Eclipse Strategic Pricing

Release 9.0.2

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Eclipse Strategic Pricing Overview

Eclipse Strategic Pricing is a companion product that improves the architecture and pricing in your system to optimize your profit margins. In addition, Strategic Pricing does the following:

- Captures price premiums in the least sensitive market segments you serve.

- Focuses discounting where it produces the most competitive advantage.

- Uses measured customer and item categories to drive consistent pricing for similar customers and items, to achieve the greatest possible profit.

- Calculates optimized freight and handling chargers for each ship via enabled for Strategic Pricing

With the assistance and partnership with Strategic Pricing Associates, you examine your customers, the products you sell, and your invoices to create a consistent pricing strategy based on actual data from your system, while recognizing the competitive realities in the marketplaces that you serve. You can also assign factors to create a Strategic Pricing model for your freight and handling chargers for each shipping method you use.

Before using Eclipse Strategic Pricing, you are required to attend the online training or in-person seminars that Strategic Pricing Associates offers to fully understand the theory of Strategic Pricing and how to apply the new pricing analysis in your day-to-day business. To use Strategic Pricing software to its full potential, you must maintain a Data Services contract with Strategic Pricing Associates that is renewed annually.

To get started with Strategic Pricing, see the following topics:

- Strategic Pricing Service Structure
- Setting Up for Strategic Pricing Overview

Viewing Strategic Pricing Service Levels

After purchasing and implementing your Strategic Pricing, review the Strategic Pricing System Settings screen which displays the tiers of service you have purchased through Strategic Pricing Associates. You cannot edit the tier settings, but they serve as a reminder of what they are. Certain functionality described in this help document is dependent on tier-level.

To view Strategic Pricing service levels and expirations dates:

1. From the **File > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **System Settings** to display the Strategic Pricing System Settings screen.

   The following view-only information displays:

Field	Description
Data Service Level **Pricing Service Level** **Customer/SKU Service Level**	The service level to which you are currently subscribed: Strategic Costing, Silver, Gold, and Platinum. The service level determines which Strategic Pricing features of are available to you If any level of service is not authorized, the system displays **Not Authorized**. For more information about what is available with each service level, see Strategic Pricing Service Structure that you received from Strategic Pricing Associates.
Data Service Effective Date	The date you uploaded your product core statuses from Strategic Pricing Associates.
Data Service Expiration Date	The date your Strategic Pricing Data Services data expires. This field displays **Not Authorized** until you complete your first upload of data from Strategic Pricing Associates.
Sensitivity Expiration Date	The date your Strategic Pricing customer sensitivity data expires. This field displays **Not Authorized** until you complete your first upload of data from Strategic Pricing Associates.

Strategic Pricing Service Structure

The service that you purchase with Eclipse Strategic Pricing determines how finite the pricing data is that you receive from Strategic Pricing Associates. The system tracks the expiration date of your Strategic Pricing Associates contract, and some values reset after your expiration date passes without a renewal. Those values are described in detail in this documentation. Purchasing the Strategic Pricing companion product is a one time charge. In addition, you purchase your services directly from Strategic Pricing Associates for a single year, or at a discount for multiple years. Contact your sales representative for more information.

Data Services (Required)

This service tier is required, and must be renewed annually or purchased in multi-year agreements. The Data Services tier is available in multiple levels.

	Strategic Costing	Silver	Gold	Platinum
Specify customer size, by dollars or quantity, with separate retail and warehouse divisions	x	x	x	x
Customer category definitions	x	x	x	x
Product core status	x	x	x	x
Sell Group visibility	x	x	x	x
List-Cost price cube modifier	x	x	x	x
Export from Eclipse and import data from Strategic Pricing Associates	x	x	x	x
Data analysis and impact tools in Eclipse	x	x	x	x
Pricing simulation	x	x	x	x
Product core status defined per customer category			x	x
Separate discount/mark up for Core vs. Non-Core products			x	x
Product Core Status per customer				x

Pricing Service (Optional)

This service tier is a one-time cost, and then purchased again in subsequent years, as needed. The Pricing Service tier is available in multiple levels.

	Strategic Costing	Silver	Gold	Platinum
Recommended discount structures imported from Strategic Pricing Associates for customer size/category/sell group-vendor combinations	x	x	x	x
Gen 2 (Dynamic) Slopes/Premiums Analysis by Strategic Pricing Associates			x	x
Customer sensitivity rating imported from Strategic Pricing Associates				x
Customer sensitivity/customer category matrices				x

Customer/SKU (Optional)

This service tier is optional and does not require renewal. It is a one time cost, and then purchased again in subsequent years, as needed. The Customer/SKU tier is available in multiple levels.

	Strategic Costing	Silver	Gold	Platinum
Basic customer/product exception pricing recommendations for medium, large, and huge customers.	x	x	x	x
Cost to server factor recommendations from Strategic Pricing Associates			x	x
Customer sensitivity factor included in recommended pricing from Strategic Pricing Associates				x

Setup Requirements for Strategic Pricing

Before you can use strategic prices for your customers in sales order entry, you are required to attend Strategic Pricing Associates' online training or in-person seminars so you understand the theory of Strategic Pricing and how it should be applied.

Work with Strategic Pricing Associates to set up factors required for the Strategic Pricing calculations. In addition, set up the elements described below.

Control Maintenance Records

Set the following control maintenance records.

- Strategic Pricing Customer Category

- Strategic Pricing Core Status Groups

- Global Buy/Sell Basis Name

- Although you do not need to change your settings to the **Stop Best Price Check At First Valid Sell Group** control maintenance record, if you are using Strategic Pricing, the system treats this record as if it were set to **Yes** when it finds a valid Strategic Pricing sell group. The system uses the first Sell Group to modify either the vendor's list or cost at order entry.

Authorization Keys

Assign the following authorization keys to enable users to create sell matrix cells that use your strategic pricing calculations:

- SMATRIX.MAINT

- SMATRIX.MATIN.CUS.CLASS

- SPRC.PRICE.EDIT - Restricts pricing edits. Use the Strategic Pricing Authorization Parameters window to define parameters users are restricted to changing, such as by category, customer size, or product core status.

- SPRC.VIEW.AUDIT - Allows access to the Strategic Pricing Audit window through Sales Order Entry

- Standard Pricing authorization keys also apply to Strategic Pricing. For more information, see the *Getting Started With Pricing* section of the Pricing Management documentation.

- SPRC.CORE.STATUS.EDIT - Enables users to edit product core statuses at the customer and product level.

Other Required Setup

Set the following additional components prior to using Strategic Pricing.

Components	Details	Required for Export?
Branches	Enable and disable Strategic Pricing functionality per branch in your system. For more information, see Enabling and Disabling Branches.	No
Price Lines	Map the Strategic List and Strategic Cost global basis names to local basis names in each or your price lines that you want to use the Strgc List or Strgc Cost as the basis. For more information, see Setting Up Strategic Pricing Basis Names.	No
Customer Categories	Define customer categories to group like customers by the market they serve. For more information, see Customer Categories Overview.	Yes
Sizes	Set threshold levels (in sales dollars or sales quantity) to define each customer size. For more information, see Defining Customer Size Thresholds.	Yes
Customers	Complete the following setup for each customer you want to use strategic prices: • Flag the customer to use strategic prices (not required before exporting data) • Assign the customer to a categories • Assign a size to the customer For more information, see Setting Customers to Use Strategic Prices, Assigning Customers to Categories, and Updating Customer Sizes Overview.	Yes
Sell Group Visibility and Vendor Assignments	Define the visibility for each sell group assigned to a product. Sell Group visibility is defining how visible the pricing for the products is to the market. Valid options: Very High, High, Medium, Low, and Very Low. Define a vendor for each group. This would represent the main vendor used to purchase the products in the group. Load a single vendor for each group. For more information, see Assigning Vendors to Sell Groups.	Yes
Default Price Cube Modifiers	Set the default multipliers for the strategic price calculations. Consult Strategic Pricing Associates on setting this up.	No
Matrix Cells	Update existing matrix cells or define new sell matrix cells that use the Strategic List or Strategic Cost as the pricing basis. **Note:** The majority of the matrix cells for Strategic Pricing are imported into the system. For more information, see Sell Matrix Cells and Strategic Pricing Overview.	No

Enabling Branches

You can enable and disable the Strategic Pricing functionality per branch in your system. However, you do not need to set up all your branches for Strategic Pricing.

> **Note:** Your Strategic Pricing exported data contains sales totals from all your branches, even if they are not enabled for Strategic Pricing.

To enable a branch for Strategic Pricing:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Branch Maintenance** to display the Strategic Pricing Branch Maintenance screen.

2. For each branch that you want to enable for Strategic Pricing, change the **Enabled** field to **Yes**.

3. In the **Branch Type** field, select whether the primary function of the branch is a retail branch with a sales counter, or a warehouse branch.

   Distinguishing between your branches allows you to apply different sizes and pricing structures to your customers who shop primarily at your retail locations. The branch type defaults to **Warehouse**.

   Note: The Retail pricing functionality will be added in a future release.

4. Press **Esc** to save your changes and enable the branches for Strategic Pricing.

To disable a branch for Strategic Pricing:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Branch Maintenance** to display the Strategic Pricing Branch Maintenance screen.

2. For each branch for which you want to disable Strategic Pricing, change the **Enabled** field to **No**.

3. Press **Esc** to save your changes and disable the branches for Strategic Pricing.

Setting Price Cube Modifiers and Factors

Use the Strategic Pricing Maintenance **Price Cube** pane to define factors used to determine the Strategic List or Strategic Cost. These factors consist of Price Cube Modifiers and Price Cube Factors.

Price Cube Modifiers

Price Cube Modifiers work with the Price Cube Factors to determine the Strategic List price or Strategic Cost of a product. These modifiers are defined with minimum and maximum values for supplier list price or supplier cost. The number of modifiers and minimum values for supplier list price or cost are developed together with Strategic Pricing Associates. When calculating a price, if the system does not find a Price Cube Modifier at the sell group level, it uses the default modifier set in the Strategic Pricing Price Cube Maintenance screen.

The minimum values must increase to establish a range from the top of the table to the bottom. The system uses the value of a product to select the Price Cube Modifier, and then uses that modifier when determining the Strategic List price and Strategic Cost calculations. In the following example, any product priced between $0.00 and $9.99 uses a modifier of 1.40. Of the product is priced between $10.00 and $14.99, the system uses a modifier of 1.20.

Modifiers	
Min Value	Modifier
0.00	1.40
10.00	1.25
15.00	1.20

The system uses the last price cube modifier if the value is over the last minimum level.

To view and edit the Price Cube Modifiers for a sell group:

1. From the **Files** > **Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Sell Group Maintenance** to display the Strategic Pricing Sell Group Maintenance screen.

2. In the **Sell Group** field, select the sell group to display the Price Cube Modifiers and Price Cube Factors for that group.

3. Make any necessary changes to minimum values or the multipliers.

   Enter the minimum values from lowest to highest in the table. For example, 5.00 needs to be on the line above 8.00, and so on.

4. Press **Esc** to save your changes and exit the window.

To view and edit the Price Cube Modifiers:

1. From the **Files** > **Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Price Cube Maintenance** to display the Strategic Pricing Maintenance Price Cube Maintenance screen.

2. Make any necessary changes to minimum values or the multipliers.

   Enter the minimum values from lowest to highest in the table. For example, 5.00 needs to be on the line above 8.00, and so on.

3. Press **Esc** to save your changes and exit the window.

Price Cube Factors

Price Cube Factors work with Price Cube Modifiers to determine the Strategic List Price or Strategic List Cost for a product. The system searches for a product's core status (based on your service tier level), and maps that to the visibility of the vendor (how visible a vendor's pricing is to distributors) assigned to the sell group to determine the Price Cube Factor used in the strategic price and strategic cost calculations.

When calculating a price, if a Price Cube Factor is not defined at the sell group level, the system uses the Price Cubes in the . Strategic Pricing Price Cube Maintenance screen. If a Price Cube Factor is not defined at the default level, the value defaults to 1.

Price Cube Factors are multiplied against the Price Cube Modifier to alter the factor based on Core Status and Sell Group Visibility.

Enter the factor as decimals, for example, enter 5% as 0.05.

Price Cube Factors Visibility	Core A	Core B	Non-Core C	Non-Core D
Very High	0.01	0.06	0.03	0.05
High	0.03	0.00	0.03	0.07
Medium	0.05	0.02	0.05	0.07
Low	0.07	0.09	0.11	0.12
Very Low	0.09	0.12	0.15	0.17

To view and edit the Price Cube Factors for a sell group:

1. From the **Files** > **Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Sell Group Maintenance** to display the Strategic Pricing Sell Group Maintenance screen.

2. In the **Sell Group** field, select the sell group to display the Price Cube Modifiers and Price Cube Factors for that group.

3. Enter any necessary changes to the cube factors.

4. Press **Esc** to save your changes and exit the screen.

To view and edit the default Price Cube Factors:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Price Cube Maintenance** to display the Strategic Pricing Price Cube Maintenance screen.

2. Enter any necessary changes to minimum values or the multipliers.

3. Press **Esc** to save your changes and exit the screen.

Defining Default Strategic Price Matrix Values

When Strategic Pricing is enabled, the pricing hierarchy includes an extra check for the default strategic price matrix values. When Strategic Pricing is enabled and a customer on a sales order has a customer category and size assigned and is enabled for Strategic Pricing, the system first checks for sell matrix cells for the customer category and size combination for the ship-to and then bill-to customer compared to a product or sell group. If the system is unable to find a strategic price matrix cell, it uses the default strategic matrix cell value you define in the Strategic Pricing Default Matrix Values screen.

Use the Default Strategic Pricing Matrix Values by Sell group Visibility to specify strategic pricing factors that are used as a default when a sell matrix is not defined for Strategic Pricing. A non-defined matrix most likely happens if the distributor has a new line and the strategic pricing matrix cell was never defined.

If there is a default factor defined for the customer category and size combination, the system applies that factor to the strategic price calculation. If the system uses the default strategic matrix value instead of a standard matrix cell, the price still displays with a **^** in order entry to indicate it is a strategic price. If the system used a default strategic price matrix value, the pricing audit indicates that the Strategic Pricing Default Matrix was used. If the system does not find a default strategic value, it indicates that it used a default pricing matrix.

> **Note:** If the default matrix does not contain a formula for a category/size combination, the system uses normal Eclipse pricing to determine the price for the product.

To define a set of default strategic matrix values:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Default Price Matrix** to display the Strategic Pricing Default Matrix Values screen.

2. In the **Price/Cost Basis** field, select whether you want to set default strategic matrix values for the Strategic List or Strategic Cost pricing basis.

3. For each customer category and size combination, enter the pricing formula the system uses if the customer and size combination does not have a standard matrix cell.

   Pricing basis names, such as Strategic List or Strategic Cost combined with formulas create the pricing scheme used to map a customer's price. Formulas can add, subtract, multiple, and divide a price or cost basis. For example, if you want to charge a small contractor twice as must as the standard list price, enter ***2** in the **Large** column for the **Contractor** category. If the system uses the default strategic matrix values, it calculates the price as **Strategic List * 2**.

   To learn more about pricing formulas and how to enter them, see Pricing Basis and Formula Guidelines in the standard Pricing Management documentation. The formula formats you enter for standard sell matrix cells also apply to the strategic matrix values.

   If you leave a customer category and size combination blank, the system uses the list price from the price sheet as the product's price in order entry.

4. Press **Esc** to save your changes and exit the window.

Strategic Pricing for Products Overview

With the assistance and partnership with Strategic Pricing Associates, examine your customers, the products you sell, and your invoices to create a consistent pricing strategy based on actual data from your system, while recognizing the competitive realities in the marketplaces that you serve.

Strategic prices are calculated for each customer and product combination based on the service tier you have purchased. To get started using Strategic Pricing to calculate prices for the products you sell, see the following topics:

- Setting Up for Strategic Pricing Overview
- Strategic Pricing Components Overview

Using the Pricing Audit with Strategic Pricing

Strategic Pricing calculations can be a challenge to understand when applying matrix pricing and price cube factors. Eclipse provides more information in the standard Pricing Audit to help you review how pricing factors were applied to a line item. This audit displays pricing formulas with calculations for the line items on the order and all the hierarchy steps and displays each matrix ID found. The audit indicates which matrix formula is being applied and displays the calculation the system uses to find the price.

> **Note:** If you are not a SUPERUSER, you must have the SPRC.VIEW.AUDIT
> authorization key assigned to view the Strategic Pricing Audit information.

Eclipse provides details for how the Strategic Pricing cube factors have been applied:

```
Strategic Pricing Price Factors Used
Product Core Status = CORE A; Sell Group Visibility = High
[Price Cube Modifier,(1.00)*Price Cube Factor,(0.03)]*
[Sell Group Coreness,(0.3000)*Product Coreness,(1.0000)]+1 = 1.009(Price Cube Factor)
Price,(8.531)*Price Cube Factor,(1.009) = 8.608
```

To display the Pricing Audit for a line item:

1. Create or open a sales order and display the order's **Body** tab.

2. Move the cursor to the line item whose pricing you want to know about.

3. With the item selected, from the **Inquiries** menu, select **Pricing Audit**. A Hold Entry Preview window displays Pricing Audit information for the selected line item.

4. Save or print the report, as needed.

Strategic Pricing Components Overview

Strategic Pricing Associates uses several factors in the Strategic List and Strategic Cost calculations to determine the best prices for your product for each customer. As your service level increases, so does the refinement of the Strategic List and Strategic Calculations.

Strategic Pricing contains the following key components:

Component and Description	Service Level	Needed for Export
Product Core Status The measure of the frequency of sale and the likelihood that your customers will shop for better pricing. The service tier you subscribe to determines how the product core status is determined. For more information, see Product Core Statuses Overview, Product Core Status Assignments File, and Viewing and Editing Product Core Statuses	All	No
Customer Categories A way to group like customers by the market they serve. Define your customer categories using the **Strategic Pricing Customer Category** control maintenance record. Product core statuses are based on the customer category if you subscribe to the Gold or Platinum Data Service. For more information, see Customer Categories Overview and Assigning Customers to Categories.	All	Yes
Customer Sizes A further refinement of your customer categories. For example small, medium, or large customers within a particular category, such as Electrical. The customer size allows you to calculate different prices for a large versus a small electrical customer. For more information, see Customer Sizes Overview, Defining Customer Size Thresholds, and Customer Size and Sensitivity Assignments File.	All	Yes
Customer Sensitivity A rank that indicates how reactive a customer is to pricing changes, and ranges from Very Low to Very High. For more information, see Customer Sensitivity Overview, Customer Size and Sensitivity Assignments File, and Viewing and Editing Customer Sensitivity Factors.	Pricing Service Platinum	No
Vendor Visibility How visible a manufacturer's prices are in the market. Define which vendors you use to sell groups of products that share common pricing schemes. Assign vendors to your sell groups prior to export. For more information, see Product Sell Group/Vendor File and Assigning Vendors to Sell Groups.	All	Yes
Price Cube Modifiers and Price Cube Factors Price Cube Modifiers and Price Cube Factors work together to modify the vendor list/cost to calculate a Strategic List price or Strategic Cost for a product. These modifiers are defined with minimum values for supplier list price or supplier cost Price Cube Modifiers and Price Cube Factors are set at the global (default) level, or for each Sell Group.	All	No

Customer Categories Overview

One of the key components of the Strategic Pricing model is categorizing your customers into market segments. The combination of customer categories, such as resellers or contractors, and customer sizes, such as medium and large, is used to drive the pricing assignments and calculations for your customers.

Important: Define customer categories and assign customers to categories *prior* to exporting data for Strategic Pricing Associates. If a customer does not have a category, it is excluded from the export data.

Customer categories are a way to group like customers by the market they serve. In the standard Eclipse pricing model, you group your customers by price class, which could have multiple levels of price classes. Strategic Pricing uses categories and Strategic Pricing Associates analyzes the customers by what they have purchased and how that compares to other customers within the same category or market segment.

Define the valid customer categories in the **Strategic Pricing Customer Category** control maintenance record. You can define as many categories as is appropriate for your business, however Strategic Pricing Associates recommends using approximately six categories. Typical Categories include Contractor, OEM, and Dealer.

In addition, for each customer to which you want to apply Strategic Pricing, you need to assign the customer a size and select whether to use the Strategic List Price or the supplier's list price.

Assigning Customers to Categories

Define the valid customer categories in the **Strategic Pricing Customer Category** control maintenance record. You can define as many categories as is appropriate for your business, however Strategic Pricing Associates recommends using approximately six categories. Typical Categories include Contractor, OEM, and Dealer.

You need to assign each customer to a category prior to exporting your data for Strategic Pricing Associates.

> **Note:** In addition to the procedures below, you can also assign categories using the Eclipse mass load functionality.

To assign a customer to a category from Strategic Pricing Maintenance:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Customer Maintenance** to display the Strategic Pricing Customer Maintenance screen.

2. In the **Customer** field, enter or select the customer to assign to a category.

3. In the **Customer Category** field, select the category to assign to the customer.

   The drop-down list displays the customer categories defined in the **Strategic Pricing Customer Category** control maintenance record.

4. Press **Esc** to save the customer category setting.

To assign a customer to a category from Customer Maintenance:

1. From the **Files** menu, select **Customer** to display the Customer Maintenance screen and display the customer record to which you want to assign a customer category.

2. Use the **Pricing** hot key and then the **Add'l** hot key to display the Additional Customer Pricing/Printing Data screen.

3. In the **Strategic Pricing Category** field, select the category to assign to the customer.

   Press **F10** to display the customer categories defined in the **Strategic Pricing Customer Category** control maintenance record.

4. Press **Esc** to return to the Customer Pricing/Printing screen.

5. Press **Esc** to save the customer record and exit the screen.

Customer Sizes Overview

One of the key components of the Strategic Pricing model is grouping your customers in market segments. The combination of customer categories and customer sizes ranging from Very Tiny to Huge, is used to drive the pricing assignments and calculations. Using your export data, Strategic Pricing Associates recommends customer sizes for you using thresholds based on sales dollars or items invoiced.

Grouping a customer in a size group helps to further define the market segment that a customer falls in to. For example, your business serves primarily electrical customers. Your electrical contract customers can also range in size from a small contractor to a large one. Classifying your customers into a size group refines the set of customers to which you can apply a strategic price for a product.

Strategic Pricing Associates works with you to determine your customer size before you export your data. This gives you a base set of sizes to start with. After Strategic Pricing Associates analyzes your data and you import the file, you can manually edit the customer size using the Customer Size and Sensitivity Update Queue.

Defining Customer Size Thresholds

One of the key components of the Strategic Pricing model is categorizing your customers into market segments. The combination of customer categories, such as resellers or contractors, and customer sizes, such as medium and large, is used to drive the pricing assignments and calculations. Using your export data, Strategic Pricing Associates recommends customer size thresholds for you, and you manually enter the number they provide you for each customer category.

> **Note:** We recommend reviewing and making updates to your customer sizes on a yearly or twice yearly basis, or on the guidance of Strategic Pricing Associates.

Complete the following prior to defining category size thresholds:

- Define customer categories in the **Strategic Pricing Customer Category** control maintenance record.

- Assign the categories to your customers that you want to use Strategic Pricing. If the categories are not assigned, then the normal Eclipse Pricing model applies.

- Export data and work with Strategic Pricing Associates to determine your thresholds.

The thresholds you set are buckets for classifying your customer base and are based on the customer size factor you set for Strategic Pricing. For example, if you choose to use invoice dollars and enter a threshold of 2500, that equals $2500 in invoiced sales for the past 12 months. When you run the customer size update, it recommends categorizing customers in the buckets based on these settings. Using the customer size factors allows you to continually refine how your customers are classified and how you tier your pricing model based on your customer's purchasing activity.

Important: The customer size factor you select applies to all customers who have a customer category assigned in Customer Maintenance.

To set up customer size thresholds:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Customer Categories Maintenance** to display the Strategic Pricing Customer Categories Maintenance screen.

2. In the **Calculate customer size using invoice** field, select how you want to determine a customer's size:

   - **Invoice Dollars** - Determines a customer's category and size combination by the total amount of sales dollars invoiced to that customer.

   - **Invoice Quantity -** Determines a customer's category and size combination by the total number of products invoiced to that customer.

3. For each customer category and size combination, enter the lower limit threshold value. Each row within a column must be greater than the row above it.

   For example, you have a customer category called **Contractor**. The threshold you set for medium sized contractors must be greater than the threshold you set for small size contractors. Thus, creating a scale as the categories grow in size.

   Setting a threshold value for Very Tiny for any customer category is optional. Leaving this cell blank makes the lowest threshold limit zero.

4.   Press **Esc** to save the threshold limits.

Updating Customer Sizes Overview

The combination of customer categories and customer sizes is used to drive pricing assignments and calculations in Strategic Pricing. Using your export data, Strategic Pricing Associates recommends customer sizes for you using thresholds based on sales dollars or items invoiced. Periodically, your customers might move into a different customer size within their category, or you might decide to set your thresholds differently, which might require you to review and move customers into a different size.

> **Note:** We recommend reviewing and making updates to your customer sizes on a yearly or twice yearly basis, or on the guidance of Strategic Pricing Associates.

To update customer sizes, do the following:

1. Upload the Customer Size and Sensitivity Assignments file from Strategic Pricing Associates, and review the existing and recommended customer size assignments in the Customer Size and Sensitivity Update Queue. Customer sensitivity is only included in this file if you subscribe to the Platinum Pricing Service. For more information, see *Uploading Strategic Pricing Data*.

   If you do not have a Customer Size and Sensitivity Assignments file from Strategic Pricing Associates, you can gather the changes to customer sizes based on the transaction data that exists in your system for each customer that has a customer category assignment. For more information, see *Building the Customer Size Update File*.

2. Review the existing and recommended customer size assignments.

3. Upload the changed customer sizes, which updates pricing for those customers.

Building the Customer Size Update File

Run the Customer Size Upload utility to gather data about your customers assigned a Strategic Pricing customer category and their sales activity for a given time frame. The system gathers the information that you can then review and update in the Customer Size and Sensitivity Queue.

Important: If Strategic Pricing Associates provides you a Customer Size and Sensitivity Assignments file, upload that file and view the contents of the file in the Customer Size and Sensitivity Queue, instead of running the Customer Size Upload utility.

Only one customer size build file can exist at a time. If you have an existing file, the system prompts you to purge the previous file before creating a new one.

To build the customer size update file:

1. From the **Maintenance > Price Maintenance > Strategic Pricing** menu, select **Customer Size Build** to display the Strategic Pricing Customer Size Upload Build screen.

2. Complete the following information to determine which customer records are included in the created file:

Field	Description
Br/Tr/All	Enter the branch, branches, or territory for which to run the customer size file. You can select any branch, not just those enabled for Strategic Pricing. For example, you might choose to exclude a branch that is now closed but that might have sales data from within the period for which you select to build the file.
Start Date and End Date	Enter the first date and the last date for which to sum sales totals. For example, if you want to review the customer sizes based on sales for the first half of the 2009 calendar year enter 01/01/2009 in the Start Date field and 06/30/2009 in the End Date field. The system looks at all sales in the branch you entered in the **Br/Tr/All** field and sums the total amount of sales dollars or quantity based on how you have your customer size thresholds defined. We recommend that you run the build for at least 12 months to determine the correct customer size.
Only Customers with Existing Size	Enter **Y** to include only customers that have a customer size already assigned. If this field is set to **N**, the system selects all customers that have a Strategic Pricing category assigned in the customer record.

3. Do one of the following to create the customer size file:

   - To run the build immediately - Use the **Begin** hot key.

   - To schedule the file to run later - Use the **Opts** hot key, select **Scheduling**, and select when and how often to run the build.

Reviewing and Updating Customer Sizes

Periodically, your customers might move into a different customer size within their category, or you might decide to set your thresholds differently, which requires you to review and move customers into a different size. Grouping a customer in a size group helps to further define the market segment that a customer falls into, and also affects the strategic list price calculation.

> **Note:** We recommend reviewing and making updates to your customer sizes on a yearly or twice-yearly basis, or on the guidance of Strategic Pricing Associates.

Using the Customer Size and Sensitivity Update Queue, you can review and make any necessary adjustments to the new size assignments prior to updating your customers' sizes and thus changing their pricing. You can use the queue to review and make changes to only customer sizes, only customer sensitivity, or to both customer size and sensitivity.

You can also update customer sizes in the Strategic Pricing Customer Maintenance screen. Use that screen if you need to update a single customer.

Before you can review and update the recommended customer size changes, you need to do one of the following:

- Upload the Customer Size and Sensitivity Assignment file that Strategic Pricing Associates provides to you. Because the Customer Size and Sensitivity Assignments file from Strategic Pricing Associates contains only customer IDs and not customer names, uploading the file and then viewing it in the Customer Size and Sensitivity Update Queue allows you to review the information by customer name, which is mapped to your customer data when you upload the file.

- Build the customer size recommendations based on the sales transaction data currently in your system. Building your own data allows you to make size updates to a large number of customers without the Customer Size and Sensitivity Assignment file. Build your own customer size data if you are initially setting up your customers for the Strategic Pricing export, or when you want to review customer sizes on your own, without working with Strategic Pricing Associates.

To review and update customer sizes:

1. From the **Files > Price Maintenance > Strategic Pricing** menu, select **Customer Size and Sensitivity Queue** to display the Customer Size and Sensitivity Queue screen.

2. Enter the selection criteria at the top of the screen and press **Enter** to display customers and their size recommendations.

   > **Note:** If you are also reviewing customer sensitivity assignments, see Reviewing and Updating Customer Sensitivity Levels.

Field	Description
Category	To view size and sensitivity assignments for customers in a single category, select a category in this field. Use the **Multi** hot key to view multiple categories. To view customers in all categories, leave this field blank.
	Customer categories are defined in the Strategic Pricing Customer Category control maintenance record. A customer must be assigned to a category to use strategic prices. For more information about customer categories, see Customer Categories Overview.
	Note: If you select multiple categories, the system displays a **Category** column that replaces the **Last Upd** column.
Size	To view size and sensitivity assignments for customers that are currently assigned a specific size, select a customer size in this field. Customer sizes range from Very Tiny to Huge. Use the **Multi** hot key to select multiple customer sizes. To view customers of all sizes, leave this field blank.
	A customer must be assigned a size to use strategic prices. For more information about customer sizes, see Customer Sizes Overview.
Sensitivity	To view size and sensitivity assignments for customers that are currently assigned a specific sensitivity level, select a level in this field. Use the **Multi** hot key to select multiple sensitivity levels. To view customers in all sensitivity levels, leave this field blank.
	For more information about customer sensitivity, see Customer Sensitivity Overview.
Date Last Updated	To view customers that have not had a size or sensitivity update since a specific point in time, enter a date in this field. The system displays only customers that have not had a size update since the date you enter.
Customer	To view the size and sensitivity assignments for one or more customers, enter the customer name in this field. Use the **Multi** hot key to enter multiple customers.
Customer Level	To view size and sensitivity assignments for only bill-to or ship-to customers, select **Bill To** or **Ship To** in this field. The default selection is **Ship To**.
Show Only Recommended Changes	To view only the customers that have a recommended change in their size assignment, select **Size** in this field. The system shows only those customers whose current size and new size are different.

The queue lists customers alphabetically by name.

3. If the **Current Size** and **New Size** fields are not visible on the screen, use the **Change View** hot key and select **Size Only or Size/Sensitivity**.

4. Review the customer, their current sizes, and their new size recommendations. Update the new size in the **New Size** field for customers, as necessary.

As you make changes to the recommended sizes, the system saves your changes automatically so you can revisit your changes later, without affecting customer pricing. A customer's pricing does not change until you upload your changes from this queue. Your changes to customer sensitivity levels display with an asterisk.

Right-click a row in the queue and select **Delete Row** to remove the customer from the queue. The customer is not included in the update.

Note: If you uploaded the Customer Size and Sensitivity Assignments file, the queue does not contain an amount in the **Total Sales** field for each customer.

5. When you are finished making changes, use update the customer size assignments. The system uploads the customer size for all customers listed in the queue, even if you did not make a change to the size recommendation. For more information, see *Uploading Customer Size Changes to Customers*.

Updating Customer Size and Sensitivity Settings

Using the Customer Size and Sensitivity Update Queue, you can review and update customer sizes and sensitivity levels, as necessary. However, a customer's strategic price does not change until you update the customer records with the changes in the queue. Make all the changes necessary and then upload the changes to the customer records.

Important: Using the procedure below uploads all settings in the Customer Size and Sensitivity Update Queue, even if they are currently not displayed in the screen, and clears the contents of the queue. To make additional changes after updating, you need to rebuild the Customer Size Update file or upload a new Customer Size and Sensitivity Assignments file from Strategic Pricing Associates.

To upload customer size and sensitivity changes to customers:

1. From the **Files > Price Maintenance > Strategic Pricing** menu, select **Customer Size Queue** to display the Customer Size and Sensitivity Update Queue screen.

2. Review and update customer sizes and sensitivity levels, as necessary. For more information, see Reviewing and Updating Customer Sizes and Reviewing and Updating Customer Sensitivity Levels.

3. Use the **Update Customer Settings** hot key to display the Strategic Pricing Customer Update screen.

4. Do one of the following to update the customers' sizes and sensitivity settings:

   - Use the **Begin** hot key to run the update immediately.

   - Use the **Schedule** hot key and schedule the update to run at a later time.

Customer Sensitivity Overview (Available with Platinum Pricing Service tier)

If you subscribe to the Platinum Pricing Service, your Strategic Pricing data includes an additional factor called customer sensitivity that you can use in the Strategic List Price and Strategic Cost calculations. Customer sensitivity is a rank that indicates how reactive a customer is to pricing changes, based on Strategic Pricing Associates market research, and ranges from Very Low to Very High. Strategic Pricing combines customer sensitivity ranks for each combination of customer category and size, creating a matrix of pricing factors to use during the strategic price calculation. Typically, as the sensitivity level increases, the pricing factors decrease.

After exporting your data and working directly with Strategic Pricing Associates on your pricing analysis, Strategic Pricing Associates sends you a Customer Size and Sensitivity Assignments file that contains the sensitivity recommendations for each of your customers. Because the file contains customer numbers and not customer names, upload the file in the Customer Size and Sensitivity Update Queue to make changes to the suggested sensitivity levels, and update the customer's pricing from the queue.

> **Note:** Each customer included in the file must have a customer category set, or the import for that customer fails.

Customer Size and Sensitivity Assignments File (Size available with all Data Service tiers; Sensitivity available with Platinum Pricing Service)

After exporting your data and working directly with Strategic Pricing Associates on your pricing analysis, Strategic Pricing Associates sends you a Customer Size and Sensitivity Assignments file that contains the sensitivity recommendations for each of your customers included in your export, including the following data:

Excel Column	Column Name	Description
A	**Import Set Number**	The unique identifier for the row of data.
B	**Company ID**	All. Indicates all territories and branches.
C	**Customer ID**	Eclipse customer ID as defined in Customer Maintenance.
D	**Warehouse Customer Size**	For branches that are warehouse locations, the size of the customer in that territory or branch. Possible sizes include: **Very Tiny**, **Tiny**, **Small**, **Medium**, **Large**, and **Huge**.
E	**Retail Customer Size**	The retail customer size is not currently included in Eclipse, and will be added with future Strategic Pricing enhancements.
F	**Customer Sensitivity**	The customer's determined reaction to pricing changes. Possible sensitivity settings include: **Very Low**, **Low**, **Medium**, **High**, and **Very High**. The import only includes the customer sensitivity data if the Pricing Structure tier is set to Platinum. If you are running Strategic Pricing using a different service level, the import ignores any data in this column.
G	**Customer Sensitivity Data Expiration Date**	Date your Strategic Pricing data contract for the Pricing Structure tier is no longer valid. View your service tier and expiration date in the Strategic Pricing Systems window.

Setting Customers to Use Strategic Prices

After you input or upload the customer sizes provided from Strategic Pricing Associates, you can select which customers receive strategic prices when they purchase products from you.

To use a strategic price in order entry, a customer must have a customer category and customer size assigned, and be set to use strategic prices. You can select to use your supplier's list price for customers, as needed. For more information, see Assigning Customers to Categories and Updating Customer Sizes Overview.

To set a customer to use strategic prices:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Customer Maintenance** to display the Strategic Pricing Customer Maintenance screen.

2. In the **List Price/Cost Method** field, select Strategic to indicate you want to use strategic prices for this customer in order entry.

3. Press **Esc** to save your changes and exit the screen.

    Note: All customer settings can be set using the mass load utility.

Setting Up Strategic Pricing Basis Names

If you are running Strategic Pricing, the **Global Buy/Sell Basis Names** control maintenance record contains a Strategic Price and Strategic Cost global basis. These basis names take the place of user-defined basis names 9 and 10. Set the view level and corresponding non-stock indicators for each basis within the control maintenance record. You then need to map the Strategic Price and Strategic Cost basis names to local basis names within your price lines.

To access the Global Buy/Sell Basis Names control maintenance record:

1. From the **System > System Files** menu, select **Control Maintenance**.

2. In the **Keyword** field, enter the record name and press **Enter**.

To map a global basis to a local basis:

1. From the **Files > Price Maintenance** menu, select **Price Line** to display the Price Line screen.

2. In the **ID** field, enter the price line you want to update.

   Ensure that local basis names are defined.

3. In the Global field, scroll to see **Strgc List** and **Strg Cost** and select the local basis to assign to each in the **Basis** field.

4. Press **Esc** to save your changes and exit the screen.

   Note: Mass Load can be used to load in the local basis to Strgc List and Cost.

Updating Customer Sensitivity Levels Overview (Available with Platinum Pricing Service tier)

If you subscribe to the Platinum Pricing Service, your Strategic Pricing data includes an additional factor called customer sensitivity that you can use in the Strategic List Price and Strategic Cost calculations. Customer sensitivity is a rank that indicates how reactive a customer is to pricing changes, and ranges from Very Low to Very High.

After exporting your data and working directly with Strategic Pricing Associates on your pricing analysis, Strategic Pricing Associates sends you a Customer Size and Sensitivity Assignments file that contains the sensitivity recommendations for each of your customers. Because the file contains customer numbers and not customer names, upload the file and then review it in the Customer Size and Sensitivity Update Queue to make changes to the suggested sensitivity levels, and update the customers records from the queue. After you complete the upload, you can view but cannot change the customer sensitivity level through the Strategic Pricing Customer Maintenance screen. To make changes for a customer, you need to complete another upload through the Customer Size and Sensitivity Update Queue.

> **Note:** We recommend reviewing and making updates to your customer sensitivity levels on a yearly or twice yearly basis, or on the guidance of Strategic Pricing Associates.

To update customer sensitivity levels, do the following:

- Upload the Customer Size and Sensitivity Assignments file that Strategic Pricing Associates provides to you.

- Review and update the customer sensitivity levels.

- Upload the new sensitivity levels, which updates pricing for those customers.

Reviewing and Updating Customer Sensitivity Levels (Available with Platinum Pricing Service tier)

Periodically, your customers sensitivity level might change. Using the Customer Size and Sensitivity Update Queue, you can review and make any necessary changes to the new sensitivity level prior to updating your customers' sensitivity levels, and thus changing their pricing. You can use the queue to review and make changes to only customer sensitivity, customer size, or to both customer sensitivity and size.

> **Note:** We recommend reviewing and making updates to your customer sensitivity on a yearly or twice yearly basis, or on the guidance of Strategic Pricing Associates.

Before you can review and update the recommended customer sensitivity changes in the Customer Size and Sensitivity Update Queue, you need to upload the Customer Size and Sensitivity Assignment file that Strategic Pricing Associates provides to you. Because the Customer Size and Sensitivity Assignments file from Strategic Pricing Associates contains only customer IDs and not customer names, uploading the file and then viewing it in the queue allows you to review the information by customer name, which is mapped to your customer data when you upload the file.

> **Note:** You can also use the Customer Size and Sensitivity Update Queue to update customer sizes based on sales transaction data gathered in a file created using the Customer Size Update utility. If you are viewing data that was built using the utility, you can view the sensitivity settings in the queue, but you are unable to change the sensitivity settings.

To review and update customer sensitivity levels:

1. From the **Files > Price Maintenance > Strategic Pricing** menu, select **Customer Size and Sensitivity Queue** to display the Customer Size and Sensitivity Queue screen.

2. Enter the selection criteria at the top of the screen and press **Enter** to display customers and their sensitivity recommendations.

> **Note:** If you are also reviewing customer sensitivity assignments, see Reviewing and Updating Customer Sizes.

Field	Description
Category	To view size and sensitivity assignments for customers in a single category, select a category in this field. Use the **Multi** hot key to enter categories. To view customers in all categories, leave this field blank. Customer categories are defined in the Strategic Pricing Customer Category control maintenance record. A customer must be assigned to a category to use strategic prices. For more information about customer categories, see Customer Categories Overview. **Note:** If you select multiple categories, the system displays a **Category** column that replaces the **Last Upd** column.

Field	Description
Size	To view size and sensitivity assignments for customers that are currently assigned a specific customer size, select a size in this field. Customer sizes range from Very Tiny to Huge. Use the **Multi** hot key to enter multiple sizes. To view customers of all sizes, leave this field blank. A customer must be assigned a size to use strategic prices. For more information about customer sizes, see Customer Sizes Overview.
Sensitivity	To view size and sensitivity assignments for customers that are currently assigned a specific sensitivity level, select a level in this field. Use the **Multi** hot key to enter multiple sensitivity levels. To view customers in all sensitivity levels, leave this field blank. For more information about customer sizes, see Customer Sensitivity Overview.
Date Last Updated	To view customers that have not had a size or sensitivity update since a specific point in time, enter a date in this field. The system displays only customers that have not had an update since the date you enter.
Customer	To view the size and sensitivity assignments for one or more customers, enter the customer name in this field. Use the **Multi** hot key to the field to enter multiple customers.
Customer Level	To view size and sensitivity assignments for only bill-to or ship-to customers, select **Bill To** or **Ship To** in this field. The default selection is **Ship To**.
Show Only Recommended Changes	To view only the customers that have a recommended change in their sensitivity level, select **Sensitivity** in this field. The system shows only those customers whose current sensitivity and new sensitivity are different.

The queue lists customers alphabetically by name.

3. If the **Current Sensitivity** and **New Sensitivity** fields are not visible on the screen, use the **Change View** hot key and select **Sensitivity Only or Size/Sensitivity**.

4. Review the customer, their current sensitivity levels, and their new recommendations. Update the new sensitivity in the **New Sensitivity** field for customers, as necessary.

   As you make changes to the recommended sensitivity, the system saves your changes automatically so you can revisit your changes and make additional adjustments later, without affecting customer pricing. A customer's pricing does not change until you upload your changes from this queue. Your changes to customer sensitivity levels display with an asterisk.

   Select a row in the queue and use the **Delete Row** hot key to remove the customer from the queue. The customer is not included in the update.

5. When you are finished making changes, update the customer sensitivity assignments. For more information, see Uploading Customer Size Changes to Customers.

Updating Customer Size and Sensitivity Settings

Using the Customer Size and Sensitivity Update Queue, you can review and update customer sizes and sensitivity levels, as necessary. However, a customer's strategic price does not change until you update the customer records with the changes in the queue. Make all the changes necessary and then upload the changes to the customer records.

Important: Using the procedure below uploads all settings in the Customer Size and Sensitivity Update Queue, even if they are currently not displayed in the screen, and clears the contents of the queue. To make additional changes after updating, you need to rebuild the Customer Size Update file or upload a new Customer Size and Sensitivity Assignments file from Strategic Pricing Associates.

To upload customer size and sensitivity changes to customers:

1. From the **Files > Price Maintenance > Strategic Pricing** menu, select **Customer Size Queue** to display the Customer Size and Sensitivity Update Queue screen.

2. Review and update customer sizes and sensitivity levels, as necessary. For more information, see Reviewing and Updating Customer Sizes and Reviewing and Updating Customer Sensitivity Levels.

3. Use the **Update Customer Settings** hot key to display the Strategic Pricing Customer Update screen.

4. Do one of the following to update the customers' sizes and sensitivity settings:

   - Use the **Begin** hot key to run the update immediately.

   - Use the **Schedule** hot key and schedule the update to run at a later time.

Product Core Statuses Overview

Product core statuses apply to all non-lot billed and "other charge" products in your Eclipse system, and work much like Eclipse product ranks. Strategic Pricing Associates analyzes your sales transaction data and applies this measurement to your products based on the frequency of sale and the likelihood that your customers will shop for better pricing. Products are measured using the following core statuses:

- Core A

- Core B

- Non-Core C

- Non-Core D

Core statuses are assigned to products at the top of each customers market segment, and are typically the highest in sales amount, highest in visibility, and are products that the customer has a high incentive to shop for price competitors. For example, in a hotel environment, the room rate would be a Core A or Core B product. Non-Core statuses are assigned to products lower in the customers market segment, and are typically low in sales, low in visibility, and there is low incentive for the customer to price shop. Competitors often overlook non-core products, and customers buy them infrequently. For example, in a hotel environment, internet access, room service, and faxing services would be Non-Core C and Non-Core D products.

Your service tier determines how your core statuses are defined:

- **Strategic Costing tier -** Core statuses are based on product sales for all branches and customers, and are assigned at the product level.

- **Silver Data Services tier** - Core statuses are based on product sales for all branches and customers, and are assigned at the product level.

- **Gold Data Services tier** - Core statuses are based on product sales for all branches and customer categories, and are assigned at the customer category level and product level.

- **Platinum Data Services tier** - Core statuses are based on product sales for all branches for a customer and product and are assigned at the customer level, category level, and the product level.

    Note: If your Data Services contract has expired, the system processes all products as Core A, regardless of their setting in the import file or the system. You can check your service level and the expiration date in the Strategic Pricing System Settings window. For more information see Viewing Strategic Pricing Service Levels and Expiration Dates.

Default Core Statuses

For all service tiers, you can also assign a default core status at the sell group level. If the product does not have a core status defined in the locations listed above, the system uses the default core status defined in the product's sell group. Defining a default product core status assigns the core status to products added to the system and the sell group outside the normal Strategic Pricing analysis process. A default core status allows the system to use a strategic price for new products that do not yet have a core status assignment.

    Note: If a default core status is not available, the system uses Non-Core D for all products. If your Data Services contract has expired, the system processes all

products as Core A, regardless of their setting in the import file or the system. You can check your service level and the expiration date in the Strategic Pricing System Settings window. For more information see Viewing Strategic Pricing Service Levels and Expiration Dates.

After you import the core status into the system, you can edit the status only if are assigned the SPRC.CORE.STATUS.EDIT authorization key and your Data Services contract has not expired.

Core Status Families

For all service tiers, you can also assign individual products to a core status family. Use core status families to help ensure that you are using a consistent core status across related products, such as wire, that might not have the same amount of sales, even though the individual products are priced the same.

When pricing a product on an order, the system first determines if the product is part of a core product family to determine its core status assignment. If the product *is* part of a core status family, the system uses the highest core status of the items in the family for the product's strategic price calculation.

For more information about core status families, see Core Statuses and Similar Products Overview.

Coreness Status

For all service tiers, you can also assign individual products a coreness score. The coreness score at the product level creates an addition factor that, in conjunction with the core status value, makes the sell price calculation more precise. Strategic Pricing Associates provide the ideal coreness score for your products and these scores upload with the SPA information file.

Product Core Status Assignments File

The Core Status Assignments file provided from Strategic Pricing Associates for upload contains core status assignments for your products. Your service tier determines which data from the Core Status Assignments file is included in the upload, and also determines the refinement of your Strategic Pricing calculations. If your Data Services data has expired, the system uses Core A for all products, regardless of what you upload from the file.

> **Note:** Core statuses per product are included with any Strategic Pricing service tier.

You can change the status assignments in Microsoft Excel before uploading the pricing components into the system, allowing you to review and potentially change any of the data and core status determinations before updating prices. To update product core statuses after you upload the file, you can process another upload, or change the core statuses in Strategic Pricing Maintenance if you are assigned the SPRC.CORE.STATUS.EDIT authorization key, and your data services expiration date has not passed..

- **Data Services Tier** *(Silver)* - Your upload includes core statuses at the product level. Core statuses apply at the product level only, the customer category does not apply. The upload processes only rows in the file with data in the **Item ID** and **Core Status** columns and updates the product to have the core status in the file.

	A	B	C	D	E	F
1		PAV FM2DDSN	Contractor	IDC		Core A
2		PAV FM2DDSN	OEM	IDC		Core B
3		PAV CPOM2DDV	OEM	IDC		Non-Core C
4		PAV CPOM2DDV		IDC	100143	Core B
5		PAV CPOM2DDV		IDC		Non-Core D
6		PAA AD075B25T1A1		IDC		Core B
7		RI M015-61-1S-007-52-B1-QB-0		IDC	100143	Core A

- **Data Services Tier** *(Gold)* - Your upload includes core statuses by product per customer category. The core statuses apply to all customers assigned a particular customer category (OEM, Reseller, Contractor). The upload processes rows in the file with data in the **Item ID**, **Core Status**, and **Customer Category** columns and updates the product for the customer category to have the core status in the file. The upload also includes these rows if you have the Platinum service.

	A	B	C	D	E	F
1		PAV FM2DDSN	Contractor	IDC		Core A
2		PAV FM2DDSN	OEM	IDC		Core B
3		PAV CPOM2DDV	OEM	IDC		Non-Core C
4		PAV CPOM2DDV		IDC	100143	Core B
5		PAV CPOM2DDV		IDC		Non-Core D
6		PAA AD075B25T1A1		IDC		Core B
7		RI M015-61-1S-007-52-B1-QB-0		IDC	100143	Core A

- **Data Services Tier** *(Platinum)* - Your upload includes core statuses by product per customer. The core statuses apply to each individual customer. The upload processes rows in the file with data in the **Item ID** and **Customer** columns and updates the product for the individual customer to have the core status in the file.

	A	B	C	D	E	F
1		PAV FM2DDSN	Contractor	IDC		Core A
2		PAV FM2DDSN	OEM	IDC		Core B
3		PAV CPOM2DDV	OEM	IDC		Non-Core C
4		PAV CPOM2DDV		IDC	100143	Core B
5		PAV CPOM2DDV		IDC		Non-Core D
6		PAA AD075B25T1A1		IDC		Core B
7		RI M015-61-1S-007-52-B1-QB-0		IDC	100143	Core A

The Core Status Assignments file contains the following data:

Excel Column	Column Name	Description
A	**Import Set Number**	Unique identifier for the row of data.
B	**Item ID**	Eclipse product ID, as defined in Product Maintenance.
C	**Customer Category**	The group the customer belongs to, such as reseller or contractor, as assigned in Customer Maintenance. For more information about customer categories, see Setting Up Customers.
D	**Company ID**	All. Indicates all territories and branches.
E	**Customer ID**	Eclipse customer ID, as defined in Customer Maintenance.
F	**Core Status**	Core A, Core B, Non-Core C, or Non-Core D.
G	**Core Status Data Expiration Date**	Date your Strategic Pricing service contract expires. After your contract expires, all core statuses in the system change to Core A. You can import this file again, however, the core statuses remain Core A.

Viewing and Editing Product Core Statuses

After you import the Core Status Assignments file, you can view the core status assignments in the screens. Your service tier determines which data displays and also determines the refinement of your Strategic Pricing calculations.

Core statuses are view only, unless you are assigned the SPRC.CORE.STATUS.EDIT authorization key.

To view and edit product core statuses:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select Product Maintenance to display the Strategic Pricing Product Maintenance screen.

   The following data displays depending on your service tier.

   Note: For information about core status families, see Assigning Products to Core Status Families.

Data Services Tier	Data Description
Strategic Costing	The core status for the product.
Silver	The core status for the product.
Gold	The core status assigned to each customer category for the product. If you do not have the Gold tier, the category section of the window does not display and the system pulls the core status from the product level.
Platinum	The core status assigned to each customer for the product. If you do not have the Platinum tier, the customer section of the window does not display and the system pulls the product's core status from either the customer category or the product level. You can also view a product's core status for a customer using the **Customer Maintenance** option from the Strategic Pricing Maintenance menu.

Viewing and Editing Product Coreness Scores

After you import the Product Core Status file, you can view the coreness score assignments in the screens. The *coreness score* is available on all service level tiers for Strategic Pricing.

To view and edit product coreness scores:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Product Maintenance** to display the Strategic Pricing Product Maintenance screen.

   The following data displays depending on your service data.

Data Services Tier	Data Description
Strategic Costing	The coreness score for the product.
Silver	The coreness score for the product.
Gold	The coreness score assigned to each customer category for the product. If you do not have the Gold tier, the category section of the window does not display and the system pulls the core from the product level.
Platinum	The coreness score assigned to each customer for the product. If you do not have the Platinum tier, the customer section of the window does not display and the system pulls the product's coreness score from either the customer category or the product level. You can also view a product's coreness score for a customer using the **Customer Maintenance** option from the Strategic Pricing Maintenance menu.

Core Statuses and Similar Products Overview

Use core status families to help ensure that a consistent core status is used across related products that might not have the same amount of sales, even though the individual products might otherwise have different core status assignments. When pricing a product on an order, the system first determines if the product is part of a core product family to determine its core status assignment. If the product *is* part of a core status family, the system uses the highest core status of the items in the family for the product's strategic price calculation.

For example, you sell red, black, and green wire. You price wire the same, regardless of color, however, you sell more red and black wire than you do green wire. When you complete your core status analysis with Strategic Pricing Associates, you receive a core status assignment of Core A for both red and black, but Non-Core C for green wire based on the amount of sales. You want the green wire to be considered a Core A product, to ensure consistent pricing for your wire, without having to manually edit the core status each time you receive updates from Strategic Pricing Associates. Using a core status family, you can group products like wire that need to maintain contain consistent pricing together.

Use the **Strategic Pricing Core Status Groups** control maintenance record to define the valid core status families to which you can assign a product.

Assigning Products to Core Status Families

Use core status families to help ensure that a consistent core status is used across related products that might not have the same amount of sales, even though the individual products might otherwise have different core status assignments.

When pricing a product on an order, the system first determines if the product is part of a core product family to determine its core status assignment. If the product *is* part of a core status family, the system uses the highest core status of the items in the family for the product's strategic price calculation.

Valid core status families are defined in the **Strategic Pricing Core Status Groups** control maintenance record.

To assign a product to a core status family:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Product Maintenance** to display the Strategic Pricing Product Maintenance screen.

2. In the **Product** field, enter the product for which you want to assign a core status family.

3. In the **Core Status Product Family** field, select the family to which this product belongs.

4. Update any additional information for the product.

5. Press **Esc** to save your changes and exit the screen.

Vendor Price Visibility Overview

One of the components that Strategic Pricing Associates uses to calculate prices for your customers is how public a manufacturer's prices are to distributors for the products that they buy. Based on the core status of a product, a visibility factor is set based on product pricing sensitivity. Uploading the contents of the Product Sell Group/Vendor file creates or updates Eclipse matrix cells. If you are using Strategic Pricing, these matrix cells add an additional dimension to your pricing hierarchy within Eclipse. You need to enter the vendor visibility, Price Cube Modifier and the Price Cube Factor information manually for each of your product sell groups, and at the Strategic Pricing default level.

Sensitivity levels are set for each customer. Each product core status is assigned a multiplier for each visibility level, and that multiplier is used in the pricing calculation. For example, if a customer has a visibility level of High, and is ordering a product that has a core status of Core A, the system first looks at the sell group settings for the modifier assigned to a Core A product for high visibility customers. If there is not a modifier listed at the sell group table, the system looks at the default Price Cube level.

> **Note:** If your Data Services contract has expired, the system uses a visibility level of Very High.

Assigning Vendors to Sell Groups

One of the components that Strategic Pricing Associates uses to calculate prices for your customers is how public a manufacturer's prices are to distributors for the products that they buy. To help Strategic Pricing Associates determine a visibility rating, prior to exporting your data, define which vendors you use to buy groups of products that share common pricing schemes. To do this, assign a Strategic Pricing vendor to your sell groups.

> **Note:** You can also mass load the vendor ID into your sell groups.

To assign a vendor to a sell group from Strategic Pricing Maintenance:

1. From the **Files > Price Maintenance > Strategic Pricing Maintenance** menu, select **Sell Group Maintenance** to display the Strategic Pricing Sell Group Maintenance screen.

2. In the **Sell Group** field, select the sell group to which you want to assign a Strategic Pricing vendor.

3. In the **Pricing Vendor** field, enter or select the vendor you want to assign to the group for Strategic Pricing purposes.

4. Press **Esc** to save your changes.

Assigning Vendor Visibility and Default Core Statuses to Sell Groups

Set a default core status for each sell group so the system can calculate strategic prices for products within the sell group that do not have a core status assigned. After you assign your vendors to your product sell groups, also set the vendor visibility rank to indicate how visible the vendor or manufacturer's pricing structures for your product sell groups are to the market.

Use the following visibility ratings for your sell groups:

Visibility Level	Description
Very High	Generally your top-tier (leading) vendors, comprising products bought by a high percentage of your customers or at least a high percentage of customers of a key customer type; representing your key market position in the marketplace; with the heaviest and most visible competitive coverage.
High	Important vendors, comprising products bought by a significant percentage of your customers or at least a significant percentage of customers of a key customer type; representing your secondary position in the marketplace; with strong and visible competitive coverage.
Medium	An intermediate designation.
Low	Non-significant vendors, comprising products bought by a low percentage of your customers or at least a low percentage of customers of most key customer types; of little significance to your position in the marketplace; with little and/or low-visibility competitive coverage.
None	Marginal vendors, comprising products bought by a small/tiny percentage of your customers; representing your key market position in the marketplace; with essentially no significance to your market position; products provided as a convenience to your customers.

To assign vendor visibility and a default core status to a sell group:

1. From the **Files > Price Maintenance > Strategic Pricing Maintenance** menu, select **Sell Group Maintenance** to display the Strategic Pricing Sell Group Maintenance screen.

2. In the **Sell Group** field, select the sell group to which you want to assign a Strategic Pricing vendor.

3. In the **Vendor Visibility** field, select the rank that indicates how visible the vendor or manufacturer's pricing structures are to the market.

   Sensitivity ranks range from Very Low to Very High. If there is no visibility factor imported with your Strategic Pricing data and your Data Services Expiration Date is still valid, the system uses Very Low. If your Data Services contract has expired, the system uses a sensitivity setting of Very High.

4. In the **Default Core Status** field, select the product core status the system uses if one is not defined for a product within the sell group.

   Defining a default product core status assigns the core status to products added to the system and the sell group outside of the normal Strategic Pricing analysis process. A default core status allows the system to use a strategic price for new products that do not yet have a core status assignment.

5. In the **Default Coreness** field, review the statistical sensitivity rating that calculates the new sell price for this sell group. Valid entries occur between .0000 and 1.000. The default is 1.0000.

   The coreness value is supplied by Strategic Pricing Associates. We do not recommend adjusting this value without consulting SPA.

6. Press **Esc** to save your changes.

Assigning Vendor Visibility by Customer Category to Sell Groups (Available with Gold and Platinum Data Service Tiers)

You can define different visibility for each customer category defined in Strategic Pricing Sell Group Maintenance. These different visibilities help in the initial markup of the vendor's list price or cost that you are using for Strategic Pricing.

After you assign your vendors to your product sell groups, you can set the vendor visibility by customer category. You can define more sharply by customer category which product families need to have pricing discretion. These definitions can also be useful on reports for your pricing. For example, you have a sell group with a default vendor visibility defined. You can then define visibility by customer category.

To assign vendor visibility by customer category to sell groups:

Type your drop-down text here.

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Sell Group Maintenance** to display the Sell Group Maintenance screen..

2. Apply or display sell group settings for which you want to assign visibility by customer category. For information about how to apply sell group settings, see *Assigning Vendors to Sell Groups* in this document.

3. In the **Visibility by Customer Category** area, under the **Customer Category** column, enter the category for which you want to further define visibility.

4. In the **Visibility by Customer Category** area, under the **Visibility** column, enter the level of visibility for which you want to further define the category.

5. Press **Esc** to save your changes and exit the screen..

Sell Matrix Cells and Strategic Pricing Overview

The purpose of a matrix cell is to define parameters that determine how your products are priced. After you have set up the Strategic Pricing components, you need to set up your matrix cells to use the strategic price and set up a default Strategic Pricing matrix. The strategic price calculation is based on your service tier.

Important: Without Strategic Pricing matrix cell definitions, the system uses the default Strategic Pricing matrix if the customer on a sales order has a size and category assigned and is set to use the strategic price. If the default matrix does not exit, the system prices line items in sales order entry from the price sheet, without the strategic price, even if the customer has a Strategic Pricing category and size defined or the product has a core status defined.

If the customer's **List Price/Cost Method** field is set to **Supplier** instead of **Strategic**, the system ignores all Strategic Pricing matrix cells, but saves what the strategic price would have been for reporting purposes. If a Strategic Pricing matrix cell exists but is not used on the order, the strategic price is also saved for reporting purposes.

Eclipse and Strategic Pricing offers flexibility in how refined you want your pricing. Using a customer size/category matrix cell, you can isolate Strategic Pricing to a specific group of customers and a certain set of products. Using these matrix cells allows you to slowly integrate strategic prices for a group of products or a group of customers, and allows you to see the effect of using strategic prices in your bottom line business results.

You can also update your existing matrix cells to use the Strc List or Strgc Cost global basis, without creating a customer size/category matrix cell. However, this turns on strategic pricing for all customers with a category assignment and product core status assignments that use those matrix cells.

The Eclipse pricing hierarchy checks your pricing matrix beginning with standard matrix cells. If the system encounters a customer size/category cell for the customer's size and category combination, the system uses that matrix to determine the price for the product. See Pricing Matrix Hierarchy Details in the standard Eclipse Pricing Management documentation for details about where the customer size/category matrix cell falls in the hierarchy.

Depending on your service tier, Strategic Pricing Associates provides files that you can upload that you can use to create and update matrix cells automatically:

- **Customer to Product matrix cells** - If you subscribe to the Customer/SKU tier, Strategic Pricing Associates provides a file with a net price for product per customer included in your export. For more information, see Customer/Product Pricing Structures File.

- **Sell group matrix cells** - If you subscribe to the Pricing Service tier, Strategic Pricing Associates provides a file that you can upload to create sales pricing matrix cells per product group. For more information, see Product Sell Group/Vendor Pricing Structures File.

For more information about matrix cells, see the following topics:

- Defining Default Strategic Pricing Sell Matrix Cells

- Defining Customer Size/Category Sell Matrix Cells

- Pricing Matrix Hierarchy Details

- Pricing Matrix Overview

For more information about how prices are determined in sales order entry if you are using Strategic Pricing, see Working with Strategic Priced Products in Sales Order Entry.

Defining Customer Size/Category Sell Matrix Cells

If you use Strategic Pricing, you can isolate price updates to a specific customer size and category combination using a customer size/category matrix cell. Customer size/category sell matrix cells are defined in the same way as you define other matrix cells, however, you need to specify the customer size and category for the cell. To use a strategic price, you need to use the Strategic List or Strategic Cost as your basis, however, the matrix cell does not require that you use the Strategic List or Strategic cost basis. If the system does not find a customer size/category matrix cell during order entry, it looks to the default strategic price matrix values for the pricing formula. For more information, see *Defining Default Strategic Price Matrix Values* in the online help documentation.

> **Note:** You must have at least the Silver Service Level in order to create a sell matrix for Strategic Pricing. If you have the Strategic Costing service level, you are not required to define customer sizes or categories.

The customer must have a customer size and category assigned and the product must have a core status assigned for the system to use the customer size/category cell to price a product in sales order entry.

You must be assigned the SMATRIX.MAINT and the SMATRIX.MAINT.CUS.CLASS authorization keys to view or edit the Sell Matrix Maintenance window.

To define a customer size/category matrix cell in Sell Matrix:

1. From the **File > Price Maintenance** menu, select **Sell Matrix** to display the Matrix Information screen.

2. In the **Cust Size/Category** field, select the customer size and category combination for which to create the matrix cell.

3. Select a sell group in the **Group** field to create the cell for a group of products, or select a product in the **Product** field to create the cell for a single product.

4. Continue defining the sell matrix cell as you would other individual cells, using the Strategic List or Strategic Cost global basis as your pricing basis.

To define a customer size/category matrix cell in Quick Sell Matrix:

1. From the **File > Price Maintenance** menu, select **Quick Sell Matrix** to display the Matrix Information screen.

2. In the **Cust Size/Category** field, select the customer size and category combination for which to create the matrix cell.

3. Select a sell group in the **Group** field to create the cell for a group of products, or select a product in the **Product** field to create the cell for a single product.

4. Use the **CoRSt** hot key to select a core status to limit the display to those core statuses. The **C** column displays an asterisk for any cells with core status overrides.

   Note: This field only displays if you have Gold or Platinum level service.

5. Continue defining the sell matrix cell as you would other individual cells, using the Strategic List or Strategic Cost global basis as your pricing basis.

   Note: You can also create customer size/category sell matrix cells using a different global basis if you do not want to create them using the strategic price.

Applying Discounts by Product Core Status (Available with Gold and Platinum Data Service tiers)

If you subscribe to the Gold or Platinum Pricing Service tiers, you can set up different formulas based on each product core status, also known as bucket splitting. Using formulas for product core statuses within a matrix cell allows you to break the same cell into different discounts based on core status, you can use one matrix cell with options for discounting within that cell. For example, if you have a group of customer size/category matrix cells and subscribe to the Silver Data Service tier, all core and non-core products receive the same discount. If you have the Gold or Platinum tier, you can use the same matrix to apply a three percent discount to Core A products, and a five percent discount to Core B products.

To apply a discount to a product core status:

1. From the **Files > Price Maintenance** menu, select **Sell Matrix** to display the Sell Matrix Maintenance screen.

2. Enter the necessary information to display the sell matrix you want to use.

3. Use the **Core Status Discount** hot key to display the Core Status/Non-Core Status discount screen.

4. At the prompt, select the product core status for which you want to manage discounts.

    The system refreshes the quantity break table to display pricing information for that product core status.

5. In the **Qty Brks** column, define the breaks at which you want to apply discounts. For example, if a customer buys more than 25 of the product, you want to apply a discount.

6. For each quantity break, complete the following information to define the discount formula for products with that core status assigned. A discount is not required for each core status. For more information about product core statuses, see Product Core Statuses Overview.

Field	Description
Basis	Select the basis name you want to use for the base price calculation, for example LIST or Strgc List.
Formula	Enter the formula that applies to the matrix for each product core status to lower the price according to the profitability of the product. For example, if you want to use the calculated strategic price for a product, but reduce the price by five percent, select **Strgc List** in the **Basis** field, and enter **-5** in the formula field. When the system finds this matrix cell, it uses the calculated strategic list price based on you service level, and discounts the product by five percent.

7. Press **Esc** to save your changes and exit the Sell Matrix Maintenance screen.

Product Sell Group/Vendor Pricing Structures File

After exporting your data and working directly with Strategic Pricing Associates on your pricing analysis, Strategic Pricing Associates sends you a Product Sell Group/Vendor file that includes the following data. When you upload this file, the system creates and updates customer category/size sell matrix cells.

> **Note:** If you subscribe to any Data Service, you receive this file from Strategic Pricing Associates one time only. Subscribe to the Pricing Service to continue to receive updates to this file.

If you subscribe to the Silver Data Services tier, the system processes only Core A and Core B rows in the file, and skips any Non-Core C and Non-Core D rows. If you subscribe to the Gold or Platinum Data Services tier, the system processes all rows in the file.

Excel Column	Column Name	Description
A	**Import Set Number**	Unique identifier for the row of data.
B	**Company ID**	All, to indicate all territories and branches.
C	**Product Group ID**	Eclipse product sell group to which the product belongs.
D	**Supplier ID**	Eclipse vendor ID as assigned in Vendor Maintenance for the vendor assigned to the product sell group for Strategic Pricing.
F	**Customer Size**	The size of the customer: **Very Tiny**, **Tiny**, **Small**, **Medium**, **Large**, or **Huge**.
G	**Core/Non-Core**	Indication about whether the pricing applies to products with Core A and Core B core statuses, or Non-Core C and Non-Core D statuses. **Note:** If your Data Services tier is Silver, the import only imports rows for Core products.
H	**Factor Type**	Pricing factor, which affects the Strategic Pricing calculation and whether the system prices using the Strategic List Price or the Strategic Cost. Possible values include: • **D** - (Discount) The system processes it to use the Strategic List Price *minus* the value listed in the **Factor** field. • **M** - (Markup) The system processes it to use the Strategic Cost *plus* the value listed in the **Factor** field. • **G** - (Gross Margin) The system processes it to use the Strategic Cost and uses the value in the **Factor** field as the GP value.
I	**Factor**	The value to add or subtract as the discount or addition to the calculation.

Uploading the contents of this file creates or updates matrix cells specific to a sell group. The pricing basis used for the cells is determined by the **Factor Type** in the import. If the **Factor Type** is D, the system uses Strgc List as the pricing basis. If the **Factor Type** is M or G, the system uses Strgc Cost as the pricing basis.

Customer/Product Pricing Structures File (Available with Customer/SKU tier)

If you subscribe to the Customer/SKU tier, Strategic Pricing Associates determines a net price for products for each customer based on the customer's sensitivity to pricing changes. After exporting your data and working directly with Strategic Pricing Associates on your pricing analysis, Strategic Pricing Associates sends you a Customer/Product Assignments file that contains a net price suggestion for each customer and product that were included in your export, including the following data.

Excel Column	Column Name	Description
A	**Import Set Number**	The unique identifier for the row of data.
B	**Company ID**	All. Indicates all territories and branches.
C	**Customer ID**	Eclipse customer ID as defined in Customer Maintenance.
D	**Item ID**	Eclipse product ID as defined in Product Maintenance. The product ID must match that of one in Eclipse to create the matrix cell.
E	**Core Status**	Core A, Core B, Non-Core C, or Non-Core D. The core status is included for your reference only and is not included in the upload.
F	**Price**	The net price for the product for the customer.

Uploading the contents of this file creates or updates customer to product matrix cells with a net price for each of your customers included in the export. The pricing basis for all uploaded cells from this file default to **Strgc List**.

Applying Price Cube Factors to Non-Strategic-Pricing Matrix Cells

You can apply the price cube modifiers and factors set in the Strategic Pricing Maintenance **Price Cube** pane to not only Strategic Pricing matrix cells, but also to any sell basis on any pricing matrix cells you have in set up in Eclipse. The system uses the set core status information based on your service level, and applies those calculations to non-Strategic-Pricing matrix cells.

> **Note:** The Shipping Branch must be enabled for Strategic Pricing before applying price cube factors.

To apply price cube factors:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** select **Customer Maintenance** pane.

2. In the **Customer** field, enter the customer for which you want to apply price cube factors.

3. In the **Enable Price Cube Factors for Non-Strategic-Pricing Matrix Cells** field, type **Y** for yes.

4. Press **Esc** to save the changes.

Working with Strategic Priced Products in Sales Order Entry

As you are adding products to a sales order, if all of the following conditions are met, the system uses the calculated strategic price for the item on the order:

- The pricing branch is enabled for Strategic Pricing.

- The customer has a Strategic Pricing category and size assigned.

- The customer has the List/Cost Method option set to **Strategic**.

  Note: When checking if an order should allow strategic pricing, the system defaults to the Bill-To method if the Ship-To method is left blank.

- The product has a core status assigned, or the sell group has a default core status set. If the product does not have a core status assigned, the system uses the default core status set for the product's sell group. If there is no default core status, the system uses Non-Core D.

- The customer or product has a strategic price sell matrix cell defined, or there is a default strategic price matrix defined.

If you have discounts set up for a product core status, sales order entry respects those discounts based on the product's core status assignment. For more information, see Applying Discounts by Product Core Status.

How do I know if the Strategic Price was used?

The system indicates line items on an order that use a strategic price with a **^** symbol next to the line item's price in the sales order body.

Your service tier determines how the system calculated the strategic price for a product for each customer. Within sales order entry, use the Price Audit screen to review the matrix cells the system checked when determining a line item's price, to determine how the strategic price was calculated. The pricing audit for the product contains information about each step that the system took to determine the item's price, including which matrices it reviewed, and which matrix it did use to determine the price. If the system used a default strategic price matrix value, the pricing audit indicates that the Strategic Pricing Default Matrix was used. If the system does not find a default strategic value, it indicates that it used a default pricing matrix.

If the customer is set up for Strategic Pricing, but the system did not use the strategic price on the order, the system logs what the strategic price would have been. You can run a report that details the difference between the price used and the strategic price.

To verify how the system calculated the strategic price:

1. From a sales order, display the order's Body screen and select the line item whose pricing you want to review.

2. Use the **Inq** hot key, then the **Additional Inqs** hot key, and then the **Audit** hot key to display the pricing information for the product.

Can I override the Strategic Price?

If you have the appropriate authorization, you can override a strategic price, just like you can any other price on a sales order. If you override a strategic price, the system logs the strategic price for the product

as well. You can run a report that details the difference between the price used and the strategic price. You can also override the strategic price on the order by changing the category and size for a line item.

For more information about overriding prices on sales orders, see Changing Sales Order Prices.

Changing the Strategic Pricing Category or Size in Order Entry

If you have the appropriate pricing authorization, you can override a strategic price for a product on an order by changing the customer category and size for the product.

> **Note:** You can also override prices like you can any other price on a sales order. If you override a strategic price, the system logs the strategic price for the product as well. You can run a report that details the difference between the price used and the strategic price.

To change the category or size for a product in order entry using a view specific to order entry, you need to create a view using the SPRC.CAT and SPRC.SIZE view elements. You can add these elements to any view, or create a new view for Strategic Pricing. For more information about creating an order entry view, see Creating Custom OE Views in the Application Maintenance documentation.

You can also change the customer category and size using the Order Pricing Override window accessed from the **Edit Order > Pricing** menu in the Body of the sales order.

To change the Strategic Pricing category or size using an OE view:

1. Create a sales order.

2. Use the View hot key and select **SP Category/Size/Price** to display the **SP Category** and **SP Size** columns.

3. Update the category and size accordingly. The changes you make affect the strategic price and the system re-prices the product on the order.

Column	Description
SP Ctgry	The Strategic Pricing category assigned to the bill-to customer on the order. Changing the customer category can alter the product's core status determination, depending on your Strategic Pricing Data Services level. This can also change the sensitivity factor.
SP Size	The Strategic Pricing customer size assigned to the bill-to customer on the order. Changing the customer size can also change the sensitivity factor.

When looking at the customer size and category in the OE view, a pound sign (#) displays to indicate that the size or category as overridden at the order level. If you override the size or category at the line item level, an asterisk (*) displays.

4. Continue processing the order as usual.

Strategic Pricing Price Calculation – Strategic Costing Service Tier

The Strategic Pricing *Strategic Costing* tier allows you to inflate, or puff, a sell basis on your current pricing structure. The Strategic Costing level is a tier *below* the Silver tier.

Using Price Cubes for All Matrix Cells

This level does not require you to upload price files and can apply to *any* matrix using the **Enable Price Cube Factors for Non-Strategic Pricing Matrix Cells** check box in the Customers pane of Strategic Pricing Maintenance. In addition, categorizing and sizing your customers is *optional* in Strategic Costing.

Coreness Scores

Strategic Costing uses a *coreness score* which provides a more precise statistical sensitivity rating that Strategic Pricing Associates calculate at the Sell Group and Product level. This coreness score is a four decimal score ranging from .0000 to 1.000, although it could be higher than 1.000. The system defaults to 1.000.

Disabling Price Cubes at the Sell Group or Matrix Level

In Strategic Pricing Maintenance, you can disable the Price Cube Factors application by Sell Group, if needed. Use the **Disable Price Cube Factors** check box in the Sell Groups pane.

You can disable the price cube application at the individual sell matrix level, if needed. Use the **Disable Price Cube Factors** check box to eliminate that check on the sell matrix.

Strategic Pricing Authorization

Strategic Costing uses the branch, customer, sell group, and matrix settings to control how the pricing is applied. You can use authorization parameters to control how the pricing applies by user. You can limit price changes on products that are strategically priced based on user authorization while leveraging the pricing categories, pricing sizes, core status, and sell group vendor visibility.

For more information, see Defining Strategic Pricing Authorization Levels in this document.

Strategic Pricing List and Cost Calculation – Silver Data Service Tier

The system calculates the Strategic List Price and Strategic Cost by applying the core status from the product record, Visibility from the product's sell group, and the Price Cube Modifier from either the product sell group or from the Price Cube default settings. These are applied to either the vendor's list or cost, depending on the basis used in the sell matrix, and if the customer has the **List Price/Cost Method** selection set to **Strategic** in the Strategic Pricing Customer Maintenance screen.

The following conditions are true for the strategic list and cost calculation:

- If the product does not have a core status assigned the system uses the default core status set for the product's sell group. If the product's sell group does not have a default core status set, the system uses a default core status of Non-Core D.

- If the product is part of a core status family, the system uses the highest core status of the products in the family, instead of the product's individual core status assignment.

- If a Vendor Visibility factor is not set for the product sell group, the system uses Very Low.

- If Price Cube Modifiers and Price Cube Factors are not defined at the sell group level, the system uses the default modifiers and factors in the Price Cube Maintenance screen.

If your Data Services contract has expired, the following conditions are true for the strategic list and cost calculation:

- The system processes all products as Core A , regardless of the product's setting.

- The system processes all calculations with a Vendor Visibility factor of Very High.

Example: Silver Data Services Tier

Product **4 V6S-S** with a list price of $11.99 has a core status of Non-Core C. In the Silver Data Services tier, the core status is taken from *only* the product record.

Looking at the visibility table for the sell group, a Non-Core C product with a High Visibility factor has a 0.05 multiplier. Then, looking at the Price Cube Modifier table, an item with a list price above $10.00 and below $50.00 has a 0.70 Price Cube Modifier.

If the sell matrix is set up to use Strategic List, the strategic list price is calculated as follows:

> **Supplier List Price x [(Visibility Factor x Price Cube Modifier) + 1]**
>
> $11.99 * [0.05*0.70)+1]
>
> $11.99 * 1.0350 = **$12.4097**

If the sell matrix is set up to use Strategic Cost, calculation is as follows:

> **Vendor Cost x [(Visibility Factor x Price Cube Modifier) + 1]**

Pricing Calculation Flow: Silver Data Services Tier

The system determines the strategic price for an item using the following steps:

| Customer on sales order has a size and category assignment | → | Strategic Price flag set for customer? | —Yes→ | Determine core status from Product record | → | Determine visibility based at the product's sell group | → | Determine Price Cube Modifier based on the product's list price |

No

If the customer does not have a size and category, or the Strategic Price flag is not set in Customer Maintenance, the system uses the product's price sheet to calculate an item's price

If the product does not have a core status, the system uses the default core status set for the product's sell group. If the sell group does not have a default core status, the system uses Non-Core D. If the product is part of a core status family, the system uses the highest status of all products in the family.

If the products' sell group does not have a visibility factor, the system uses Very Low. If the sell group does not have modifiers or factors defined, the system uses the default Price Cube Modifiers and default Price Cube factors set in Strategic Pricing Maintenance.

Strategic Pricing List and Cost Calculation – Gold Data Service Tier

The system calculates the Strategic List Price and Strategic Cost by applying the core status from the Product record, Visibility from the product's sell group, and the Price Cube Modifier from either the product sell group or from the Price Cube default settings. These are applied to either the vendor's list or cost, depending on the basis used in the sell matrix, and if the customer has the **List Price/Cost Method** selection set to **Strategic** in the Strategic Pricing Customer Maintenance screen.

The following conditions are true for the strategic list and cost calculation:

- If the core status for a product at the customer category level is not defined, the system uses the core status at the product level. If the product does not have a core status assigned the system uses the default core status set for the product's sell group. If the product's sell group does not have a default core status set, the system uses a default core status of Non-Core D.

- If the product is part of a core status family, the system uses the highest core status of the products in the family, instead of the product's individual core status assignment.

- If a Vendor Visibility factor is not set for the product sell group, the system uses Very Low.

- If Price Cube Modifiers and Price Cube Factors are not defined at the sell group level, the system uses the modifiers and factors in the Price Cube Maintenance screen.

If your Data Services contract has expired, the following conditions are true for the strategic list and cost calculation:

- The system processes all products as Core A, regardless of the customer category setting.

- The system processes all calculations with a Vendor Visibility factor of Very High.

Example: Gold Data Services Tier

Product **4 V6X-S** with a list price of $11.99 and the customer ordering the product is assigned to the **Contractor** customer category. In the Gold Data Services tier, the core status is taken from the customer category level for a product. The customer ordering the product is a Contractor, and product 4 V6X-S has a core status of Core B for customers assigned the contractor category.

Looking at the visibility table for the sell group, a Core B product with a High Visibility factor has a 0.03 multiplier. Then, looking at the Price Cube Modifier table, a product with a list price above $10.00 and below $50.00 has a 0.70 Price Cube Modifier.

If the sell matrix is set up to use Strategic List, the strategic list price is calculated as follows:

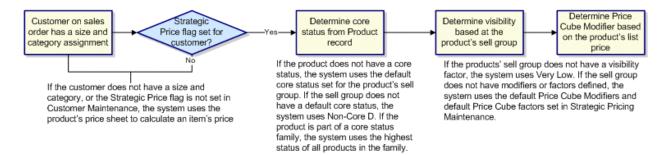**Supplier List Price x [(Visibility Factor x Price Cube Modifier) + 1]**

$11.99 * [0.03*0.70)+1]

$11.99 * 1.0 = **$12.2418**

If the sell matrix is set up to use Strategic Cost, calculation is as follows:

Vendor Cost x [(Visibility Factor x Price Cube Modifier) + 1]

Pricing Calculation Flow: Gold Data Services Tier

The system determines the strategic price for an item using the following steps:

Strategic Pricing List and Cost Calculation - Platinum Data Service Tier

The system calculates the Strategic List Price and Strategic Cost by applying the core status from the Product record, Visibility from the product's sell group, and the Price Cube Modifier from either the product sell group or from the Price Cube default settings. These are applied to either the vendor's list or cost, depending on the basis used in the sell matrix, and if the customer has the **List Price/Cost Method** selection set to **Strategic** in the Strategic Pricing Customer Maintenance screen.

The following conditions are true for the strategic list and cost calculation:

- If the core status for a product at the customer level is not defined, the system uses the core status at the customer category level. If the product does not have a core status assigned at the customer category level, the system uses the core status set at the product level. If the product does not have a core status assigned the system uses the default core status set for the product's sell group. If the product's sell group does not have a default core status set, the system uses a default core status of Non-Core D.

- If the product is part of a core status family, the system uses the highest core status of the products in the family, instead of the product's individual core status assignment.

- If a Vendor Visibility factor is not set for the product sell group, the system uses Very Low.

- If Price Cube Modifiers and Price Cube Factors are not defined at the sell group level, the system uses the default modifiers and factors in the Price Cube Maintenance screen.

If your Data Services contract has expired, the following conditions are true for the strategic list and cost calculation:

- The system processes all products as Core A, regardless of the customer category setting, or any other setting for the core status.

- The system processes all calculations with a Vendor Visibility factor of Very High.

Example: Platinum Data Services Tier

Product **4 V6X-S** with a list price of $11.99 and the customer ordering the product is assigned to the **Contractor** customer category. In the Platinum Data Services tier, the core status is taken from the customer level for a product. For this customer, product **4 V6X-S** has a core status of Core B.

Looking at the visibility table for the sell group, a Core B product with a High Visibility factor has a 0.03 multiplier. Then, looking at the Price Cube Modifier table, a product with a list price above $10.00 and below $50.00 has a 0.70 Price Cube Modifier.

> **Note:** The calculation is the same as that for the Gold Data Service Tier, however, where the system finds the product core status is different.

If the sell matrix is set up to use Strategic List, the strategic list price is calculated as follows:

Supplier List Price * [(Visibility Factor * Price Cube Modifier) + 1]
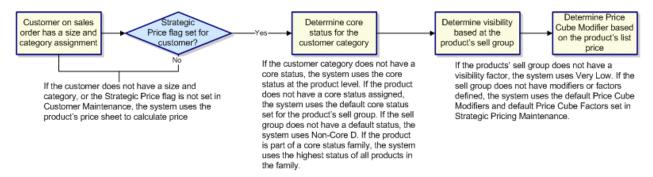
$11.99 * [0.03*0.70)+1]

$11.99 * 1.0 = **$12.2418**

If the sell matrix is set up to use Strategic Cost, calculation is as follows:

Vendor Cost * [(Visibility Factor * Price Cube Modifier) + 1]

Pricing Calculation Flow: Platinum Data Services Tier

The system determines the strategic price for a product using the following steps:

If the customer does not have a size and category, or the Strategic Price flag is not set in Customer Maintenance, the system uses the product's price sheet to calculate price

If the customer does not have a core status, the system looks at the customer category, and then to the product. If the product does not have a core status, the system looks at the default core status for the product's sell group. If there is no default, the system uses Non-Core D. If the product is part of a core status family, the system uses the highest status of all products in the family.

If the products' sell group does not have a visibility factor, the system uses Very Low. If the sell group does not have modifiers or factors defined, the system uses the default Price Cube Modifiers and default Price Cube Factors set in Strategic Pricing Maintenance.

Strategic Pricing List and Cost Calculation - Pricing Service Tier

If you subscribe to the Platinum Pricing Service tier in addition to your Data Services tier, the Strategic List and Strategic Cost can also include the customer's sensitivity rating in the calculation. Customer sensitivity is a rank that indicates how reactive a customer is to pricing changes, and ranges from Very Low to Very High. Strategic Pricing combines customer sensitivity rating for each combination of customer category and size, creating a matrix of pricing factors to use during the strategic price list calculation. Typically, as the sensitivity level increases, the pricing factors decrease. If sensitivity ratings are not available, the system calculates the Strategic List Price and Strategic Cost based on the Data Services tier.

> **Note:** If you subscribe to the Silver or Gold Pricing Service, the system calculates Strategic List and Strategic Cost based on your Data Services level.

If the sell matrix is set up to use Strategic List, the strategic list price is calculated as follows:

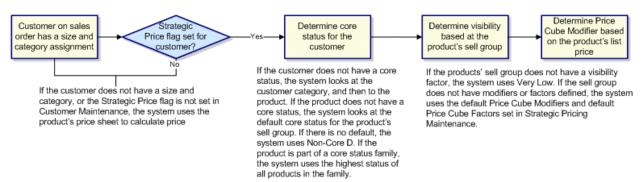**Supplier List Price * [(Visibility Factor * Price Cube Modifier +1) * Customer Sensitivity]**

If the sell matrix is set up to use Strategic Cost, calculation is as follows:

Vendor Cost * [(Visibility Factor * Price Cube Modifier * Customer Sensitivity) + 1]

For additional information about customer sensitivity, see Customer Size and Sensitivity Assignments.

List and Cost Calculation - Customer/SKU Tier

If you subscribe to the Customer/SKU Service tier in addition to your Data Services tier, the system calculates the Strategic List and Strategic Cost based on your Data Services tier, as well as the Platinum Pricing Service if you also subscribe to that tier. Strategic Pricing Associates determines the core status of your products based on your service tier, and recommends a net price for each of your products based on the customer. However, the actual Strategic List and Strategic Cost calculations does not change based on the Customer/SKU service tier.

Exporting Data for Strategic Pricing Associates

Strategic Pricing Associates analyzes your product, customer, sales, and pricing data for the past 12 months to determine the best pricing strategy and multipliers for your pricing formulas.

Exporting data creates a *sales history* export. This file is required to gather sales transactions for each customer and the products they have purchased in the past 12 months. This information is used to rank customers and products. This file includes the customer category information. Sales history includes only stock and non-stock items, and does not included lot billed items. The export includes sales data from all your branches.

Prior to exporting data, complete the following setup and training:

- Assign customers to categories.

- Assign vendors to sell groups.

- Complete your introduction training with Strategic Pricing Associates.

To export data for Strategic Pricing Associates:

1. From the **Files > Price Maintenance > Strategic Pricing** menu, select **File Exports** to display the Strategic Pricing File Exports screen.

2. Enter the criteria to select the data included in the export files.

Field	Description
Start Date and **End Date**	Enter the date range for which you want to export pricing data. Strategic Pricing Associates requires that you export data for a 12 month period. Do not export more than 12 months worth of data.
Br/Tr/All	Enter the branch, branches, or territories to include in the export files.
Report Delimiter	Select **Tab** to separate the columns in each export file with tabs. Tab-delimited is the format that Strategic Pricing Associates requires for the export files.

3. Use the **Hold** hot key to create the four export files and save them to your Hold file.

4. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

5. Select the first export file you want to download, and use the **Download** hot key.

6. Enter the directory path where you want to save the file and click **Open**.

7. Select **ASCII, LF=CR/LF, Tab col** and press **Esc**.

8. At the prompt, enter **Y** to include the heading row that identifies each column in the downloaded file and press **Esc** to download the file.

9. Repeat this procedure for each download file.

10. Send the files to your Strategic Pricing Associates representative using e-mail or CD, depending on the file size.

Exported Data

The following data is included in the Strategic Pricing Sales History export file. Use the following information to help troubleshoot any export errors, as well as clean up the data in your system prior to sending it to Strategic Pricing Associates for analysis. Data is exported for a 12 month period.

Export File Column Name	Eclipse Field, Description, or Calculation
Transaction Date	**Invoice Date** in mm/dd/yyyy format on the sales order.
Order Date	**Order Date** in mm/dd/yyyy format of the sales order.
Order Number	**Sales Order Number** without the generation number.
Invoice Number	**Invoice Number** with the sales order generation number.
Customer Number	The bill-to customer **Customer ID** assigned to the customer record in Customer Maintenance.
Customer Type	**Strategic Pricing Category** for the bill-to customer as assigned in the Customer Pricing Information screen.
Customer Size	The bill-to customer Strategic Pricing Customer Size.
Customer On/Off	Indicates that Strategic Pricing is enabled and the Supplier equals the standard Eclipse pricing for the bill-to customer.
Ship To Customer	Ship-to customer ID on the sales order as assigned to the customer record in Customer Maintenance.
Ship To Type	Strategic Pricing Category as assigned to the ship-to customer.
Ship To Size	Strategic Pricing Customer Size as assigned to the ship-to customer.
Ship To On/Off	Indicates that Strategic Pricing is enabled and the Supplier equals the standard Eclipse pricing for the ship-to customer.
Outside Salesperson	Outside salesperson defined on the sales order.
Price Branch	Price Branch on sales order generation.
Ship Branch	Ship Branch on sales order generation.
Direct Ship Indicator	Displays **Stock** or **Direct** indicating if the sales order generation is a direct order or a standard stock order generation.
Product ID	The **Product ID** assigned to the product record in Product Maintenance.
Product Description	Displays the first line of the **Product Description** from Product Maintenance.
Quantity	The **Quantity** for each generation on an order. This is the amount of the product shipped based on the units of measure. For example, if the product is sold in cases, 5 indicates that 5 cases were shipped. The quantity shipped for returns is a negative number.
Unit of Measure	The unit of measure (UOM) for the shipped quantity of the product on the sales order generation.

Export File Column Name	Eclipse Field, Description, or Calculation
Unit Size	Based on the unit of measure used on the sales order, the quantity of the unit of measure from Product Maintenance.
Sell Group	The first sell group defined for the product that is used for the price cube factors and coreness score.
Sell Group Description	The description for the first sell group defined for the product.
Sell Group Used On Order	The sell group used on sales order generation.
Sell Group Description	The sell group description for the product on the sales order generation.
Current SPA Basis	The current sell basis amount on the sales order that includes the price cube factors applied without the matrix discount. **Note:** Prior to Release 9.0.2, this was the **Current SPA Price** column.
Current COGS	The cost-of-goods-sold (COGS) from each line item on the sales order. **Note:** Prior to Release 9.0.2, this was the **Current SPA Cost** column.
System Price at Transaction	The calculated price at the initial order entry point with price cube factors and matrix discounts applied. **Note:** Prior to Release 9.0.2, this was the **SPA Price at Transaction** column.
COGS at Transaction	The cost-of-goods-sold (COGS) on the sales order at the initial order entry point. **Note:** Prior to Release 9.0.2, this was the **SPA Cost at Transaction** column.
Current List	The current list price, as of today's date, from the product price sheet.
Current Cost	The current DFLT-COST, as of today's date, from the product price sheet.
List at Transaction	The list price of the product as of the pricing date on the sales order generation.
Cost at Transaction	The DFLT-COST of the product as of the ship date on the sales order generation.
Customer Unit Price	The actual unit price of each line item on the sales order generation. **Note:** Prior to Release 9.0.2, this was the **Unit Price** column.
Customer Extended Price	The actual extended unit price of each line item on the sales order generation. This is a number is negative for returns. **Note:** Prior to Release 9.0.2, this was the **EXT Unit Price** column.
Unit COGS	The cost-of-goods-sold (COGS) of each product on the sales order.
Extended COGS	Extended cost-of-goods-sold (COGS) of each line item on the order.

Export File Column Name	Eclipse Field, Description, or Calculation
Unit COMM-COST	The unit commission cost (COMM-COST) of each product on the sales order.
Extended COMM-COST	The extended commission cost (COMM-COST) of the products on the sales order.
Product Type	The matrix type for the sell prices on the order, as follows: • CONTRACT - The contract matrix. • CUSTSPEC - Customer specific matrix. • STRATEGIC - Strategic Pricing matrix. • MANOVRD - Manual Override • STANDARD - Standard Eclipse matrix.
Cost Type	The cost override cost type used, if any, as follows: • REGULAR - No cost override. • REBATE - Matrix contains rebate information. • COSTOVRD-COGS - An override exists, but no rebate applied.
Stock Type	The product status defined in Product Maintenance, as follows: STOCK or NONSTOCK.
Price Line	Price line of the product.
Product Status	Status of the product.
Core Status	The core status of the product used on the sales order.
Visibility	The visibility of the first defined sell group for the product.
Manufacturer	The **Vendor ID**, as defined in Vendor Maintenance, that is associated with the first sell group defined for the product. Assign vendors to your sell groups prior to running the export. For more information, see Assigning Vendors to Sell Groups.
Manufacturer Name	The **Vendor Name**, as defined in Vendor Maintenance, that is associated with the first sell group for the product. Assign vendors to your sell groups prior to running the export. For more information, see Assigning Vendors to Sell Groups.
Contract Customer	The customer name on the contract used on the sell matrix.
Current Strategic Price	The calculated strategic price should be today on all lines defined on the export. If there is no strategic pricing matrix cell defined for the product, then the system displays N/A (Not Applicable). **Note:** Prior to Release 9.0.2, this was the **Strategic Unit Price** column.
Current Extended Strategic Price	The calculated extended strategic price on all lines of the export. If there is no strategic pricing matrix cell defined for the product, then the system displays N/A (Not Applicable). **Note:** Prior to Release 9.0.2, this was the **Extended Strategic Unit Price** column.
Writer ID	The writer defined in the header of the sales order generation.
Product G/L Type	The general ledger type defined in Product Maintenance.

Export File Column Name	Eclipse Field, Description, or Calculation
Current Sell Basis name	The current sell basis name used on the matrix or DFLT-SPA Matrix. Manual overrides display N/A (Not Applicable). **New in Release 9.0.2**
Current Matrix Discount	Displays the current matrix formula used on this order. Manual overrides display N/A (Not Applicable). **New in Release 9.0.2**
System Sell Basis at Transaction	Displays the original matrix sell basis was when the order was taken or when the strategic pricing matrix was used. **New in Release 9.0.2**
Extended Strategic Price at Transaction	Displays the extended strategic price at initial order entry, even if Strategic Pricing is not used and matrix discounts applied. **New in Release 9.0.2**
PCF Dollars	Displays the extended strategic price at initial order entry, even if Strategic Pricing is not used. **New in Release 9.0.2**
Strategic Costing	Displays **Yes** for any line that used strategic costing. Would not display on manual overrides. **New in Release 9.0.2**
Bill To Customer Name	The bill-to customer name as defined in Customer Maintenance. **New in Release 9.0.2**

Uploading Data Files from Strategic Pricing Associates

As you are working with Strategic Pricing Associates, they send you multiple files for your review. Work with them to correct any errors or make any changes. When you have finalized your data, depending on your service level, Strategic Pricing Associates sends you the following files that are appropriate for upload into Eclipse. Use these files to ensure accurate data entry for your customers, sell groups, and products.

- Product Core Status (All service tiers)

    The Core Status Assignments file contains all the product ranks for all your products that were included in your export file. Your service tier determines which data from the Core Status Assignments file is included in the upload. The Core Status Assignments file is available at any service level.

    You can change this file using Microsoft Excel before uploading the pricing components into the system, allowing you to review and potentially change any of the data before updating prices.

    For more information, see the following topics:

- Product Core Status Assignments File

- Viewing and Editing Product Core Statuses

- Customer Size/Sensitivity (Platinum Pricing Service tier)

    If you subscribe to the Pricing Service tier at any level, Strategic Pricing Associates provides you a Customer Size and Sensitivity Assignments file that contains customer size and sensitivity assignments for all the customers that were included in your export. No new customer records are created.

    Because the file contains customer numbers and not customer names, upload the file and view it in the Customer Size and Sensitivity Update Queue. Make changes to the suggested customer sizes and sensitivity assignments from within the queue.

    For more information, see the following topics:

- Customer Size and Sensitivity Assignments File

- Reviewing and Updating Customer Sizes

- Reviewing and Updating Customer Sensitivity

- Matrix Sell Group (Any Pricing Service tier)

    If you subscribe to the Pricing Service tier at any level, you also receive a Product Sell Group/Vendor file that when uploaded creates or updates Eclipse matrix cells. If you are using Strategic Pricing, these matrix cells add an additional dimension to your pricing hierarchy within Eclipse.

    For more information, see the following topics:

- Product Sell Group/Vendor File

- Pricing Matrix Hierarchy Details in the Pricing Management documentation.

- Matrix Customer/Product (Any Customer/SKU tier)

If you subscribe to the Customer/SKU tier at any level, Strategic Pricing Associates provides you a Customer/Product file that when uploaded creates and updates sell matrix cells at the product level for a customer.

For more information about the file, see Customer/Product Assignments File.

- Sell Group Visibility (Any service tiers)

  The Sell Groups file contains all the pricing visibility for all your sell groups included in your export file, including core status, coreness scores, and vendor visibility. Your service tier determines which data from the Sell Groups Visibility file is included in the upload. The visibility file is available at any service level.

  You can change this file using Microsoft Excel before uploading the pricing components into the system, allowing you to review and potentially change any of the data before updating prices.

Important: Because these files contain factors and settings that directly affect pricing for your customers, we recommend that you run uploads after normal business hours at the end of the week or over the weekend.

All updates are from the point in time that you complete the upload going forward. Orders that exist in your system prior to the upload are not affected by the pricing changes. If you changed your customer categories after you exported data and sent it Strategic Pricing Associates, your categories in the import files and what exists in your system may no longer match. Any mismatches are logged as errors in your Hold file when you complete the upload.

Strategic Pricing Associates sends you data in a .txt file. You can upload the data directly from the .txt, or change the file to a XML spreadsheet, manipulate the data there, and then upload the XML spreadsheet. If the system encounters an error during the upload, it stops processing at the point of the error and sends an error report to your Hold file with the details about the line in the file caused the error.

To save a .txt file as an XML spreadsheet:

1. Open the .txt file in Microsoft Excel.

   The Text Import Wizard Displays.

2. In Step 1 of 3 of the wizard, select **Delimited** in the **Original data type** field and click **Next**.

3. In Step 2 of 3 of the wizard, select **Tab** in the **Delimiters** field.

   All files your receive for upload from Strategic Pricing Associates are tab delimited files.

4. Click **Finish** to display the content of the file in Excel.

5. Making any necessary changes to the file.

   You can update any data in the file, except the customer service agreement date.

6. From the **File** menu, select **Save As**.

7. In the **Save as type** field, select **XML Spreadsheet** and click **Save**.

To upload pricing data from Strategic Pricing Associates:

1. Save the .txt file as a spreadsheet file in XML format.

2. From the **Files > Price Maintenance > Strategic Pricing** menu, select **File Uploads** to display the Strategic Pricing Uploads screen.

3. In the **Upload Type** field, select the type of data contained in the file you want to upload. See the descriptions above for reference.

> **Important:** Uploading the Product Sell Group/Vendor Pricing Structures and the customer/Product Pricing Structures creates and updates sell matrix cells in your pricing structure. Perform these uploads at a time when it is appropriate to update pricing for your customers.

4. In the **File Nam**e field, enter the path to the file that you wan to upload. To select the file, use the **Choose File** hot key.

5. Use the **Process** hot key and do one of the following to upload the contents of the file:

    - Select **Begin** to upload the contents of the file now.

    - Select **Schedule** to schedule the file to upload at a later time.

Strategic Pricing and Freight Overview

Use strategic freight calculations to increase the actual freight charges on an order to help offset the loss of freight charges for freight exempt customers or reduced freight charges. The system calculates Strategic Freight charges for the ship vias that you indicate as strategic ship vias, and applies them at the order level.

To get started using strategic freight for your customer orders, see the following topics:

- Setting Customers to Use Strategic Freight

- Setting Ship Vias to Use Strategic Freight

- Working with Strategic Freight in Sales Order Entry

Setting Customers to Use Strategic Freight

Use strategic freight calculations to increase the actual freight charges on an order to help offset the loss of freight charges for freight exempt customers or reduced freight charges. You can select which customers you charge strategic freight when they purchase products from you.

To use a strategic freight in order entry, a customer must have a customer category and customer size assigned, and be set to use strategic freight. The ship via on the order must also be set to use strategic freight. For more information, see Setting Ship Vias to Use Strategic Freight.

To set a customer to use strategic freight:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Customer Maintenance** to display the Strategic Pricing Customer Maintenance screen.

2. In the **Customer** field, enter the customer you want to set up to use strategic freight.

3. In the **Use Strategic Freight** field, enter **Y** to indicate you want to use strategic freight for this customer in order entry.

4. Press **Esc** to save your changes and exit the screen.

Setting Ship Vias to Use Strategic Freight

To use the calculated strategic freight for orders using a particular shipping method, you must first enable the ship via for strategic freight and set up how you want the system to calculate the freight; either using a set markup percentage or Freight Cube Modifiers and Freight Cube Factors so the system has all the information it needs to calculate strategic freight for the products on an order.

- If you set a markup percentage, the system calculates the standard freight for the product on an order, and multiplies it by the markup percentage to determine the strategic freight.

- If a freight markup percentage is not defined for the ship via, the system uses the value of a product and its load factor (weight, size, etc.) to determine the Freight Cube Modifier for a product. The system matches the product value to a minimum and maximum range to and uses the modifier assigned to that range. o determine the Freight Cube Factor, the system searches for a product's core status (based on your service tier level), and maps that to the visibility of the vendor (how visible a vendor's pricing is to distributors) assigned to the sell group.

  For more information about how Eclipse calculates strategic freight using the modifiers and factors, see Strategic Freight Calculations - All Data Service Tiers and Strategic Freight Calculations - Platinum Pricing Service Tier.

- If a freight markup percentage is not defined, and the Freight Cube Modifiers and Freight Cube Factors are not defined, and the ship via is flagged to use strategic freight, the system uses the standard freight for the product on the order.

To set a ship via to use strategic freight:

1. From the **Files** > **Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Freight Maintenance** to display the Strategic Pricing Freight Maintenance screen.

2. In the **Ship Via** field, select the shipping method, such as Our Truck or UPS, to display the Freight Cube Modifiers and Freight Cube Factors for that ship via.

3. To indicate that you want to use the calculated strategic freight for orders using this shipping method, enter **Y** in the **Use Strategic Freight** field.

4. Do one of the following:

To...	Do this...
use a set markup percentage when calculating the strategic freight for the ship via	In the **Freight Markup %** field, enter the percentage, such as .25 for a quarter of 1 percent. The system
use modifiers and factors when calculating the strategic freight for the ship via	In the Freight Cube Modifiers table, enter the minimum and maximum modifier values to establish a range from the top of the table to the bottom. In the Freight Cube Factors table, enter the factors that Strategic Pricing Associates provides for each core status and visibility combination.

5. Press **Esc** to save your changes and exit the screen.

Defining Strategic Freight Sensitivity Factors

If you subscribe to the Platinum Pricing Service, your Strategic Pricing data includes an additional factor called sensitivity that you can use in your strategic freight calculations. strategic freight sensitivity is a rank that you can assign to each customer sensitivity level that indicates how reactive a customer is to changes, based on Strategic Pricing Associates market research. strategic freight combines sensitivity ranks for each combination of customer category and size, creating a matrix of freight factors to use during the Strategic Freight calculation. Typically, as the sensitivity level increases, the freight factors decrease.

The sensitivity data expires according to your contract with Strategic Pricing Associates. After the data expires, the strategic freight calculations no longer contain a factor for sensitivity. View the expire date in the Strategic Pricing Customer Maintenance screen.

To define strategic freight sensitivity factors:

1. From the **Files** > **Price Maintenance > Strategic Pricing > Strategic Pricing Maintenance** menu, select **Freight Sensitivity Maintenance** to display the Strategic Pricing Freight Sensitivity Maintenance screen.

2. In the **Customer Sensitivity Level** field, select the customer sensitivity, such as Low or Very High, for which you want to set freight sensitivity factors.

3. For each customer category and size combination, enter the freight sensitivity factor that Strategic Pricing Associates provided to you.

4. Press **Esc** to save your changes.

Strategic Freight Calculations - All Data Service Tiers

The system calculates the strategic freight in one of the following ways:

- Multiplies the standard freight charge by the percentage defined as the freight markup for the ship via, if a markup percentage is set. See Setting Ship Vias to Use Strategic Freight for more information about setting a flat markup percentage for a shipping method.

- If a freight markup percentage is not defined for the ship via, the system uses the value of a product and its load factor (weight, size, etc.) to determine the Freight Cube Modifier for a product. The system matches the product value to a minimum and maximum range to and uses the modifier assigned to that range. o determine the Freight Cube Factor, the system searches for a product's core status (based on your service tier level), and maps that to the visibility of the vendor (how visible a vendor's pricing is to distributors) assigned to the sell group.

  For more information about how Eclipse calculates strategic freight using the modifiers and factors, see below.

Strategic Freight Calculation with Modifiers and Factors

The following conditions are true for the strategic freight calculation using the Freight Cube Modifiers and Freight Cube Factors:

- The product core status is determined by your service level. If the core status for a product at the customer level is not defined, the system uses the core status at the customer category level. If the product does not have a core status assigned at the customer category level, the system uses the core status set at the product level. If the product does not have a core status assigned the system uses the default core status set for the product's sell group. If the product's sell group does not have a default core status set, the system uses a default core status of Non-Core D.

- If the customer does not have a category assigned, the system uses the Core A value from the ship via's Freight Cube Factors table.

- If there are no factors entered in the Freight Cube Factors table in the **Ship Vias** area of the in the strategic freight Maintenance screen, then the system does not calculate a strategic freight charge even if the ship via is flagged to use strategic freight.

If your Data Services Expiration Date has *passed*, the following conditions are true for the strategic freight calculation:

- The system processes all products as Core A, regardless of the product's setting.

- If a Vendor Visibility factor is not set for the product sell group, the system uses Very High.

An order for a total of $255.89 for a Tiny Contractor has two products on it with the following characteristics:

Product	Extended Weight	Sell Group	Visibility Level	Core Status
4 V6X-S	5.25 lbs	TRPL-S	Low	Non-Core C
5 ZW9 D	12.75 lbs	TPPL-A	Very High	Core A

The standard system-calculated freight charge for the ship via on the order is $15.00.

For this example, the Freight Cube Modifiers and the Freight Cube Factors for the ship via are entered as follows. You enter the values in the Freight Cube Modifiers and Freight Cube Factors tables with the information that Strategic Pricing Associates provides to you.

Freight Cube Modifiers				Freight Cube Factors				
Min	<Max	Modifier		Visibility	Core A	Core B	Non-Core C	Non-Core D
0.00	100.00	1.50		Very High	0.05	0.05	0.10	0.12
100.00	200.00	1.00		High	0.05	0.10	0.12	0.15
200.00	500.00	0.70		Medium	0.10	0.12	0.15	0.20
500.00	1500.00	0.50		Low	0.12	0.15	0.20	0.25
1500.00	Max	0.05		Very Low	0.15	0.20	0.25	.25

To calculate strategic freight, the system first prorates the actual freight charge for the products on the order based on their weight using the following calculation:

(Extended Weight of Product / Total Extended Weight of All Products) * Actual Shipment Cost

In this example, the prorated portion of the weight for 4 V6X-S is **(5.25** / **18.00) * 15.00 = 4.3755**. The prorated portion of the weight for 5 ZW9 D is **(12.75 / 18.00) * 15.00 = 10.625**.

The strategic freight charge for each product on the order is determined using the following calculation:

Prorated Freight Cost * [(Freight Cube Factor * Freight Cost Cube Multiplier) + 1]

The modifiers and factors are determined as follows:

Product	Freight Cube Modifier	Freight Cube Factor
4 V6X-S	0.70 based on the order total of $255.89 falling between $200 and $500	0.20 based on a Non-Core C with Low Visibility
5 ZW9 D	0.70 based on the order total of $255.89 falling between $200 and $500	0.05 based on Core A with Very High Visibility

In this example, the strategic freight for the two products on the order is as follows:

Product 4 V6X-S: $4.3755 * [(0.20 * 0.70)] + 1 = $4.9881

Product 5 ZW9D: $10.6245 * [0.05 * 0.70) +1 = $10.9964

Total strategic freight for the order is **$4.9881 + $10.9964 = $15.98**, representing a **6.53%** increase in freight from the original freight charge.

Strategic Freight Calculations - Platinum Pricing Service Tier

The system calculates the strategic freight in one of the following ways:

- Multiplies the standard freight charge by the percentage defined as the freight markup for the ship via, if a markup percentage is set. See Setting Ship Vias to Use Strategic Freight for more information about setting a flat markup percentage for a shipping method.

- If a freight markup percentage is not defined for the ship via, the system uses the value of a product and its load factor (weight, size, etc.) to determine the Freight Cube Modifier for a product. The system matches the product value to a minimum and maximum range to and uses the modifier assigned to that range. o determine the Freight Cube Factor, the system searches for a product's core status (based on your service tier level), and maps that to the visibility of the vendor (how visible a vendor's pricing is to distributors) assigned to the sell group.

  For more information about how Eclipse calculates strategic freight using the modifiers and factors, see below.

Strategic Freight with Modifiers and Factors Including Customer Sensitivity

If you subscribe to the Platinum Pricing Service tier and use customer sensitivity, the strategic freight value is also modified by the customer category/size combination for the customer on the order.

> **Note:** Visibility and product core statuses are determined in the same manner as strategic prices applied to products.

The following conditions are true for the strategic freight calculation:

- The product core status is determined by your service level. If the core status for a product at the customer level is not defined, the system uses the core status at the customer category level. If the product does not have a core status assigned at the customer category level, the system uses the core status set at the product level. If the product does not have a core status assigned the system uses the default core status set for the product's sell group. If the product's sell group does not have a default core status set, the system uses a default core status of Non-Core D.

- If the customer does not have a category assigned, the system uses the Core A value from the ship via's Freight Cube Factors table.

- If there are no factors entered in the Freight Cube Factors table in the **Ship Vias** area of the in the Strategic Freight Maintenance screen, then the system does not calculate a strategic freight charge even if the ship via is flagged to use strategic freight.

If your Data Services Expiration Date has *passed*, the following conditions are true for the strategic freight calculation:

- The system processes all products as Core A, regardless of the product's setting.

- If a Vendor Visibility factor is not set for the product sell group, the system uses Very High.

An order for a total of $255.89 for a Tiny Contractor has two products on it with the following characteristics:

Product	Extended Weight	Sell Group	Visibility Level	Core Status
4 V6X-S	5.25 lbs	TRPL-S	Low	Non-Core C
5 ZW9 D	12.75 lbs	TPPL-A	Very High	Core A

The standard system-calculated freight charge for the ship via on the order is $15.00.

For this example, the Freight Cube Modifiers and the Freight Cube Factors for the ship via are entered as follows. You enter the values in the Freight Cube Modifiers and Freight Cube Factors tables with the information that Strategic Pricing Associates provides to you.

Freight Cube Modifiers

Min	<Max	Modifier
0.00	100.00	1.50
100.00	200.00	1.00
200.00	500.00	0.70
500.00	1500.00	0.50
1500.00	Max	0.05

Freight Cube Factors

Visibility	Core A	Core B	Non-Core C	Non-Core D
Very High	0.05	0.05	0.10	0.12
High	0.05	0.10	0.12	0.15
Medium	0.10	0.12	0.15	0.20
Low	0.12	0.15	0.20	0.25
Very Low	0.15	0.20	0.25	.25

To calculate strategic freight, the system first prorates the actual freight charge for the products on the order based on their weight using the following calculation:

(Extended Weight of Product / Total Extended Weight of All Products) * Actual Shipment Cost

In this example, the prorated portion of the weight for 4 V6X-S is **(5.25 / 18.00) * 15.00 = 4.3755**. The prorated portion of the weight for 5 ZW9 D is **(12.75 / 18.00) * 15.00 = 10.625**.

The strategic freight charge for each product on the order is determined using the following calculation:

Prorated Freight * [(Freight Cube Factor * Freight Cost Cube Multiplier) + 1] * Sensitivity Factor

The modifiers and factors are determined as follows:

Product	Freight Cube Modifier	Freight Cube Factor
4 V6X-S	0.70 based on the order total of $255.89 falling between $200 and $500	0.20 based on a Non-Core C with Low Visibility
5 ZW9 D	0.70 based on the order total of $255.89 falling between $200 and $500	0.05 based on Core A with Very High Visibility

In this example, the strategic freight for the two products on the order is as follows:

Product 4 V6X-S: $4.3755 * [(0.20 * 0.70)] + 1 = $4.9881

Product 5 ZW9 D: $10.6245 * [0.05 * 0.70) +1 = $10.9964

Total = $15.9845

The sensitivity for a Tiny Contractor is 1.0400 as determined by the Customer Sensitivity factors below:

Sensitivity Factor Values

Size	OEM	CASH CUSTOMER	CONTRACTOR	USER	RESELLER
Huge	1.0010	1.0011	1.0025	1.0025	1.0010
Large	1.0025	1.0030	1.0050	1.0050	1.0025
Medium	1.0050	1.0040	1.0100	1.0100	1.0050
Small	1.0075	1.0065	1.0300	1.0300	1.0075
Tiny	1.0100	1.0010	1.0400	1.0400	1.0100
Very Tiny	1.0200	1.0100	1.0500	1.0500	1.0200

The total strategic freight for the order is **$15.9845 * 1.0400 = $16.62**, representing a **10.8%** increase in freight from the original freight charge.

Strategic Pricing Analysis Tools Overview

As you work with Strategic Pricing Associates to continually evaluate your pricing strategy, use the Strategic Pricing analysis tools to track the effectiveness by salesperson, customer category and size, by product group, and by core product status. Tracking and evaluating your pricing helps you to identify areas where you are making the most from using system-calculated strategic prices, to identify where you might have missed a pricing opportunity.

To use the gap analysis tools and the freight analysis tool, you must first build the analysis file. After the data is available, you can view the gaps between the actual price on orders and the strategic price using the following categories:

- Gap analysis by branch

- Gap analysis by salesperson

- Gap analysis by customer

- Freight usage analysis

In addition, you can view the differences between prices that were overridden on an order, and the strategic price. For more information, see Analyzing Strategic Price Overrides, as well has running simulations to see the difference between original prices and strategic prices for customers that are not currently set up to use strategic prices.

Building the Strategic Pricing Analysis File

Prior to viewing the analysis data for strategic prices and strategic freight, run the Strategic Pricing Analysis Build utility to gather data from your sales transactions about how items on orders were priced and how freight was calculated. The system gathers the information for the date range you set. You can then review and analyze the information in the analysis reports.

Only one analysis build file can exist at a time. If you have an existing file, creating a new file overwrites the old file. If you want to analyze data for a different date range, a different branch type, or customer type, you need to rebuild the file with different selections.

> **Note:** The build is not required to analyze price overrides.

To build the Strategic Pricing Analysis file:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Strategic Pricing Analysis Build** to display the Strategic Pricing Analysis Build screen.

2. In the **Start Date** and **End Date** fields, enter the first and last dates in a range of dates for which to collect data.

3. In the **Branch Level** field, select whether to collect data by price branch or ship branch on each order. The selection you make here determines which branch data is available when you analyze the pricing data by branch.

4. In the **Customer Level** field, select whether to collect data by ship-to customer or bill-to customer on each order. The selection you make here determines which customers are included in the file.

5. Do one of the following to create the customer size file:

   - To run the build immediately - Use the **Begin** hot key.

   - To schedule the file to run later - Use the **Opts** hot key, select **Scheduling**, and select when and how often to run the build.

Strategic Pricing Gap Analysis Overview

The gap amount and percentages are a measure of the actual pricing used on an order versus what the system-calculated strategic price for the product would have been, and serves as a measure of how closely actual prices match to the calculated Strategic Pricing rules. Reasons for prices not matching could include:

- A product used contract pricing.

- A user overrode the price on an order.

- A product was placed on the order as an substitute product, using the price of the originally ordered product.

The gap calculation is a ratio of the net price to the strategic price for a product: **Gap = Net Price/Strategic Price**. If a line item on an order used the system-calculated strategic price, the gap is $0 (or 100%, meaning you achieve 100% of the strategic price opportunity).

The calculation does not include the following:

- Lot billing orders

- Credit orders

- Finance charge orders

- Invoices prior to turning on Strategic Pricing

- Invoices that do not have a calculated strategic price, for example, orders for customers that do not have a category or size.

Use the gap analysis tools to review where you made the most using Strategic Pricing, and the areas where you have opportunities to improve. You can view statistics by the following:

- Salesperson

- Customer

- Branch

To get started, build the Strategic Pricing Analysis File.

Analyzing Strategic Price Gaps by Salesperson

As you work to continually evaluate your pricing strategy, use the Sales Writer/Rep analysis tool to evaluate your company's pricing usage as a gap analysis by salesperson or order writer and identify areas where you are making the most from using the system-calculated strategic prices, or where you might have missed a pricing opportunity.

Analyze the pricing performance of each of your inside and outside salespeople or order writers using the following views. Each view contains sales information from the date range you selected when you built the analysis file.

- **Overall** - Use this view to compare strategic price usage by salesperson or writer. This is the default view.

- **Category/Size** - Use this view to compare strategic price usage by salesperson or writer for each customer category and size combination.

- **Customer** - Use this view to compare strategic price usage by salesperson or writer for each customer.

- **Product Sell Group** - Use this view to compare strategic price usage by salesperson or writer for each sell group.

- **Product Core Status** - Use this view to compare strategic price usage by salesperson or writer for each product core status.

- **Vendor** - Use this view to compare strategic price usage by salesperson or writer for each vendor.

Depending on the view you select, specific columns display with information for that view. For example, if you select the **Overall** view, the data in each column is for all transactions for a salesperson or order writer for the dates you selected when you built the analysis file. If you change the view to **Customer**, the data in each column is for all transactions for a salesperson or order writer for each customer, and the view contains a customer ID and customer name. Use the different views to refine what you see to better analyze the benefits you are receiving from Strategic Pricing.

Column	Description
ID	The salesperson's or order writer's system ID.
Salesperson or Writer	The salesperson's or order writer's name.
Actual Sales	The total extended price of all line items the user sold during the selected period.
Actual Cost	The total extended cost of all line items sold during the selected period. The cost displays only if you select the **Include Cost/Profit** check box, and if you have the COST.VIEW or the COGS.VIEW authorization key assigned to you.
GP$	The gross profit in dollars of the total sales for the salesperson or order writer. **Actual Sales – Actual Cost**
GP%	The gross profit as a percentage of the total sales for the salesperson. ((**Actual Sales** – **Actual Cost**) / **Actual Sales**) * 100
Recommended Sales	The total extended price of sales for the salesperson or order writer if the strategic price had been used on each line item sold. **Strategic Unit Price * Quantity Shipped**

Column	Description
Gap$	The difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used. <center>**Recommended Sales – Actual Sales**</center>The gap amount can be a negative amount if you have achieved more than the recommended sales.
Gap%	The difference as a percentage between what was actually sold and the extended price of sales if the strategic price had been used. For example, if 90% displays in this field, you have achieved 90% of the amount in the **Recommended Sales** column. <center>(**Actual Sales** / **Recommended Sales**) * 100</center>The gap percentage can be more than 100% if you have achieved more than the recommended sales.
Gap by Customer size	For each customer size, such as Huge and Medium, the difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used for all customers within a specific size. There is a separate column for each customer size. This column displays in the **Overall** view.
Gap by Customer Category	For each customer category, the difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used for all customers within a category. There is a separate column for each customer category. This column displays in the **Overall** view.
Category	The customer category, such as Contractor. This column displays the **Category/Size** view.
Size	The customer size, such as Medium or Huge. This column displays the **Category/Size** view.
Customer	The customer name as defined in Customer Maintenance. This column displays in the **Customer** view.
Sell Group	The product sell group to which the product represented belongs. This column displays in the **Product Sell Group** view.
Core Status	The status rank of the product, such as Core A. Core statuses are assigned to products at the top of each customer market segment, and are typically the highest in sales amount, highest in visibility, and are products that the customer has a high incentive to shop for price competitors. For more information, see Product Core Statuses Overview. This column displays in the **Product Core Status** view.
Vendor	The vendor assigned to the product group. This column displays in the **Vendor** view.

If you are using Eterm, the analysis displays as a report viewable in your Hold file. You can download the report from their to use in a different program, if necessary.

To analyze strategic price gaps by salesperson:

1. Build the analysis file, if necessary.

2. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Sales Rep/Writer Analysis** to display the Strategic Pricing Sales Rep/Writer Analysis screen.

3. Enter the information you want to include in your analysis.

Field	Description
Salesperson Type	Select how you want to analyze Strategic Pricing information: • **Outside salesperson** - Displays information by primary outside sales representative on an order. This is the default. • **Inside salesperson** - Displays information by primary inside sales representative on an order. • **Order writer** - Displays information by the person who entered the order associated with the invoice.
Salesperson	Select the ID of the user for which you want to analyze Strategic Pricing information. To enter multiple user IDs, use the **Multi** hot key. To include all your salespeople in the analysis, leave this field blank.
Report View	Select the view that you want to include in the report. The view determines which data within the analysis displays. For a description of each view and what it displays, see the explanations above. To change the view at any time, select a new view in this field and regenerate the report.
Show Cost/Profit	Set this field to **Y** to include the cost and profit gap information in the analysis. You must have the COST.VIEW or the COGS.VIEW authorization key assigned to view cost and profit information in the Strategic Pricing analysis tools.
Customer Category	Select the customer category for which you want to view Strategic Pricing usage. To run the analysis for more than one category at a time, use the **Multi** hot key to enter multiple categories. To include all your categories in the analysis, leave this field blank. **Note:** If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.
Customer Size	Select the size, such as Tiny or Huge, for which you want to view Strategic Pricing usage. To run the analysis for more than one customer size at a time, use the **Multi** hot key to enter multiple sizes. To include all customer sizes in the analysis, leave this field blank. **Note:** If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.

3. Set options, if needed, and generate the report.

4. If you selected to include cost and profit information, select whether to include the generic cost, COGS, or none and press **Enter**.

Analyzing Strategic Price Gaps by Customer

As you work to continually evaluate your pricing strategy, use the Customer analysis tools to evaluate your company's pricing usage by customer and identify areas where you are making the most from using the system-calculated strategic prices, or where you might have missed a pricing opportunity.

Analyze the pricing performance for each of your customers using the following views. Each view contains sales information from the date range you selected when you built the analysis file.

- **Overall** - Use this view to compare strategic price usage by customer. This is the default view.

- **Product Sell Group** - Use this view to compare strategic price usage by customer for each sell group.

- **Product Core Status** - Use this view to compare strategic price usage by customer for each product core status.

- **Vendor** - Use this view to compare strategic price usage by customer for each vendor.

Depending on the view you select, specific columns display with information for that view. For example, if you select the **Overall** view, the data is for all transactions for a customer for the dates you selected when you built the analysis file. If you change the view to **Product Core Status**, the data in each column is for all transactions for each customer per core status, and the view contains a **Core Status** column. Use the different views to refine what you see to better analyze the benefits you are receiving from Strategic Pricing.

Column	Description
Customer	The customer's name as defined in Customer Maintenance.
Category	The customer group to which the customer is assigned. For more information, see Customer Categories Overview.
Customer Size	The size, very tiny to huge, to which the customer belongs. For more information, see Customer Sizes Overview.
Actual Sales	The total extended price of all line items on orders for the customer sold during the selected period.
Actual Cost	The total extended cost of all line items on orders during the selected period. The cost displays only if you select the **Include Cost/Profit** check box, and if you have the COST.VIEW or the COGS.VIEW authorization key assigned to you.
GP$	The gross profit in dollars of the total sales for the customer during the selected period. **Actual Sales – Actual Cost**
GP%	The gross profit as a percentage of the total sales for the customer during the selected period. ((**Actual Sales – Actual Cost**) / **Actual Sales**) * 100
Recommended Sales	The total extended price of sales for the customer if the strategic price had been used on each line item sold. Strategic Unit Price * Quantity Shipped

Column	Description
Gap$	The difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used. **Recommended Sales – Actual Sales** The gap amount can be a negative amount if you have achieved more than the recommended sales.
Gap%	The difference as a percentage between what was actually sold and the extended price of sales if the strategic price had been used. For example, if 90% displays in this field, you have achieved 90% of the amount in the **Recommended Sales** column. **(Actual Sales / Recommended Sales) * 100** The gap percentage can be more than 100% if you have achieved more than the recommended sales.
Sell Group	The product sell group to which the product represented for this customer belongs. This column displays in the **Product Sell Group** view.
Core Status	The status rank of the product represented for this customer is assigned. Core statuses are assigned to products at the top of each customers market segment, and are typically the highest in sales amount, highest in visibility, and are products that the customer has a high incentive to shop for price competitors. For more information, see Product Core Statuses Overview. This column displays in the **Product Core Status** view.
Vendor	The vendor assigned to the product group to which the product represented for this customer belongs. This column displays in the **Vendor** view.

If you are using Eterm, the analysis displays as a report viewable in your Hold file. You can download the report from their to use in a different program, if necessary.

To analyze strategic price gaps by Customer:

1. Build the analysis file, if necessary.

2. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Customer Analysis** to display the Strategic Pricing Customer screen.

3. Enter the information you want to include in your analysis.

Field	Description
Customer	Select the customer for which you want to analyze Strategic Pricing information. To enter multiple customers, use the **Multi** hot key. To include all your customers in the analysis, leave this field blank.
Report View	Select the view that you want to include in the report. The view determines which data within the customer analysis displays. For a description of each view and what it displays, see the explanations above. To change the view at any time, select a new view in this field and regenerate the report.

Field	Description
Show Cost/Profit	Set this field to **Y** to include the cost and profit gap information in the analysis. You must have the COST.VIEW or the COGS.VIEW authorization key assigned to view cost and profit information in the Strategic Pricing analysis tools.
Customer Category	Select the customer category for which you want to view Strategic Pricing usage. To run the analysis for more than one category at a time, use the **Multi** hot key to enter multiple categories. To include all your categories in the analysis, leave this field blank. **Note:** If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.
Customer Size	Select the size, such as Tiny or Huge, for which you want to view Strategic Pricing usage. To run the analysis for more than one customer size at a time, use the **Multi** hot key to enter multiple sizes. To include all customer sizes in the analysis, leave this field blank. **Note:** If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.

4. Set options, if needed, and generate the report.

5. If you selected to include cost and profit information, select whether to include the generic cost, COGS, or none and press **Enter**.

Analyzing Strategic Price Gaps by Branch

As you work to continually evaluate your pricing strategy, use the Branch analysis tools to evaluate your company's pricing usage by branch and identify areas where you are making the most from using the system-calculated strategic prices, or where you might have missed a pricing opportunity.

Analyze the pricing performance for each of your branches using the following views. Each view contains sales information from the date range and the branch type you selected when you built the analysis file.

- **Overall** - Use this view to compare strategic price usage by branch. This is the default view.

- **Customer Category/Size** - Use this view to compare strategic price usage by branch for each customer category and size.

- **Customer** - Use this view to compare strategic price usage by branch for each customer.

- **Product Sell Group** - Use this view to compare strategic price usage by branch for each sell group.

- **Product Core Status** - Use this view to compare strategic price usage by branch for each product core status.

- **Vendor** - Use this view to compare strategic price usage by branch for each vendor.

Depending on the view you select, the specific columns display for that view. For example, if you select the **Overall** view, the data represented in the system is for all transactions at either the price branch or ship branch for the dates you selected when you built the analysis file. If you change the view to **Product Core Status**, the data in each column is for all transactions for each branch per core status, and the view contains a **Core Status** column. Use the different views to refine what you see to better analyze the benefits you are receiving from Strategic Pricing.

Column	Description
Branch	The branch ID as defined in Branch Maintenance.
Actual Sales	The total extended price of all line items the user sold during the selected period.
Actual Cost	The total extended cost of all line items sold during the selected period. The cost displays only if you select the **Include Cost/Profit** check box, and if you have the COST.VIEW or the COGS.VIEW authorization key assigned to you.
GP$	The gross profit in dollars of the total sales for the branch. **Actual Sales – Actual Cost**
GP%	The gross profit as a percentage of the total sales for the branch. (**(Actual Sales – Actual Cost**) / **Actual Sales**) * 100
Recommended Sales	The total extended price of sales for the branch if the strategic price had been used on each line item sold. **Strategic Unit Price** * **Quantity Shipped**
Gap$	The difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used. **Recommended Sales – Actual Sales** The gap amount can be a negative amount if you have achieved more than the recommended sales.

Column	Description
Gap%	The difference as a percentage between what was actually sold and the extended price of sales if the strategic price had been used. For example, if 90% displays in this field, you have achieved 90% of the amount in the **Recommended Sales** column. **(Actual Sales / Recommended Sales) * 100** The gap percentage can be more than 100% if you achieved more than the recommended sales.
Gap by Customer Size	For each customer size, such as Huge and Medium, the difference in dollars between what was actually sold and the extended price of sales if the strategic price had been used for all customers within a specific size. There is a separate column for each customer size. This column displays in the **Overall** view.
Category	The customer category, such as Contractor. This column displays in the **Category/Size** view.
Size	The customer size, such as Medium or Huge. This column displays in the **Category/Size** view.
Customer	The customer name as defined in Customer Maintenance. This column displays in the **Customer** view.
Sell Group	The product sell group to which the product belongs. This column displays in the **Product Sell Group** view.
Core Status	The status rank of the product, such as Core A. Core statuses are assigned to products at the top of each customers market segment, and are typically the highest in sales amount, highest in visibility, and are products that the customer has a high incentive to shop for price competitors. For more information, see Product Core Statuses Overview. This column displays in the **Product Core Status** view.
Vendor	The vendor assigned to the product group. This column displays in the **Vendor** view.

If you are using Eterm, the analysis displays as a report viewable in your Hold file. You can download the report from their to use in a different program, if necessary.

To analyze strategic price gaps by branch:

1. Build the analysis file, if necessary.

2. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Branch Analysis** to display the Strategic Pricing Customer screen.

3. Enter the information you want to include in your analysis.

Field	Description
Br/Tr/All	Select the branch or territory for which you want to analyze Strategic Pricing usage. To enter multiple branches or territories, press **F10** and select **Multiple Branches**. To include all your branches and territories in the analysis, type **All**.

Field	Description
Report View	Select the view that you want to use to analyze Strategic Pricing usage. The view determines which data within the Branch analysis displays. For a description of each view and what it displays, see the explanations above.
	To change the view at any time, select a new view in this field and regenerate the report.
Include Cost/Profit	Select this check box to include cost and profit gap information in the analysis.
	You must have the COST.VIEW or the COGS.VIEW authorization key assigned to view cost and profit information in the Strategic Pricing analysis tools.
Customer Category	Select the customer category for which you want to view Strategic Pricing usage. To run the analysis for more than one category at a time, use the **Multiple** button to enter multiple categories.
	To include all your categories in the analysis, leave this field blank.
	If you selected the **Overall** view, you cannot filter by customer category.
	Note: If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.
Customer Size	Select the size, such as Tiny or Huge, for which you want to view price overrides. To run the analysis for more than one customer size at a time, use the **Multi** hot key to enter multiple sizes.
	To include all customer sizes in the analysis, leave this field blank.
	If you selected the **Overall** view, you cannot filter by customer size.
	Note: If you run the analysis for all your categories, it is possible that the analysis data will exceed the viewable area in the Hold file, however, you can download the analysis to review the data.

4. Set options, if needed, and generate the report.

5. If you selected to include cost and profit information, select whether to include the generic cost, COGS, or none and press **Enter**.

Analyzing Strategic Price Overrides

As you work to continually evaluate your pricing strategy, use the Price Override analysis tool to evaluate when a salesperson or order writer overrode a price on an order, and to compare customer-specific and contract pricing to a the system-calculated strategic price. The analysis includes sales transactions that invoiced within the date range you enter in the **Start Date** and **End Date** fields directly in the window.

> **Note:** The Price Override analysis does not require that you build the analysis file.

Analyze pricing overrides using the following views.

- **Overrides** - Use this view to see orders that had a sell price override due to a manual override or re-price on the sales order. This is the default view.

  The **Overrides** view contains the following fields specific to overrides:

Field	Description
Unit Qty	The total number of the product on the order.
UOM	The unit of measure, such as ea (each), of the product on the order.
Original Unit Price	The original price for the product before the override.
Original Ext Price	The original price of the product multiplied by the total quantity ordered.
Override Unit Price	The actual price used for the product on the order.
Override Ext Price	The actual price used for the product multiplied by the total quantity ordered.
Changed By	The system ID of the user who overrode the price on the order.
Change Date	The date the price was overridden, which might be after the date the order was entered.

- **Contract Pricing** - Use this view to compare a contract price on an order to the calculated strategic price.

  The Contract **Pricing** view contains the following fields specific to contract pricing:

Field	Description
Contract Unit Price	The unit price of the product that came from a contract sell matrix cell.
Strategic Unit Price	The system-calculated strategic price that would have been used had the item been priced using a strategic price matrix cell.

- **Customer Pricing** - Use this view to compare a customer-specific price on an order to the calculated strategic price.

  The **Customer** Pricing view contains the following fields specific to customer-specific prices:

Field	Description
Customer Unit Price	The unit price used specifically for the customer from a customer-specific sell matrix cell.
Strategic Unit Price	The system-calculated strategic price that would have been used had the item been priced using a strategic price matrix cell.

Each view contains standard information to help you identify the transaction.

Field	Description
Order	The invoiced sales order generation.
Order Date	The date the order was created.
Ship Branch	The branch from which the order shipped.
User ID, Salesperson, or Writer	Based on the selection in the **Select By** field, the system ID and the name of the outside salesperson, inside salesperson, or the order writer.
Product ID	The system-generated product ID of the product on the order.
Product Description	The description of the product on the order.

If you are using Eterm, the analysis displays as a report viewable in your Hold file. You can download the report from there to use in a different program, if necessary.

To view strategic price overrides:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Freight Analysis** to display the Strategic Pricing Overrides Analysis screen.

2. Enter the information you want to include in your analysis.

Field	Description
Br/Tr All	Select the branch or territory for which you want to analyze freight usage. To enter multiple branches or territories, press **F10** and select **Multiple Branches**. To include all your branches and territories in the analysis, type **All**.
Start Date and End Date	Enter the first and last dates in the time period for which you want to select orders. The system returns only orders invoiced within the date range you select. A start and date is required to run the analysis. The end date defaults to today's date.
Salesperson Type	Select how you want to analyze price overrides: • **Outside salesperson** - Displays the primary outside sales representative on an order. This is the default. • **Inside salesperson** - Displays the primary inside sales representative on an order. • **Writer** - Displays the person who entered the order associated with the invoice.
Salesperson	Select the ID of the user for which you want to view price overrides. To run the analysis for more than one salesperson at a time, use the **Multi** hot key to enter multiple user IDs. To include all your salespeople or order writers in the analysis, leave this field blank.
Report View	Select the view that you want to use to analyze Strategic Pricing usage. The view determines which data within the Branch analysis displays. For a description of each view and what it displays, see the explanations above. To change the view at any time, select a new view in this field and regenerate the report.

Field	Description
Customer Category	Select the customer category for which you want to view price overrides. To run the analysis for more than one category at a time, use the **Multi** hot key to enter multiple categories.
	To include all your categories in the analysis, leave this field blank.
Customer Size	Select the size, such as Tiny or Huge, for which you want to view price overrides. To run the analysis for more than one customer size at a time, use the Multi hot key to enter multiple sizes.
	To include all customer sizes in the analysis, leave this field blank.

2. Set options, if needed, and generate the report.

3. If you selected to include cost and profit information, select whether to include the generic cost, COGS, or none and press **Enter**.

Analyzing the Impact of Strategic Prices for Customers

As you are enabling Strategic Pricing at your site, you can view the impact of setting a customer to use the system-calculated strategic prices prior to changing the **List Price/Cost Method** option for the customer to **Strategic**. Use the Strategic Pricing Simulation Report to view how the original unit price and gross profit amounts would have changed if the strategic price was used on the customers' past invoiced orders.

For information about the details included in the report, see What the Report Includes.

To analyze the impact of strategic prices for customers:

1. From the **File > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Strategic Pricing Simulation Report** to display the Strategic Pricing Simulation Report screen.

2. Enter the selection criteria for the report in the following fields.

Field	Description
Br/Tr/All	Select the branch or territory for which you want to run the pricing simulation. To enter multiple branches or territories, use the **Multi** hot key. To include all your branches and territories in the analysis, type **All**. Branches do not have to be enabled for strategic pricing to be included in the analysis.
Bill-To/Ship-To	Select whether to include invoices for bill-to or ship-to customers in the simulation.
Customers	Enter the customer for which you want to run the simulation. To run the simulation for more than one customer at a time, use the **Multi** hot key to enter multiple customers. To run the simulation for all your customers, leave this field blank.
Start Date and **End Date**	Enter the first and last dates in the time period for which you want to select orders to include in the simulation. The system returns only orders invoiced within the date range you select and excludes strategically priced orders and manual price overrides.
Price As Of	Enter the date that you want to use to price the invoices included in the report. For example, you are running the simulation for orders that were invoiced 6 months ago, well prior to when you implemented Strategic Pricing. You want to see how those invoices would have been priced using the strategic price as of yesterday. Enter yesterday's date in this field to reprice the orders using the system-calculated strategic price as of yesterday.
Detail/Summary	Select whether to run the simulation in full detail mode which includes simulations for each product on an order, or in summary mode which includes simulations by branch.

3. To further narrow the contents of the report, use the **Addl** hot key and enter the additional criteria for the report in the following fields.

Field	Description

Customer Category	Enter the customer category, such as Cash or Contractor, to include only customers in that category in the simulation. To run the simulation for more than one category at a time, use the **Multi** hot key to enter multiple categories. To run the simulation for all your categories, leave this field blank.
Customer Size	Enter the customer size, such as Tiny or Huge, to include only customers assigned that size in the simulation. To run the simulation for multiple sizes at a time, use the **Multi** hot key to enter multiple sizes. To run the simulation for all customers regardless of size, leave this field blank.
Vendor	Enter the vendors to include in the simulation. Entering a vendor in this field limits the simulation to include only information for the products whose sell group has this vendor assigned. To run the simulation for more than one vendor at a time, use the **Multi** hot key to enter multiple vendors. To run the simulation for all vendors, leave this field blank.
Sell Groups	Enter the product sell group to include only orders with products that belong to that sell group in the simulation. To run the simulation for more than one sell group at a time, use the **Multi** hot key to enter multiple sell groups. To run the simulation for all sell groups, leave this field blank.
Misc Charge	Select whether to run the simulation including, excluding, or for only products with a status of Misc Chrg. The default is **Exclude**.
Nonstock	Select whether to run the simulation including, excluding, or for only products with a status of Nonstock. The default is **Include**.
Customer-Specific Matrix Cells	Select whether to run the simulation including orders that were priced using a matrix cell that is defined specifically for a customer. The default is **Include**.
Contract-Specific Matrix Cells	Select whether to run the simulation including orders that were priced using a matrix cell that came from a pricing contract. The default is **Include**.

4. Set options if needed, and generate the report.

What the Report Includes

The Strategic Pricing Simulation Report includes the following information:

Column	Description
Branch	(Summary View Only) The branch for which you ran the report. You can run the report for a single branch, multiple branches, or all your branches.
Customer ID/Name	(Summary View Only) The customer for which you ran the report. You can run the report for a single customer, multiple customers, or all your customers.
Category	(Summary View Only) The strategic pricing customer category to which the customer belongs, such as Contractor. For more information about customer categories, see Customer Categories Overview.

Column	Description
Size	(Summary View Only) The customer size, such as Tiny or Huge, assigned to the customer. For more information about customer sizes and size thresholds, see Customer Sizes Overview.
Order ID	(Summary View Only) The number of the invoiced order for the customer. The report does not include strategically priced orders or those with manual overrides.
Ship Date	(Summary View Only) The date the order shipped from your warehouse.
Original Total	(Summary View Only) The total dollar amount of the order, as it was originally written and priced.
Product ID/Desc	(Detail View Only) The line item on the order.
Sell Group	(Detail View Only) The product sell group to which the product belongs.
Vendor	(Detail View Only) The vendor assigned to the sell group for strategic pricing.
Ship Qty	(Detail View Only) The total quantity of the line item on the order.
UOM	(Detail View Only) The unit of measure in which the product was sold, such as each, or box.
Original Unit Price	(Detail View Only) The priced used on the original order for the line item.
Original Extended Price	(Detail View Only) the price used on the original order for the line item, multiplied by the ship quantity.
Original GP$	The gross profit in dollars of the totals sales of the line item if you are using the Detail view, or for the customer if you are using the Summary view.
Original GP%	The gross profit as a percentage of the totals sales for the line item if you are using the Detail view, or for the customer if you are using the Summary view.
Strategic Unit Price	(Detail View Only) The strategic price as of the date you entered in the **Price as Of** field when you ran the report.
Strategic Extended Price	(Detail View Only) The strategic price as of the date you entered in the **Price as Of** field when you ran the report, multiplied by the quantity of the item on the order.
Strategic Total	(Summary View Only) The strategic price
Strategic GP$	The gross profit amount if the strategic price as of the date you entered in the **Price as of** field was used for the orders.
Strategic GP%	The gross profit as a percentage if the strategic price as of the date you entered in the **Price as of** field was used for the orders.
Change in GP$	(Detail View Only) The difference between the **Original GP$** and the **Strategic GP$**.
Change in GP%	(Detail View Only) The difference between the **Original GP%** and the **Strategic GP%**.

Analyzing Strategic Freight Usage

As you work to continually evaluate your freight costs, use the Freight Recovery Analysis Report to evaluate your company's freight charges and the gap between what you are charging and what you are shipping for no charge.

Analyze the freight recovery rate performance using the following views. Each view contains sales information from the date range you selected when you built the analysis file.

- **Overall Summary** - Use this view to compare strategic freight as a whole by branch. This is the default view.

- **Customer** - Use this view to compare strategic freight usage by customer.

- **Ship Via** - Use this view to compare strategic freight usage by shipping method, such as Our Truck or UPS.

Depending on the view you select, specific columns display with information for that view. For example, if you select the **Overall** view, the data in each column is for all transactions at a branch for the dates you selected when you build the analysis file. If you change the view to **Customer**, the data in each column is for all transactions for each customer, and the view contains a customer ID and customer name. Use the different views to refine what you see to better analyze the benefits you are receiving from using strategic freight on your orders.

Column	Description
Branch	The shipping branch of the order transactions.
Customer	The customer to which the freight was charged. This column displays in the **Customer** view.
Ship Via	The shipping method, such as Our Truck or UPS, that was used to ship the orders. This column displays in the **Ship Via** view.
Actual Freight	The total extended freight of all line items sold on orders at the branch during the period for which the analysis file is built.
Recommended Freight	The total extended freight charge if the strategic freight had been used on each line item sold.
Gap$	The difference in dollars between the freight that was actually charged and the extended strategic freight if the strategic freight had been used. **Recommended Freight** - **Actual Freight** The gap amount can be a negative amount if you have achieved more than the recommended freight.
Gap%	The difference as a percentage between the freight that was actually charged and the extended freight if the strategic freight had been used. For example, if 90% displays in this field, you have achieved 90% of the amount in the **Recommended Freight** column. (**Actual Freight** / **Recommended Freight**) * 100 The gap percentage can be more than 100% if you have achieved more than the recommended freight.

If you are using Eterm, the analysis displays as a report viewable in your Hold file. You can download the report from their to use in a different program, if necessary.

To analyze strategic freight:

1. Build the analysis file, if necessary.

2. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Freight Analysis** to display the Strategic Pricing Freight Analysis screen.

3. Enter the information you want to include in your analysis.

Field	Description
Br/Tr/All	Select the branch or territory for which you want to analyze freight usage. To enter multiple branches or territories, press **F10** and select **Multiple Branches**. To include all your branches and territories in the analysis, type **All**.
Report View	Select the view that you want to include in the report. The view determines which data within the analysis displays. For a description of each view and what it displays, see the explanations above. To change the view at any time, select a new view in this field and regenerate the report.

4. Set options, if needed, and generate the report.

5. If you selected to include cost and profit information, select whether to include the generic cost, COGS, or none and press **Enter**.

Strategic Pricing Impact Analysis Overview

The Strategic Impact Analysis calculates the gross profit percentage (GP%) of all sales for the period entered and is broken down by Strategic Pricing vendor, sell group, customer category, and customer size. We recommend running the Impact Baseline build for one year's worth of sales and the period should be prior to turning on Strategic Pricing. For example, you implemented Strategic Pricing in May of 2009. Run the baseline build for April 2008 to April 2009.

The system pulls the information as a fresh search each time you run a baseline. This means that if you run a baseline build for April 2008 and April 2009, then decide to change the parameters of the build, the system pulls the data like a new report. If you want to keep the first build, save the results to a spreadsheet or other file on your computer before running the build again.

The system uses the calculated GP% to determine the impact of using Strategic Pricing. On the Strategic Pricing Impact Report the GP% is used to calculate the estimated gross profit dollars (GP$) on sales that were strategically priced. The system compares the actual GP$ from the order to the baseline GP$ which indicates the overall impact.

Using the impact report in either detail or summary mode, companies can analyze the benefits of Strategic Pricing and single out sell group/customer category/size combinations and make adjustments. The report shows opportunities to use Strategic Pricing.

Building the Strategic Pricing Impact Baseline

The Strategic Pricing Impact Analysis provides tools to compare how Strategic Pricing helps your overall sales. Use the Strategic Pricing Impact Baseline build to create a starting point from which to compare the gross profit (GP) using Strategic Pricing to the Baseline GP.

You must create a baseline GP% before attempting to determine the impact with the Impact Report. The Baseline GP% is only on the summary mode of the Strategic Pricing Impact Report. The GP% is for the combination of the Strategic Vendor, Sell Group, Customer Category, and Customer Size. The same selection options and filters are available for the Baseline GP% Build as the summary report. Baseline GP% should represent the GP% from the prior year's sales, most likely before Strategic Pricing was used. From the build point on, it can be used as a metric to compare sales impact year to year. Once the build completes, the selection and filters are saved for your reference.

The system builds based on the defined Strategic Pricing parameters. The system uses the following priority to gather and display results:

1. Vendor, Sell Group, Customer Category, Customer Size

2. Vendor, Sell Group, Customer Category

3. Vendor, Sell Group

4. Vendor

5. No Base Line Found

> **Important:** The build may take several hours depending on your business. We recommend scheduling the build during off-hours and using Phantom Throttling to ensure that normal business practices are not interrupted. For more information see, Managing Queued Phantom Processes and Controlling the Number of Phantoms Running.

> **Important:** We recommend using the parameters you define in the build as the parameters for the Strategic Pricing Impact Report to make analysis easier.

Running the Strategic Pricing Impact Report

The Strategic Pricing Impact Report shows opportunities to use Strategic Pricing and helps you analyze the standard matrix pricing and overrides with orders that used Strategic Pricing. This report gives you all sales based on the parameters you select, the impact, and the projected impact by using Strategic Pricing. You can run the report in summary or detail mode.

> **Note:** This report is run for sales orders only. Purchase orders and transfers are not included.

> **Note:** If you use the **Print** or **Hold** options, depending on your authorization level, the system may prompt you to choose whether to view generic (commission) costs, cost of goods sold, or no costs on the report. Select an option to run the report.

To run the Strategic Pricing Impact Report:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Strategic Pricing Impact Report** to display the report driver.

2. In the **Build/Report** field, enter **Report**.

3. In the **Br/Tr/All** field, enter the branch, branches, or territories to include in the report.

4. Use the **Start Date** and **End Date** fields to identify a range of ship dates for which to run the report. These fields support variable dates.

   The system populates this field with the date entered in the **Start Date** field, but you can change it, if needed.

4. Complete the remaining fields, as needed:

Field	Description
Select By	Indicate whether to run the report for price lines, sell groups, customer sizes, customer categories, or sales sources. Your selection determines the label for the next field. For example, if you enter **Price Line** in the **Select By** field, the next field is labeled **Price Line**.
Variable Field	Indicate whether to include, exclude, or run the report only for direct sales. The default is **Exclude**. **Note:** You can only access this field if the **Stock/Non-Stock** field is set to **Include**.
Sort By	Select how to sort the report. The default is **Customer**.
Page Break	Set to **Yes** to insert a page break prior to each new report section based on the value in the **Sort by** field.
Status	Select products for the report by their product status code. Use the **Multi** hot key to enter multiple status codes. ***Multi*** displays in the field. The default is **All**.
Select Branch	Indicate whether data is based on the pricing or shipping branch. The default is **Pricing**.

Field	Description
Customer Level	Indicate whether data is based on the following customer type: **Ship-To or Bill-To**. The default is **Ship-To**.
Detail/Summary	Indicate what level of detail to include on the report: • **Detail** - Displays actual line item information for each combination. The detail mode helps you prove from where the summary numbers were derived. • **Summary** - Based on the combination of sales for the Strategic Pricing vendor, sell group, customer category, and customer size.
Show Kits as Components	Indicate if you want to show kits as their individual components (**Yes**) or as a summary of the kit as a whole (**No**). The default is **Yes**.
Strategic Pricing Vendor	Select one or more vendors to limit the report to only those vendors.
Product Core Status	Select one or more core status codes, such as *Core A* or *Non-Core D*, to limit the report to only those codes.

5. Use the **Status** hot key to display the Product Status Selection screen. Enter one or more product status codes to limit the types of orders from which you want the system to pull data.

6. Use the **Inc/Exc** hot key to limit the product types from which you want the system to pull data.

Field	Description
Stock/Non-Stock	Indicate whether to include or exclude items with a *stock* and *nonstock* product status. For example, if you want to run the report for consignment inventory and you want it *only* for consignment inventory, then select **Exclude**. The default is **Include**.
Directs	Indicate whether to include, exclude, or run the report only for direct sales. The default is **Exclude**. **Note:** You can only access this field if the **Stock/Non-Stock** field is set to **Include**.
Credits	Indicate whether to include, exclude, or run the report only for credit sales. The default is **Exclude**. For example, to run a report that shows the amount of returns for a given period in terms of total sales, use this selection in **Only** mode.

Field	Description
Work Order Material Detail	Indicates whether to include, exclude, or run the report only for sales of work order components placed on a sales order. If you select to include or only run the report for work order material details, the report lists the material detail of the work order, and does not include the finished good. Select **Exclude** to show only the finished goods. The default is **Exclude**. **Note:** If the product on the sales order is a kit item, the report includes only those components that are not part of the kit itself if the **Show Kits as Components** field is set to **Yes**. If the **Show Kits as Components** field is set to **No**, the report includes only the kit item itself.
Vendor Consign	Indicate whether to include, exclude, or run the report only for vendor consignments. If you set this field to **One**, then the **Vendor Customer Consign** field is available. The default is **Exclude**. **Note:** Only the **Vendor Consign** field reports on all inventory adjustments.
Customer Consign	Indicate whether to include, exclude, or run the report only for customer consignments. The default is **Exclude**. **Note:** If this field is set to **One**, then the **Consignment Customer** field activates.
Ven-Cust Consign	Indicate whether to include, exclude, or run the report only for vendor-customer consignments. The default is **Exclude**.
Consignment Vendor	If you select **One** in the **Vendor Consign** field, this field activates. Enter the vendor's name for which you want to run the report. The system skips this field if the **Vendor Consign** field is set to Include or **Exclude**.
Consignment Customer	If you select One in the **Customer Consign** field, this field activates. Enter the customer's name for which you want to run the report. The system skips this field if the **Customer Consign** field is set to Include or **Exclude**.
Manual Override	Select whether to include sales with manual overrides on the prices. The default is **Include**.
Cost Override	Select whether to include sales with cost overrides of any kind on the prices.
Customer Specific Pricing	Select whether to include sales with customer specific pricing. The default is **Include**.
Contract Specific Pricing	Select whether to include sales with contract specific pricing. The default is **Include**.

7. Set options, if needed, and generate the report.

8. Analyze the data results: summary mode or detail mode.

Analyzing the Strategic Pricing Impact in Detail Mode

Use the Strategic Pricing Impact Report to analyze how using Strategic Pricing influences your final sales. Run the report in Detail Mode for product-level information and comparison.

This mode displays all sales based on your selection in line item detail. This detail includes what the actual sell price was but also compares to the standard matrix pricing you would normally have used if Strategic Pricing was not enabled or if you did not override the sell price of the product. The results of these comparisons display as the impact measured in dollars or percentage of the two prices.

> **Note:** As with most Eclipse Reports, the header of the report displays both the report date parameters and the baseline parameters used in addition to the include and exclude options.

After running the Strategic Pricing Impact Report, access the report, and review the following columns. We recommend downloading the data to a spreadsheet for reviewing.

Field/Column	Description
CustID	The customer's auto-assigned number generated by Eclipse.
Customer Name	The full customer name as listed in Customer Maintenance.
Category	The Strategic Pricing category defined in Strategic Pricing Sell Group Maintenance.
Size	The Strategic Pricing customer size defined in Strategic Pricing Sell Group Maintenance. This is based on either overall sales dollars or quantity and assigned to your customers, such as Tiny or Huge.
Order#	The order's auto-assigned number generated by Eclipse, including any generation number if the order is split and the product is on more than one generation.
PrcBr	The pricing branch for the order.
ShipBr	The shipping branch for the order.
Stk/Dir	Indicates if the product was on a standard order or the direct generation of the order.
ShipDate	The date the item shipped from the warehouse.
Inside	Lists the user ID of the inside salesperson as listed on the Sales Order Header.
Outside	Lists the user ID of the outside salesperson as listed on the Sales Order Header.
Writer	Lists the user ID of the person who created the order as listed on the Sales Order Header.
Vendor	The Strategic Pricing vendor assigned to the sell group of the product that was used in pricing.
SellGrp	The product's sell group used on the sales order.
Visibility	The visibility defined in Strategic Pricing Sell Group Maintenance.. Displaying this helps determine if you have the Strategic Pricing cube set correctly. Sensitivity rankings range from Very Low to Very High.
ProdID	The product's auto-assigned number generated by Eclipse.
ProductDesc	The full description of the product as listed in Product Maintenance.
ProdStatus	The product status at the time of the order, such as **Stock** or **Non-Stock**.
CoreST	The Strategic Pricing core assigned to the product defined in Strategic Pricing Sell Group Maintenance..

Field/Column	Description
QtyShip	The number of products shipped on the order.
UnitPrc	The individual price as set up in Product Maintenance.
ExtAmt	The extended unit price from the sales order. This extended amount reflects any pricing-per-unit of measure or pricing-per-quantity information defined in Product Price Sheet Maintenance.
ExtCOGS	The extended cost of goods sold (COGS) for the product on the order.
GP$	The gross profit in dollars of the total sales for the product on the order.
GP%	The gross profit percentage calculated for the product.
OvrdFlag	The symbol used to indicate an override type as displayed on the unit price for the product on the order.
OvrdType	The override type as indicated by the symbol in the **OvrdFlag** column: • ***** - Manual override • **#** - Customer Matrix override • **^** - Strategic Pricing Matrix override
TransType	The transaction type for the product: **Standard** or **Strategic Pricing**.
StdPrc	If the product was priced using Strategic Pricing then this price represents the unit price prior to using Strategic Pricing. If Strategic Pricing was *not used* then this price matches the sales order's unit price.
ExtStdPrice	The extended price for the product on the order.
Impact$	The overall impact in dollars comparing the unit price on the sales order to the standard price. If Strategic Pricing was used, then this price would represent the dollars made or lost by using Strategic Pricing.
Impact%	The overall gross profit percentage (GP%) increase or decrease (what you gained or lost) by using Strategic Pricing or a manual override for the product. For example, your columns populate as follows: **Strategic Price** = $ 9.12 **Standard Price** = $ 8.98 **Impact$** = $ 0.14 **Impact%** = 1.60% The **Impact%** column represents the percentage increase from the standard price.
StdMatrix	The standard price of the product. Helps users see how the system calculated the alternate price displayed in the **StdPrice** column.

Analyzing the Strategic Pricing Impact in Summary Mode

Use the Strategic Pricing Impact Report to analyze how using Strategic Pricing influences your final sales. Run the report in Summary mode for sell group, customer size, and customer category information and comparison.

The report is split into different sections: defined parameters, strategic pricing, non-strategic pricing with overrides, and non-strategic pricing with matrix pricing:

- **Defined Parameters Columns** - Based on the selection when the report runs. The parameters, such as defined price lines or the branch selection, should match the parameters defined in your baseline build. By matching the parameters, the report analysis becomes easier.

Field/Column	Description/Calculation
VendID	The vendor's auto-assigned number generated by Eclipse during vendor setup in Vendor Maintenance.
Vendor	The SPA* vendor defined in Strategic Pricing Sell Group Maintenance.
Sell Group	The strategic pricing sell group used on the sales order.
Category	The Strategic Pricing customer's category as defined in Strategic Pricing Customer Maintenance. This label is assigned to customers to define the various markets to which you sell. For more information, see Defining Customers Size/Category Sell Matrix Cells.
Size	The Strategic Pricing customer size as defined in Strategic Pricing Customer Maintenance. The size is based on either overall sales dollars or quantity and assigned to your customers, such as Tiny or Huge.
Baseline Margin%	Built by running the Strategic Pricing Impact Baseline. This percentage is required for the Summary Report and represents the gross profit percentage (GP%) on sales for the branches and period defined by the user.
	The percentage should be the GP% on sales prior to turning on Strategic Pricing. This gives you a comparison between GP% before and after turning on Strategic Pricing. GP% is based on the combination of vendor, sell group, customer category and customer size.
	Calculation: (Price - Cost) / Price x 100

*Strategic Pricing Associates pricing

- **Strategic Pricing Columns** - The results of using the Strategic Pricing Associates recommended settings.

Field/Column	Description/Calculation
TotalSales$ SPA*	The total sales dollars for any order priced with Strategic Pricing. The sell basis is StrgcList or StrgcCost.
TotalCost$ SPA or TotalCOGS$	The total COMM-COST or cost-of-goods-sold (COGS) dollars of any order priced using Strategic Pricing. The sell basis is StrgcList or StrgcCost.
	Note: The column name is determined by your cost selection.

Field/Column	Description/Calculation
GP$ SPA	The gross profit dollars of any order priced using Strategic Pricing. The sell basis is StrgcList or StrgcCost. **Calculation:** Strategic Price - Cost
GP% SPA	The gross profit percentage of any order priced using Strategic Pricing. The sell basis is StrgcList or StrgcCost. **Calculation:** Strategic Price Analysis Base %
GP$ at Baseline% SPA	The gross profit dollars that would be made if the order were prices using the Baseline GP%. User can see the dollar difference between Strategic Pricing GP$ and the Baseline GP$. **Calculation:** (Strategic Price x Baseline Margin %) / 100
Impact $ SPA	The overall impact in dollars by using Strategic Pricing. This value can be negative or positive. **Calculation:** (GP$SPA - GP$ at Baseline %)

*Strategic Pricing Associates pricing

- **Non-Strategic Pricing Overrides** - The current results of non-strategically priced products.

Field/Column	Description/Calculation
TotalSales$ NonSPA (Ovrds)	The total dollars of any order where the sell price of a product has been overridden.
TotalCost$ or Total COGS$ NonSPA (Ovrds)	The total COMM-COST or cost-of-goods-sold (COGS) dollars of the total sales for non-strategic pricing for orders that have been overridden. **Note:** The column name is determined by your cost selection.
GP$ NonSPA (Ovrds)	The gross profit in dollars of any order where the sell price of a product has been overridden. **Calculation:** Override Price - Cost
GP% NonSPA (Ovrds)	The gross profit percentage of any order where the sell price of a product has been overridden. **Calculation:** (Override Price - Cost) / Override Price x 100
Strategic Base% SPA	The gross profit percentage (GP%) that would be made if Strategic Pricing had been used instead of overriding the sell price.
GP$ at SPA Base %	The gross profit dollars if the Strategic Base% was used. **Calculation:** (Cost x SPA Base %) - Cost
Impact $ NonSPA (Ovrds)	The overall impact in dollars by using Strategic Pricing. This value can be negative or positive. **Calculation:** GP$ Non-SPA (Ovrds)- GP$ at Non-SPA Base %

*Strategic Pricing Associates pricing

- **Non-Strategic Pricing Matrix Pricing** - The current results of non-strategically priced products.

Column	Description/Calculation
TotalSales$ NonSPA (Matrix)	The total sales dollars of any order using a Standard Eclipse Matrix (non-SPA*).

Column	Description/Calculation
TotalCost$ NonSPA (Matrix)	The total COMM-COST or cost-of-goods-sold (COGS) of any order using a Standard Eclipse Matrix (non-SPA*).
GP$ NonSPA (Matrix)	The total gross profit dollars of any order using a Standard Eclipse Matrix (non-SPA*). **Calculation:** Standard Price - Cost
GP% NonSPA (Matrix)	The total gross profit percentage of any order using a Standard Eclipse Matrix (non-SPA*). **Calculation:** (Standard Price - Cost) / Standard Price x 100
Strategic Base% NonSPA	The gross profit percentage that would be made if the Strategic Base% was used instead of the standard matrix pricing.I'm **Calculation:** (Strategic Price - Cost) / Strategic Price x 100
GP$ at NonSPA Base %	The gross profit dollars if strategic pricing had been used. **Calculation:** (Cost x SPA Base %) - Cost
Impact $ NonSPA (Matrix)	The overall impact in dollars by using Strategic Pricing. This value can be negative or positive. **Calculation:** GP$ Non SPA (Matrix) - GP$ at NonSPA Base %
% of Sales @ SPA Price	The percentage of strategic sales compared to all other sales. **Calculation:** Strategic Price / (Strategic Price + Override Price + Standard Price)

*Strategic Pricing Associates Pricing

Strategic Pricing Reports

In addition to the analysis tools, you can run the following Strategic Pricing reports to review your pricing information as it relates to your Strategic Pricing setup.

- Strategic Pricing Impact Report
- Matrix Pricing Report
- Category-Product Core Status Report
- Customer-Product Core Status Report

Running the Strategic Pricing Impact Report

The Strategic Pricing Impact Report shows opportunities to use Strategic Pricing and helps you analyze the standard matrix pricing and overrides with orders that used Strategic Pricing. This report gives you all sales based on the parameters you select, the impact, and the projected impact by using Strategic Pricing. You can run the report in summary or detail mode.

> **Note:** This report is run for sales orders only. Purchase orders and transfers are not included.

> **Note:** If you use the **Print** or **Hold** options, depending on your authorization level, the system may prompt you to choose whether to view generic (commission) costs, cost of goods sold, or no costs on the report. Select an option to run the report.

To run the Strategic Pricing Impact Report:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Strategic Pricing Impact Report** to display the report driver.

2. In the **Build/Report** field, enter **Report**.

3. In the **Br/Tr/All** field, enter the branch, branches, or territories to include in the report.

4. Use the **Start Date** and **End Date** fields to identify a range of ship dates for which to run the report. These fields support variable dates.

   The system populates this field with the date entered in the **Start Date** field, but you can change it, if needed.

4. Complete the remaining fields, as needed:

Field	Description
Select By	Indicate whether to run the report for price lines, sell groups, customer sizes, customer categories, or sales sources. Your selection determines the label for the next field. For example, if you enter **Price Line** in the **Select By** field, the next field is labeled **Price Line**.
Variable Field	Indicate whether to include, exclude, or run the report only for direct sales. The default is **Exclude**. **Note:** You can only access this field if the **Stock/Non-Stock** field is set to **Include**.
Sort By	Select how to sort the report. The default is **Customer**.
Page Break	Set to **Yes** to insert a page break prior to each new report section based on the value in the **Sort by** field.
Status	Select products for the report by their product status code. Use the **Multi** hot key to enter multiple status codes. ***Multi*** displays in the field. The default is **All**.
Select Branch	Indicate whether data is based on the pricing or shipping branch. The default is **Pricing**.

Field	Description
Customer Level	Indicate whether data is based on the following customer type: **Ship-To or Bill-To**. The default is **Ship-To**.
Detail/Summary	Indicate what level of detail to include on the report: • **Detail** - Displays actual line item information for each combination. The detail mode helps you prove from where the summary numbers were derived. • **Summary** - Based on the combination of sales for the Strategic Pricing vendor, sell group, customer category, and customer size.
Show Kits as Components	Indicate if you want to show kits as their individual components (**Yes**) or as a summary of the kit as a whole (**No**). The default is **Yes**.
Strategic Pricing Vendor	Select one or more vendors to limit the report to only those vendors.
Product Core Status	Select one or more core status codes, such as *Core A* or *Non-Core D*, to limit the report to only those codes.

5. Use the **Status** hot key to display the Product Status Selection screen. Enter one or more product status codes to limit the types of orders from which you want the system to pull data.

6. Use the **Inc/Exc** hot key to limit the product types from which you want the system to pull data.

Field	Description
Stock/Non-Stock	Indicate whether to include or exclude items with a *stock* and *nonstock* product status. For example, if you want to run the report for consignment inventory and you want it *only* for consignment inventory, then select **Exclude**. The default is **Include**.
Directs	Indicate whether to include, exclude, or run the report only for direct sales. The default is **Exclude**. **Note:** You can only access this field if the **Stock/Non-Stock** field is set to **Include**.
Credits	Indicate whether to include, exclude, or run the report only for credit sales. The default is **Exclude**. For example, to run a report that shows the amount of returns for a given period in terms of total sales, use this selection in **Only** mode.

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Field	Description
Work Order Material Detail	Indicates whether to include, exclude, or run the report only for sales of work order components placed on a sales order. If you select to include or only run the report for work order material details, the report lists the material detail of the work order, and does not include the finished good. Select **Exclude** to show only the finished goods. The default is **Exclude**. **Note:** If the product on the sales order is a kit item, the report includes only those components that are not part of the kit itself if the **Show Kits as Components** field is set to **Yes**. If the **Show Kits as Components** field is set to **No**, the report includes only the kit item itself.
Vendor Consign	Indicate whether to include, exclude, or run the report only for vendor consignments. If you set this field to **One**, then the **Vendor Customer Consign** field is available. The default is **Exclude**. **Note:** Only the **Vendor Consign** field reports on all inventory adjustments.
Customer Consign	Indicate whether to include, exclude, or run the report only for customer consignments. The default is **Exclude**. **Note:** If this field is set to **One**, then the **Consignment Customer** field activates.
Ven-Cust Consign	Indicate whether to include, exclude, or run the report only for vendor-customer consignments. The default is **Exclude**.
Consignment Vendor	If you select **One** in the **Vendor Consign** field, this field activates. Enter the vendor's name for which you want to run the report. The system skips this field if the **Vendor Consign** field is set to Include or **Exclude**.
Consignment Customer	If you select One in the **Customer Consign** field, this field activates. Enter the customer's name for which you want to run the report. The system skips this field if the **Customer Consign** field is set to Include or **Exclude**.
Manual Override	Select whether to include sales with manual overrides on the prices. The default is **Include**.
Cost Override	Select whether to include sales with cost overrides of any kind on the prices.
Customer Specific Pricing	Select whether to include sales with customer specific pricing. The default is **Include**.
Contract Specific Pricing	Select whether to include sales with contract specific pricing. The default is **Include**.

7. Set options, if needed, and generate the report.

8. Analyze the data results: summary mode or detail mode.

Running the Matrix Pricing Report

The Matrix Pricing Report is required for Strategic Pricing Associates during their annual review of your sales history information.

For more information about the columns that display on the report, see What the Report Shows below.

To run the Matrix Pricing Report:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Matrix Pricing Report** to display the report driver.

    The system populates the header area with the following information:

Field	Description
Design ID*	The system's ID name of the report design: SPA.MATRIX.PRC.
File Name*	The name of the Solar Eclipse file from which the data for the report is obtained: MATRIX.
Width*	The width of the report, based on the number of characters, from the left side of the report to the right side of the report, including the spaces between columns.
Sample	If designated on the Report Writer/Mass Load Design screen, the number of selected records to which the report was limited.
Created*	The date the report design was last created.
By*	The name of the user who created the report design.
Title*	The name of the report that displays on the heading of each page in the report, and as the Report Title in the Report Queue window.

    * View Only

2. Use the following hot keys, as needed, for additional report parameters:

Hot Key	Description
Opts	Select how to you want to report to be sent to you.
Column Data	Indicate which additional columns you want to add to the report. If this hot key is not highlighted, there are no additional columns to add or the dictionary selected does not require this information..
Selection Data	Select additional parameters for which to run the report. If this hot key is not highlighted, there are no additional parameters to select.
Notes	Select to display the user notes that were entered for this report design in the Report Writer/Mass Load Design window. Notes display in a view only mode.

3. Set options, if needed, and generate report.

What the Report Shows

The Matrix Pricing Report show the following column information:

Column	Description
BR	The branch number or name.

Column	Description
SPA CustSize	The customer size as indicated in Strategic Pricing setup parameters.
SPA Cust Cat	The customer category as indicated in Strategic Pricing setup parameters.
Sell Group	The sell group ID.
Sell Group Name	The sell group name.
Default	The Default Sell Basis Name.
Dlft Form	The Default Sell Basis Formula.
CoreA	The Core A Sell Basis Name.
CoreA Form	The Core A Sell Basis Formula.
Core B	The Core B Sell Basis Name.
CoreB Form	The Core B Sell Basis Formula.
NonCoreC	The Non-Core C Sell Basis Name.
NonCoreC Form	The Non-Core C Sell Basis Formula.
NonCoreD	The Non-Core D Sell Basis Name.
NonCoreD Form	The Non-Core D Sell Basis Formula.
Eff Date	The effective date for the pricing matrix.
Exp Date	The expiration date for the pricing matrix.
VenID-SellGrp	The vendor ID on the Sell Group.

Running the Category-Product Core Status Report

Use the Category-Product Core Status Report to review core status by category and product.

For more information about the columns that display on the report, see What the Report Shows below.

To run the Category-Product Core Status Report:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Category-Product Core Status** to display the report driver.

   The system populates the header area with the following information:

Field	Description
Design ID*	The system's ID name of the report design: SPA_PROD_CORE_ST.
File Name*	The name of the Solar Eclipse file from which the data for the report is obtained: PRODUCT.
Width*	The width of the report, based on the number of characters, from the left side of the report to the right side of the report, including the spaces between columns.
Sample	If designated on the Report Writer/Mass Load Design screen, the number of selected records to which the report was limited.
Created*	The date the report design was last created.
By*	The name of the user who created the report design.
Title*	The name of the report that displays on the heading of each page in the report, and as the Report Title in the Report Queue window.

2. Use the following hot keys, as needed, for additional report parameters:

Hot Key	Description
Opts	Select how to you want to report to be sent to you.
Column Data	Indicate which additional columns you want to add to the report. If this hot key is not highlighted, there are no additional columns to add.
Selection Data	Select additional parameters for which to run the report. If this hot key is not highlighted, there are no additional parameters to select.
Notes	Select to display the user notes that were entered for this report design in the Report Writer/Mass Load Design window. Notes display in a view only mode.

3. Set options, if needed, and generate report.

Running the Customer-Product Core Status Report

The Customer-Product Core Status Report is required for Strategic Pricing Associates during their annual review of your sales history information.

For more information about the columns that display on the report, see What the Report Shows below.

To run the Customer-Product Core Status Report:

1. From the **Files > Price Maintenance > Strategic Pricing > Strategic Pricing Analysis** menu, select **Customer-Product Core Status** to display the report driver.

   The system populates the header area with the following information:

Field	Description
Design ID*	The system's ID name of the report design: SPA_CUST_PROD_ST.
File Name*	The name of the Solar Eclipse file from which the data for the report is obtained: SPRC.CUSTOMER.
Width*	The width of the report, based on the number of characters, from the left side of the report to the right side of the report, including the spaces between columns.
Sample	If designated on the Report Writer/Mass Load Design screen, the number of selected records to which the report was limited.
Created*	The date the report design was last created.
By*	The name of the user who created the report design.
Title*	The name of the report that displays on the heading of each page in the report, and as the Report Title in the Report Queue window.

2. Use the following hot keys, as needed, for additional report parameters:

Hot Key	Description
Opts	Select how to you want to report to be sent to you.
Column Data	Indicate which additional columns you want to add to the report. If this hot key is not highlighted, there are no additional columns to add.
Selection Data	Select additional parameters for which to run the report. If this hot key is not highlighted, there are no additional parameters to select.
Notes	Select to display the user notes that were entered for this report design in the Report Writer/Mass Load Design window. Notes display in a view only mode.

3. Set options, if needed, and generate report.

What the Report Shows

The Customer-Product Core Status Report show the following column information:

Column	Description
ID	The product ID.
Default	The Default Product Core Status.

Column	Description
SPRC_CAT_CORE_1	Product Core Status by respective category.
SPRC_CAT_CORE_2	
SPRC_CAT_CORE_3	
SPRC_CAT_CORE_4	
SPRC_CAT_CORE_5	
SPRC_CAT_CORE_6	

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