



# *Lot Pricing Feature*



eCommerce Industries, Inc.



February 2003 Item # H-LOTPRICE

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## Understanding the New Lot Pricing Features

eNsite Pro has a new lot pricing feature. The lot pricing feature makes it much easier to sell items in large quantities, and provides a more accurate audit trail.

Lot pricing can help you do any of the following:

- Sell print jobs
- Sell office furniture with custom fabrics
- Sell items in bulk such as paper, fabric, chemicals, and so on
- Invoice part of an item's price before you complete the entire transaction
- Add or change costs after delivering the item
- Sell items with fractional quantities
- Sell items in very large quantities.

If a customer wants to buy envelopes printed with a corporate logo, for example, lot pricing can make this sale easier in a number of ways. You begin by creating a lot item for the envelopes in the Item window. When you select the item in order entry, the system identifies your item as a lot item, and specifies a quantity of one. (You always sell one lot.) The new Lot Pricing dialog box appears. You can enter order quantity, price, pricing quantity, and ship quantity. Using the information entered in these boxes, you can easily keep track of all the details for each lot price order.

This new feature also affects accounts payable. New boxes appear in the A/P Post PO PO Entry tab when verifying orders from accounts payable.

You can also view lot pricing information in O/E History.

You can also run reports on lot pricing items. Additional fields were added to Report Writer in P-LINE2. These user-defined fields include: Lot Order, Lot Price \$, Lot Unit, and Lot Shipped.

## What You Need to Set Up

Use the following instructions to set up your system:

- 1 Set up the new Lot Pricing Stock Class field. Go to the heading **Setting Up the (LE2) Screen**.
- 2 Set up a lot pricing item in the Item window. Go to the heading **Setting Up the Lot Pricing Item**.
- 3 Using lot pricing in order entry and verifying orders in accounts payable. Go to the heading **Using the Lot Pricing Features**.



## Setting Up the (LE2) Screen

Use the following instructions:

- 1 Go to the (LE2) Screen and select the [C] Change action code.
- 2 Press Tab to move the cursor to the Lot Pricing Stock Class field. Enter a user-defined code for items that will always be sold in a quantity of one lot. See Figure 1.

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**Note:** If you set up any item with this stock class, the item will be processed as a lot item.


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- 3 Press Enter to move through the cursor back to the action code field.

## Setting Up the Lot Pricing Item

You must set up a lot pricing item in order for these new features to work. You can set up your item in the (E) Inventory Master screen or the Item window. You can enter a new item or change an existing one.

Use the following instructions to set up a new item with lot pricing in eNsite Pro:

- 1 Go to the Item window and click the  button to set up a new item. Enter any information that you need for this new item. If you are changing an existing item, retrieve the item as you normally would.


**Figure 1:**  
**The Lot Pricing  
Stock Class  
Field**

```
11:03:36                (LE2) Inventory Parameters (Con't.)                10/07/02
=====
Action [I] (C=Change, I=Inquiry)  G/L Location [ 1 ]
=====
Online Stock/Price Check Stock Class:  to  + [ , , , , ]
Online Stock/Price Check Category : Which Category ? (1-4)
                                   Category Range:  to  + [ , , , , ]

Supplies: Stock Class Range:  to  + [ , , , , ]
          Vendor(s):          :          :          :          :
          :                   :          :          :          :

Single Pulling Location Dept Range:  to  + [ , , , , ]
Lot Pricing Stock Class: A
```



- 2 You can enter the stock class for this item in two places. Enter the stock class that you specified in the Lot Pricing Stock Class field in the (LE2) screen in the Class box in either the Item Master tab or the Item Settings tab. (The stock class entered in the Class box in the Item Settings tab will override the Class box in the Item Master tab.)
- 3 When you finish entering information for the lot pricing item, click  to save your changes.

## Using the Lot Pricing Features

You use the lot pricing features in Furniture Order Entry.

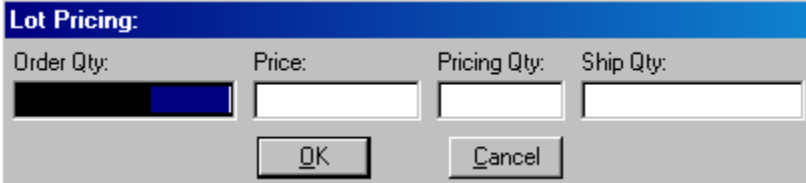
### Placing the Items on the Order

Use the following instructions:

- 1 In the Order Entry window, select Furniture in the Order Style drop down box.
- 2 Continue with the order as you normally would. In the Item Detail tab, enter the lot item number and press Enter.
- 3 The Lot Pricing dialog box opens. In this box, you can enter order quantity, price, pricing quantity, and ship quantity, as shown in Figure 2.

In the Order Qty box, enter the number of individual items you're selling.

**Figure 2:**  
**The Lot Pricing**  
**Dialog Box**



Order Qty:	Price:	Pricing Qty:	Ship Qty:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Lot Pricing Feature

In the Price box, enter the price per unit. For example, if you sell printed envelopes by the thousand, this is the price per thousand. You can enter up to four figures after the decimal point for precision pricing.

In the Pricing Qty box, enter the number of units that the lot price applies to. Using the previous example, you would enter 1000.

In the Ship Qty box, enter the number of items you are shipping.

- 4 Continue with the order as you normally would. In the Order totals tab, click the Build P/O box.

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**Note:** The purchase order builds with a quantity of one.

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## Posting A/P Invoices

After you build the purchase order, you can initial or final verify the items on the purchase order from accounts payable. Use the following instructions:

- 1 Go to Accounts Payable.
- 2 Click the A/P Post PO tab and select the vendor.
- 3 From the menu, click View then select Furniture Posting.
- 4 Retrieve the purchase order by project number, order number, purchase order number, or acknowledgement number.
- 5 After you retrieve the correct purchase order, click the Totals tab.
- 6 Click the Verify Order button. During this process, you will change the shipped quantity on the order to one. This receives the item on the purchase order and posts an invoice to accounts payable.
- 7 The system opens the Order Entry window allowing you to initial or final verify the order. (You should initial verify the order if you are not ready to bill the customer.)

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*For more information on posting A/P invoices, see your online help.*

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The Verify tab appears with a list of items. Change the quantity shipped to one.

You should also enter the correct A Cost and P Cost.

- 8 Right-click the shipped quantity and select Show Lot Pricing.
- 9 The Lot Order Dialog box appears. In the Ship Qty box, enter the actual shipped quantity, if any.

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**Note:** The Lot Order Dialog box is for informational use only. You can view this information in O/E History.

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- 10 Click Accept in the Verify tab. The A/P Totals tab opens.
- 11 Click Next if the total cost is correct.
- 12 In the Freight-Post tab, add any additional charges.
- 13 When you finish making changes, click Post Invoice.
- 14 The system writes an SB special line to the order. You can view this special in O/E History.

When you receive another invoice for this order, you can re-post the invoice. Use the following instructions:

- 1 Follow Steps 1-4 above. When you enter the purchase order number, the message PO Has Already Been Posted Post Cost Change appears. Click Yes.
- 2 After you retrieve the correct purchase order, click the Totals tab.
- 3 Click the Verify Order button.
- 4 The system opens the Order Entry window allowing you to initial or final verify the order. (You should initial verify the order if you are not ready to bill the customer.)

The Verify tab appears with a list of items. The quantity shipped will be one.

**Figure 3: The Lot Item Cost Dialog Box**



## Lot Pricing Feature

- 5 Click the item for which the cost needs to be adjusted.
- 6 The Lot Item Cost dialog box opens, as shown in Figure 3. You can add or replace the original cost.

To add the amount to the previous cost, click Add to Original Cost. Enter the amount of the new invoice in the Change Cost box.

To replace the Previous Cost shown, click Replace Original Cost and enter the new amount in the Change Cost box.

For example, if the original cost was \$5.00 and you just received another bill for \$15.00, you would click Add to Original Cost and enter \$15.00 in the Change Cost box. However, if the original total was \$5.00 and it is now a total of \$15.00, you would click Replace Original Cost and enter \$15.00 in the Change Cost box.

- 7 Click Apply.
- 8 The system will update the A Cost and the P Cost. In the Verify tab, click Accept.
- 9 The Totals tab will open. If the total cost is correct, click Next.
- 10 In the Freight-Post tab, add any additional charges. When finished, click Post Invoice.

**Figure 4: The SB Special in O/E History**

The screenshot shows the 'D/E History' window with the following details:

- Order Settings:** Order Number: 25715-0, Order Date: 02/06/2003, Invoice Date: [blank], Short P/O #: 445T, Long P/O #: [blank], Order Maker: DONNIE SCRIBN, Order Status: 7.
- Customer:** ID: 730600, Dept: [blank], Name: S J C CUSTOM DESIGNS, Address: 13358 GLENSIDE CIRCLE, DALLAS, TX 75234.
- Totals:** Sub Total: 25.95, Discount: [blank], Tax: [blank], Total: 25.95.
- Additional Information:** Salesperson: CASH ACCT, Pay Code: C.O.D., G/L Loc: 1, Inv Loc: 1.
- Journal:** DATA/MASTER

Item Number	Comp	Description	UM	Order	Ship	Sell	Extended
AAAA		sequence					
555	NON INSC	DOLLY KIT	EA	1	1	25.950	25.95
SPECIAL	SB	101 02/06/03 RALPH	#		73	\$139.537	
SPECIAL	SB	101 02/06/03 RALPH	#		95	\$179.990	

## Viewing Order Entry History

Using the order entry SB special, you can view order entry history for lot pricing items. Use the following instructions:

- 1 In O/E History, retrieve the order you want to view by customer name or order number.
- 2 In the history boxes at the bottom of the screen, the detail line includes the following information: order-taker, posting date, vendor number, accounts payable invoice number, and cost added, as shown in Figure 4.

