

**INZANT SALES  
PRICING MODULE  
EXCEL LOADER  
  
TRAINING NOTES**



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## Revision History

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# 1 Executive Summary

The Inzant Sales Pricing Module allows for the configuration of complex pricing and discounting structures. The pricing rules are stored and processed in the cloud services for orders raised on the iPads and Management Web Client. Additionally there is a Price Check button that allows orders to be processed with the pricing rules prior to submission of the orders.

The Pricing Module is designed to be automatically configured from Client ERP systems however to make the Pricing Module available to users without ERP systems that support complex pricing we have produced a management Excel spreadsheet.

These training notes are designed to assist with the configuration of the Excel spreadsheet to allow the loading of pricing rules.

## 2 Spreadsheet Operation

The spreadsheet is designed to dynamically select the columns that need to be completed for the different Pricing Rules. Additionally the columns are setup to provide lookup settings for each pricing rule where appropriate. This has the effect of minimising the potential for errors in the configuration of the pricing rules.

### 2.1 Pricing Rules

The following Pricing Rules are available for use in the Pricing Module:

Name	Description
All Retailer, Product, Discount	An individual product will be assigned a discount value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts.
All Retailers, Group Product, Individual Discount	A group of products will be assigned a discount value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
All Retailers, Group Product, Group Discount	A group of products will be assigned a discount value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the quantity of all products in the group.
All Retailers, Product, Price	An individual product will be assigned a price value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts.
All Retailers, Group Product, Individual Price	A group of products will be assigned a price value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
All Retailers, Group Product, Group Price	A group of products will be assigned a price value for all retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the quantity of all products in the group.

Group Retailer, Product, Discount	An individual product will be assigned a discount value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for discounts.
Group Retailers, Group Products, Individual Discount	A group of products will be assigned a discount value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
Group Retailers, Group Products, Group Discount	A group of products will be assigned a discount value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the quantity of all products in the group.
Group Retailer, All Products, Individual Discount	All products will be assigned a discount value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
Group Retailers, All Products, Group Discount	All products will be assigned a discount value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the quantity of all products in the group.
Group Retailer, Product, Price	An individual product will be assigned a price value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for prices.
Group Retailers, Group Products, Individual Price	A group of products will be assigned a price value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for prices. The quantity used in the rule is based on the individual product.
Group Retailers, Group Products, Group Price	A group of products will be assigned a price value for a group of retailers. This rule also facilitates the implementation of quantity breakpoints for prices. The quantity used in the rule is based on the quantity of all products in the group.

Retailer, Product, Discount	An individual product will be assigned a discount value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for discounts.
Retailer, Group Product, Individual Discount	A group of products will be assigned a discount value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
Retailer, Group Product, Group Discount	A group of products will be assigned a discount value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the quantity of all products in the group.
Retailer, All Products, Discount	All products will be assigned a discount value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for discounts. The quantity used in the rule is based on the individual product.
Retailer, Product, Price	An individual product will be assigned a price value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for prices.
Retailer, Group Product, Individual Price	A group of products will be assigned a price value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for prices. The quantity used in the rule is based on the individual product.
Retailer, Group Product, Group Price	A group of products will be assigned a price value for an individual retailer. This rule also facilitates the implementation of quantity breakpoints for prices. The quantity used in the rule is based on the quantity of all products in the group.

## **2.2 Entering the Rules**

The following information details how to complete the spreadsheet columns. A row should be completed for every discount in the system. For a discount type that has multiple quantity breakpoints, a row will be required for every different breakpoint.

There should be no blank rows in the spreadsheet as the processor will not process any rows that follow a blank row.

The spreadsheet also allows for column filtering to select related discounts that have been previously entered to enable quick access to rules that already exist.

### **2.2.1 Pricing Rule Type**

This is the first column to complete for a new pricing rule entry. The field is setup to present the available options using a list box selector. Once a rule type is selected the fields that are required will be known as unrelated fields are greyed out.

### **2.2.2 Supplier**

This field allows for discounts to be linked to a specific supplier. The field is setup to present the available options using a list box selector. If the Supplier field is left blank then the rule will be applied for all suppliers.

*Note: If this field is not relevant for your Inzant Sales implementation the field will be hidden.*

### **2.2.3 Retailer Account Number**

Where a rule type is for a specific retailer, this field will be enabled. The field is setup to allow free text to be entered. The Inzant Retailer Account number should be entered into this field.

### **2.2.4 Retailer Group Field**

Where a rule type is for a group of retailers, this field will be enabled. The field is setup to present the available options using a list box selector.

### **2.2.5 Retailer Group Identifier**

Where a rule type is for a group of retailers, this field will be enabled. The field is setup to allow free text to be entered. The text entered in the field will be the value appropriate for the Retailer Group Field selection for the actual group of retailers.

### **2.2.6 Product Code**

Where a rule type is for a specific product, this field will be enabled. The field is setup to allow free text to be entered. The Inzant Product Code number should be entered into this field.

### **2.2.7 Product Group Field**

Where a rule type is for a group of products, this field will be enabled. The field is setup to present the available options using a list box selector.



### 2.2.8 Product Group Identifier

Where a rule type is for a group of products, this field will be enabled. The field is setup to allow free text to be entered. The text entered in the field will be the value appropriate for the Product Group Field selection for the actual group of products.

### 2.2.9 Min Quantity

This field allows for a minimum quantity of products to be specified before the pricing rule is applied. It is therefore possible to setup the duplicate rules with different quantities to provide quantity breakpoints.

### 2.2.10 Wholesale Price

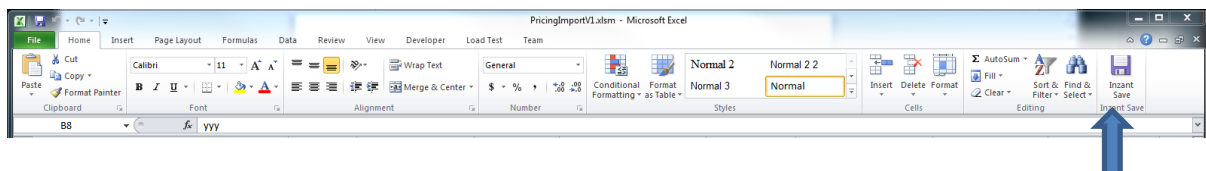
Where a rule type is for a fixed wholesale price, this field will be enabled. . The field is setup to allow free text to be entered. The actual product price for the product should be entered into this field.

### 2.2.11 Discount Percent

Where a rule type is for a discount, this field will be enabled. . The field is setup to allow free text to be entered. The actual discount for the product should be entered into this field.

## 2.3 Spreadsheet Import Process

To upload the pricing configuration we have included an “Inzant Save” button in the Home ribbon. This button will save a importable version of the spreadsheet in the same loacation on your computer with a txt extension.



The txt file should then be emailed to your Inzant system where it will be automatically imported. Once the import process is complete you will receive a confirmation email message.

*Note: We will provide you with the email address for the import process.*



## 2.4 Examples

We have provided some common examples of different discounting options. If you require further assistance please contact Inzant Support.

### Group Retailers, Group Products, Individual Discount (with quantity break points)

Pricing Rule Type	Supplier	Retailer Account Number	Retailer Group Field	Retailer Group Identifier	ProductCode	Product Group Field	Product Group Identifier	Min Quantity	Wholesale Price	Discount Percent
Group Retailers, Group Products, Individual Discount			Group	Amcal		Full Product Category Path	\Lollies\Red	5		7.5
Group Retailers, Group Products, Individual Discount			Group	Amcal		Full Product Category Path	\Lollies\Red	10		10

This example provided the following discount structure

For all retailers that have their Group field set to Amcal, any products that are in the Category Lollies, (sub category) Red, will have a 7.5% discount applied if 5 or more of an individual product is ordered. If 10 or more of an individual products is ordered then a 10% discount will be applied to that individual product.

### Group Retailers, Group Products, Group Discount (with quantity break points)

Pricing Rule Type	Supplier	Retailer Account Number	Retailer Group Field	Retailer Group Identifier	ProductCode	Product Group Field	Product Group Identifier	Min Quantity	Wholesale Price	Discount Percent
Group Retailers, Group Products, Group Discount			Group	Independent Pharmacy		Full Product Category Path	\Sweets\Green	10		5
Group Retailers, Group Products, Group Discount			Group	Independent Pharmacy		Full Product Category Path	\Sweets\Green	20		7.5

This example provided the following discount structure

For all retailers that have their Group field set to Amcal, any products that are in the Category Sweets, (sub category) Green, will have a 5% discount applied if 5 or more of any products in the category are ordered. If 10 or more of the products in the category are ordered then a 10% discount will be applied to the group of products.



### Retailer, Product, Discount

Pricing Rule Type	Supplier	Retailer Account Number	Retailer Group Field	Retailer Group Identifier	ProductCode	Product Group Field	Product Group Identifier	Min Quantit	Wholesale Price	Discount Percen
Retailer, Product, Discount		Gardian 12345			GO17S			1		20

This example provided the following discount structure

The retailer with Account number Gardian 12345 will receive a 20% discount for the product with code GO17S when more than 1 item is ordered.

### All Retailers, Group Product, Individual Discount

Pricing Rule Type	Supplier	Retailer Account Number	Retailer Group Field	Retailer Group Identifier	ProductCode	Product Group Field	Product Group Identifier	Min Quantit	Wholesale Price	Discount Percen
All Retailers, Group Products, Individual Discount						Top Product Category	\Oral	6		7.5

All retailers will receive a 7.5 % for products in the Top level category Oral where 6 or more are ordered.