

# Retek® Price Management 10.0



## User Guide



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- Detailed step by step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.



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## Chapter 1 – Introduction

This document provides the procedures and descriptive information that you need to use the Retek Price Management™ (RPM) system. The RPM system allows your organization to actively plan and manage pricing changes. This system augments the Retek Merchandising System functionality (RMS).

RPM is interfaced with RMS to import item candidates for price changes and export the price changes back to RMS. With RPM, you can improve your price change process using predetermined business rules, metrics, and budgets. This allows for more standardized and accurate measurements. This also provides more predictable results.

Using industry best practices and company-set goals, you can perform what-if analysis for price changes. You can create the price change schedule and enter the budget for each time period on the schedule. For each time period, you can generate a list of items to review for price changes based on criteria set at Corporate and Department levels.

There is also an approval process built into RPM. If your job includes approval and review of price changes, you can approve or reject the pricing decisions that were made and enter a reason for your decision.

RPM allows you to set up rules that will automatically include or exclude items that meet the conditions of the rules. This allows the buyer to focus on those items that require attention. The use of RPM ensures that markdowns are taken wisely, margins remain the same, and your prices are competitive with your competitors' prices.

**Note:** Many field names can be changed within RPM. This document describes the field names that the product is shipped with. When you change field names, make sure that you keep track of the original field name and the corresponding new field name.

## RPM business process

The following tables summarize the tasks that are used to complete the various processes within RPM. The tables are specific to:

- RPM setup
- RPM business process

**Note:** All of the RPM set up processes should be completed before you proceed with the RPM business process.

### Set up RPM

#### Setup

##### Administration

[Set security levels for user access](#)

[Set up system options and defaults](#)

[Set up aggregation levels and Department values](#)

##### Pricing Setup

[Set up candidate rules and rule variables](#)

[Set up pricing guides](#)

[Set up pricing strategies](#)

[Set up the schedule](#)

### Business process

#### Business Process

##### Pricing Updates

[Update candidate rules and rule variables](#)

[Update pricing strategies](#)

[Update pricing guides](#)

[Update schedules](#)

##### Pricing Worksheet

[Review, modify, submit, or delete a Pricing Worksheet](#)

[Approve a Pricing Worksheet](#)

[Reject a Pricing Worksheet](#)



## Chapter 2 – Navigate in RPM and use the windows

This chapter describes how to navigate in general in RPM. It also discusses the main windows in the application and lists the procedures that they are used in. This chapter provides:

- Instructions to log on to and exit Retek Price Management (RPM)
- Instructions to navigate within a window
- Information about the Administration, Pricing Setup, and Pricing tabs and the windows within those tabs

### Log on to and exit RPM

The way that you access RPM depends on how the system is set up at your location. Contact your system administrator for instructions. After you have started RPM, you are prompted to log on to the system.

#### Log on to RPM

- 1 From the Log On window, enter your user name in the Username field.
- 2 In the Password field, enter your password.
- 3 Click **Log On**. The Retek Price Management Main Menu opens.

#### Exit RPM


- 1 Select the Home tab to exit to the Main Menu.
- 2 On the Main Menu, click **Logout**. You are returned to the Log On window.

### Navigate within a window

Use the **Tab** key to move from field to field within a window. You can also use your mouse to click within a field and place the cursor.


There are several tools within a window that you should become familiar with to simplify the data entry process.

### Use the List of Values button

The List of Values (LOV) button  is found to the right of a field. The button displays all defined values or options available for the field.


**Note:** The LOV will be empty if:


- No values have been defined for the list.
- You do not have security access to the contents of the list.

- 1 Click . A list of options displays.
- 2 Select an option from the list.
- 3 Click **OK**. The selected option is entered in the appropriate field.

**Note:** Type the first few characters of the desired value instead of scrolling through all of the values to find a desired entry.

### Use the drop-down list

Some fields can only accept values from a predefined list of options. Such fields have a down arrow button  to the right of the text field.

- 1 Select the down arrow button . A drop-down list of options displays.
- 2 Select a value from the drop-down list. The selected option is entered in the appropriate field.

### Select multiple options from a list

Sometimes you may want to select more than one option from a list of values.


To select items in a sequence:


- 1 Click on the first item in the sequence to highlight it.
- 2 Hold down the **Shift** key, scroll to the last item you want to include, and click it. Sequential items are selected.

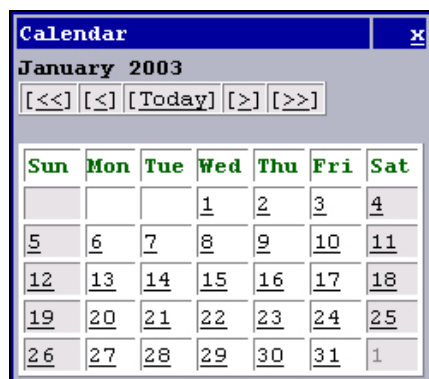
To select multiple options that are not next to each other on the list:

- 1 Click the first item to highlight it.
- 2 Hold down the **Ctrl** key and click all options in the drop-down list that you want to include.
- 3 When you have selected all desired customer statuses, click **OK**. Multiple items are selected.

### Use the calendar button

The calendar button  allows you to view a monthly calendar and select a date. The button is found to the right of a date field. When you select a date from the calendar, the system enters the date for you in the correct format.

- 1 Select . The Calendar pop-up window displays the current month and year.



- 2 Select the appropriate month and year.
  - To choose a month in the past, select  $\leq$ .
  - To choose a month in the future, select  $\geq$ .
  - To choose a year in the past, select  $\leq\leq$ .
  - To choose a year in the future, select  $\geq\geq$ .
- 3 Select the appropriate date. The selected date is entered in the date field.

### Use keyboard shortcuts

You can use the keyboard shortcuts listed in this table.

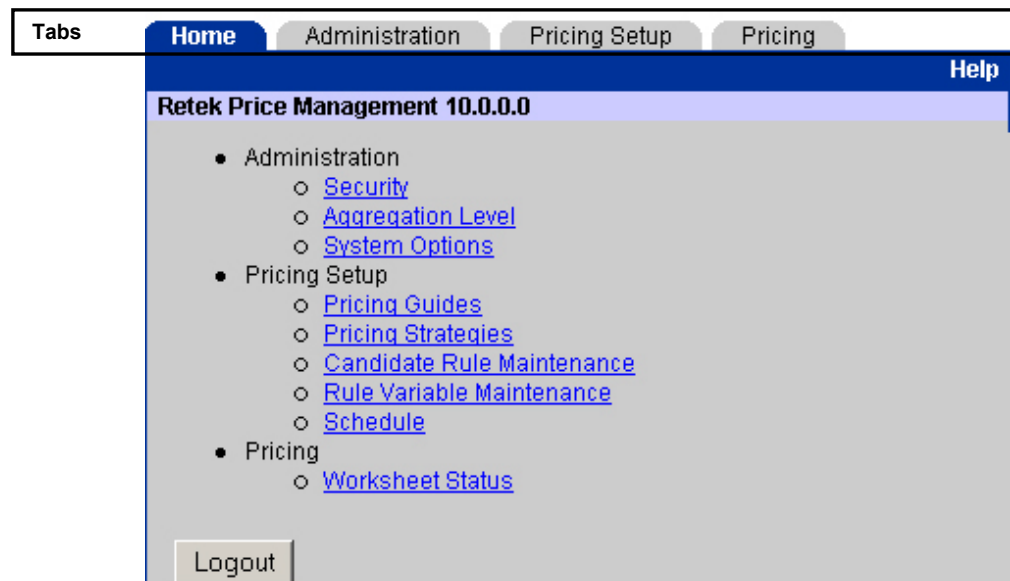
| Function       | Key         |
|----------------|-------------|
| Clear Field    | F5          |
| Next Field     | Tab         |
| Previous Field | Shift + Tab |
| Save           | Alt + S     |
| Copy           | Ctrl + C    |
| Paste          | Ctrl + V    |
| Select All     | Ctrl + A    |

## Use the RPM tabs

RPM is divided into three functional areas that correspond to the following tabs:

- [Administration](#)
- [Pricing Setup](#)
- [Pricing](#)

The Administration tab includes functionality for Security, Aggregation Level designation, and System Options. The Pricing Setup tab includes the functionality to set up Pricing Guides, Pricing Strategies, Candidate Rules, Candidate Rule Variables, and the Schedule. The Pricing tab includes functionality for the Pricing Worksheet Status and Pricing Worksheet.



### Tab descriptions

The four navigation tabs and a brief description of the functionality available from each tab are described in the table below.

| Tab                            | Functionality  |
|--------------------------------|--|
| Home                           | Provides a Main Menu to help you navigate in RPM.  |
| <a href="#">Administration</a> | Contains many of the functions that are performed at system setup or are updated with less frequency. The Administration tab includes functionality to set: <ul style="list-style-type: none"> <li>• Security</li> <li>• Aggregation Level</li> <li>• System Options</li> </ul>  |
| <a href="#">Pricing Setup</a>  | Contains the structure where price change parameters are identified so that new retail prices can be proposed. You can establish settings on various windows to determine when, what items, and what retails to propose. The Pricing Setup tab includes functionality to set up and maintain: <ul style="list-style-type: none"> <li>• Pricing Guides</li> <li>• Pricing Strategies</li> <li>• Candidate Rule Maintenance</li> <li>• Rule Variable Maintenance</li> <li>• Schedule</li> </ul>  |
| <a href="#">Pricing</a>        | Contains the Worksheet Status and Pricing Worksheet functionality. The <a href="#">Worksheet Status window</a> helps you to manage and analyze the impact of the Worksheet decisions both at rolled-up and summarized levels. The <a href="#">Pricing Worksheet</a> is where the primary daily pricing function and decision-making occurs. The Pricing tab includes: <ul style="list-style-type: none"> <li>• <a href="#">Worksheet Status</a></li> </ul> <p><b>Note:</b> You must access the Pricing Worksheet from the Worksheet Status window.</p> |

## Use the Administration tab

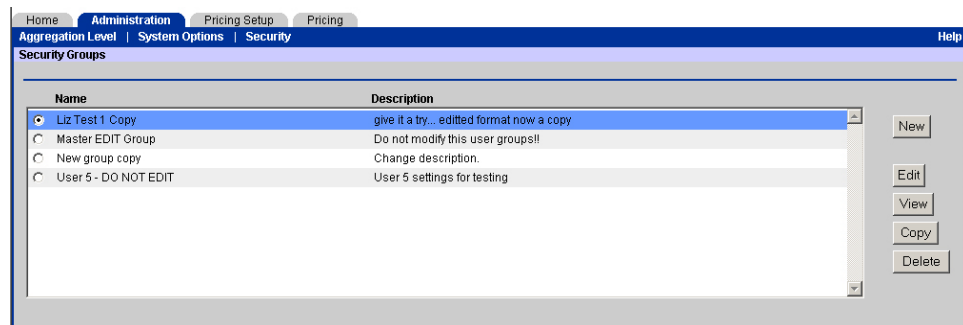
From the Administration tab, you can select [Security](#), [Aggregation Level](#), or [System Options](#).

### Security windows

From the Security windows, you can:

- [Set up a Security Group](#)
- [Edit a Security Group](#)
- [View a Security Group](#)
- [Copy a Security Group](#)
- [Delete a Security Group](#)
- [Add a user to a Security Group](#)

### Security Groups window



### Field descriptions

| Field       | Description                                |
|-------------|--|
| Name        | The name of the Security Group.            |
| Description | A brief explanation of the Security Group. |

### Button descriptions

| Button | Description  |
|--------|--|
| New    | Opens the Security Group Maintenance window so you can add a new Security Group.                           |
| Edit   | Opens the Security Group Maintenance window so you can edit the selected Security Group.                   |
| View   | Opens the Security Group Maintenance window so you can view the selected Security Group.                   |
| Copy   | Opens a window so that you can enter a unique group name and copy the selected Security Group information. |
| Delete | Removes the selected Security Group.   |

## Security Group Maintenance window

### Field descriptions

| Field       | Description   |
|-------------|---|
| Name        | The name of the Security Group.   |
| Description | A brief explanation of the Security Group.  |
| Form        | The areas of RPM that you are granting access to.   |
| Access Type | The kind of access that the user has to that area of RPM. Select from: None, View, or Edit. |
| Add User    | Select the user from the LOV.   |
| User Name   | The name of the system user that you are adding to a Security Group.                        |

### Button descriptions

| Button      | Description   |
|-------------|---|
| Add User    | Adds a user to a Security Group.  |
| Remove User | Removes a user from a Security Group.   |
| Update      | Saves the information that you entered in this window.  |
| Cancel      | Removes any changes that were not saved in this window and returns you to the Security Groups window. |

## Aggregation Level window

From the Aggregation Level window, you can [Set up aggregation levels and Department values.](#)

## Aggregation Level Setup window

The screenshot shows the 'Aggregation Level Setup' window. It features a table with the following columns: Department, Aggregation Level, Historical Sales, Sales Type (Regular, Clearance, Promotional), and Include Warehouse Stock in Calculations (Stock On Hand, Stock On Order). The table lists various departments like Video, Bakery, Kitchenware, Glassware, Outerware, Activewear, Small Appliances, Detergent, Sportswear, Milk By-Products, Womens shoes, Peanut Butter Jams & J, RPM Clearance Dept, RPM Margin Dept, RPM Comp Dept (cls), Furniture, RPM Comp Dept (all), and RPM Comp dept (code). Each row has dropdown menus for Department, Aggregation Level, and Historical Sales, and checkboxes for the Sales Type and Stock options. A 'Save' button is located at the bottom left of the table area.

## Field descriptions

| Field             | Description   |
|-------------------|---|
| Department        | The Department that you are setting up.   |
| Aggregation Level | The Corporate level that strategies are applied to, scheduled are defined, and the Pricing Worksheet is generated for. Aggregation levels are either Department or Class.   |
| Historical Sales  | The period of time for which sales are displayed on the worksheet for the selected Department. Select from: Weekly, Monthly, Half Yearly, or Yearly.<br><i>For example:</i> If you select Weekly, the Historical Sales are last week's sales. If you select Half Yearly, the Historical Sales are the last six months' sales. |
| <b>Sales Type</b> |   |
| Regular           | Select this check box to include regular sales in the historical sales totals.  |
| Clearance         | Select this check box to include clearance sales in the historical sales totals.  |



| Field  | Description   |
|--|---|
| Promotional                                    | Select this check box to include promotional sales in the historical sales totals.                                      |
| <b>Include Warehouse Stock in Calculations</b> |   |
| Stock on Hand                                  | Select this check box to include Warehouse stock that is on hand in the sell-thru and price change amount calculations. |
| Stock on Order                                 | Select this check box to include Warehouse stock that is on order (in the On Order column with store On Order amounts). |

**Button descriptions**

| Button | Description  |
|--------|--|
| Save   | Saves the information that you entered in this window. |

## System Options window

With the System Options window, you can [Set up system options and defaults.](#)

### System Options window

The screenshot shows the 'System Options' window. On the left, there are labels 'Options' and 'Defaults' with brackets pointing to their respective sections in the window. The 'Options' section contains three dropdown menus: 'Sales Calculation Method' set to 'Smoothed Average Sales', 'Cost Calculation Method' set to 'Highest Location Cost', and 'Update Item Attributes' set to 'Yes'. The 'Defaults' section contains two dropdown menus: 'Lead Item Calculation Type' set to 'Margin Target' and 'Pricing Strategy' set to 'Clearance'. A 'Save' button is located at the bottom of the window.

### Field descriptions

| Field                    | Description   |
|--------------------------|---|
| <b>Options</b>           |   |
| Sales Calculation Method | <p>Select the option that is designated by your corporation's pricing management.</p> <p>Select from:</p> <p><i>None</i> – Projected sales fields will not display a value</p> <p><i>Smoothed Average Sales</i> – An estimate of projected weekly sales</p>   |
| Cost Calculation Method  | <p>The price that is used as the item's cost for the zone on the Pricing Worksheet.</p> <p>Select from:</p> <p><i>Highest Location Cost</i> – The highest cost at a location in the price zone.</p> <p><i>Average Location Cost</i> – The average non-zero cost across all locations in the price zone.</p> <p><i>Primary Location Cost</i> – The cost at the primary location in the price zone.</p> <p><b>Note:</b> If the primary location cost is zero, use the average location cost method.</p> |

| Field                      | Description  |
|----------------------------|--|
| Update Item Attributes     | <p>Select the option that is designated by your corporation's pricing management.</p> <p>Select from:</p> <p><i>No</i> – The snapshot will not change for its entire assigned period.</p> <p><i>Yes</i> – Each new batch run within a snapshot period updates the following:</p> <ul style="list-style-type: none"> <li>• Exceptions</li> <li>• Competitor retails</li> <li>• Store stock on hand</li> <li>• Warehouse Stock on Hand</li> <li>• Current Retail</li> <li>• Current Cost</li> <li>• Replenishment indicator</li> <li>• Current Multi Retail</li> <li>• New Cost</li> <li>• On order amount</li> <li>• Pending promotions</li> <li>• Pending clearances</li> <li>• Pending price changes</li> <li>• Pending cost changes</li> </ul> |
| <b>Defaults</b>            |  |
| Lead Item Calculation Type | <p>Select the option that is designated by your corporation's pricing management.</p> <p>Select from:</p> <p><i>Margin Target</i> – The retail price of the lead item is based on adding a margin% to its cost.</p> <p><i>Competitive Target</i> – The retail price of the lead item is based on a comparison with a competitor's lead item retail price.</p>  |
| Pricing Strategy           | <p>Select the option that is designated by your corporation's pricing management.</p> <p>Select from:</p> <p><i>Clearance</i></p> <p><i>Competitive</i></p> <p><i>Margin</i></p> <p><i>Relationship</i></p>  |

**Button descriptions**

| Button | Description  |
|--------|--|
| Save   | Saves the information that you entered in this window. |

## Use the Pricing Setup tab

From the Pricing Setup tab, you can select [Pricing Guides](#), [Pricing Strategies](#), [Candidate Rule Maintenance](#), [Rule Variable Maintenance](#), or [Schedule](#).

## Pricing Guide windows

From the Pricing Guides windows, you can:

- [Set up the pricing guide](#)
- [Set the pricing guide as the default for the Department or Corporation](#)
- [View Corporate pricing guides](#)
- [View Department pricing guides](#)
- [Copy or link a Corporate pricing guide to a Department](#)
- [Edit a pricing guide](#)
- [Delete a pricing guide](#)

## Pricing Guides window

Home Administration **Pricing Setup** Pricing

[Pricing Guides](#) | [Pricing Strategies](#) | [Candidate Rule Maintenance](#) | [Rule Variable Maintenance](#) | [Schedule](#)

**Pricing Guides**

☒ Corporate Pricing Guides  
☐ Department Pricing Guides for

Display


| Name  | Description   |
|---|---|
| <input checked="" type="radio"/> Maria's PG \$0.01 to \$1000 (linked) | Maria's Pricing Guide \$0.01 to \$1000.00 by \$3.00, ending in 00 |
| <input type="radio"/> Tom (linked)                                    | trying it   |
| <input type="radio"/> Bens dept pricing guide                         | all values from 1.00 to 10.00 end in 00                           |
| <input type="radio"/> Heusinkveld New Guide (linked)                  | This is a new pricing guide!                                      |
| <input type="radio"/> Ben June5 price guide 1                         | Ben June5 price guide 1 description                               |
| <input type="radio"/> Liz Voto Test #1 (linked)                       | This is the new #1 corporate pricing guide...                     |
| <input type="radio"/>   |   |

New Edit View Copy Set Default Delete

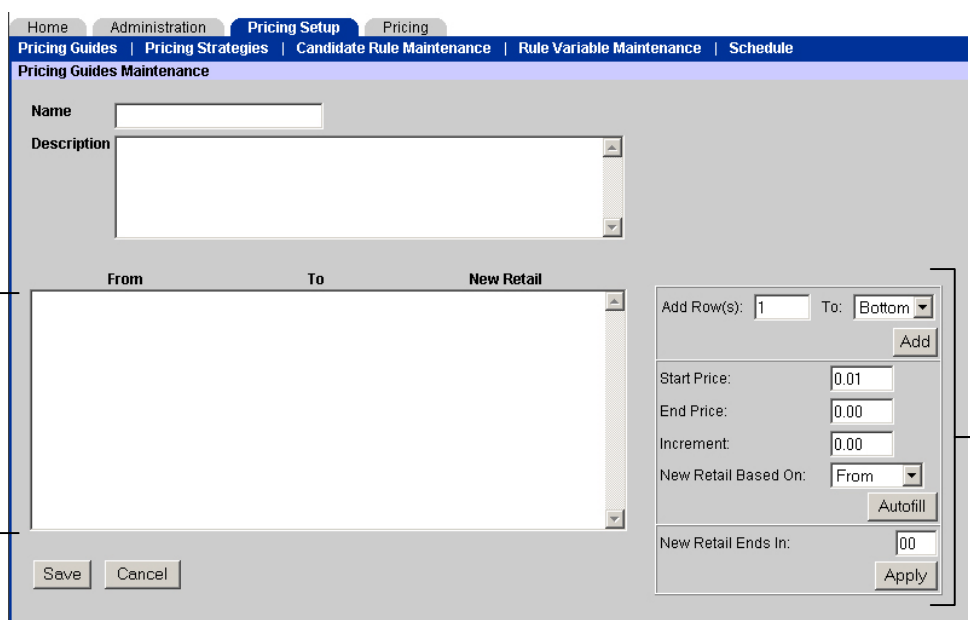
## Field descriptions

| Field                         | Description   |
|-------------------------------|---|
| Corporate Pricing Guides      | Displays your Corporate pricing guides.   |
| Department Pricing Guides for | Displays your Department pricing guides. You must also enter an appropriate value in the field. |
| Name                          | Name of the pricing guide.  |
| Description                   | A brief explanation of the pricing guide.   |

## Button descriptions

| Button  | Description   |
|---|---|
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option.   |
| Display   | Displays the pricing guides for the selected Department or Corporate level.   |
| New   | Allows you to create a new pricing guide.   |
| Edit  | Allows you to edit the selected pricing guide.  |
| View  | Allows you to look at the details of the selected pricing guide.  |
| Copy  | Allows you to duplicate the selected pricing guide.   |
| Set Default   | Allows you to assign the selected pricing guide as the Default or choice automatically used by RPM for your Department or Corporation. This is the Pricing Guide that is used when the pricing guide selection list is set to Default for the pricing strategy. |
| Delete  | Removes the selected pricing guide from RPM.  |

## Pricing Guides Maintenance window



The screenshot shows the 'Pricing Guides Maintenance' window. The window has a header area with fields for 'Name' and 'Description'. Below this is a 'Price Point Table' with columns 'From', 'To', and 'New Retail'. To the right of the table is a 'Define Pricing Guide' section with fields for 'Add Row(s)', 'To', 'Start Price', 'End Price', 'Increment', 'New Retail Based On', 'Autofill', 'New Retail Ends In', and 'Apply'. The 'Add Row(s)' field is set to '1' and 'To' is set to 'Bottom'. The 'Start Price' is '0.01', 'End Price' is '0.00', and 'Increment' is '0.00'. 'New Retail Based On' is set to 'From'. 'Autofill' is checked. 'New Retail Ends In' is set to '00'. The 'Apply' button is highlighted.

**Header**

**Price Point Table**

**Define Pricing Guide**

## Field descriptions

| Field                       | Description   |
|-----------------------------|---|
| <b>Header</b>               |   |
| Name                        | Name of the pricing guide.  |
| Description                 | A brief explanation of the pricing guide.   |
| <b>Price Point Table</b>    |   |
| From                        | The beginning of the price range increment.   |
| To                          | The end of the price range increment.   |
| New Retail                  | The new retail price for items with the pricing guide applied where the unadjusted retail price falls within the range defined by the From and To fields. A New Retail is listed for each From – To price range.  |
| <b>Define Pricing Guide</b> |   |
| Add Row(s)                  | The number of rows you want to add to the pricing guide.  |
| To                          | The location on the pricing guide where you want to add the row(s). Select from Top or Bottom.  |
| Start Price                 | The retail price that you want to begin the pricing guide with.   |
| End Price                   | The retail price that you want to stop the pricing guide with.  |
| Increment                   | One of a series of regular consecutive additions. This determines the amount that the To price is above the From price.   |
| New Retail Based On         | Select from To, From, or Average. This determines whether the new retail price is based on the To price, the From price, or an average of the two prices.   |
| New Retail Ends In          | The numerical value that you want your retail price to end in.<br><b>Note:</b> If you enter only one digit, the second digit is replaced. If you enter two digits, both digits are replaced. <i>For example:</i> If you enter 7 in the New Retail Based On field and your current price is \$3.52, your new price will be \$3.57. If you enter 77 in the New Retail Based On field and your current price is \$3.52, your new price will be \$3.77. |

**Button descriptions**

| Button   | Description   |
|----------|---|
| Add      | Inserts the number of rows you entered in the Add Row(s) field to the area that you selected in the To field (Top or Bottom).   |
| Autofill | Populates the pricing guide in the From / To / New Retail box with the information that you entered in the Start Price, End Price, Increment, and New Retail Based On fields. |
| Apply    | Replaces the last one or two digits of the retail price with the New Retail Ends In value that you entered.   |
| Save     | Saves all information that you entered in this window and applies it to the pricing guide in RPM.   |
| Cancel   | Removes any changes that were not saved in this window and returns you to the Pricing Guides window.  |

## Pricing Strategies windows

From the Pricing Strategies windows, you can:


- [Set up competitive pricing](#)
- [Set up clearance pricing](#)
- [Set up margin pricing](#)
- [Set up relationship pricing](#)
- [Copy a pricing strategy to another Department](#)
- [Update competitive pricing strategies](#)
- [Update clearance pricing strategies](#)
- [Update margin pricing strategies](#)
- [Update relationship pricing strategies](#)

### Pricing Strategy search window

#### Field descriptions

| Field            | Description  |
|------------------|--|
| Department       | The Department for which you want to view information.       |
| Class            | The Class for which you want to view information.            |
| Price Zone Group | The Price Zone Group for which you want to view information. |
| Price Zone       | The Price Zone for which you want to view information.       |

#### Button descriptions

| Button  | Description   |
|---|---|
| Search  | Displays results that meet the criteria that you selected.                        |
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option. |



## Pricing Strategy – Clearance window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance | Schedule

**Pricing Strategy - Clearance**

Header

Department: 5000 - RPM Clearance Dept

Class:

Price Zone Group: 1000 - Competitive - Paint

Price Zone:

Pricing Strategy:  Pricing Guide:

**Clearance Strategy Parameters**

Markdowns as a percent of:

1st Markdown:  % (First markdown is always off the regular price.)

2nd Markdown:  %

3rd Markdown:  %

4th Markdown:  %


5th Markdown:  %

Clearance Strategy Parameters

## Field descriptions

| Field                                      | Description   |
|--|---|
| <b>Header</b>                              |   |
| Department                                 | The Department for which you want to view information.  |
| Class                                      | The Class for which you want to view information.   |
| Price Zone Group                           | The Price Zone Group for which you want to view information.  |
| Price Zone                                 | The Price Zone for which you want to view information.  |
| Pricing Strategy                           | The pricing strategy applied to the aggregation level that you have selected.   |
| Pricing Guide                              | The pricing guide applied to the aggregation level that you have selected.  |
| <b>Clearance Strategy Parameters</b>       |   |
| Markdowns as a percent of                  | Clearance markdowns are calculated as a percentage of either the regular price or the last clearance price. The first markdown is always a percentage of the regular price. |
| 1 <sup>st</sup> Markdown                   | Percentage to be taken off the regular price.   |
| 2 <sup>nd</sup> – 5 <sup>th</sup> Markdown | Percentage to be taken off either the regular price or the previous markdown price.   |

**Button descriptions**

| Button  | Description   |
|---|---|
| New   | Brings you to the Pricing Strategy search window where you can select the Department and Class to start a new pricing strategy. |
| Copy  | Allows you to copy the selected pricing strategy to another Department/Class/Price Zone Group/Price Zone combination.           |
| Specify Warehouses  | Allows you to include the inventory that is in warehouses in the pricing strategy.  |
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option.   |
| Save  | Saves the information that you entered in this window.  |

## Pricing Strategy – Margin window

**Header**

Department: 5000 - RPM Clearance Dept  
 Class:  
 Price Zone Group: 1000 - Competitive - Paint  
 Price Zone:  
 Pricing Strategy: Margin Pricing Guide: None Specify Warehouses

**Margin Strategy Parameters**

| Market Basket Code | Margin Target Percent |
|--------------------|-----------------------|
| A                  |                       |
| B                  |                       |
| C                  |                       |
| No Code            |                       |

**Reference Competitors**

Competitor A  
 Competitor:  
 Store:  
 Compete: Price Above Percent

Competitor B  
 Competitor:  
 Store:

## Field descriptions

| Field  | Description  |
|--|--|
| <b>Header</b> – see Pricing Strategy – Clearance window <a href="#">field descriptions</a> |  |
| <b>Margin Strategy Parameters</b>  |  |
| Market Basket Code   | <p>Valid Market Basket Code values are A, B, C and null. Market basket codes are used in RPM to determine the Lead Item for a Class. RPM looks for the first letter of the alphabet that appears in the Class/Price Zone that is being reviewed. If RPM finds an item with a market basket code of A, it will present the first item with that market basket code as the Lead Item. If no A items are found it will look for a Market Basket Code of B and so on.</p> <p><b>Note:</b> If more than one item with the same code is found, the lowest item number is taken first.</p> <p>Market Basket Codes in RPM are also used at a Zone/Department or Class level to set the Competitive Target (how you want to price your lead item compared to your competitor).</p> <p><b>Note:</b> When items in a link code are aggregated in RPM, the highest market basket code item is presented in the Pricing Worksheet and the remaining items in the link are presented to the user when the linked code name is clicked.</p> |

| Field                                | Description   |
|--------------------------------------|---|
| Margin Target Percent                | The difference between the cost of the item and the retail price divided by the selling price and expressed as a percent.<br>Margin % = [(Retail Price – Cost) / Retail Price] x 100  |
| <b>Reference Competitors (A – E)</b> |   |
| Competitor                           | Additional competitor against which you want to compare your prices. Reference competitors are used after your retail price has been proposed. RPM alerts you if your proposed retail price does not meet the compete % for your competitor's retail price. |
| Store                                | The competitor's store against which you want to compare your prices.   |
| Compete                              | How you want your prices to compare to this competitor. Select either Price Above or Price Below.   |
| Percent                              | The percent above or below your primary competitor's price that represents your reference competitor strategy.  |

**Button descriptions**

See Pricing Strategy – Clearance window [button descriptions](#).

## Pricing Strategy – Competitive window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance | Schedule

**Pricing Strategy - Competitive**

Header

Department: 5000 - RPM Clearance Dept

Class:

Price Zone Group: 1000 - Competitive - Paint

Price Zone:

Pricing Strategy: Competitive Pricing Guide: None

**Primary Competitor**

Primary Competitor

Competitor:

Store:

Compete: Match

**Reference Competitors**

Reference Competitors

Competitor B

Competitor:

Store:

Compete: Price Above Percent:

## Field descriptions

| Field   | Description   |
|---|---|
| <b>Header</b> – see Pricing Strategy – Clearance window <a href="#">field descriptions</a>              |   |
| <b>Primary Competitor</b>   |   |
| Competitor  | The competitor that you compare your retail prices to. New retail prices are proposed based on this comparison. All calculations are based on this competitor.  |
| Store   | The competitor's store that your retail prices are compared against. All calculations are based on this store's regular retail prices.  |
| Compete   | How you want your prices to calculate based on your competitor's regular retail prices. Options are: Price Above, Price Below, Price by Code, or Match.<br><br><b>Note:</b> If you select Price by Code, the compete type applies to all items with market basket codes as well as to items with no code. |
| <b>Reference Competitors (B – E)</b> – see Pricing Strategy – Margin <a href="#">field descriptions</a> |   |

### Button descriptions

See Pricing Strategy – Clearance window [button descriptions](#).

### Pricing Strategy – Relationship, Margin Target window

**Header**

Department: 5000 - RPM Clearance Dept

Class:

Price Zone Group: 1000 - Competitive - Paint

Price Zone:

Pricing Strategy: Relationship Pricing Guide: None

**Relationship Strategy Parameters**

Lead Item Retail Calculation Selection Type: Margin Target

Margin %:

Size Tolerance %:

Equal Size Margin %:

Smaller Size Margin %:

Larger Size Margin %:

**Reference Competitors**

Competitor A

Competitor:

Store:

Complete: Price Above Percent:

Competitor B

Competitor:

### Field descriptions

| Field  | Description  |
|--|--|
| <b>Header</b> – see Pricing Strategy – Clearance window <a href="#">field descriptions</a> |  |
| <b>Relationship Strategy Parameters</b>  |  |
| Lead Item Retail Calculation Selection Type  | The kind of calculation that is used to determine the retail price of the lead item. Choices are: Price Index Target or Margin Target.   |
| Margin %   | The difference between the cost of the item and the retail price divided by the selling price and expressed as a percent.<br>Margin % = [(Retail Price – Cost) / Retail Price] x 100 |
| Size Tolerance %   | The percentage of the lead item size within which items are considered to be the same size.  |

| Field   | Description   |
|---|---|
| Equal Size Margin %   | The percentage that you want to make on items that are the same size as the lead item.    |
| Smaller Size Margin %   | The percentage that you want to make on items that are a smaller size than the lead item. |
| Larger Size Margin %  | The percentage that you want to make on items that are a larger size than the lead item.  |
| <b>Reference Competitors (A – E)</b> – see Pricing Strategy – Margin <a href="#">field descriptions</a> |   |

### Button descriptions

See Pricing Strategy – Clearance window [button descriptions](#).

### Pricing Strategy – Relationship, Competitor Target Profit % window

**Header**

Department: 5000 - RPM Clearance Dept

Class:

Price Zone Group: 1000 - Competitive - Paint

Price Zone:

Pricing Strategy: Relationship Pricing Guide: None

**Relationship Strategy Parameters**

Lead Item Retail Calculation Selection Type: Competitor Target

Related Item Calculation Type: Profit %

Size Tolerance %:

Equal Size Profit %:

Smaller Size Profit %:

Larger Size Profit %:

**Primary Competitor**

Competitor:

Store:

| Market Basket Code | Compete     | Percent              |
|--------------------|-------------|----------------------|
| A                  | Price Above | <input type="text"/> |
| B                  | Price Above | <input type="text"/> |
| C                  | Price Above | <input type="text"/> |

**Reference Competitors**

Competitor B:

Competitor:

Store:

Compete: Price Above Percent:

## Field descriptions

| Field  | Description  |
|--|--|
| <b>Header</b> – see Pricing Strategy – Clearance window <a href="#">field descriptions</a> |  |
| <b>Relationship Strategy Parameters</b>  |  |
| Lead Item Retail Calculation Selection Type  | The kind of calculation that is used to determine the retail price of the lead item. Choices are: Price Index Target or Margin Target.   |
| Related Item Calculation Type  | The kind of calculation that is used to determine the retail price of related items. Choices are: Profit % or Margin %.  |
| Size Tolerance %   | The percentage of the lead item size within which items are considered to be the same size.  |
| Equal Size Profit %  | The percentage that you want to make on items that are the same size as the lead item.   |
| Smaller Size Profit %  | The percentage that you want to make on items that are a smaller size than the lead item.  |
| Larger Size Profit %   | The percentage that you want to make on items that are a larger size than the lead item.   |
| <i>Primary Competitor</i>  |  |
| Competitor   | The competitor that you compare your retail prices to. New retail prices are proposed based on this comparison. All calculations are based on this competitor.   |
| Store  | The competitor's store against which you want to compare your prices.  |
| Market Basket Code   | <p>Valid Market Basket Code values are A, B, C and null. Market basket codes are used in RPM to determine the Lead Item for a Class. RPM looks for the first letter of the alphabet that appears in the Class/Price Zone that is being reviewed. If RPM finds an item with a market basket code of A, it will present the first item with that market basket code as the Lead Item. If no A items are found it will look for a Market Basket Code of B and so on.</p> <p><b>Note:</b> If more than one item with the same code is found, the lowest item number is taken first.</p> <p>Market Basket Codes in RPM are also used at a Zone/Department or Class level to set the Competitive Target (how you want to price your lead item compared to your competitor).</p> <p><b>Note:</b> When items in a link code are aggregated in RPM, the highest market basket code item is presented in the Pricing Worksheet and the remaining items in the link are presented to the user when the linked code name is clicked.</p> |



| Field   | Description  |
|---|--|
| Compete   | How you want your price to compare with your primary competitor. Options are: Price Above, Price Below, or Match.                                  |
| Percent   | The percent above or below your primary competitor's price that you want to price your items. (Match will not allow you to enter a percent value.) |
| <b>Reference Competitors (A – E)</b> – see Pricing Strategy – Margin <a href="#">field descriptions</a> |  |

### Button descriptions

See Pricing Strategy – Clearance window [button descriptions](#).

### Pricing Strategy – Relationship, Competitor Target Margin % window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance | Schedule

**Pricing Strategy - Relationship**

Header

Department: 5000 - RPM Clearance Dept

Class:

Price Zone Group: 1000 - Competitive - Paint

Price Zone:

Pricing Strategy: Relationship Pricing Guide: None

**Relationship Strategy Parameters**

Lead Item Retail Calculation Selection Type: Competitor Target

Related Item Calculation Type: Margin %

Size Tolerance %:

Equal Size Margin %:

Smaller Size Margin %:

Larger Size Margin %:

Primary Competitor

Competitor:

Store:

Market Basket Code Compete Percent

A Price Above

B Price Above

C Price Above

**Reference Competitors**

Competitor B

Competitor:

Store:

Compete: Price Above Percent:

Relationship Strategy Parameters

Primary Competitor

Reference Competitors

**Field descriptions**

| Field  | Description  |
|--|--|
| <b>Header</b> – see Pricing Strategy – Clearance window <a href="#">field descriptions</a>                                       |  |
| <b>Relationship Strategy Parameters</b>  |  |
| Lead Item Retail Calculation Selection Type  | The kind of calculation that is used to determine the retail price of the lead item. Choices are: Price Index Target or Margin Target. |
| Related Item Calculation Type  | The kind of calculation that is used to determine the retail price of related items. Choices are: Profit % or Margin %.                |
| Size Tolerance %   | The percentage of the lead item size within which items are considered to be the same size.  |
| Equal Size Margin %  | The percentage that you want to make on items that are the same size as the lead item.   |
| Smaller Size Margin %  | The percentage that you want to make on items that are a smaller size than the lead item.  |
| Larger Size Margin %   | The percentage that you want to make on items that are a larger size than the lead item.   |
| <i>Primary Competitor</i> – see Pricing Strategy – Relationship, Competitor Target Profit % <a href="#">field descriptions</a> . |  |
| <b>Reference Competitors (A – E)</b> – see Pricing Strategy – Margin <a href="#">field descriptions</a>                          |  |

**Button descriptions**

See Pricing Strategy – Clearance window [button descriptions](#).

## Candidate Rule Maintenance windows

From the Candidate Rule Maintenance windows, you can:

- [Set up a candidate rule and define a variable for the rule](#)
- [Update a candidate rule](#)
- [Delete a candidate rule](#)

### Candidate Rules window

| ID   | Name                              | Text  | Type      | Status                          |
|------|-----------------------------------|---|-----------|---------------------------------|
| 1000 | Susan test                        | Current Retail = 9.95   | Inclusion | <input type="checkbox"/> Active |
| 1001 | Faisal Test modified              | Current Margin % <= 21  | Exclusion | <input type="checkbox"/> Active |
| 1003 | Rule with variables               | Class = 2000  | Inclusion | <input type="checkbox"/> Active |
| 1004 | Faisal Test                       | Class = [class]   | Inclusion | <input type="checkbox"/> Active |
| 1005 | Laura 5_24_02 candidate rule test | Sell Thru = 100   | Exclusion | <input type="checkbox"/> Active |
| 1006 | Maria's test candidate rule 1     | Class = [class]   | Inclusion | <input type="checkbox"/> Active |
| 1010 | Lauras candidate rule multi test  | Replenishment Indicator = yes AND<br>On Order > [On Order Amount] AND<br>First Received Date > 1/1/02 | Inclusion | <input type="checkbox"/> Active |
| 1011 | santjune5_candidateruletest0      | Sell Thru = 100   | Exclusion | <input type="checkbox"/> Active |

### Field descriptions

| Field  | Description  |
|--------|--|
| ID     | The identification number that is assigned to the candidate rule.  |
| Name   | The name of the candidate rule.  |
| Text   | A summary of the rule conditions.  |
| Type   | The kind of candidate rule that is applied. Options are <i>Exclusion</i> – Items that meet any exclusion rule are not displayed in RPM.<br><i>Inclusion</i> – Items that meet any inclusion rule are displayed with the applicable rule numbers in the Rule column on the Pricing Worksheet. |
| Status | The status of the rule. Options are Active and Inactive.   |

**Button descriptions**

| Button | Description   |
|--------|---|
| New    | Opens the Candidate Rule Maintenance window so that you can add a new candidate rule.         |
| Save   | Saves the information that you entered in this window.  |
| Edit   | Opens the Candidate Rule Maintenance window so that you can edit the selected candidate rule. |
| Delete | Removes the selected candidate rule from RPM.   |

## Candidate Rule Maintenance window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | **Candidate Rule Maintenance** | Rule Variable Maintenance

**Candidate Rule Maintenance**


Name

Description

Type

Active ☒

Field  Operator  Values or Variable Name

☐ Use value as a variable 


Conditions

## Field descriptions

| Field       | Description   |
|-------------|---|
| Name        | The name of the candidate rule.   |
| Description | A brief explanation of the candidate rule. This description can be up to 250 characters.  |
| Type        | The kind of candidate rule that is applied. Options are Exclusion or Inclusion. Select an option from the drop-down list. Items that meet any exclusion rule are not displayed in RPM. Items that meet any inclusion rule are displayed with the applicable rule numbers in the Rule column on the Pricing Worksheet. |
| Active      | If the box is checked, the candidate rule is in effect or active. If the box is not checked, the candidate rule is not in effect or inactive. Only active rules are run during a snapshot.  |
| Field       | The field to which the candidate rule is applied. Select the appropriate option from the drop-down list.  |

| Field                   | Description  |
|-------------------------|--|
| Operator                | Indicates the relationship that the Field item has to the Value or Variable Name. Select the appropriate option from the drop-down list.<br><b>Note:</b> All operator options may not be available for some field types. |
| Values or Variable Name | Either a value that applies across all items, or a variable name.  |
| Conditions              | Provides a summary of all criteria that an item must meet for this rule.   |
| Use value as a variable | If box is checked, the value is used as a variable. If the box is unchecked, the value is not used as a variable.  |

#### Button descriptions

| Button  | Description  |
|---|--|
| Add   | Adds the information that you entered in the Field, Operator, and Values or Variable Name fields to the Conditions box, while saving the information that was previously in those fields.  |
| Replace   | Replaces the highlighted Condition in the Condition field with the information that is displayed in the Field, Operator, and Values or Variable Name fields.   |
| Remove Condition  | Removes the selected row from the Conditions box.  |
| Edit  | Information from the selected row in the Conditions box displays in the Field, Operator, and Values or Variable Name fields so that you can edit it.   |
| Save  | Saves the information that you entered in this window.   |
| Cancel  | Removes any changes that were not saved in this window.  |
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option.<br><b>Note:</b> This list of values includes all variables that have been defined for the field. If no variables have been defined or you are defining the first variable, the list will be blank. |

## Rule Variable Maintenance windows

From the Rule Variable Maintenance windows, you can:

- [Set up rule variable values for one or more Departments](#)
- [Set up a candidate rule and define a variable](#)
- [Delete a candidate rule variable](#)
- [Update a candidate rule variable](#)

### Rule Variable Maintenance window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | **Rule Variable Maintenance** | Schedule

**Rule Variable Maintenance**

**Departments**

5000 View

Previous Next

**5000 - RPM Clearance Dept**

| Variable                              | Field     | Value                | Rules Referenced |
|---------------------------------------|-----------|----------------------|------------------|
| <input type="radio"/> 200             | On Order  | <input type="text"/> | 1049             |
| <input type="radio"/> On Order Amount | On Order  | <input type="text"/> | 1010 1121        |
| <input type="radio"/> class           | Class     | 1000                 | 1180 1004 1006   |
| <input type="radio"/> huge            | Class     | <input type="text"/> | 1048             |
| <input type="radio"/> itemNum         | Item #    | <input type="text"/> | 1180             |
| <input type="radio"/> sell thru       | Sell Thru | 40                   | 1013 1014        |


Delete Save Close

**Retek**

### Field descriptions

| Field            | Description  |
|------------------|--|
| Departments      | Departments for which you want to view candidate rule variables. |
| Variable         | Name of the candidate rule variable.                             |
| Field            | Field to which the variable is applied.                          |
| Value            | Value of the variable for the selected Departments.              |
| Rules Referenced | The rules to which the variable applies.                         |

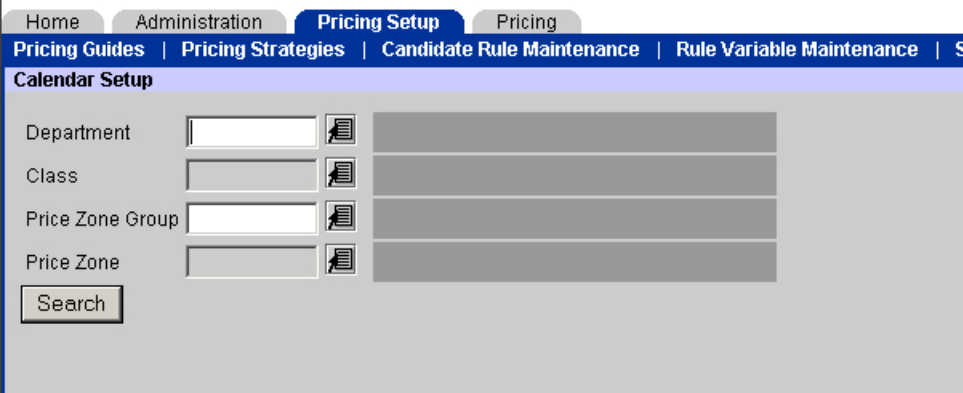
**Button descriptions**

| Button  | Description  |
|---|--|
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option.  |
| View  | Allows you to view the variables and assigned values for the selected Department when the selected variable was defined against candidate rules. |
| Previous  | Displays the preceding Department from the list of values and saves any changes to the selected Department.                                      |
| Next  | Displays the next Department from the list of values and saves any changes to the selected Department.   |
| Delete  | Removes the selected variable from the candidate rule.   |
| Save  | Saves the information that you entered in this window.   |
| Close   | Returns you to the Candidate Rules window.   |

**Schedule windows**

From the Schedule windows, you can:


- [Set up the snapshot calendar](#)
- [Update the snapshot calendar](#)


**Calendar Setup window**



Home Administration **Pricing Setup** Pricing


Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance | S

**Calendar Setup**

Department  

Class  

Price Zone Group  


Price Zone  



**Field descriptions**

| Field            | Description  |
|------------------|--|
| Department       | The Department for which you want to view information.       |
| Class            | The Class for which you want to view information.            |
| Price Zone Group | The Price Zone Group for which you want to view information. |
| Price Zone       | The Price Zone for which you want to view information.       |

**Button descriptions**

| Button  | Description   |
|---|---|
| Search  | Displays results that meet the criteria that you selected.                        |
|  (LOV) | Displays a list of values (LOV) from which you can select the appropriate option. |

**Schedule window**

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance

**Schedule**

**Header**


Department 5000 - RPM Clearance Dept New


Class

Price Zone Group 1000 - Competitive - Paint Copy

Price Zone

**Calendar Setup**

Start Date  

End Date  

Take snapshot every  days

**Snapshot Setup**

Inclusion Rules Frequency


Exception Frequency

Save

**Field descriptions**

| Field                        | Description   |
|------------------------------|---|
| <b>Header</b>                |   |
| Department                   | Department for which the schedule is being created, updated, or changed.  |
| Class                        | Class for which the schedule is being created, updated, or changed.   |
| Price Zone Group             | Price Zone Group for which the schedule is being created, updated, or changed.  |
| Price Zone                   | Price Zone for which the schedule is being created, updated, or changed.  |
| <b>Calendar Setup</b>        |   |
| Start Date                   | Date that you want to begin the calendar.   |
| End Date                     | Date that you want to end the calendar.   |
| Take snapshot every ___ days | Frequency at which you want to capture the selected information. This is the number of days that defines the size of the snapshot.                      |
| <b>Snapshot Setup</b>        |   |
| Candidate Frequency          | How often you want the candidate rules to run during a defined calendar period.<br>1=every snapshot<br>2=every other snapshot<br>3=every third snapshot |
| Exception Frequency          | How often you want exceptions to be checked within a defined calendar period.<br>1=every snapshot<br>2=every other snapshot<br>3=every third snapshot   |

### Button descriptions

| Button  | Description  |
|---|--|
| New   | Opens the Calendar Setup window so that you can change the Department for which you want to view or edit the schedule. |
| Copy  | Allows you to copy the selected schedule to another Department.  |
|  calendar icon | Displays a calendar from which you can select a date.  |
| Save  | Saves the information that you entered in this window.   |
| Cancel  | Removes any changes that were not saved in this window.  |

### Schedule Detail window

Home Administration **Pricing Setup** Pricing

Pricing Guides | Pricing Strategies | Candidate Rule Maintenance | Rule Variable Maintenance | **Schedule**

**Schedule**

Department 5000 - RPM Clearance Dept New

Class

Price Zone Group 1000 - Competitive - Paint Copy

Price Zone

**Calendar Setup**

Calendar 6/21/02 - 6/27/03 New Change Dates Copy Calendar Delete

Take snapshot every 7 days

**Snapshot Setup**

| Start Date | Rules   | Budget |
|------------|---|--------|
| 6/21/02    | <input checked="" type="checkbox"/> Inclusion Rules <input type="checkbox"/> Exception            |        |
| 6/28/02    | <input checked="" type="checkbox"/> Inclusion Rules <input checked="" type="checkbox"/> Exception |        |
| 7/5/02     | <input checked="" type="checkbox"/> Inclusion Rules <input type="checkbox"/> Exception            |        |
| 7/12/02    | <input checked="" type="checkbox"/> Inclusion Rules <input checked="" type="checkbox"/> Exception |        |

**Field descriptions**

| Field   | Description  |
|---|--|
| <b>Header</b> – see Schedule <a href="#">field descriptions</a> . |  |
| <b>Calendar Setup</b>   |  |
| Calendar  | Dates that you want to begin and end the calendar period.  |
| Take snapshot every ___ days                                      | Frequency at which you want to capture the selected information. This is the number of days that defines the size of the snapshot.                     |
| <b>Snapshot Setup</b>   |  |
| Begin Date  | The date that the snapshot starts.   |
| Rules   | Check the type of rule that you want to apply to the snapshot if you want Inclusion rules and/or Exception rules to be part of the scheduled snapshot. |
| Budget  | Enter the budget for this snapshot period.   |

**Button descriptions**

| Button   | Description  |
|--|--|
| <b>Header</b> – see Schedule <a href="#">button descriptions</a> . |  |
| <b>Calendar Setup</b>  |  |
| New  | Allows you to create a new calendar for the Department/Class/Price Zone Group/Price Zone combination that is selected. |
| Change Dates   | Allows you to change the dates of an existing snapshot.  |
| Copy Calendar  | Allows you to copy an entire calendar.   |
| Delete   | Allows you to delete the calendar that is displayed.   |
| Save   | Saves all information that you have entered in this window.  |
| Cancel   | Returns you to the previous window without saving any information that you have entered in this window.                |

## Use the Pricing tab

This section discusses some of the options that are available within the Worksheet Status window as well as the Pricing Worksheet. It also describes how to navigate, the buttons, fields, and features in both windows. From the Pricing tab, you can select [Worksheet Status](#). You must navigate from the Worksheet Status window to the [Pricing Worksheet](#) window.

From the Pricing tab, you can:

- [Modify a Pricing Worksheet](#)
- [Accept and submit a Pricing Worksheet](#)
- [View pricing strategy details on a Pricing Worksheet](#)
- [Delete a Pricing Worksheet](#)
- [Approve a Pricing Worksheet](#)
- [Reject a Pricing Worksheet](#)
- [Reset the status of a Pricing Worksheet](#)
- [Check price change totals](#)
- [Check sales totals](#)
- [Perform competitive analysis](#)

## Worksheet Status window

**Header**

Home Administration Pricing Setup **Pricing** Help

**Worksheet Status**

View Department: ALL Data Valid on Date: Apr 1, 2002

| Select                   | Department                      | Price Zone  | Worksheet Status | Action | Reason | Budget | Price Change Amount | Price Change SOH | Price Change Items | Sales Amount |   |
|--------------------------|---------------------------------|---|------------------|--------|--------|--------|---------------------|------------------|--------------------|--------------|---|
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5004 - Competitive Market D | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5002 - Competitive Market B | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5003 - Competitive Market C | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5005 - Competitive Market E | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5006 - Competitive Market F | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <input type="checkbox"/> | 5000 - RPM Clearance Dept / ALL | 5000 - Competitive for RPM 5000 / 5007 - Competitive Market G | New              |        |        |        | 0                   | 0                | 0                  | 0            |   |
| <b>Totals</b>            |                                 |   |                  |        |        |        | 0                   | -3322            | 10905              | 105          | 0 |

**Body**

**Footer**


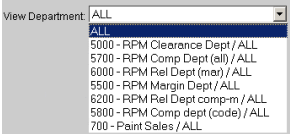


☒ View Worksheet Detail



**Retek**

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### Field and Button descriptions

The following table describes the fields, buttons, columns, and features of the Worksheet Status window.




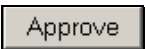

| Worksheet Status Feature  | Purpose   |
|---|---|
| <b>Header</b>   |   |
|    | Returns you to the previous window.   |
|    | <p>Allows you to select the appropriate Department from a drop-down list.</p> <p><i>For example:</i> If the Department is aggregated at the Department level then the Classes will be represented by /ALL. If the Department is aggregated at the class level, then the Class names will be displayed in the drop down list.</p> <p>You can view all aggregation levels on the worksheet status for all zones represented; but you can select only one aggregation level to view in the worksheet. You can select one, many, or all zones for an aggregation level to view within the Pricing Worksheet but only if the zones are of the same currency.</p> |
| Data Valid on Date  | The calendar date that the data in the window was last updated.   |
|  | Allows you to refresh all data. When you click  , the most current worksheet status displays. This allows you to view changes that someone else may be making in real time.  |
| <b>Body</b>   |   |
| Select  | Check one or more boxes in this column to select the rows.  |
| Department  | The Department that the corresponding Pricing Worksheet represents.   |
| Price Zone  | The price zone that the worksheet is for.   |

| Worksheet Status Feature | Purpose  |
|--------------------------|--|
| Worksheet Status         | <p>The current status of the worksheet. Valid statuses are:</p> <ul style="list-style-type: none"> <li>New</li> <li>Updated</li> <li>In Progress</li> <li>Deleted</li> <li>Delete Approved</li> <li>Delete Rejected</li> <li>Submitted</li> <li>Approved</li> <li>Rejected Submit</li> </ul> <p>For more information, see the <a href="#">Worksheet status and actions</a> section.</p>  |
| Action                   | <p>Select an option from the drop-down list. Action options are:</p> <ul style="list-style-type: none"> <li>Approve</li> <li>Delete</li> <li>Reject</li> <li>Reset</li> <li>Submit</li> </ul> <p>For more information, see the <a href="#">Worksheet status and actions</a> section.</p>   |
| Reason                   | <p>Click  to enter a cause for rejecting a worksheet. If comments exist, the bubble is red .</p>   |
| Budget                   | <p>The budget amount that has been set up for the selected aggregation zone in the Schedule.</p>   |
| Price Change Amount      | <p>The amount of the price change multiplied by the stock on hand. This varies by worksheet status. When the status is <i>New</i>, <i>Updated</i>, <i>Deleted</i>, or <i>In Progress</i>, the Price Change Amount applies to all items where the new retail equals the current retail. When the worksheet is <i>Submitted</i>, <i>Approved</i>, or <i>Rejected</i>, Price Change Amount applies to just the items that have the Price Change indicator checked and the new retail is not equal to the current retail.</p> <p><b>Note:</b> If the item is on Clearance, the comparison is made based on the Current Clearance rather than the Current Retail.</p> |



| Worksheet Status Feature | Purpose  |
|--------------------------|--|
| Price Change SOH         | <p>The number of in-stock items that have a price change. This varies by worksheet status. When the status is <i>New</i>, <i>Updated</i>, <i>Deleted</i>, or <i>In Progress</i>, the Price Change SOH applies to all items where the new retail equals the current retail. When the worksheet is <i>Submitted</i>, <i>Approved</i>, or <i>Rejected</i>, Price Change SOH applies to just the items that have the Price Change indicator checked and the new retail is not equal to the current retail.</p> <p><b>Note:</b> If the item is on Clearance, the comparison is made based on the Current Clearance rather than the Current Retail.</p>  |
| Price Change Items       | <p>The number of different items that have price changes. This varies by worksheet status. When the status is <i>New</i>, <i>Updated</i>, <i>Deleted</i>, or <i>In Progress</i>, the Price Change Items applies to all items where the new retail equals the current retail. When the worksheet is <i>Submitted</i>, <i>Approved</i>, or <i>Rejected</i>, Price Change Items applies to just the items that have the Price Change indicator checked and the new retail is not equal to the current retail.</p> <p><b>Note:</b> If the item is on Clearance, the comparison is made based on the Current Clearance rather than the Current Retail.</p>  |
| Sales Amount             | <p>Displays the sales amount for the aggregation zones selected or all zones on the worksheet when no zones are selected.</p> <p><math>\text{sales amount} = * \text{retail} \times \text{projected sales}</math></p> <p><b>*Note:</b> The retail value used in this calculation depends on the status of the worksheet.</p> <p><i>For example:</i> When the worksheet status is <i>New</i>, <i>Updated</i>, or <i>Deleted</i>, use the proposed retail value. If the worksheet is <i>In Progress</i>, <i>Submitted</i>, or <i>Approved</i>, use the current retail value for items that do not have the price change indicator checked and the clearance indicator is not checked. The current clearance retail value is used where the clearance indicator is checked but the price change indicator is not checked. The new retail value is used for items where the price change indicator is checked.</p> |

| Worksheet Status Feature | Purpose  |
|--------------------------|--|
| Sales Margin Amount      | <p>Displays the calculated margin amount for items in the selected price zone or all zones when no items are selected.</p> <p><b>*margin amount = (retail – cost) x projected sales</b></p> <p><b>*Note:</b> The values that are used to calculate margin amount depend on the status of the worksheet.</p> <p><i>For example:</i> When the worksheet status is New, Updated, or Deleted,<br/> margin amount = (<i>proposed</i> retail – <i>new</i> cost) x sales volume</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the clearance and price change indicators are not checked,<br/> margin amount = (<i>current</i> retail – <i>new</i> cost) x sales volume</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the clearance indicator is checked,<br/> margin amount = (<i>current Clearance</i> retail – <i>new</i> cost) x sales volume</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the price change indicator is checked,<br/> margin amount = (<i>new</i> retail – <i>new</i> cost) x sales volume</p> |
| Margin %                 | <p>Displays the calculated margin % for the selected price zone or all zones when no zones are selected.</p> <p><b>*margin % = (margin / sales) x cost or retail</b></p> <p><b>*Note:</b> The margin % depends on the status of the worksheet and whether the aggregation level is set up in RMS by Department as <i>retail</i> or <i>cost</i>.</p> <p><i>For example:</i> When the worksheet status is Current, the formula is<br/> margin % = <i>current</i> margin amount / <i>current</i> cost or retail.</p>  |
| Currency Code            | <p>The type of currency used in this zone. <i>For example:</i> USD = US dollars</p>  |

| Worksheet Status Feature  | Purpose  |
|---|--|
| Totals row  | <p>Displays the totals for the price changes in all retail zones that you have selected. Displays Budget, Price Change Amount, Price Change SOH, Price Change Items, Sales Amount, Sales Margin Amount, and Margin % for all selected rows.</p> <p><b>Note:</b> You must use a single currency for all calculations.</p> |
| <b>Footer</b>   |  |
|    | Allows you to select all check boxes in the Select column.   |
|    | Allows you to clear all check boxes in the Select column.  |
|    | <p>Allows you to view the Pricing Worksheet for all zones that you selected.</p> <p><b>Note:</b> You must select zones within the same aggregation level that have the same currency code.</p>   |
|   | Provides a mass approve function that changes the status of all selected rows from Deleted or Submitted to Approved.   |
|  | <p>Calculates Budget, Price Change Amount, Price Change SOH, Price Change Items, Sales Amount, Sales Margin Amount, and Margin % for all selected rows.</p> <p><b>Note:</b> You must use a single currency for all calculations.</p>   |

### Navigate the Worksheet Status window

➡ **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

To access a row below or above the visible rows:

- 1 Drag the bottom scrollbar all the way to the right. The worksheet scrollbar displays.
- 2 Drag the newly-displayed scrollbar on the right side of the screen up or down to view the desired row(s).

### Worksheet status and actions

The Worksheet status indicates where in the pricing strategy process a specific Worksheet is. Valid statuses are:

- New – Worksheet as it appears after snapshot is taken
- Updated – Worksheet has been updated by the batch process since the snapshot was taken and has no items selected for a price change
- In Progress - Worksheet that has had at least one item selected for a price change
- Deleted – Only new or updated worksheets can be deleted. When deleted worksheets are approved, their displayed status will be Approved. Deleted worksheets can be reviewed but cannot be changed.
- Submitted – Only Worksheets with a status of In Progress can be submitted. Once submitted, the Worksheet is frozen. At least one item in a zone must be selected for a price change before the worksheet can be submitted.
- Approved – Worksheets with a status of Submitted or Deleted can be approved. Price changes are sent to RMS immediately, but they go into effect on the effective date on the worksheet. An approved worksheet's status can be reviewed but cannot be changed.
- Rejected – Worksheets with a status of Submitted or Deleted can be rejected. When a worksheet is rejected, you must reset the status.

**Action column status**

The Action column drop-down list displays available options for Worksheet status. This table describes the status options that are available for each existing status in the Action column.

| If the status is | Your Action options are                        |
|------------------|--|
| New              | Delete   |
| Updated          | Delete   |
| In Progress      | Submit   |
| Submitted        | Reject<br>Approve                              |
| Deleted          | Reject<br>Approve<br>Reset (to New or Updated) |
| Delete Approved  | Cannot change status once approved             |
| Delete Rejected  | Reset (to Deleted)                             |
| Approved         | Cannot change status once approved             |
| Rejected Submit  | Reset (to Submitted)                           |

## Pricing Worksheet window

The Pricing Worksheet is divided into three parts:

- [Toolbar](#)
- [Body](#)
- [Footer](#)

The features of these parts are discussed in this section.

**Note:** One user at a time can access an aggregation zone.

### Toolbar

The toolbar on the Pricing Worksheet provides functionality to navigate the Pricing Worksheet and to select the view that you want to use.


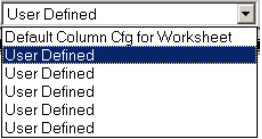




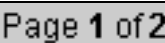



The screenshot shows the Pricing Worksheet window with the following components:

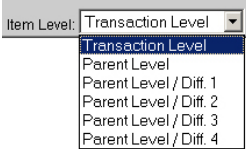





- Navigation Tabs:** Home, Administration, Pricing Setup, Pricing (selected).
- Toolbar:**
  - Buttons: Home, Save View, Page 1 of 2, Rows / Page: 15, Item Level: Transaction.
  - Dropdown: User Defined.
- Data Table:**

| Select                   | Retail Zone   | Item # | Description   | Cause | Rule | Relationship | Market Bas | Size | UOM | Comp A Ret | C |
|--------------------------|---------------|--------|---------------|-------|------|--------------|------------|------|-----|------------|---|
| <input type="checkbox"/> | 5000 - 500... | 5001   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5002   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5003   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5004   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5005   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5006   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5007   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5008   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5009   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5010   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5011   | RPM Cleara... |       |      |              |            |      |     |            |   |
| <input type="checkbox"/> | 5000 - 500... | 5012   | RPM Cleara... |       |      |              |            |      |     |            |   |
- Footer:**
  - Buttons: Price Change Totals, Sales Totals, Competitive Analysis, Close Totals.
  - Navigation icons: Back, Forward, Home, Search, etc.

### Field and Button descriptions

This table describes the features on the Pricing Worksheet toolbar.

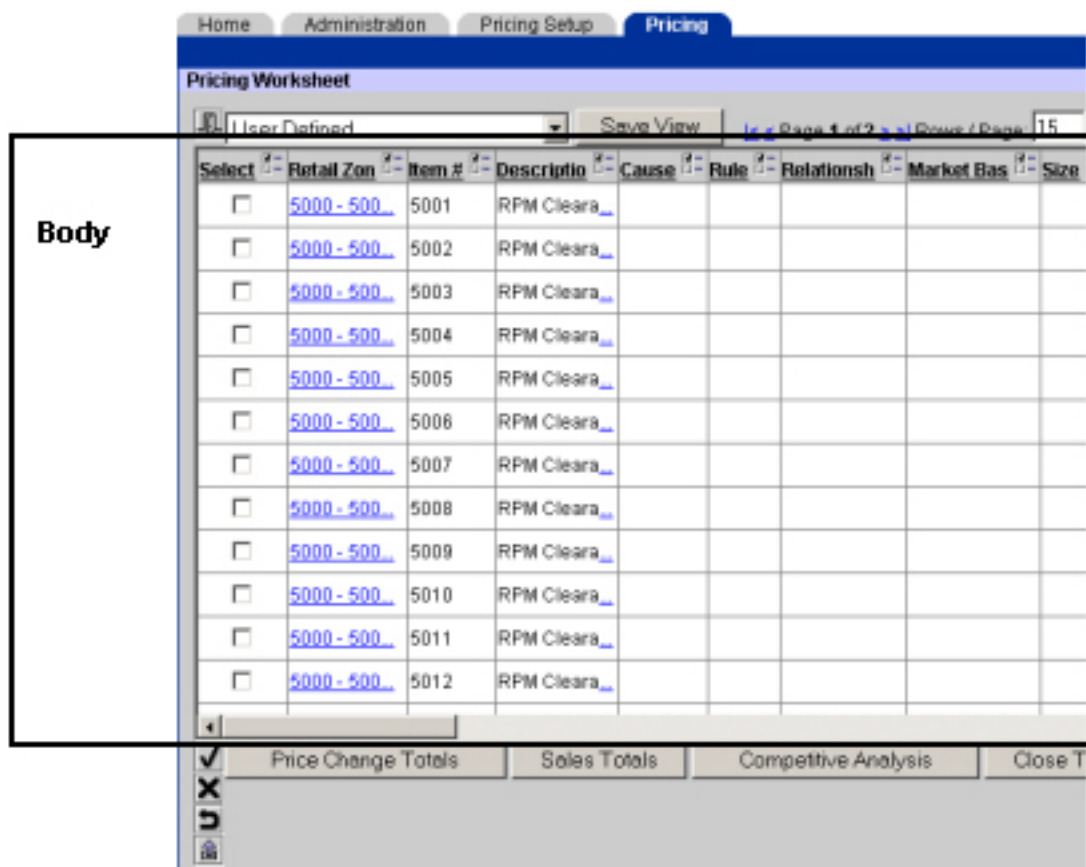
| Toolbar Feature   | Purpose   |
|---|---|
|    | Returns you to the previous window.   |
|    | Allows you to select either one of the views that you have defined or the default view of the Pricing Worksheet. For more information, see the <a href="#">Create a customized view of the Pricing Worksheet</a> procedure. |
|    | Saves the custom view that you created. For more information, see the <a href="#">Create a customized view of the Pricing Worksheet</a> procedure.  |
|    |  Brings you to page one of the Pricing Worksheet.  |
|   |  Brings you to the previous page of the Pricing Worksheet.   |
|   |  Tells you what page you are viewing and the total number of pages in the Pricing Worksheet.   |
|   |  Brings you to the next page of the Pricing Worksheet.   |
|   |  Brings you to the last page of the Pricing Worksheet.   |
|  | Shows the number of rows on the Pricing Worksheet that are displayed on each page. For more information, see the <a href="#">Create a customized view of the Pricing Worksheet</a> procedure.                               |

| Toolbar Feature   | Purpose   |
|---|---|
|    | <p>Allows you to view items from six levels.</p> <p><b>Transaction Level</b> – View items by transaction level. Cost, retail, and stock on hand are held at the transaction level.</p> <p><b>Parent Level</b> – View all items with the same parent. <i>For example:</i> Yogurt is the parent. You can view all yogurt items.</p> <p><b>Parent Level / Diff type</b> – View all items with the same parent, based on the differentiator type regardless of the Differentiator position of that Differentiator type. <i>For example:</i> This allows you to view all items where Color was used, regardless of which Differentiator position holds color.</p> <p><b>Parent Level / Diff 1</b> – View all items with the same parent and same Differentiator 1 value.</p> <p><b>Parent Level / Diff 2</b> – View all items with the same parent and same Differentiator 1 and 2 values.</p> <p><b>Parent Level / Diff 3</b> – View all items with the same parent and same Differentiator 1, 2, and 3 values.</p> <p><b>Parent Level / Diff 4</b> – View all items with the same parent and same Differentiator 1, 2, 3, and 4 values.</p> <p><b>Note:</b> If you assign the same differentiator number to the same characteristic for all items, sorting by differentiators will produce more meaningful results. <i>For example:</i> For all items, you define Differentiator 1 as Color.</p> |
|  | <p>Allows you to filter items by various parameters. For more information, see the <a href="#">Filter information on the Pricing Worksheet</a> procedure.</p>   |
|  | <p>Removes the filter that you applied. All items are shown as they were displayed before you applied the filter.</p>   |
|  | <p>Allows you to save the information that you entered or changed. You must save information before you can see the results of your changes in the Pricing Worksheet.</p>   |
|  | <p>Allows you to arrange each column in ascending or descending order. For more information, see the <a href="#">Sort by column</a> procedure.</p>  |
|  | <p>Allows you to refresh all data back to snapshot status.</p>  |




## Body

The body of the Pricing Worksheet provides the functionality to view price change proposals, perform what-if analysis, indicate clearance price changes, select items for price changes, indicate new or changes to existing multi unit retail prices, and view item data needed to make an educated decision.



### Pricing Worksheet body features

This table describes the features in the body of the Pricing Worksheet.

| Body Feature  | Purpose  |
|---|--|
|  | <p>This appears at the top of every column.</p> <p>Allows you to set up:</p> <ul style="list-style-type: none"> <li>Columns to be hidden or displayed</li> <li>The order that columns are displayed</li> <li>Width of each column</li> </ul> <p>For more information, see the <a href="#">Create a customized view of the Pricing Worksheet</a> procedure.</p> |
| RPM Cleara...   | <p>Indicates that part of the word is cut off. Click ... to display a pop-up window with additional information.</p>   |

| Body Feature                  | Purpose   |
|-------------------------------|---|
| <a href="#">5000 - 500...</a> | Indicates that there is additional information about the linked information. See <a href="#">Linked columns</a> for more information. |

### Pricing Worksheet column descriptions

This table lists all of the columns on the Pricing Worksheet and provides a description for each column. It also lists which columns you can edit and which are linked. If a column is editable or linked, there is an X in the column. Linked columns are explained on page 60.

| Column       | Description   | Edit | Linked |
|--------------|---|------|--------|
| Select       | Check one or more boxes in this column to select the rows.  | X    |        |
| Retail Zone  | The Price Zone Group /Price Zone for the item. When you click on the Retail Zone, a pop-up window opens with the pricing strategy displayed. You can perform what-if analysis in the pop-up window.   |      | X      |
| Item #       | A number that uniquely identifies the item.   |      |        |
| Description  | A brief explanation of the item.  |      |        |
| Cause        | The exceptions that exist for the item. All new exceptions are listed.<br><i>For example:</i> CC = Cost change and CR = Competitive Retail change   |      |        |
| Rule         | The identification for the rules that were met if candidate rules were applied. All rules that the item meets display. If you click the rule number, a pop-up window opens with the rule identification number, name, and conditions displayed.   |      | X      |
| Relationship | The size relationship of the item when Relationship pricing strategy is selected. Valid relationship values are:<br>Lead – this is the lead item<br>E – the size of the item is equal to the size of the lead item (with tolerances)<br>S – the size of the item is smaller than lead item (with tolerance)<br>L – the size of the item is larger than the lead item (with tolerance) |      |        |

| Column                   | Description   | Edit | Linked   |
|--------------------------|---|------|----------|
| Market Basket Code       | <p>The Market Basket Code that is assigned to the item in RMS. Valid Market Basket Code values are A, B, C and No Code.</p> <p><b>Note:</b> When items in a link code are aggregated in RPM, the highest market basket code item displays in the Pricing Worksheet. The remaining items in the link display when you select the underlined value in the Link Code column.</p> |      |          |
| Size                     | The item's package size.  |      |          |
| UOM                      | <p>The unit of measure that is associated with the package size of an item.</p> <p><i>For example:</i> The UOM for peanut butter is equal to its package size, 24 oz.</p>   |      |          |
| Comp A Retail            | The price that your main competitor charges for this item.  |      | <b>X</b> |
| Comp A Alert             | <p>There are two alert statuses, <b>Green</b> and <b>Red</b>.</p> <p><b>Green</b> – Indicates that the New Retail agrees with the strategy that is defined for Competitor A.</p> <p><b>Red</b> – Indicates that the New Retail does not agree with the strategy that is defined for Competitor A.</p>   |      |          |
| Comp A Multi Unit Retail | <p>The price that your main competitor charges for this item if it is sold as a multi-unit.</p> <p><i>For example:</i> 2/4.00 means that 2 is the number of units and 4.00 is the price when two units are purchased.</p>   |      |          |
| Comp B Retail            | The price that a secondary competitor charges for this item   |      | <b>X</b> |
| Comp B Alert             | <p>There are two alert statuses, <b>Green</b> and <b>Red</b>.</p> <p><b>Green</b> – Indicates that the New Retail agrees with the strategy that is defined for Competitor B.</p> <p><b>Red</b> – Indicates that the New Retail does not agree with the strategy that is defined for Competitor B.</p>   |      |          |
| Comp C Retail            | The price that a secondary competitor charges for this item   |      | <b>X</b> |

| Column             | Description   | Edit     | Linked   |
|--------------------|---|----------|----------|
| Comp C Alert       | There are two alert statuses, <b>Green</b> and <b>Red</b> .<br><b>Green</b> – Indicates that the New Retail agrees with the strategy that is defined for Competitor C.<br><b>Red</b> – Indicates that the New Retail does not agree with the strategy that is defined for Competitor C. |          |          |
| Comp D Retail      | The price that a secondary competitor charges for this item   |          | <b>X</b> |
| Comp D Alert       | There are two alert statuses, <b>Green</b> and <b>Red</b> .<br><b>Green</b> – Indicates that the New Retail agrees with the strategy that is defined for Competitor D.<br><b>Red</b> – Indicates that the New Retail does not agree with the strategy that is defined for Competitor D. |          |          |
| Comp E Retail      | The price that a secondary competitor charges for this item   |          | <b>X</b> |
| Comp E Alert       | There are two alert statuses, <b>Green</b> and <b>Red</b> .<br><b>Green</b> – Indicates that the New Retail agrees with the strategy that is defined for Competitor E.<br><b>Red</b> – Indicates that the New Retail does not agree with the strategy that is defined for Competitor E. |          |          |
| Retail Label Type  | The kind of retail label.<br><i>For example:</i> Cents Off  |          |          |
| Retail Label Value | A value that is assigned to the type of retail label.<br><i>For example:</i> If the Retail Label Type is Cents Off, the Retail Label Value may be 50.   |          |          |
| Effective Date     | The date that the price change will go into effect.<br>Effective date = end of snapshot date + price prior create days value  | <b>X</b> |          |
| Store Stock        | The total Stock on Hand (SOH) for all stores in this price zone.  |          |          |

| Column                  | Description   | Edit | Linked |
|-------------------------|---|------|--------|
| WH stock                | The total Stock on Hand (SOH) for all Warehouses that are assigned to this zone.  |      |        |
| Out of Stock Date       | The date that is sent to RMS if this is a clearance price change. The default value for all items is 120 days after the effective date unless the item is already on clearance. If the item is already on clearance, the out of stock date from RMS displays. | X    |        |
| Seasons                 | The season numbers display if the item has assigned seasons. When you click the season number link, a pop-up window opens with all of the item's assigned seasons and phases displayed.   |      | X      |
| Class                   | A number that uniquely identifies the Class in the merchandise hierarchy where the item is assigned.  |      |        |
| Subclass                | A number that uniquely identifies the Subclass in the merchandise hierarchy where the item is assigned.   |      |        |
| Diff One                | The first differentiator characteristic that was used when creating the item in RMS.  |      |        |
| Diff Two                | The second differentiator characteristic that was used when creating the item in RMS.   |      |        |
| Diff Three              | The third differentiator characteristic that was used when creating the item in RMS.  |      |        |
| Diff Four               | The fourth differentiator characteristic that was used when creating the item in RMS.   |      |        |
| Original Retail         | The retail price for the item on the day that it was first creating in RMS. It is based on the primary zone.  |      |        |
| Current Retail          | The existing active retail price for the item in the price zone.  |      |        |
| Current Cost            | The item's cost on the start date of the snapshot. If updates are set to Yes, the current cost will be for the last day within the snapshot that was updated.   |      |        |
| Current Cost Margin %   | $[(\text{current retail} - \text{current cost}) / \text{current cost}] \times 100 = \text{current cost margin \%}$  |      |        |
| Current Retail Margin % | $[(\text{current retail} - \text{current cost}) / \text{current retail}] \times 100 = \text{current retail margin \%}$  |      |        |

| Column                   | Description   | Edit | Linked |
|--------------------------|---|------|--------|
| Current Retail/UOM       | The price per unit of measure (UOM) calculated from the current retail.<br><i>For example:</i> A 20 oz. jar of apricot preserves sells for \$5.00. The UOM for preserves is ounces. The Current Retail/UOM is 0.25/ounce. |      |        |
| Current Markup           | Current Markup = Current Retail – Current Cost<br><br><b>Note:</b> If the item is on clearance, the Current Clearance Retail value is used for this calculation.  |      |        |
| Current Multi Retail     | Multi unit pricing that is in effect for this item in this price zone.<br><i>For example:</i> If an item sells at 3/\$5.00, 3 is the number of units and \$5.00 is the price when 3 units are purchased.                  |      |        |
| Proposed Retail          | The retail price calculated for the item using the pricing strategy and pricing guides.   |      |        |
| Proposed Markup          | Proposed Markup = proposed retail – new cost  |      |        |
| Proposed Cost Margin %   | $[(\text{proposed retail} - \text{new cost}) / \text{new cost}] \times 100 = \text{proposed cost margin \%}$  |      |        |
| Proposed Retail Margin % | $[(\text{proposed retail} - \text{new cost}) / \text{proposed retail}] \times 100 = \text{proposed retail margin \%}$   |      |        |
| Proposed Retail/UOM      | The proposed price per unit of measure (UOM) calculated from the proposed retail. See the example for <a href="#">Current Retail/UOM</a> for more information.  |      |        |
| New Retail               | If the item has not been edited and no what-if analysis have been performed, the New Retail is equal to the proposed retail.  | X    |        |
| New Markup               | New Markup = new retail – new cost  |      |        |
| New Cost                 | The cost that will be in effect on the system-generated effective date.   |      |        |
| New Cost Margin %        | $[(\text{new retail} - \text{new cost}) / \text{new cost}] \times 100 = \text{new cost margin \%}$  |      |        |
| New Retail Margin %      | $[(\text{new retail} - \text{new cost}) / \text{new retail}] \times 100 = \text{new retail margin \%}$  |      |        |

| Column                   | Description  | Edit | Linked |
|--------------------------|--|------|--------|
| New Retail/UOM           | The price per unit of measure (UOM) calculated from the new retail. See the example for <a href="#">Current Retail/UOM</a> for more information.   |      |        |
| New Multi Units          | The value from the current multi units, if multi unit pricing is in effect.<br>*If multi unit pricing is not in effect, the field is empty and can be edited.  | *X   |        |
| New Multi Retail         | The value from the current multi unit retails, if multi unit pricing is in effect.<br>*If multi unit pricing is not in effect, the field is empty and can be edited.   | *X   |        |
| UDA                      | If user defined attributes (UDA) are assigned to this item, UDA displays. If no UDAs are assigned, the column is blank.  |      | X      |
| First Received Date      | The earliest date that the item was received at any location in the company.   |      |        |
| Last Received Date       | The most recent date that the item was received at any location in the company.  |      |        |
| Link Code                | The link code that is assigned to this item at the price zone level.   |      | X      |
| Supplier                 | The primary vendor for the item.   |      |        |
| Clearance                | If the check box is selected, the item is pending clearance or on active approved clearance. If the check box is cleared, the item is not on clearance.  | X    |        |
| Current Clearance Retail | The present clearance retail price. This is based on an active clearance in RMS. A clearance is active in RPM if the downloaded date of the clearance is on or before today's date.  |      |        |
| Sell Thru                | Sum of the sales for the locations in a Price Zone divided by the sum of the stock on hand (SOH) for those locations plus the sum of the sales for those locations. $\text{Sell Thru} = [\text{Sales} / (\text{SOH} + \text{Sales})] \times 100$                             |      |        |
| Seasonal Sell Thru       | Sum of the sales by season for the locations in a Price Zone divided by the sum of the stock on hand (SOH) for those locations plus the sum of the sales for those locations. $\text{Sell Thru} = [\text{Seasonal Sales} / (\text{SOH} + \text{Seasonal Sales})] \times 100$ |      |        |

| Column                 | Description  | Edit     | Linked   |
|------------------------|--|----------|----------|
| Promotions             | <p>The status of promotions for the item in locations in this zone. Options are:</p> <p>None – No promotions exist</p> <p>Pending – Promotions start after the proposed effective date</p> <p>Conflicting – The start date and end date of a promotion overlaps the proposed effective date for this item in these locations</p> |          | <b>X</b> |
| Price Changes          | <p>The status of price changes for the item in locations in this zone. Options are:</p> <p>None – No price changes exist</p> <p>Pending – At least one price change or clearance event exists</p> <p><b>Note:</b> Price Changes include regular and clearance price changes.</p>   |          | <b>X</b> |
| Cost Changes           | <p>The status of supplier cost changes for the item in locations in this zone. Options are:</p> <p>None – No pending cost changes exist</p> <p>Pending – At least one cost change exists</p>   |          | <b>X</b> |
| Sales Units            | <p>The smoothed average sales value for the item based on all locations in this zone.</p> <p><b>Note:</b> If the Sales Calculation indicator is set to None, 0 displays in the field.</p>  |          |          |
| Price Change Indicator | <p>Select the check box in this field to lock the row. When the row is locked, the item should be sent back as a price change unless the new retail is the same as the current retail. If the clearance indicator is checked, the new retail is equal to the current clearance retail.</p>                                       | <b>X</b> |          |
| Price Change Amount    | <p>price change amount = current retail – new retail</p> <p>or, if this is a clearance item</p> <p>price change amount = current clearance retail – new retail</p>   |          |          |



| Column                  | Description   | Edit | Linked |
|-------------------------|---|------|--------|
| On Order Amount         | <p>The number of units of the item that are on order for locations in this zone and warehouses with inventory that has been assigned to the pricing strategy.</p> <p><b>Note:</b> Only warehouses that have the order indicator set to On (in the aggregation level setup) are included in this amount.</p> |      |        |
| Replenishment Indicator | <p>If <b>Y</b>, at least one location is currently on replenishment.</p> <p>If <b>N</b>, no locations are on replenishment.</p> <p><b>Note:</b> An item is on replenishment if they are restocked based on how it sells.</p>  |      |        |
| Price Elasticity        | Field is a placeholder only. It can be used by clients with a custom interface to send a value to this field.   |      |        |
| Elastic Sales Units     | Field is a placeholder only. It can be used by clients with a custom interface to send a value for this field.  |      |        |
| VPN                     | The vendor product number (VPN) assigned to the item by the supplier.   |      |        |
| Historical Sales        | The sales units for the item in stores in this zone.  |      |        |
| Weeks Since First Sale  | The number of weeks between today and the date of the first sale of the item in this price zone.  |      |        |
| Parent #                | A number that uniquely identifies the parent for this transaction-level item. If the item is a single-level item, no Parent # displays.   |      |        |
| Parent Description      | A brief explanation about the parent of the item.   |      |        |

### Linked columns

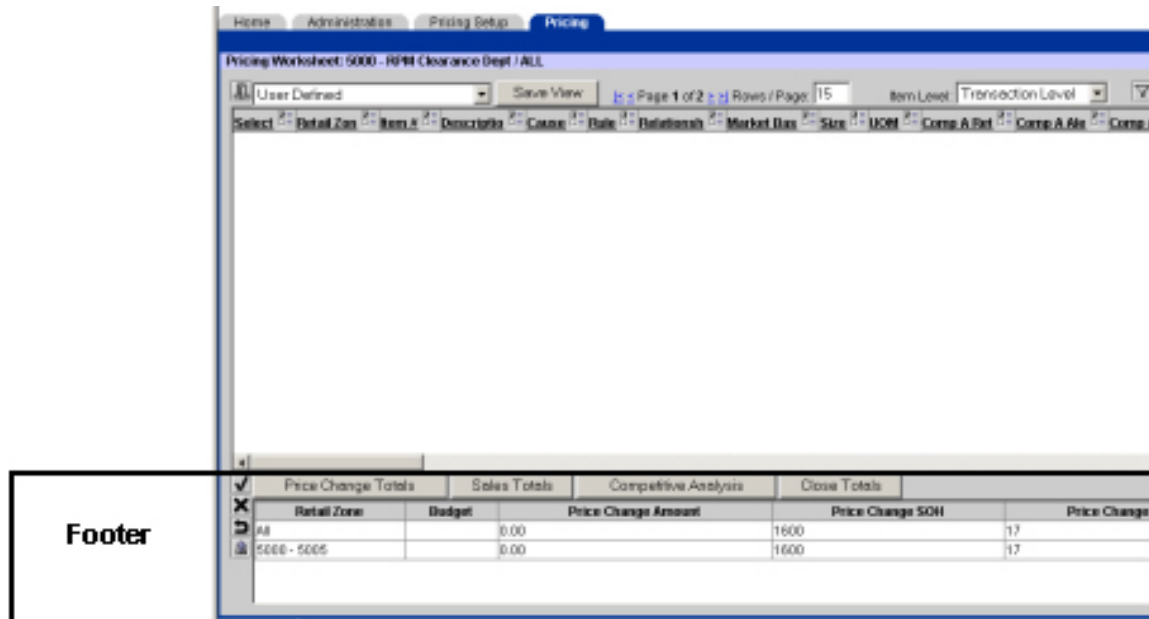
This table lists all of the linked columns. It also explains what happens when you click the link on each column.

| Column        | Result of clicking the link:   |
|---------------|--|
| Retail Zone   | A pop-up window opens with the current pricing strategy defined for the selected zone displayed. All strategy parameters and the pricing guide are also included in this pop-up window. You can change the Pricing Guide, the Pricing Strategy, and the effective date. There is also a Reset button that will refresh just the zone that applies to the information in the pop-up window. When you click <b>Reset</b> , all data is set back to the last snapshot update with the exception of rows that have been locked by clicking the price change indicator. |
| Rule          | A pop-up window opens with the inclusion rules that were met by that item displayed. Information in the pop-up includes the rule Name and Conditions.  |
| Comp A Retail | A pop-up window opens with the competitor, the competitor's store, and the retail at that store displayed. The compete type and % are also displayed if they were defined for the pricing strategy.  |
| Comp B Retail | See <a href="#">Comp A Retail</a> .  |
| Comp C Retail | See <a href="#">Comp A Retail</a> .  |
| Comp D Retail | See <a href="#">Comp A Retail</a> .  |
| Comp E Retail | See <a href="#">Comp A Retail</a> .  |
| Seasons       | A pop-up window opens with all seasons, phases, and descriptions assigned to the item displayed.   |

| Column        | Result of clicking the link:   |
|---------------|--|
| UDA           | <p>A pop-up window opens with User Defined Attributes for Value, Date, and/or Text displayed. The item number also displays.</p> <p><b>Value tab</b></p> <p>ID column – A number that uniquely identifies the UDA</p> <p>Description column – A brief explanation of the UDA. <i>For example:</i> fabric.</p> <p>Value column – A number that uniquely identifies the value</p> <p>Value Description column – A brief explanation of the value. <i>For example:</i> cotton.</p> <p><b>Date tab</b></p> <p>ID column – A number that uniquely identifies the UDA</p> <p>Description column – A brief explanation of the date. <i>For example:</i> Release date (for a music CD)</p> <p>Date column – The date that was assigned to the Date UDA for this item.</p> <p><b>Text tab</b></p> <p>ID column – A number that uniquely identifies the UDA.</p> <p>Description column – A brief explanation of the text that is expected in the Text column.</p> <p>Text column – The text that is entered in RMS. In RMS, you can enter up to 250 characters of free text.</p> |
| Link code     | A pop-up window opens with Item #, Description, Cause, Rule, Retail Label Type, Retail Label Value, Pending Price Changes, Clearances, Promotions, Cost Changes, and Store Stock displayed.  |
| Promotions    | A pop-up window opens with the pending or conflicting promotion numbers, descriptions, locations, and their start and end dates displayed.   |
| Price Changes | A pop-up window opens with the pending regular price changes and clearance price changes with their active dates and retail displayed.   |
| Cost Changes  | A pop-up window opens with all pending supplier cost changes listed by supplier for the item. The displayed values are based on any change in cost that would affect any location in the price zone. Additional information in this window includes Cost change number and description, supplier, active date, average unit cost across locations in the zone, and the new cost based on the active date.  |






## Footer

The footer of the Pricing Worksheet provides the functionality to perform various calculations.



### Pricing Worksheet footer features

This table describes the features in the footer of the Pricing Worksheet.

| Footer Feature  | Purpose   |
|---|---|
|  | Allows you to select all check boxes in the Select column.  |
|  | Allows you to clear all check boxes in the Select column.   |
|  | Allows you to move the selected rows' Current Retail to the New Retail column.<br><i>For example:</i> You always want the retail on pre-priced items to remain the same. So, you select the columns that contain pre-priced items and click  . |
|  | Allows you to export information on all selected rows to any application that can understand a comma delineated text file. Applications such as MS Excel and Access can read .csv files.  |

| Footer Feature  | Purpose  |
|---|--|
| <div data-bbox="456 247 745 289" style="border: 1px solid black; padding: 2px; text-align: center;">Price Change Totals</div> | <p>Displays the totals for all of the item rows that you selected. If no rows are selected, the totals reflect all rows in the worksheet. Five columns display:</p> <p><b>Retail Zone</b> – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.</p> <p><b>Budget</b> – The budget amount that has been set up in the Schedule for the selected aggregation zone.</p> <p><b>Price Change Amount</b> – How much the price will change. This varies by the clearance status of the item. When the item is on clearance, the Price Change Amount is equal to the current clearance minus the new retail. When item is not on clearance, the Price Change Amount is equal to the current retail minus the new retail.</p> <p><b>Price Change SOH</b> – The number of in-stock units that will be affected by the price change.</p> <p><b>Price Change Items</b> – The number of different items that have price changes.</p> <p><b>Note:</b> If no items are selected, the totals are displayed for all items where a price change would occur.</p> |
| <div data-bbox="456 1129 623 1171" style="border: 1px solid black; padding: 2px; text-align: center;">Sales Totals</div>      | <p>Displays the totals for sales of all items that you have selected. Five columns display:</p> <p><b>Sales Amount</b> – Displays the sales amount for the aggregation zones selected or all zones on the worksheet when no zones are selected.<br/> <math>\text{sales amount} = \text{*retail} \times \text{projected sales}</math></p> <p><b>*Note:</b> The retail value used in this calculation depends on the status of the worksheet.</p> <p><i>For example:</i> When the worksheet status is New, Updated, or Deleted, use the proposed retail value. If the worksheet is In Progress, Submitted, or Approved, use the current retail value for items that do not have the price change indicator checked and the clearance indicator is not checked. The current clearance retail value is used where the clearance indicator is checked but the price change indicator is not checked. The new retail value is used for items where the price change indicator is checked.</p>  |

| Footer Feature | Purpose   |
|----------------|---|
|                | <p><b>Retail Zone</b> – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.</p> <p><b>Status</b> – Displays the current status of the worksheet for the items selected.</p> <p><b>Margin Amount</b> – Displays the calculated margin amount for items in the selected price zone or all zones when no items are selected.</p> <p><b>*margin amount = (retail – cost) x projected sales</b></p> <p><b>*Note:</b> The values that are used to calculate margin amount depend on the status of the worksheet.<br/> <i>For example:</i> When the worksheet status is New, Updated, or Deleted,<br/> margin amount = (<i>proposed</i> retail – <i>new</i> cost) x sales volume</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the clearance and price change indicators are not checked,<br/> margin amount = (<i>current</i> retail – <i>new</i> cost) x sales volume</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the clearance indicator is checked,<br/> margin amount = (<i>current Clearance</i> retail – <i>new</i> cost) x sales volume</p> <p><b>Margin %</b> – Displays the calculated margin % for the selected price zone or all zones when no zones are selected.</p> <p><b>*margin % = (margin / sales) x cost or retail</b></p> <p><b>*Note:</b> The margin % depends on the status of the worksheet and whether the aggregation level is set up in RMS by Department as <i>retail</i> or <i>cost</i>.<br/> <i>For example:</i> When the worksheet status is Current, the formula is<br/> margin % = <i>current</i> margin amount / <i>current</i> cost or retail.</p> <p>When the worksheet status is In Progress, Submitted, or Approved and the price change indicator is checked,<br/> margin amount = (<i>new</i> retail – <i>new</i> cost) x sales volume</p> |

| Footer Feature  | Purpose   |
|---|---|
| <div data-bbox="456 249 743 296">Competitive Analysis</div> | <p>Displays the totals for how you are competing in all retail zones that you have selected. Seven columns display:</p> <p><b>Retail Zone</b> – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.</p> <p><b>Status</b> – Displays the current status of the worksheet for the items selected.</p> <p><b>A</b> – Displays how the retail price of your items with an <i>A</i> market basket code compares with your competitor's retail price for their <i>A</i> items.</p> <p><b>B</b> – Displays how the retail price of your items with a <i>B</i> market basket code compares with your competitor's retail price for their <i>B</i> items.</p> <p><b>C</b> – Displays how the retail price of your items with a <i>C</i> market basket code compares with your competitor's retail price for their <i>C</i> items.</p> <p><b>No Code</b> – Displays how the retail price of your items with no market basket code compares with your competitor's retail price for their items with no market basket code.</p> <p><b>Total</b> – Displays how the retail price of all items compares with your competitor's retail price.</p> |
| <div data-bbox="456 1161 630 1199">Close Totals</div>       | <p>Closes the display area in the footer of the Pricing Worksheet.</p>  |

## Pricing Worksheet navigation

### Navigate within the Pricing Worksheet


- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens with the number of pages listed at the top of the worksheet.
- To **move forward** one page, click [➤](#). The next page with your location in the Worksheet displays.
- To **move to the last page** of the Worksheet, click [➤](#). The next page with your location in the Worksheet displays.
- To **move back** one page, click [➤](#). The previous page displays.
- To **move to the first page** of the Worksheet, click [➤](#). The first page displays.
- To **access a row** below or above the visible rows, drag the scrollbar on the right side of the screen up or down to view the desired row(s).

### Access the desired view of the Pricing Worksheet

- **Navigate:** Main Menu > Pricing > Worksheet Status. [The Worksheet Status window](#) opens.
- 1 Select the row that you want to view.
- 2 Click **View Worksheet Detail**. The [Pricing Worksheet window](#) opens.
- 3 From the view drop-down list, select the desired view.

**Note:** To create a customized view, see the [Create a customized view of the Pricing Worksheet](#) procedure.

### Export the Pricing Worksheet

- 1 On the Pricing Worksheet, select the lines that you want to export.
- 2 Click . The File Download dialog box opens.
- 3 Select **Save this file to disk**.
- 4 Click **OK**. The Save As dialog box opens.
- 5 Navigate to the location where you want to save the file.
- 6 Click **Save**. When the file download is complete, the Download Complete dialog box opens.
- 7 From the Download Complete dialog box, you can open the file or close the window.

**Note:** Save the file in the .csv format so that you can open it in any application that supports comma delineated text file. Applications such as MS Excel and Access can read .csv files.



## Customize the Pricing Worksheet display


If you have security access to the Pricing Worksheet, you have several options for changing the way that you can view information. You can sort information by column. You can also modify the appearance of the Pricing Worksheet and save five different customized views of the Pricing Worksheet that you can access.

### Create a customized view of the Pricing Worksheet



When customizing your views of the Pricing Worksheet, you can:

- Define the columns that are displayed and hidden
- Arrange the order of the columns that are displayed
- Set the width of the columns that are displayed
- Define the number of rows that are displayed
- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

**Note:** Do not hide columns that you can edit such as the Select and Price Change Indicator columns unless you do not use them.





- 1 In the Select column, click the check box on any line.
- 2 Click **View Worksheet Detail**. The [Pricing Worksheet window](#) opens.
- 3 Define the columns that are displayed and hidden.
  - a In the heading of any column, click . The Column Ordering dialog box opens.
  - b Select one or more columns to hide or show.

**Note:** To select multiple columns, see the [Select multiple options from a list](#) procedure.

- c Click  to move the selected columns to the Hidden Columns field or  
Click  to move the selected columns to the Displayed Columns field.
- d Click **Save**. The selected columns are hidden on the Pricing Worksheet.

**Note:** To close the dialog box without saving any changes, click **Cancel**.

- 4 Arrange the order of the columns that are displayed.
  - a In the Column Ordering dialog box, select the Displayed Columns that you want to re-order in the same manner (move all up or down).
 

**Note:** To select multiple columns, see the [Select multiple options from a list](#) procedure.
  - b Move the selected columns.
    - To move the selected columns one column to the left, click .
    - To move the selected columns to the far left side of the Pricing Worksheet, click .
    - To move the selected columns one column to the right, click .
    - To move the selected columns to the far right side of the Pricing Worksheet, click .
  - c Click **Save**. The dialog box closes and selected columns are re-ordered on the Pricing Worksheet.
 

**Note:** To close the dialog box without saving any changes, click **Cancel**.
- 5 Set the size of the columns that are displayed.
  - a In the Column Ordering dialog box, click **Column Widths**. The Column Widths dialog box with all of the displayed columns opens.
  - b Enter the desired column width in the Width field next to the column that you want to re-size.
  - c Repeat step b for each column that you want to re-size.
 

**Note:** The number in the Width field is an estimate of the number of characters that fit in the column. You can edit column width only on columns that are displayed.
  - d Scroll to the bottom of the Column Widths dialog box.
  - e Click **Save**. The Column Widths dialog box closes.
  - f In the Column Ordering dialog box, click **Save**. The dialog box closes and columns are re-sized on the Pricing Worksheet.
 

**Note:** To close either dialog box without saving any changes, click **Cancel**.
- 6 Define the number of rows that are displayed.
  - a On the Pricing Worksheet header in the Rows/Page field, enter the number of rows that you want to display.
 

**Note:** The number of rows that are displayed is the same for every view.

- 7 Click **Save View**. The Column Setup dialog box opens.
- 8 In the New Name field, enter the new name of the view.
- 9 Click **Save**. The dialog box closes and your newly-named view displays on the View drop-down list.

**Note:** To close the dialog box without saving any changes, click **Cancel**.

### Create a custom view from the Default view


- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

**Note:** Do not hide columns that you can edit such as the Select and Price Change Indicator columns unless you do not use them.


- 1 In the Select column, click the check box on any line.
- 2 Click **View Worksheet Detail**. The [Pricing Worksheet window](#) opens.
- 3 From the view drop-down list, select **Default**. The default Pricing Worksheet window opens.
- 4 Make the desired changes.
- 5 Click **Save View**. The default view that you modified is saved.

**Note:** This does not change or remove the Default view.





### Sort by column

- 1 On the Pricing Worksheet header, click . The Pricing Worksheet Sort dialog box opens.
- 2 In the All Available Columns fields, select the columns that you want to sort in the same manner (all ascending or descending).

**Note:** To select multiple columns, see the [Select multiple options from a list](#) procedure.

- 3 Click  to move the selected columns to the Sort By field.
- 4 Arrange the sort order of the columns.

**Note:** The first sort is performed on the column that is at the top of the list in the Sort By field. The second sort is performed on the column that is second in the list in the Sort By field.

- To move the selected column up one, click .
- To move the selected column to the top of the list, click .
- To move the selected column down one, click .
- To move the selected to the bottom of the list, click .


- 5 To sort column data in ascending order, highlight the column and click **Ascending**.  
or  
To sort column data in descending order, highlight the column and click **Descending**.
- 6 Click **Apply**. The dialog box closes and columns are sorted in the order specified.

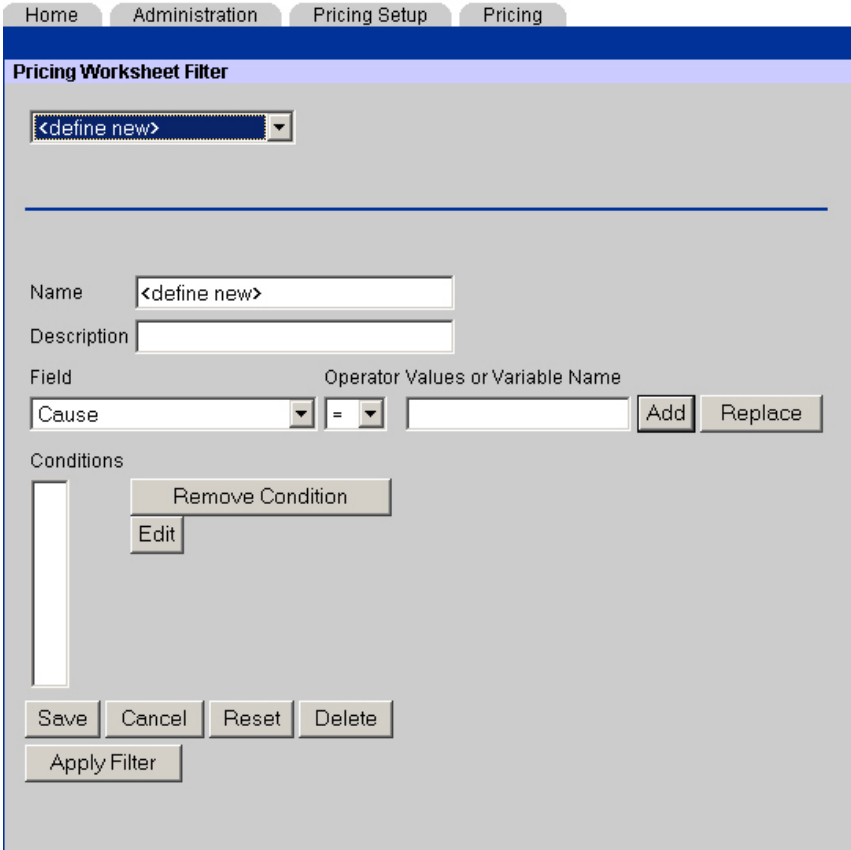
**Note:** To close the dialog box without saving any changes, click **Cancel**.

### Filter information on the Pricing Worksheet

You can filter only at the transaction level.

**Note:** After information is filtered at the transaction level, you can view it from another aggregation level.

- 1 On the header of the Pricing Worksheet, click . The Pricing Worksheet Filter window opens.



Home Administration Pricing Setup Pricing

**Pricing Worksheet Filter**

<define new>

---

Name <define new>

Description

Field Operator Values or Variable Name

Cause =

Add Replace

Conditions

Remove Condition

Edit

Save Cancel Reset Delete

Apply Filter

## 2 Create your filter.

- To select an existing filter, select a filter from the drop-down list at the top of the window. The filter displays in the Conditions field.
- To create a new filter:

**Note:** If you just want to view filtered information, you do not need to complete the Name and Description fields or save the information.

### a Enter information in the following fields:

- Name – The name of the filter
- Description – A brief explanation of the filter. This description can be up to 250 characters.
- Field – The field to which the filter is applied. Select the appropriate option from the drop-down list.
- Operator – Indicates the relationship that the Field item has to the Value. Select the appropriate option from the drop-down list.

**Note:** All options may not be available for some field types.

- Values – The value that you want to compare against

- b Repeat step a until you have added all of the conditions that you want to use.
- c Click **Add**. The condition displays in the Conditions field.
- d Click **Save** to save all of the filter parameters that you set.

- To edit a Condition:


**Note:** To add a new Condition to a rule without changing any existing Conditions, follow steps c-d below.

- a In the Conditions box, select the Condition that you want to change.
- b Click **Edit**. The components of the selected condition display in the Field, Operator, and Values fields.
- c Enter the appropriate information in the Field, Operator, and Values fields.
- d To include the new or updated Condition without removing the existing Condition, click **Add**.  
Or  
To substitute the existing Condition with the one you just created or edited, click **Replace**.

- To remove a condition from the Conditions box, click **Remove Condition**.

## 3 Click **Apply Filter**. The Pricing Worksheet Filter window closes and the filter is applied to the Pricing Worksheet.

### Remove filters from the Pricing Worksheet

- 1 On the header of the Pricing Worksheet, click . All filters are removed from the selected view of the worksheet.

## Chapter 3 – Use Administration features

An Administrator sets up the areas that manage the Retail Price Management (RPM) system. These tasks include set up for:

- [Security levels for user access](#)
- [System options and defaults](#)
- [Set up aggregation levels and Department values](#)

**Note:** Many field names can be changed within RPM. This document describes the field names that the product is shipped with. When you change field names, make sure that you keep track of the original field name and the corresponding new field name.

### Set security levels for user access

Security within RPM is based on two things:

- RMS security settings – Determines what information the user can access in RPM, based on their level of access, merchandising hierarchy, and zone security settings for the functional pricing area.
- RPM security settings – Determines where the user can navigate and what actions they can perform within RPM.

You can give users full, limited, or no access. The four levels of form access are:

- None – User cannot access the form
- View – User can navigate through the form, but cannot change or save information
- Edit – User can navigate through the form, change, and save information
- Approve – User can approve price changes.

**Note:** Approve is an option for only the Worksheet Status form.

Users can be linked to one or more groups. All users within a group share the same permissions to view, add, edit, and delete records in specified functional areas, merchandise levels, organizational levels, and Price Zones. The users that you set up in RPM must be valid system users.

**Note:** If a user is assigned to more than one user group, the group with the greater access is the default when the user logs in.

From the [Security Groups window](#), you can:

- [Set up a Security Group](#)
- [Copy a Security Group](#)
- [Edit a Security Group](#)
- [Delete a Security Group](#)
- [View a Security Group](#)
- [Add a user to a Security Group](#)

**Set up a Security Group**

- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Click **New**. The [Security Group Maintenance window](#) opens.
  - 2 In the Name field, enter the name of the Security Group.
  - 3 In the Description field, enter a brief statement that describes the Security Group.
  - 4 Select the appropriate Access Type for each of the following forms from the drop-down lists:
    - Security
    - System Options
    - Aggregation level
    - Pricing Guides
    - Schedule
    - Candidate Rule
    - Rule Variable Maintenance
    - Strategy setup
    - Worksheet Status
    - Worksheet
  - 5 To save the Security Group and return to the Main Menu, click **Save**.  
Or  
To add a user to the newly-created group, follow steps 4-9 of the [Add a user to a Security Group](#) procedure.



### Edit a Security Group

- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Select the radio button next to Security Group that you want to edit.
- 2 Click **Edit**. The [Security Group Maintenance window](#) opens with information about the selected Security Group.
- 3 Change the information for any of the following forms, as appropriate:
  - Description
  - Security
  - System Options
  - Aggregation level
  - Pricing Guides
  - Schedule
  - Candidate Rule
  - Rule Variable Maintenance
  - Strategy setup
  - Worksheet Status
  - Worksheet
- 4 To save your changes to the Security Group and return to the Main Menu, click **Save**.

**Note:** To exit the Security Group Maintenance window without saving any information that you entered, click **Cancel**.

### View a Security Group


- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Select the radio button next to Security Group that you want to view.
- 2 Click **View**. The [Security Group Maintenance window](#) opens with information about the selected Security Group.
- 3 To exit the Security Group Maintenance window, click **Cancel**.

### Copy a Security Group

- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Select the radio button next to Security Group that you want to copy.
- 2 Click **Copy**. A pop-up window opens.
- 3 In the pop-up window field, enter a unique name for the new Security Group.
- 4 Click **OK**. The pop-up window closes and the newly-created Security Group displays at the top of the list.
- 5 To save the new Security Group and return to the Main Menu, click **Save**.

**Note:** To exit the Security Group Maintenance window without saving any information that you entered, click **Cancel**.

### Add a user to a Security Group

- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Click **New**. The [Security Groups window](#) opens.
- 2 Select the radio button next to Security Group that you want to add the user to.
- 3 In the Add User field, click . The Users pop-up window opens with a list of valid user names.
- 4 Select the radio button next to appropriate name from the list. When you select a name, it is highlighted.
- 5 Click **OK**. The pop-up window closes and the selected name displays in the field.
- 6 Click **Add User**. The name that you selected displays in the User Name field.
- 7 Repeat steps 4 – 6 for each user that you want to add to this Security Group.
- 8 To save the information that you entered, click **Save**.

**Note:** To exit the Security Group Maintenance window without saving any information that you entered, click **Cancel**.

### Delete a Security Group

- **Navigate:** Main Menu > Administration > Security. The [Security Groups window](#) opens.
- 1 Select the radio button next to Security Group that you want to delete.
- 2 Click **Delete**. The message displays, “*Are you sure you want to delete the Security Group?*”
- 3 Click **OK** to delete the group. The Security Group is removed from the list.

## Set up options and defaults for the system

RPM system options are system-wide for all users. Only users with the appropriate security clearance can change the system options. The options that you select are:

- Sales calculation method
- Cost calculation method
- Update item attributes

RPM system defaults are system-wide for all users. Any user can override the defaults during their session in RPM. The default settings that you set up include:

- Lead item calculation type
- Pricing strategy

### Set up system options and defaults

- **Navigate:** Main Menu > Administration > System Options. The [System Options window](#) opens.
- 1 In the Options section of the window, select the appropriate options from the drop-down lists in the following fields:
  - Sales Calculation Method
  - Cost Calculation Method
  - Update Item Attributes
- 2 In the Defaults section of the window, select the appropriate options from the drop-down lists in the following fields:
  - Lead Item Calculation Type
  - Pricing Strategy
- 3 Click **Save**. The System Options are saved.

## Set up aggregation levels and Department values

### Set up aggregation levels and Department values

**Note:** All schedules and strategies for the Department are **deleted** if you change the aggregation level setting from Department to Class or from Class to Department. After a change is made, the schedules and strategies will need to be rebuilt based on the new aggregation setting.

➡ Navigate: Main Menu > Administration > Aggregation Level. The [Aggregation Level Setup window](#) opens.

In the row for the appropriate Department:

- 1 From the Aggregation Level drop-down list, select the appropriate aggregation level.
- 2 From the Historical Sales drop-down list, select the appropriate time period.
- 3 In the Sales Type section, check one or more of the following boxes:
  - Regular – Select this check box to include regular sales in the historical sales totals.
  - Clearance – Select this check box to include clearance sales in the historical sales totals.
  - Promotional – Select this check box to include promotional sales in the historical sales totals.
- 4 In the Include Warehouse Stock in Calculations section, check one or more of the following boxes:
  - Stock on Hand– Select this check box to include Warehouse stock that is on hand in the sell-thru and price change amount calculations.
  - Stock on Order– Select this check box to include Warehouse stock that is on order (in the On Order column with store On Order amounts).
- 5 Click **Save**. The information that you entered is saved.

## Chapter 4 – Set up Pricing

The Pricing setup functionality allows you to set up and maintain the pricing rules, parameters, guides, and schedules for your organization. This section discusses set up tasks, which include setting up:

- [Candidate rules](#)
- [Pricing](#)
- [The Schedule](#)

**Note:** Many field names can be changed within RPM. This document describes the field names that the product is shipped with. When you change field names, make sure that you keep track of the original field name and the corresponding new field name.

### Set up candidate rules and define rule variables

A **candidate** is any item or group of items that is reviewed for pricing changes.

A **candidate rule** is a set of criteria that is compared to each item to determine if the item meets one or more conditions. RPM uses two types of candidate rules:

**Inclusion rule** – When the inclusion rule is met, the item is flagged by the system for a pricing review

**Exclusion rule** – When the exclusion rule is met, the item will not be brought in for review

A **candidate rule variable** is the portion of the candidate rule conditions that allows a rule value to vary at the Department level.

The pricing office of your organization determines the optimum strategies for using RPM in your business. After these strategies are decided, you can define the candidate rules and set up the following parameters:

- Candidate rules
- Variables for candidate rules

**Note:** Rules that have variables defined are run only against items in Departments where a value has been assigned to the variable. If there is no variable value for a Department, the candidate rule will not run against items from that Department.

### Set up a candidate rule and define a variable for the rule

There are two types of candidate rules: Inclusion and Exclusion. Exclusion rules are always run first. Inclusion rules can contain a variable for Department level differences in the value to be searched against.

➤ **Navigate:** Main Menu > Pricing Setup > Candidate Rule Maintenance. The [Candidate Rules window](#) opens.

- 1 Click **New**. The [Candidate Rule Maintenance window](#) opens.
- 2 Enter information in the following fields:
  - Name – The name of the candidate rule
  - Description – A description of the candidate rule. This description can be up to 250 characters.
  - Type – The kind of candidate rule that is applied. Options are Exclusion or Inclusion. Select an option from the drop-down list.
  - Active – Check the box if the candidate rule should be in effect or active. If the box is not checked, the candidate rule is not in effect or inactive. Only active rules are run during a snapshot.
  - Field – The field to which the candidate rule is applied. Select the appropriate option from the drop-down list.
  - Operator – Indicates the relationship that the Field item has to the Value or Variable Name. Select the appropriate option from the drop-down list.


**Note:** All options may not be available for some field types.

- Values or Variable Name – Either a value or a variable name.

**Note:** If you enter a Value, the rule runs against all Departments that use this value in the rule. If you enter a Variable, you can assign the value of the Variable by Department.

- Conditions – The resulting combination of Field, Operator, and Values or Variable Name.

**Note:** A single rule can have multiple conditions. If multiple conditions exist for a rule, an item must meet **all** of the conditions in order for the rule to be met.


- 3 If you want to use the value as a variable:
  - a Check the box in front of **Use value as variable**.
  - b In the Values or Variable Name field, enter the name or click  (LOV) and select from the list of values.

**Note:** To return to the Candidate Rule window without saving information click **Cancel**. All information that you did not save in the Candidate Rule window is lost.

- 4 To apply all of the information that you entered in this window, click **Save**. You are returned to the Candidate Rule Maintenance window.

#### Set up rule variable values for one or more Departments

- **Navigate:** Main Menu > Pricing Setup > Rule Variable Maintenance. The [Rule Variable Maintenance window](#) opens.

- 1 In the Departments field, enter the name or click  (LOV) and select from the list of values.

**Note:** If you want to set up a single variable value across multiple Departments, select the desired Departments from the LOV. See the [Select multiple options from a list](#) procedure.

- 2 Click **View**. The Departments are displayed with the variables.
- 3 In the **Value** field, enter the value to be associated with the variable when the rule is run against items from the selected Departments.
- 4 Click **Save**. The rule is saved with the variable values assigned to it.

**Note:** To return to the Candidate Rules window, click **Close**.

- 5 To set up a different rule variable value for another Department, click **Next**. The Department with the next highest numerical identification number displays in the Departments field.
- 6 Follow steps 3 – 5 for each Department that you want to work with.

**Note:** To exit the window without saving information click **Cancel**. All information that you did not save in the window is lost.

## Set up pricing

The pricing office of your organization determines the optimum strategies for using RPM in your business. After these strategies are decided, you are given information for setting up the following parameters:

- Pricing strategies
- Pricing guides

## Set up pricing strategies

Pricing strategies are defined in the [Pricing Strategies window](#). You enter and maintain the strategy by which the proposed retail price is calculated. You also set the appropriate parameters that vary across those Price Zones, Departments, or Classes. These strategies include:

- [Competitive Pricing](#)
- [Clearance Pricing](#)
- [Margin Pricing](#)
- [Relationship Pricing](#)

When you select a different pricing strategy, the appropriate fields are displayed. Depending on the aggregation settings in RPM, you can apply the defined strategy to a Department or Class across one, many, or all Price Zones in a Price Zone Group. If a strategy has been defined, you can view it when you specify the Department and Class or Price Zone Group and Price Zone.

If a Department is aggregated at the Class level, you can set up a pricing strategy at the Department level. This strategy will be saved at not only the Department level but also at the Class level. If you define a pricing strategy at the Price Zone Group level, the strategy will also be saved at the Price Zone level.

**Note:** RPM will not propose new retail prices for items that are on Clearance and a Pricing strategy of Relationship, Competitive or Margin.



### Set up competitive pricing

Competitive pricing allows you to propose retails for all the items in a merchandise hierarchy level based on:

- One primary competitor's lead item retail price
- Competitive strategy (Match, Price Above, Price Below, Price by Code) applied to all items
- A pricing guide to help round or apply ends-in logic to the unadjusted retail values

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** and **Price Zone Group** or click  (LOV) and select from the list of values.

**Note:** If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are applied to the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always applied to all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with strategies that match the criteria that you entered.

**Note:** Search results include a Pricing Strategy only if you searched on the lowest level that the strategy is applied. If an empty Pricing Strategy is displayed, you can set up the strategy and it will override all definitions that have been applied at a lower level.

*For example:* If the Pricing Strategy is applied at the Class level, and your search criteria include a Class, the Pricing Strategy displays after you click **Search**. If the Pricing Strategy is applied at the Class level, and your search criteria do not include a Class, a blank Pricing Strategy displays after you click **Search**.

- 3 From the Pricing Strategy drop-down list, select **Competitive**. The [Pricing Strategy – Competitive window](#) opens.
- 4 In the Primary Competitor section, enter the appropriate number or select from the LOV for the following fields:
  - Competitor – The competitor against which you want to calculate your prices.
  - Store – The competitor's store against which your retail prices are compared. All calculations are based on this store's regular retail prices.
- 5 In the Compete field, select the appropriate option from the drop-down list.


**Note:** When the Price by Code option is selected, Market Basket Codes / No Code fields become available. Enter a Compete strategy against Market Basket Codes or No Code.

- 6 For each reference competitor that you want to enter, in the Reference Competitor section of the window, perform one or more of the following actions:
  - Enter a Competitor.
  - Enter a Store.
  - Select an option from the Compete drop-down list.
  - In the Percentage field, enter the appropriate percentage to compete.
- 7 When you have entered all of the desired information in this window, click **Save**. The changes that you made are saved in RPM.

### Set up clearance pricing

Clearance pricing allows you to propose retails for items that meet candidate rules in a merchandise hierarchy level based on defined markdown percentages. The markdown percentages can be applied either to the item's regular retail price or the last clearance retail price.

- **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** or **Class** and **Price Zone Group** or **Price Zone**, or click  (LOV) and select from the list of values.

**Note:** If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are applied to the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always applied to all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with strategies that match the criteria that you entered.

**Note:** Search results include a Pricing Strategy only if you searched on the lowest level that the strategy is applied. If an empty Pricing Strategy displays, you can set up the strategy and it will override all definitions that have been applied at a lower level.

*For example:* If the Pricing Strategy is applied at the Class level, and your search criteria include a Class, the Pricing Strategy displays after you click **Search**. If the Pricing Strategy is applied at the Class level, and your search criteria do not include a Class, a blank Pricing Strategy displays after you click **Search**.

- 3 From the Pricing Strategy drop-down list, select **Clearance**. The [Pricing Strategy – Clearance window](#) opens.
- 4 In the Markdowns as a percent of field, select Regular Price or Last Clearance Price from the drop-down list.

**Note:** The first markdown is always a percentage off of the regular price.


- 5 Enter information in one or more of the following fields:
  - 1<sup>st</sup> Markdown – Percentage to be taken off the regular price.
  - 2<sup>nd</sup> Markdown – Percentage to be taken off either the regular price or the previous markdown price.
  - 3<sup>rd</sup> Markdown – Percentage to be taken off either the regular price or the previous markdown price.
  - 4<sup>th</sup> Markdown – Percentage to be taken off either the regular price or the previous markdown price.
  - 5<sup>th</sup> Markdown – Percentage to be taken off either the regular price or the previous markdown price.
- 6 When you have entered all of the desired information in this window, click **Save**. The changes that you made are saved in RPM.

### Set up margin pricing

Margin pricing allows you to propose retails for all the items in a merchandise hierarchy level based on the market basket code's assigned margin target.

**Note:** If your policy is to not assign market basket codes, you can still use Margin pricing by assigning a margin target to the No Code option. When no market basket code is assigned, the same margin target that you entered in the No Code field applies to all items.

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** or **Class** and **Price Zone Group** or **Price Zone**, or click  (**LOV**) and select from the list of values.

**Note:** If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are applied to the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always applied to all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with strategies that match the criteria that you entered.

**Note:** Search results include a Pricing Strategy only if you searched on the lowest level that the strategy is applied. If an empty Pricing Strategy displays, you can set up the strategy and it will override all definitions that have been applied at a lower level.

*For example:* If the Pricing Strategy is applied at the Class level, and your search criteria include a Class, the Pricing Strategy displays after you click **Search**. If the Pricing Strategy is applied at the Class level, and your search criteria do not include a Class, a blank Pricing Strategy displays after you click **Search**.

- 3 From the Pricing Strategy drop-down list, select **Margin**. The [Pricing Strategy – Margin window](#) opens.


- 4 In the Market Baskets section of the window, enter the margin percentage that you want to achieve in one or more of the following fields:
  - A
  - B
  - C
  - No Code
- 5 If you do not assign Market Basket Codes to items in this Price Zone, enter the percentage in the No Code field for the margin target that applies to all items.
- 6 For each reference competitor that you want to enter, in the Reference Competitor section of the window, perform one or more of the following actions:
  - Enter a Competitor.
  - Enter a Store.
  - Select an option from the Compete drop-down list.
  - In the Percentage field, enter the appropriate percentage to compete.
- 7 When you have entered all of the desired information in this window, click **Save**. The changes that you made are saved in RPM.

#### **Set up relationship pricing**

Relationship pricing allows you to propose retails for all the items in a merchandise hierarchy level based on:

- A lead item
- The lead item's retail price based on:
  - The margin target that is applied to the lead item's cost
  - Comparison to a competitor's lead item's retail price
- The size of your lead item relative to all the other items.
- The new markup amount of your lead item applied against a factor to determine the other item's retail based on one of the following:
  - Relative size
  - A margin target that is assigned based on relative size and applied to the related item's cost

- **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** or **Class** and **Price Zone Group** or **Price Zone**, or click  (**LOV**) and select from the list of values.

**Notes:** If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are applied to the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always applied to all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with strategies that match the criteria that you entered.

**Note:** Search results include a Pricing Strategy only if you searched on the lowest level that the strategy is applied. If an empty Pricing Strategy is displayed, you can set up the strategy and it will override all definitions that have been applied at a lower level.

*For example:* If the Pricing Strategy is applied at the Class level, and your search criteria include a Class, the Pricing Strategy displays after you click **Search**. If the Pricing Strategy is applied at the Class level, and your search criteria do not include a Class, a blank Pricing Strategy displays after you click **Search**.

- 3 From the Pricing Strategy drop-down list, select **Relationship**. The Pricing Strategy – Relationship window opens.
- 4 In the Lead Item Retail Calculation Selection Type field, select Margin Target or Competitive Target from the drop-down list.
- 5 If you selected Margin Target, the [Pricing Strategy – Relationship, Margin Target window](#) opens.
  - a Enter information in the following fields:
    - **Margin %** – The percentage you want to achieve. Margin % is the difference between the cost of the item and the retail price divided by the selling price and expressed as a percent. It is based on the cost or retail margin expressed as a %. You can enter a number with up to one decimal place.
    - **Size Tolerance %** – The percentage of the lead item size within which items are considered to be the same size. For a 20 ounce item with a size tolerance of +/- 10%, enter 10.0.
    - **Equal Size Margin %** – The percentage that you want to make on items that are the same size as the lead item.
    - **Smaller Size Margin %** – The percentage that you want to make on items that are a smaller size than the lead item.
    - **Larger Size Margin %** – The percentage that you want to make on items that are a larger size than the lead item.
  - b Continue with step 7.

- 6 If you selected Competitive Target,
  - a In the Related Item Calculation Type field, select Margin % or Profit % from the drop-down list. The [Pricing Strategy – Relationship, Competitor Target Margin % window](#) opens or the [Pricing Strategy – Relationship, Competitor Target Profit % window](#) opens.
  - b Enter information in the following fields:
 

**Note:** Margin displays if Margin % is selected for Related Item Calculation Type. Profit displays if Profit % is selected.

    - Size Tolerance % – The percentage of the lead item size within which items are considered to be the same size.
    - Equal Size Margin/Profit % – The percentage that you want to make on items that are the same size as the lead item.
    - Smaller Size Margin/Profit % – The percentage that you want to make on items that are a smaller size than the lead item.
    - Larger Size Margin/Profit % – The percentage that you want to make on items that are a larger size than the lead item
  - c In the Primary Competitor box, complete the following fields:
    - Competitor – Select the competitor from the LOV.
    - Store – Select the store from the LOV.
  - d Complete the following fields for each desired Market Basket Code
    - Compete – Select Price Above, Price Below, or Match from the drop-down list.
    - Percent – If you selected Price Above or Below, enter the percentage above or below your primary competitor that you want to compete.
- 7 For each reference competitor that you want to enter, in the Reference Competitor section of the window, perform one or more of the following actions:
  - Enter a Competitor.
  - Enter a Store.
  - Select an option from the Compete drop-down list.
  - In the Percentage field, enter the appropriate percentage to compete.
- 8 When you have entered all of the desired information in this window, click **Save**. The changes that you made are saved in RPM.

## Set up pricing guides

The pricing guide creates a uniform pricing strategy. Use a pricing guide to help round or apply ends in logic to the unadjusted retail values. You can copy, edit, view, delete, or set the pricing guide as the default for the Department or Corporation. You can also link Corporate pricing guides to the Department.


*For example* if an item falls between \$1.25 and \$1.32 the Pricing Point Table would indicate that this item should be priced at \$1.29.

**Note:** You must set up a pricing guide before you can attach it to a pricing strategy.

Use this procedure to create a new pricing guide.

### Set up the pricing guide

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.

- 1 Select the appropriate Pricing Guides radio button.
  - To set up the Corporate pricing guide, select the Corporate Pricing Guides radio button.
  - To set up a Department pricing guide:
    - a Select the Department Pricing Guides radio button.
    - b Enter a valid **Department**, or click  (**LOV**) and select from the list of values.
- 2 Click **New**. The [Pricing Guides Maintenance window](#) opens.
- 3 In the Name field, enter the name of the new pricing guide.
- 4 In the Description field, enter a brief explanation of the new pricing guide.
- 5 If you want to add rows to the Pricing Point Table:
  - a In the Add Row(s) field, enter the number of rows that you want to add.
  - b In the To field, select Top or Bottom from the drop-down list.
  - c Click **Add**. Rows are added to the Pricing Point Table.

- 6 To define the pricing guide:
  - a In the Start Price field, enter the price that you want the pricing guide to start with.
  - b In the End Price field, enter the price that you want the pricing guide to end with.

**Note:** If you enter only one digit, the second digit is replaced. If you enter two digits, both digits are replaced. *For example:* If you enter 7 in the New Retail Based On field and your current price is \$3.52, your new price will be \$3.57. If you enter 77 in the New Retail Based On field and your current price is \$3.52, your new price will be \$3.77.
  - c In the Increment field, enter the amount that you want the Pricing Guide to increase by.  
*For example:* The Start Price is \$0.01, the End Price is \$100.00, and the Increment is \$5.00. The first range is \$0.01 - \$5.01.
  - d In the New Retail Based On field, select To, From, or Average from the drop-down list.
  - e Click **Autofill**. The new pricing guide displays in the Pricing Point Table.
- 7 If you want the new retail to end in a specific number:
  - a In the New Retail Ends In field, enter the two digits that you want the new retail to end in.
  - b Click **Apply**. The Ends In that you defined displays for all New Retail values in the Pricing Point Table.
- 8 Click **Save**. The information that you entered is saved in RPM.

**Note:** If you want to exit this window without saving the information that you entered, click **Cancel**.




### Set the pricing guide as the default for the Department or Corporation

**Note:** The first pricing guide that is created automatically becomes the Default Pricing Guide. This is true for both the first Corporate guide and the first guide assigned or created for a Department.

The Corporate Default Pricing Guide applies to a Department if no pricing guides exist for that Department and **Default** is selected.

If a Department guide exists, it becomes the default guide when **Default** is selected.

The Default Pricing Guide displays in **bold text**.

- **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.
- 1 To view current Department pricing guides, select the radio button in front of Department Pricing Guides. To view current Corporate pricing guides, select the radio button in front of Corporate Pricing Guides.
- 2 Enter a valid **Department**, or click  (LOV) and select from the list of values.
- 3 Click **Display**. Pricing guides for the selected Department or Corporation are displayed in the Name / Description field.
- 4 Select the radio button in front of the pricing guide that you want to set as the Default Pricing Guide for the Department or Corporation.
- 5 Click **Set Default**. The newly-created default Corporate or Department Pricing Guide that you selected displays in **bold type**.

**Note:** If you delete the Default Corporate or Department Pricing Guide, the first guide is automatically assigned as the new Default Pricing Guide.

To copy or link a Corporate guide to the selected Department, use the [Copy or link a Corporate pricing guide to a Department](#) procedure.

If you want to exit this window without saving the information that you entered, click **Cancel**.

## Set up the schedule

The Pricing Office defines the calendar and snapshot periods. A snapshot period is the period of time during which pricing information based on a specific pricing strategy displays. With the snapshot information, the pricing office will determine when pricing review periods will occur and the type of information to be reviewed and updated.

Snapshots are created based on calendar size and frequency entered at set up. You can change any one or combination of elements in the calendar to create new or change current settings.

Budget information does not transfer if you change calendar and/or snapshot info.

From this information, you set up and maintain the calendar. These tasks include:

- Defining when Pricing Worksheets will be reviewed and the data composition of the Pricing Worksheets.
- Defining whether a budget amount will be assigned to each period in the calendar.
- Determining what data to update on an ongoing basis during the pricing review (snapshot) period.

### Set up the snapshot calendar

➤ **Navigate:** Main Menu >Pricing Setup > Schedule. The [Calendar Setup window](#) opens.

- 1 Enter a valid **Department** and **Price Zone Group** or click  (LOV) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the schedule that you want to change or view was defined at that level.

If a schedule is defined at the Department level and the aggregation set at the Class level, then the strategies are applied to the Class level.

If a schedule is defined at the Price Zone Group level, the strategy is always applied to all Price Zones in the Price Zone Group.

- 2 Click **Search**. The [Schedule window](#) opens with schedule information for the criteria that you entered.

**Note:** If you want to repeat the search on a different Department, click **New**. You are returned to the Calendar Setup window. Repeat steps 1 and 2.

- 3 To set up the calendar, enter information in the following fields:
  - Start Date – Enter the date that you want to start the calendar.
  - End Date – Enter the date that you want to end the calendar.
  - Take Snapshot Every \_\_\_\_ days – Enter the frequency in number of days at which you want to capture the selected information.

**Note:** RPM creates as many snapshots as will fit between the defined start and end dates of the calendar. The number of days in the calendar period and the size of the snapshots, in days, determines the number of snapshots that can occur within a defined calendar period. The first day of the calendar is the beginning of the first Snapshot.

If a snapshot period is too large to fit into the remaining days of a calendar period, the snapshot will not be created.

*For example:* A calendar runs from Jan 1 – Jan 20. Take Snapshot Every \_ Days field is set to 6. Three snapshots are created; one that starts on the 1<sup>st</sup>, one that starts on the 7<sup>th</sup>, and one that starts on the 13<sup>th</sup>. Because there are not enough days left to build a fourth snapshot in this defined calendar period, the next snapshot is not created.

- 4 To set up the snapshot period, enter information in the following fields:
  - Candidate Frequency – Enter how often you want to update the candidate rules in the snapshot.
  - Exception Frequency – Enter how often you want to update exceptions in your snapshot.

**Note:** If you want to exit the window without saving the changes that you entered, click **Cancel**.

- 5 When you have entered all of the desired information in this window, click **Save**.

**Note:** If the information that you entered is different from the existing calendar, a message displays. *Conflicts were discovered between calendars. Do you want to overwrite conflicting calendars with the new calendar?* If you want to apply your changes, click **OK**. If you do not want to apply your changes, click **Cancel**.

The information that you entered is saved in RPM.



## Chapter 5 – Update Pricing

### Overview

When your organization modifies its pricing strategies or the timing of pricing reviews, you need to make the appropriate changes in RPM to reflect these modifications. This section discusses the update tasks, which include updating:

- Candidate rules and variables
- Pricing strategies
- Pricing guide
- Schedule

### Update candidate rules and rule variables

You use candidate rules to search the database for items that need to be identified for pricing review. Candidate rules are defined at the Corporate level.

You can modify any of the candidate rule parameters. Some rules have variable values. These values are assigned and can be modified at the Department level.


For more information about [candidate rules](#), see Pricing Setup.

#### Update a candidate rule

➤ **Navigate:** Main Menu > Pricing Setup > Candidate Rule Maintenance. The [Candidate Rules window](#) opens with all of the current candidate rules listed.

- 1 To change an existing candidate rule, select the radio button for candidate rule you want to change.
- 2 Click **Edit**. The [Candidate Rule Maintenance window](#) opens with information about the selected candidate rule.
- 3 Change information in any of the fields, as necessary.

**Note:** See the [Field descriptions](#) for this window for more information.

- 4 If you want to use the value as a variable:
  - a Check the box in front of **Use value as variable**.
  - b Enter or Click  (**LOV**) to display a list of existing values.
  - c Select an appropriate value from the list.

- 5 If you want to edit only the Condition portion of a rule:

**Note:** To add a new Condition to a rule without changing any existing Conditions, follow steps c-d below.

- a In the Conditions box, select the Condition that you want to change.
  - b Click **Edit**. The components of the selected condition display in the Field, Operator, and Values or Variable Name fields.
  - c Enter the appropriate information in the Field, Operator, and Values or Variable Name fields.
  - d To include the new or updated Condition without removing the existing Condition, click **Add**.  
Or  
To substitute the existing Condition with the one you just created or edited, click **Replace**.
- 6 To return to the Candidate Rules window, click **Cancel**. All information that you did not save in the Candidate Rule Maintenance window is lost.
  - 7 To delete a condition, select the condition in the Conditions box.
  - 8 Click **Delete**. The condition is removed.
  - 9 To apply all of the changes that you made in this window, click **Save**. You are returned to the Candidate Rules window.

#### Delete a candidate rule


- **Navigate:** Main Menu > Pricing Setup > Candidate Rule Maintenance. The [Candidate Rules window](#) opens with all of the current candidate rules listed.
- 1 To delete an existing candidate rule, select the radio button for candidate rule you want to remove.
  - 2 Click **Delete**. A message displays, “Are you sure you want to delete the selected rule?”
  - 3 Click **OK** to delete the rule. The rule is removed from the list.

**Note:** Variables are not deleted if you delete a rule that has a condition with variables and values are assigned at the Department level. This feature allows you to use the existing variables and assigned values when you create a new rule. To delete the variables, see the [Delete a candidate rule variable](#) procedure.

**Delete a candidate rule variable**

- **Navigate:** Main Menu > Pricing Setup > Rule Variable Maintenance. The [Rule Variable Maintenance window](#) opens.

**Note:** If the variable is attached to a candidate rule, you must delete the candidate rule before you can delete the variable. To delete the candidate rule, see the [Delete a candidate rule](#) procedure.


- 1 In the Department field, enter the Department number or click  (LOV) and select from the list of values.
- 2 Click **View**. A list of the defined variables with their assigned values displays.
- 3 Select the radio button for the candidate rule variable that you want to remove.
- 4 Click **Delete**. A message displays, “This variable will be deleted for all Departments. Do you want to continue?”
- 5 Click **OK**. The variable is removed from the list.

**Note:** To leave the window without making changes, click **Close**.

### Update a candidate rule variable

**Note:** Rules that have variables defined are run only against items in Departments where a value has been assigned to the variable. If there is no variable value for a Department, the candidate rule will not run against items from that Department.

➤ **Navigate:** Main Menu > Pricing Setup > Rule Variable Maintenance. The [Rule Variable Maintenance window](#) opens.

- 1 In the Department field, enter the Department number or click  (LOV) and select from the list of values.
- 2 Click **View**. A list of the defined variables with their assigned values displays.

**Note:** To apply the same variable to more than one Department, select the desired Departments from the list. For more information on selecting multiple items from a list, see the [Select multiple options from a list](#) procedure.


- 3 In the Value field for the candidate rule variable that you want to edit, enter the appropriate value.
- 4 Click **Save**. The information is saved.

**Note:** To leave the window without making changes, click **Close**.



## Update pricing strategies


### Copy a pricing strategy to another Department

- From the Main Menu, navigate Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.
- 1 Enter a valid **Department** or **Class** and **Price Zone Group** or **Price Zone**, or click  (**LOV**) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with the strategy that matches the criteria that you entered.
- 3 If you want to repeat the search on a different Department, click **New**. You are returned to the Pricing Strategy search window. Repeat steps 1 and 2.
- 4 Click **Copy**. The pop-up Pricing Strategy search window opens.
  - a Enter or click  (**LOV**) to select the **Department**, **Class**, **Price Zone**, or **Price Zone Group** that you want to copy the pricing strategy to.

**Note:** To return the previous information to the Department field, click **Reset**.

To exit the pop-up window without making any changes, click **Cancel**. You are returned to the Pricing Strategy window.

- b To apply the pricing strategy to the selected Department, click **OK**. The Warehouses dialog box displays with the warehouses that were assigned to the aggregation zone that is shown.

**Note:** If you do not want to change the warehouses that are assigned, click **Close**. If you want to delete a warehouse,

- c In the Enter Warehouse field, enter the warehouse where you want to include inventory in the pricing strategy.
      - d Click **Save** to move the number that you entered into the lower field.
- Note:** If you want to delete a warehouse from the list, select the warehouse number in the lower box and click **Delete**.
- e For each warehouse location that you want to add, repeat steps c and d.
      - f To close the pop-up window, click **Close**.

- 5 To make changes or change the pricing strategy itself, see the appropriate [Update pricing strategies](#) procedure.
- 6 When you have made all of the desired changes in this window, click **Save**. The changes that you made are saved in RPM.

### Update relationship pricing strategies

Relationship pricing allows you to propose retails for all the items in a merchandise hierarchy level based on:

- A lead item
- The lead item's retail price based on:
  - The margin target that is applied to the lead item's cost
  - Comparison to a competitor's lead item's retail price
- The size of your lead item relative to all the other items.
- The calculation of an item's retail price based on:
  - The new markup amount of your lead item applied against a factor.
  - An assigned margin target that is based on relative size and applied to the item's cost

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid Department and Price Zone Group or click  (LOV) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

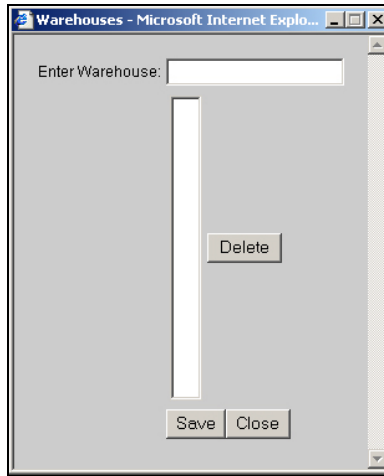
If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with the strategy that matches the criteria that you entered.

**Note:** If the current strategy is Relationship, continue with step 4.

- 3 If the Relationship strategy is not displayed, from the Pricing Strategy drop-down list, select **Relationship**. The Pricing Strategy – Relationship window opens.
- 4 To change all or part of the relationship pricing strategy, in the Relationship Pricing Calculation section of the window change information in one or more fields.
- 5 To assign a Pricing Guide, select one from the drop-down list.

- 6 If you want to assign one or more warehouses to the aggregation zone so that you can include their inventory in the pricing strategy:
  - a Click **Specify Warehouses**. The Warehouses pop-up window opens.




- b In the Enter Warehouse field, enter the number of the warehouse that you want to include inventory in the pricing strategy.
  - c Click **Save** to move the number that you entered into the lower field.
- Note:** If you entered a warehouse number into the lower field that you want to remove, click on the warehouse number and then click **Delete**.
- d For each warehouse location that you want to add, repeat steps b and c.
- e To close the pop-up window, click **Close**.
- 7 To change one or all reference competitors, in the Reference Competitor section of the window change information in one or more fields.
- 8 When you have made all of the desired changes in this window, click **Save**. The changes that you made are saved in RPM.

### Update competitive pricing strategies

Competitive pricing allows you to propose retails for the items in a merchandise hierarchy level based on:

- One primary competitor's lead item retail price
- Competitive strategy (Match, Price Above, Price Below, Price by Code) applied to all items
- A pricing guide to help round or apply ends-in logic to the unadjusted retail values

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** or **Class** and **Price Zone Group** or **Price Zone**, or click  (**LOV**) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

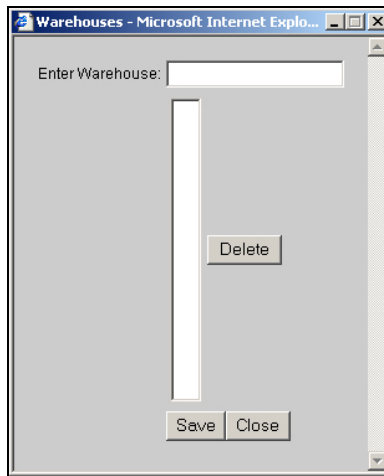
- 2 Click **Search**. The Pricing Strategy window opens with the strategy that matches the criteria that you entered.

**Note:** If the current strategy is Competitive, continue with step 4.

- 3 If the Competitive strategy is not displayed, from the Pricing Strategy drop-down list, select **Competitive**. The [Pricing Strategy – Competitive window](#) opens.
- 4 To assign a Pricing Guide, select one from the drop-down list.

- 5 If you want to assign one or more warehouses to the aggregation zone so that you can include their inventory in the pricing strategy:

- a Click **Specify Warehouses**. The Warehouses pop-up window opens.



- b In the Enter Warehouse field, enter the number of the warehouse that you want to apply the pricing strategy to.
    - c Click **Save** to move the number that you entered into the lower field.

**Note:** If you entered a warehouse number into the lower field that you want to remove, click on the warehouse number and then click **Delete**.

- d For each warehouse location that you want to add, repeat steps b and c.
    - e To close the pop-up window, click **Close**.
- 6 To change your primary competitor, enter a different Competitor and/or Store.
- 7 To change how you compete with your primary competitor, select a different option from the Compete drop-down list.

**Note:** When the Price by Code option is selected, Market Basket Codes / No Code fields become available. Enter a Compete strategy against Market Basket Codes or No Code.

- 8 For each reference competitor that you want to change, in the Reference Competitor section of the window, perform one or more of the following actions:
  - Enter a different Competitor.
  - Enter a different Store.
  - Select a different option from the Compete drop-down list.
- 9 When you have made all of the desired changes in this window, click **Save**. The changes that you made are saved in RPM.

### Update margin pricing strategies

Margin pricing allows you to propose retails for all the items in a merchandise hierarchy level based on:

- The assigned margin target
- A pricing guide to help round or apply ends in logic to the unadjusted retail values.

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** and **Price Zone Group** or click  (LOV) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

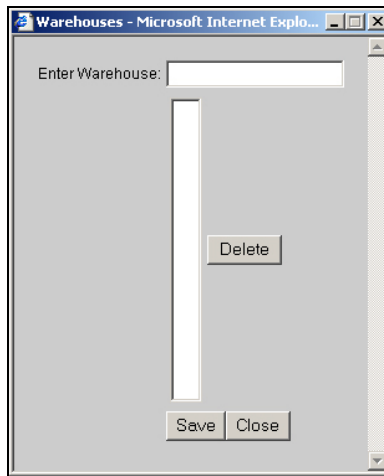
- 2 Click **Search**. The Pricing Strategy window opens with the strategy that matches the criteria that you entered.

**Note:** If the current strategy is Margin, continue with step 4.

- 3 If the Margin strategy is not displayed, from the Pricing Strategy drop-down list, select **Margin**. The [Pricing Strategy – Margin](#) window opens.
- 4 To change all or part of the Margin Pricing Strategy, in the Margin Targets section of the window change information in one or more fields.
- 5 To assign a Pricing Guide, select one from the drop-down list.

- 6 If you want to assign one or more warehouses to the aggregation zone so that you can include their inventory in the pricing strategy:

- a Click **Specify Warehouses**. The Warehouses pop-up window opens.



- b In the Enter Warehouse field, enter the number of the warehouse that you want to apply the pricing strategy to.
      - c Click **Save** to move the number that you entered into the lower field.
- Note:** If you entered a warehouse number into the lower field that you want to remove, click on the warehouse number and then click **Delete**.
- d For each warehouse location that you want to add, repeat steps b and c.
      - e To close the pop-up window, click **Close**.
  - 7 To change one or all reference competitors, in the Reference Competitor section of the window, change information in one or more fields to be consistent with the assigned market basket code.
  - 8 When you have made all of the desired changes in this window, click **Save**. The changes that you made are saved in RPM.

### Update clearance pricing strategies

Clearance pricing allows you to propose retails for items that meet candidate rules in a merchandise hierarchy level based on defined markdown percentages. The markdown percentages can be applied either to the item's regular retail price or the last clearance retail price.

**Note:** Only clearance items that meet an inclusion candidate rule are displayed on the Pricing Worksheet. This is unique to the Clearance pricing strategy.

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Strategies. The [Pricing Strategy search window](#) opens.

- 1 Enter a valid **Department** and **Price Zone Group** or click  (**LOV**) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

- 2 Click **Search**. The Pricing Strategy window opens with the strategy that matches the criteria that you entered.

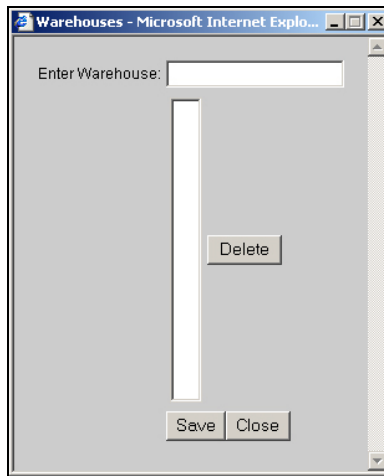
**Note:** If the current strategy is Clearance, continue with step 4.

- 3 If the Clearance strategy is not displayed, from the Pricing Strategy drop-down list, select **Clearance**. The [Pricing Strategy – Clearance window](#) opens.
- 4 To assign a Pricing Guide, select one from the drop-down list.



- 5 If you want to assign one or more warehouses to the aggregation zone so that you can include their inventory in the pricing strategy:

a Click **Specify Warehouses**. The Warehouses pop-up window opens.



- b In the Enter Warehouse field, enter the number of the warehouse that you want to apply the pricing strategy to.
- c Click **Save** to move the number that you entered into the lower field.

**Note:** If you entered a warehouse number into the lower field that you want to remove, click on the warehouse number and then click **Delete**.

- d For each warehouse location that you want to add, repeat steps b and c.
- e To close the pop-up window, click **Close**.
- 6 To change all or part of the Clearance Pricing Strategy, in the Clearance Markdowns section of the window change information in one or more fields.
- 7 When you have made all of the desired changes in this window, click **Save**. The changes that you made are saved in RPM.

## View or update pricing guides

The pricing guide creates a uniform pricing structure. Use a pricing guide to help round or apply ends in logic to the unadjusted retail values. You can copy, edit, view, delete, or set the pricing guide as the default for the Department or corporation. You can also link Corporate pricing guides to the Department.

*For example* if an item falls between \$1.25 and 1.32 the pricing point table would indicate that this item should be priced at \$1.29.

### View Corporate pricing guides


➤ **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.

- 1 To view current Corporate pricing guides, select the radio button in front of Corporate Pricing Guides.
- 2 Click **Display**. The appropriate pricing guides are displayed in the Name / Description field.
- 3 Select the radio button in front of the pricing guide that you want to view.
- 4 Click **View**. The [Pricing Guides Maintenance window](#) opens.
- 5 When you are done viewing the pricing guide, click **Cancel**. You are returned to the Pricing Guides window.

**Note:** To view Corporate pricing guides that apply to a Department, use the [View Department pricing guides](#) procedure.

### View Department pricing guides

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.

- 1 To view current Department pricing guides, select the radio button in front of Department Pricing Guides.
- 2 Enter a valid **Department** or click  (LOV) and select the desired Department from the list of values.
- 3 Click **Display**. Pricing guides for the selected Department are displayed in the Name / Description field.
- 4 Select the radio button in front of the pricing guide that you want to view.
- 5 Click **View**. The [Pricing Guides Maintenance window](#) opens.
- 6 To view Corporate pricing guides that can be applied to the selected Department, click **Corporate**. The Corporate pricing guides that you can link or copy are displayed.

**Note:** To copy or link a Corporate guide to the selected Department, use the [Copy or link a Corporate pricing guide to a Department](#) procedure.


- 7 When you are done viewing the pricing guide, click **Cancel**. You are returned to the Pricing Guides window.

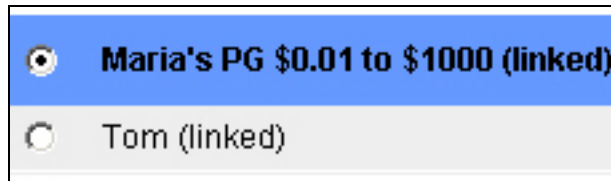
### Copy or link a Corporate pricing guide to a Department

If you copy a pricing guide, you can make changes to the guide at the Department level without affecting the Corporate pricing guide. Linked pricing guides will say (linked) next to the name of the pricing guide. If you link a pricing guide, the guide is available at the Department level, but you cannot change it at the Department level.

**Note:** You cannot copy a Department pricing guide to another Department. If you want a pricing guide to be used by more than one Department, first you must create a Corporate pricing guide, then copy the Corporate pricing guide to the appropriate Departments.

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.

- 1 Select the radio button in front of Department Pricing Guides.
- 2 Enter a valid **Department** or click  (LOV) and select the desired Department from the list of values.
- 3 Click **Display**. Pricing guides for the selected Department are displayed in the Name / Description field.
- 4 Click **Corporate** to display available Corporate pricing guides.
- 5 Select the radio button in front of the Corporate pricing guide that you want to copy or link.
  - To link the pricing guide, click **Link**. You are returned to the Pricing Guides window where the linked guide displays as (linked) in the Name / Description field.



- To copy the pricing guide:
  - a Click **Copy**. The Explorer User Prompt pop-up window opens.
  - b In the pop-up window, enter a unique name for the pricing guide that you are copying.
  - c Click **OK**. You are returned to the Pricing Guides window where the copied guide displays in the Name / Description field.

**Note:** The name that you assign to this copied pricing guide must not be exactly the same as any other existing pricing guide name.

To exit the window without saving any changes, click **Cancel**.

**Edit a pricing guide**

➤ **Navigate:** Main Menu > Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.

- 1 Follow steps 1 – 5 of the [View Department pricing guides](#) procedure.
- 2 Select the radio button in front of the pricing guide that you want to edit.
- 3 Click **Edit**. The [Pricing Guides Maintenance window](#) opens.
- 4 Change information in one or more of the following fields:
  - Name – Name of the pricing guide.
  - Description – A 250 character explanation of the pricing guide.
  - Add row(s) – The number of rows you want to add to the pricing guide.
  - To – The location on the pricing guide where you want to add the row(s). Select from Top or Bottom. Click **Add**.
  - Start Price – The price that you want the pricing guide to start with. If you change the Start Price, End Price, Increment, and/or New Retail Based On, click **Autofill** to view your changes.
  - End Price – The price that you want the pricing guide to end with. If you change the Start Price, End Price, Increment, and/or New Retail Based On, click **Autofill** to view your changes.
  - Increment – One of a series of regular consecutive additions. This determines your From – To range that displays in the From / To / New Retail box. If you change the Start Price, End Price, Increment, and/or New Retail Based On, click **Autofill** to view your changes.
  - New Retail Based On – Select from To, From, or Average. This determines whether the new retail price is based on the To price, the From price, or an average of the two prices. If you change the Start Price, End Price, Increment, and/or New Retail Based On, click **Autofill** to view your changes.
  - New Retail Ends In – The numerical value that you want your retail price to end in.

**Note:** If you enter two characters, the last two characters of the New Retail amount will change. If you enter one character, only the last character of the New Retail amount will change.  
Ends In numbers are not rounded. The number that you entered displays.

- 5 To see your changes in the From / To / New Retail box, click **Apply**.
- 6 To exit this window without saving any of your changes, click **Cancel**.
- 7 To save your changes in RPM, click **Save**.

**Delete a pricing guide**

- ➡ From the Main Menu, navigate Pricing Setup > Pricing Guides. The [Pricing Guides window](#) opens.
- 1 Follow steps 1 – 5 of the [View Department pricing guides](#) procedure.
- 2 Select the radio button in front of the pricing guide that you want to delete.
- 3 Click **Delete**. The message displays, “Are you sure you want to delete the pricing guide?”.

**Note:** If you do not want to delete the pricing guide, click **Cancel**.

If the Corporate pricing guide is linked to one or more Departments, you must delete the pricing guide at the Department level before you can delete the Corporate pricing guide.

If you delete the default Corporate or Department pricing guide, the first guide is automatically assigned as the new default pricing guide. To set another pricing guide as the default, follow the [Set the pricing guide as the default for the Department or corporation](#) procedure.

- 4 To delete the pricing guide, click **OK**. The pricing guide is removed from the list.

## Update the schedule

A schedule is made up of calendars and snapshots. A calendar is a defined period of time, such as fiscal quarter, month, or year, during which multiple snapshots occur. A snapshot is the period of time during which pricing information based on a specific pricing strategy displays. The snapshot determines when pricing review periods will occur as well as the type of information to be reviewed and updated.

Snapshots are created based on calendar size and frequency entered at set up. You can change any one or combination of elements in the calendar to create new or change current settings.

**Note:** Budget information does not transfer if you change calendar and/or snapshot info.

From this information, you set up and maintain the calendar. These tasks include:

- Defining when Pricing Worksheets will be reviewed and the data composition of the Pricing Worksheets.
- Defining whether a budget amount will be assigned to each period in the calendar.
- Determining whether data is updated on an ongoing basis during the pricing review (snapshot) period.

### Update the snapshot calendar

➤ **Navigate:** Main Menu > Pricing Setup > Schedule. The [Calendar Setup window](#) opens.


- 1 Enter a valid **Department** and **Price Zone Group** or click  (**LOV**) and select from the list of values.

**Notes:** To get an accurate list of values, you must complete the Class and Price Zone fields if the strategy you want to change was defined at that level.

If a strategy is defined at the Department level and the aggregation set at the Class level, then the strategies are held at the Class level.

If a strategy is defined at the Price Zone Group level, the strategy is always held against all Price Zones in the Price Zone Group.

- 2 Click **Search**. The [Schedule window](#) opens with schedule information for the criteria that you entered.
- 3 If you want to repeat the search on a different Department, click **New**. You are returned to the Calendar Setup window. Repeat steps 1 and 2.

- 4 If you want to copy the schedule to another Department, click **Copy**. A Calendar Setup pop-up window opens.
  - a Enter or click  (**LOV**) to select the **Department** that you want to copy the Calendar to.
  - b To apply schedule changes to the selected Department, click **OK**. You are returned to the Schedule window where the selected Department displays.

**Note:** Before the strategy is saved for the selected Department, you must click **Save** at the bottom of the window.

or

To return the previous information to the Department field, click **Reset**.

or

To exit the pop-up window without making any changes, click **Cancel**. You are returned to the Schedule window.
- 5 To change all or part of the snapshot schedule, in the Calendar Setup or Snapshot Setup section of the window change information in one or more fields.
- 6 If you want to exit the pop-up window without saving the changes that you entered, click **Cancel**.
- 7 When you have made all of the desired changes in this window, click **Save**. The Snapshot Setup section of the window displays all of the dates that snapshots are scheduled for with appropriate rules (candidate and exception) checked for the scheduled snapshot.
- 8 If you want to change when rules (inclusion and exception) are included, check or uncheck the rule boxes, as appropriate.
- 9 If you want to change the budget amount for one or more snapshot dates, change the amount in the Budget field.
- 10 If you want to exit the window without saving the changes that you entered, click **Cancel**.
- 11 When you have made all of the desired changes in this window, click **Save**.

**Note:** If the information that you entered is different from the existing calendar, a message displays. “*Conflicts were discovered between calendars. Do you want to overwrite conflicting calendars with the new calendar?*” If you want to apply your changes, click **OK**. If you do not want to apply your changes, click **Cancel**.

The changes that you made are saved in RPM.





## Chapter 6 – Use the Pricing Worksheet

### Overview

RPM provides a framework where you can accept price changes that use industry best practices and company-set goals. A competitor's retail price, the item's sell-through percent, or the total gross margin of a Department can determine how you choose to manipulate the retail price of an item.

With the Pricing Worksheet, you can:

- Review the generated price change proposals.
  - Review items that broke rules or were exceptions.
  - Review pending cost changes, price changes, and promotions.
- Perform what-if analysis.
- Make clearance decisions.
- Accept the recommendations or delete the Pricing Worksheet.

You can review the system-generated pricing-change proposals on the Pricing Worksheet and:

- Decide whether or not to take action on the recommendations.
- Examine the information about price change candidates and make decisions about which items to change and what retail prices to set.
- Modify column values and do what-if analysis in the Pricing Worksheet to help you make the best pricing decisions

**Note:** A change to any one item's retail price can affect the totals on the entire aggregation zone.

If you decide not to take action on the recommendations, delete the Pricing Worksheet. If you decide to accept the proposed retails, you will indicate that there is a price change for those items and submit the Pricing Worksheet.

## Work with the Pricing Worksheet

Review the Pricing Worksheet from the [Worksheet Status window](#). From this window, you can select the aggregated Department/Class level that was generated in the batch run and review it for pricing changes. You can choose to review one, many, or all Price Zones for the corresponding merchandise hierarchy level. The Departments, Classes, and Price Zones that you can view are based on your RMS security settings.

### Modify a Pricing Worksheet

You can modify the Pricing Worksheet to submit it for approval or to do what-if analysis. To modify the Pricing Worksheet, its status must be Updated or In Progress. You can enter or edit the information in the following fields:

- [Worksheet Status window](#)
  - Action
  - Reason
- [Pricing Worksheet window](#)
  - New Retail
  - Effective date
  - Out of stock date
  - New Multi Units
  - New Multi Retail
  - Clearance (check box)
  - Price Change Indicator (check box)

**Note:** If you make changes to an item's retail price, it can affect the totals on the aggregation zone.

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box(es) for the row that you want to modify.


**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✗ at the bottom of the Worksheet Status window.

If you select multiple price zones to modify or review, they must all be at the same aggregation level. Totals will display for currencies that are the same. *For example*, if all columns that are selected are at the Department level and the currency is USD (US dollars), totals will display. If all columns that are selected are at the Department level and the currency is USD and CD (Canadian dollars), the totals will **not** display.

- 2 Change information in any of the following fields, as necessary:

- Action – Select an option from the drop-down list.

**Note:** The status options that are available from the [Action drop-down list](#) change based on [worksheet's current status](#).

- Reason – Select  to open a pop-up window with a field where you can enter comments of up to 250 characters about the change that you made.

- 3 Click **View Worksheet Detail**. The [Pricing Worksheet window](#) opens.

- 4 Change information in any of the following fields:

- New Retail – The new retail price.
- New Multi Units – The number of units that must be purchased to receive the multi-unit retail price.  
*For example*, an item is sold at 3/\$1.00. The multi unit is 3.
- New Multi Retail – The retail price when the appropriate number of units are purchased.  
*For example*, an item is sold at 3/\$1.00. The multi retail is \$1.00.
- Clearance (check box) – Check the check box if the item is to be placed on clearance.
- Price Change Indicator (check box) – Check the check box in this field to lock the row.

**Note:** When the row is locked, the item should be sent back as a price change unless the new retail is the same as the current retail. If the clearance indicator is checked, the new retail is equal to the current clearance retail.

- Effective date – date price change will go into effect
- Out of stock date – date on which client expects to be out of stock (used for clearance)

- 5 Click **Save** to view the results of the changes that you made. Changes are applied to body of Pricing Worksheet for that item.

#### Accept and submit a Pricing Worksheet for approval

The Pricing Worksheet status must be In Progress to enable the **Submit** button. To change the Pricing Worksheet status from Updated to In Progress, you need to have at least one item with the Price Change Indicator selected.

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens. Review the information in the Worksheet Status window to ensure that it is correct.

- 1 From the **Action** drop-down list, select **Submit**. The status is changed to Submitted and the Pricing Worksheet is ready for approval.

**Note:** Before the status changes to Submitted, RPM checks the Pricing Worksheet to ensure that there are no conflicts.


The status options that are available from the [Action drop-down list](#) change based on [worksheet's current status](#).

#### View pricing strategy details on a Pricing Worksheet

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box for each row that you want to view.

**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✕ at the bottom of the Worksheet Status window.

- 2 To view the details of a pricing strategy:
  - a Click **View Worksheet Detail**. The [Pricing Worksheet](#) window opens with information displayed for all selected rows.
  - b To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.
- 3 If you want to modify any details on the Pricing Worksheet, use the [Modify a Pricing Worksheet](#) procedure.

### Delete a Pricing Worksheet

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 From the Action drop-down list, select **Delete**. The Pricing Worksheet is ready to have your deletion approved or rejected.

**Note:** The status options that are available from the [Action drop-down list](#) change based on [worksheet's current status](#).

### Approve a Pricing Worksheet


The Pricing Worksheet status must be either Submitted or Deleted before you can approve it.

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box for each row that you want to view.

**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✕ at the bottom of the Worksheet Status window.

- 2 If you want to view the details of a pricing strategy:
  - a Click **View Worksheet Detail**. The [Pricing Worksheet](#) window opens with information displayed for all selected rows.

- b To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.

- 3 When you are ready to approve the submitted Pricing Worksheet, click **Approve**. The Pricing Worksheet information is saved and applied.



**Note:** Before the status changes to Approved, RPM checks the Pricing Worksheet to ensure that there are no conflicts.

### Reject a Pricing Worksheet

You can reject a Pricing Worksheet that has a status of Submitted or Deleted. When you reject a submitted or deleted Pricing Worksheet, its status changes to Rejected.

**Note:** If you want to work with the Pricing Worksheet when its status is Rejected, see the *Reset the status of the Pricing Worksheet* procedure.

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.
- 1 In the Select column, click the check box for each row that you want to view.
 

**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✕ at the bottom of the Worksheet Status window.
- 2 If you want to view the details of a pricing strategy:
  - a Click **View Worksheet Detail**. The [Pricing Worksheet](#) window opens with information displayed for all selected rows.
  - b To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.
- 3 In the Reason field, select  to open a pop-up window with a field where you can enter comments of up to 250 characters about why you are rejecting the Pricing Worksheet.
- 4 From the **Action** drop-down list, select **Reject**. The status of the Pricing Worksheet changes to Rejected.

### Reset the status of a Pricing Worksheet

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.
- 1 From the Action column drop-down list, select **Reset**. The Worksheet Status window refreshes and the status that is displayed remains the same.
- 2 From the Action column drop-down list, select **Reset** a second time. The Worksheet Status window refreshes and the status changes to New.

**Check price change totals**

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box for each row that you want to include.

**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✕ at the bottom of the Worksheet Status window.

- 2 Click **View Worksheet Detail**. The [Pricing Worksheet](#) window opens with information displayed for all selected rows.
- 3 In the Select column, click the check box for each row that you want to include.

**Note:** To select all items, click ✓ at the bottom of the Pricing Worksheet. To unselect all items, click ✕ at the bottom of the Pricing Worksheet.

- 4 Click **Price Change Totals**. The totals for all of the item rows that you selected display in the footer section of the Pricing Worksheet. If no rows are selected, the totals reflect all rows in the worksheet. Five columns display:

**Retail Zone** – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.

**Budget** – The budget amount that has been set up in the Schedule for the selected aggregation zone.


**Price Change Amount** – How much the price will change. This varies by the clearance status of the item. When the item is on clearance, the Price Change Amount is equal to the current clearance minus the new retail. When item is not on clearance, the Price Change Amount is equal to the current retail minus the new retail.

**Price Change SOH** – The number of in-stock units that will be affected by the price change.

**Price Change Items** – The number of different items that have price changes.

**Note:** If no items are selected, the totals are displayed for all items where a price change would occur.

- 5 To close the footer pane, click **Close Totals**.

- 6 To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.

**Check sales totals**

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box for each row that you want to include.

**Note** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✕ at the bottom of the Worksheet Status window.

- 2 Click **View Worksheet Detail**. The [Pricing Worksheet window](#) opens with information displayed for all selected rows.
- 3 In the Select column, click the check box for each row that you want to include.

**Note:** To select all items, click ✓ at the bottom of the Pricing Worksheet. To unselect all items, click ✕ at the bottom of the Pricing Worksheet.

- 4 Click **Sales Totals**. The totals for the sales for the item rows that you selected display in the footer section of the Pricing Worksheet. Five columns display:

**Sales Amount** – Displays the sales amount for the aggregation zones selected or all zones on the worksheet when no zones are selected.  
 $\text{sales amount} = \text{*retail} \times \text{projected sales}$

**\*Note:** The retail value used in this calculation depends on the status of the worksheet.

*For example:* When the worksheet status is New, Updated, or Deleted, use the proposed retail value. If the worksheet is In Progress, Submitted, or Approved, use the current retail value for items that do not have the price change indicator checked and the clearance indicator is not checked. The current clearance retail value is used where the clearance indicator is checked but the price change indicator is not checked. The new retail value is used for items where the price change indicator is checked.

**Retail Zone** – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.

**Status** – Displays the current status of the worksheet for the items selected.

**Margin Amount** – Displays the calculated margin amount for items in the selected price zone or all zones when no items are selected.

$\text{*margin amount} = (\text{retail} - \text{cost}) \times \text{projected sales}$

**\*Note:** The values that are used to calculate margin amount depend on the status of the worksheet.

*For example:* When the worksheet status is New, Updated, or Deleted,  $\text{margin amount} = (\text{proposed retail} - \text{new cost}) \times \text{sales volume}$

When the worksheet status is In Progress, Submitted, or Approved and the clearance and price change indicators are not checked,  
 $\text{margin amount} = (\text{current retail} - \text{new cost}) \times \text{sales volume}$



When the worksheet status is In Progress, Submitted, or Approved and the clearance indicator is checked,

margin amount = (*current Clearance* retail – *new* cost) x sales volume

**Margin %** – Displays the calculated margin % for the selected price zone or all zones when no zones are selected.


\*margin % = (margin / sales) x cost or retail

**\*Note:** The margin % depends on the status of the worksheet and whether the aggregation level is set up in RMS by Department as *retail* or *cost*.  
For example: When the worksheet status is Current, the formula is  
margin % = *current* margin amount / *current* cost or retail.

When the worksheet status is In Progress, Submitted, or Approved and the price change indicator is checked,

margin amount = (*new* retail – *new* cost) x sales volume

- 5 To close the footer pane, click **Close Totals**.

- 6 To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.

### Perform competitive analysis

- **Navigate:** Main Menu > Pricing > Worksheet Status. The [Worksheet Status window](#) opens.

- 1 In the Select column, click the check box for each row that you want to include.

**Note:** To select all Departments, click ✓ at the bottom of the Worksheet Status window. To unselect all Departments, click ✗ at the bottom of the Worksheet Status window.

- 2 Click **View Worksheet Detail**. The [Pricing Worksheet](#) window opens with information displayed for all selected rows.
- 3 In the Select column, click the check box for each row that you want to include.

**Note:** To select all items, click ✓ at the bottom of the Pricing Worksheet. To unselect all items, click ✗ at the bottom of the Pricing Worksheet.

- 4 Click **Competitive Analysis**. The totals for how you are competing in all retail zones that you have selected display in the footer section of the Pricing Worksheet. Seven columns display:

**Retail Zone** – Lists the price zone group/price zone combinations for the items that you have selected to be included in this calculation. There is also a row for all retail zones. The values are a sum of the other four columns.

**Status** – Displays the current status of the worksheet for the items selected.

**A** – Displays how the retail price of your items with an *A* market basket code compares with your competitor's retail price for their *A* items.


**B** – Displays how the retail price of your items with a *B* market basket code compares with your competitor's retail price for their *B* items.

**C** – Displays how the retail price of your items with a *C* market basket code compares with your competitor's retail price for their *C* items.

**No Code** – Displays how the retail price of your items with no market basket code compares with your competitor's retail price for their items with no market basket code.

**Total** – Displays how the retail price of all items compares with your competitor's retail price.

- 5 To close the footer pane, click **Close Totals**.

- 6 To return to the Worksheet Status window, click . The [Worksheet Status window](#) opens.