtor Code:	3	Quantity:	1
Item Brand:	1	Item Category:	1	Item Class:	1		

OK Cancel

This is to give weight level to each criteria. In case of rules overlapping one another, the one with larger weights applies.

In a case where criteria fulfilled several price rules, then,

- the price rule with highest weights score will be used;
- if there are more than one price rule score the same highest weights score, the price rule that has a higher 'Priority' value will be used;
- if there are still more than one price rule score the same highest weights score and same Priority value, the system will prompt for selection.

During transaction, for example sales invoice, you may highlight an item, and go to **Tools > Show Selected Price Book Rules**, and the following screen will be displayed for your reference:



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Price Book Matrix

New Price Book Matrix

Edit Price Book Matrix

+ - Save Changes Cancel Changes Options

Close

Drag a column header here to group by that column

Rule No.	From Date	To Date	From Item Type	To Item Type	From Item Group	To Item Group	Credit Term	>= Qty	Unit Price	Discount	Priority	Active?
1	01-11-2017	15-11-2017					C.O.D.	0		5%	1	☒
2			APPLE	APPLE			C.O.D.	0		10%	2	☒
3					PHONE	PHONE		0	0.00	2%	1	☒

Record 1 of 3



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New Invoice - [Next Possible No: I-000005] - MOBILE PHONE TRADING 2014 [v2 testing] - AutoCount Accounting (Ver: 2.0)

Home Edit

Clipboard: Copy Whole Document, Copy Selected Details, Copy as Spreadsheet, Paste Whole Document, Paste Item Detail Only

Others: Undo Master, Apply Address, Edit MRU Items, Can Transfer?

Payment: New Payment, Posting, Calculation

Tools: Refresh Account No, Profit Calculator, Show Tax Summary, **Show Selected Price Book Rules**, Data Entry by Past Sales Records

Debtor: 300-B001, Name: BEST PHONE SDN BHD, Address: NO 8, LORONG POKOK SAKAT, 41100 KLANG, SELANGOR

Invoice No: <<New>>, Date: 10-11-2017, Branch: , Credit Term: C.O.D., Sales Agent: TEH, Ship Via: , Shipping Info:

Item C...	Description	F...	UOM	Batc...	Dep...	Qty	Unit Price	Disco...	FOC Qty	Total	GST Code	GST Rate	GST	Total (ex)	Total (inc)
>	APPLE IPHONE 5	...	PCS			1	0.00	2%	0	0.00	SR-S	6	0.00	0.00	0.00

Price Book Rules

☐ Show Only Highest Weight

Drag a column header here to group by that column

Rule No.	From Date	To Date	From Item Type	To Item Type	From Item ...	To Item Br...	From Item ...	To Item ...
1	01-Nov-17	15-Nov-17						
3								

Record 1 of 1

Subtotal (ex): 0.00, GST: 0.00, Total: 0.00

Currency: MYR, Rate: 1, Inclusive?: ☐ Taxable Amount: 0.00, Local Total: 0.00

Proceed New Invoice, Save, Save & Preview, Save & Print, Cancel



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2.2 Multi-Dimensional Price Book - Price Book Matrix

Go to **Sales > Multi-Dimensional Price Book**

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Price Book Matrix

New Price Book Matrix

Edit Price Book Matrix

Click to create new matrix

Save Changes Cancel Changes Options

Close

Drag a column header here to group by that column

Rule No.	From Date	To Date	From Item Type	To Item Type	From Item ...	To Item Br...	From Item ...	To Item Ca...	From Item ...	To Item Class	From Item G
1	01-11-2017	15-11-2017									
2			APPLE	APPLE							
3											PHONE

Record 1 of 3



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New Price Book Matrix

Matrix Name: PROMO 1 1 Copy From Matrix

Date Range: 01-11-2017 to 30-11-2017 2

Rows (Y): Item Type No filter 3

Columns (X): Debtor Code No filter

Edit: ☒ Unit Price 4 ☒ Discount

>= Qty: 0 Set Null 5

Priority: 0

☒ Active

Generate 6

Drag a column header here to group by that column

		300-A001 AUTO COUNT SDN BHD		300-B001 BEST PHONE SDN BHD		300-C001 CARE PHONE SDN BHD		300-C002 children1		300-C003 Company A		300-C004 Company B	
Item Type	Item Type	Price0	Disc0	Price1	Disc1	Price2	Disc2	Price3	Disc3	Price4	Disc4	Price5	Disc5
APPLE	APPLE	2,000.00	2%										
CELCOM	CELCOM	2,500.00	5%										
DIGI	DIGI												
LG	LG												
MAXIS	MAXIS												
MOTO	MOTOROLA												
NOKIA	NOKIA												
SAM	SAMSUNG												
SE	SONY ERIC...												

Record 7 of 9

Save Delete Close 8

1. Key in the name of the matrix.
2. Assign date range (if applicable)
3. Defined the X and Y axis and their filter options
4. To set the unit price and/or discount
5. To set minimum quantity, click set null if not applicable
6. Click to Generate
7. Key in price/ discount
8. Click on save

Click on **Save**,

The following rules are created from Price Book matrix:



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Edit Price Book Matrix

+ - Save Changes Cancel Changes Options

Drag a column header here to group by that column

Rule No.	From Date	To Date	From Item Type	To Item Type	From Debtor Code	To Debtor Code	>= Qty	Unit Price	Discount	Priority	Active?
1	01-11-2017	15-11-2017					0		5%	1	☒
2			APPLE	APPLE			0		10%	2	☒
3							0	0.00	2%	1	☒
5	01-11-2017	30-11-2017	APPLE	APPLE	300-A001	300-A001		2,000.00	2%	0	☒
6	01-11-2017	30-11-2017	CELCOM	CELCOM	300-A001	300-A001		2,500.00	5%	0	☒
7	01-11-2017	30-11-2017	DIGI	DIGI	300-A001	300-A001		3,000.00	10%	0	☒
8	01-11-2017	30-11-2017	LG	LG	300-A001	300-A001		3,000.00	10%	0	☒
9	01-11-2017	30-11-2017	MAXIS	MAXIS	300-A001	300-A001		3,000.00	10%	0	☒
10	01-11-2017	30-11-2017	MOTO	MOTO	300-A001	300-A001		3,000.00	10%	0	☒
11	01-11-2017	30-11-2017	NOKIA	NOKIA	300-A001	300-A001		3,000.00	10%	0	☒
12	01-11-2017	30-11-2017	SAM	SAM	300-A001	300-A001		3,000.00	10%	0	☒
13	01-11-2017	30-11-2017	SE	SE	300-A001	300-A001		3,000.00	10%	0	☒

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3.0 Pricing Policy

There are several places to maintain pricing of stock items:

- (1) Sales > Multi Dimensional Price Book
- (2) Stock > More Stock Maintenance > Item Price Book Maintenance (Price Book by Debtor/Creditor)
- (3) Stock > More Stock Maintenance > Item Price Book Maintenance (Price Book by Price Category)
- (4) Stock > Stock Item Maintenance (Standard Price)

During transaction, pricing rules maintained at Multi Dimensional Price Book will be captured; if there was no Multi Dimensional Price Book, the system will refer to the setting at *Tools > Options > Invoicing > Auto Price*.