

Special Prices

Special Pricing provides a way to give a particular customer a different price from the standard price level that is set up in the customer file (1-5). Profit per Gallon is added to the customer price in this setup. Price quotes can be emailed to customers based on the Special Price setup. If a customer does not have this setup, they cannot receive a quote by email.

Step 1

Jobber, File Maintenance, Inventory

If you will include freight charges or freight surcharges in your special price setup, be sure the items exist in your Inventory setup.

The items for this document are GASFRT, DIEFRT, GASFRTSUR and DIEFRTSUR. Your inventory items may have a different name.



Inventory File Maintenance

Location	1	Item	GASFRT		
Description	GASOLINE FREIGHT	Hold		Stock	M
Other Descr		UPC Code			
Misc GI	13000-200	Store 1 - Inventory	Dept No	9999	Category 9999



Inventory File Maintenance

Location	1	Item	DIEFRT		
Description	DIESEL FREIGHT	Hold		Stock	M
Other Descr		UPC Code			
Misc GI	13000-200	Store 1 - Inventory	Dept No	9999	Category 9999

Only 2 examples are listed here.

Step 2

Jobber, File Maintenance, Special Prices, Special Price Add and Change

Create special price setup for each customer and each product type.

Click the 'View All' button to choose to display an existing special price record.

1. Enter the location number for the inventory item.
2. Enter the customer number.
3. If appropriate, enter the Ship To location. This can be left blank.
4. Enter the inventory item number.
5. Enter the price type. Most common value is 'U' for Mark-Up.
6. Racktype (Gross or Net) will default from the installation setup. This can be changed if needed.
7. Enter price origin of Tank, Terminal or Both.
8. Bill Code (Gross or Net) will default from installation setup. This can be changed if needed.
9. Enter one vendor or 'ALL' for all vendors.
10. Enter one terminal or 'ALL' for all terminals.
11. Unless otherwise instructed by Petro-Data support, Fixed Terminal should be 'N'.
12. Enter your profit per gallon.
13. Enter your freight type of Freight Table (T), Rate per Gallon (R) or Flat Charge (C).
14. If you chose Rate per Gallon or Flat Charge, enter the amount here.
15. If you want to exclude this price in the Customer Quote email, enter 'N'. To include this price in the email, leave it blank.

Special Price File Maintenance

Location 9 **1** Terminal **View All**

Custno PM1 **2** Petro-Market #1

Shipto **3**

Item E87 **4** Fuel Type E87

Price Type U **5** Racktype N **6** Tax Type GAS

Spec Code

Price Origin B **7** Billcode N **8**

Vendor ALL **9** Terminal ALL **10** Fixed Terminal N **11**

Profit/Gal 0.01000 **12** Exp Date / /

Frt Type C **13** Frt Rate 100.00000 **14** Other Fuel Tax

Code 1 Code 2 Zone

No Quote **15** No Tax

Line Item Charges

Bill Frt? 16 <input type="checkbox"/>	Frt (G/N) G 17	Loc 1 18	Item GASFRT 18	FG <input type="checkbox"/>
Bill Frt Adj? N 19		Loc <input type="text"/>	Item <input type="text"/>	
Bill Other 1? N	Oth Chg 1 0.000000 20	Loc <input type="text"/>	Item <input type="text"/>	
Bill Other 2? N	Oth Chg 2 0.000000	Loc <input type="text"/>	Item <input type="text"/>	

Tot Markup 0.01000

Edit New Next Prev Delete Duplicate Exit

16. Enter 'Y' if you will bill Freight in the BOL.
17. Choose Gross or Net gallons (G/N) to use in the freight calculation.
18. Enter the Inventory location and item for the freight charge.
19. Repeat the same in Bill Frt Adj if you want to calculate a freight surcharge.
20. Bill Other 1 & 2 can be used to bill other charges as needed.

Step 3

Jobber, Rack Prices, Daily Fuel Price Report

Email the special price quote to your customers.

1. Choose Email as your printer type.
2. Click Calculate Prices.
3. Click Show Errors.
4. Choose your Rack Date.
5. Enter the cut-off hour of your rack.
6. Enter the price date. This is usually the day after Rack Date.
7. Choose a sort option.
8. Click Customer Quotes to send emails to your customer. Leave this unchecked to print a report for your internal use.
9. Click Total Price Only. This sends a single price to your customer instead of the detailed breakdown of cost plus taxes plus freight.
10. Click Print to create the email.

The email screen will display.

1. Verify the email account setup.
2. The PDFs for email will be listed in the bottom of the screen.
3. Click Start to begin sending emails

Module	Company	Shipto	Refdate	Refnum	Amount	Code	Status
SPE	Blue Farm	1	07/07/2019	20190707	0.00	E	OPEN
SPE	Petro-Market #1		07/07/2019	20190707	0.00	F	OPEN

At the end, the system will display a message that the email process is Complete.

Click Exit.

Email is Complete. Press Exit to go back to menu.