



Infor Configure Price Quote Sales Portal Pricing Tab Quickstart Guide

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Contents

- About this guide 5
- Intended audience 5
- Contacting Infor..... 6
- Chapter 1 Sales Portal Pricing Tab..... 7**
- Introduction 7
- Functional Terminology 7
- Equations for Pricing "Discount by" and "Price by" 9
 - Manufacturer's Discount, Discount by..... 9
 - %Off List:..... 9
 - For example: 9
 - Multiplier:..... 9
 - For example: 9
 - Multiplier %:..... 9
 - For example: 10
 - My Upcharge, Price by:..... 10
 - Markup %: 10
 - For example: 10
 - Margin %: 10
 - For example: 10
 - Multiplier:..... 10
 - For example: 11
 - Multiplier %:..... 11
 - For example: 11
- Header Level vs Effective..... 11
- Price Adjustments Workbook 11

About this guide

This guide details information for manufacturer customers getting started with Sales Portal pricing.

Intended audience

The intended audience for this guide is manufacturer customers who are getting started with Sales Portal pricing.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Introduction

The **Sales Portal Pricing** tab is read left to right, top to bottom. The values are modified as you manipulate the discounts and upcharges down the page.

Header values are set on the **Pricing** tab and the Effective values are manipulated by pricing adjustments by line items either through the **Price Adjustments** workbook on the **Pricing** tab or by **Adjust Price** on the **Items** tab.

Functional Terminology

Item Subtotal (MSRP):

Subtotal of the quote line items before any discounts or upcharges are applied

Manufacturer's Discount:

Discount negotiated between the manufacturer and dealer

My Cost:

Cost of items for the dealer

My Upcharge:

Dealer upcharge applied to the quote

My Items Subtotal:

Dealer created items through Sales Portal

Write-In Items Subtotal:

Items added to the quote using the **Add Write-In Item** function

Quote Subtotal (List Price):

My Cost added to My Upcharge, before the Additional Discount

Additional Discount:

Additional Discount from the dealer

Adjusted Subtotal (Discounted):

Subtotal considering all upcharges and discounts

Tax:

Default tax rate that can be set in **Account Information > My Company Profile**

Labor Tax:

Default tax rate that can be set in **Account Information > My Company Profile**. This only specifically applies to Labor Items

Shipping and Handling:

Shipping and handling surcharge

Other Charges (Specify):

Additional write-in charges

Equations for Pricing "Discount by" and "Price by"

Manufacturer's Discount, Discount by

%Off List:

Manufacturer's Discount = Entered Value/100

My Cost = Item Subtotal (MSRP) * (1-Manufacturer's Discount)

Discount Amount = Item Subtotal – My Cost

For example:

Items Subtotal (MSRP) = 645

Entered Value = 2%

My Cost = 632.10

Discount Amount = 12.90

Multiplier:

Manufacturer's Discount = Entered Value

My Cost = Item Subtotal (MSRP) * Manufacturer's Discount

Discount Amount = Item Subtotal – My Cost

For example:

Items Subtotal (MSRP) = 645

Entered Value = .98

My Cost = 632.10

Discount Amount = 12.90

Multiplier %:

Manufacturer's Discount = Entered Value/100

My Cost = Item Subtotal (MSRP) * Manufacturer's Discount

Discount Amount = Item Subtotal – My Cost

For example:

Items Subtotal (MSRP) = 645

Entered Value= 98%

My Cost = 632.10

Discount Amount = 12.90

My Upcharge, Price by:

Markup %:

My Upcharge = Entered Value / 100

Quote Subtotal (List Price) = My Cost * (1 + MyUpcharge)

Upcharge Amount = Quote Subtotal – MyCost

For example:

My Cost = 632.10

Entered Value = 2%

Quote Subtotal (List Price) = 644.74

Upcharge Amount = 12.64

Margin %:

My Upcharge = Entered Value/(100-Entered value)

Quote Subtotal (List Price) = My Cost * (1 + MyUpcharge)

Upcharge Amount = Quote Subtotal – MyCost

For example:

My Cost = 632.10

Entered Value = 1.96

Quote Subtotal (List Price) = 644.74

Upcharge Amount = 12.64

Multiplier:

My Upcharge = Entered Value

Quote Subtotal (List Price) = My Cost * My Upcharge

Upcharge Amount = Quote Subtotal – MyCost

For example:

My Cost = 632.10

Entered Value = 1.02

Quote Subtotal (List Price) = 644.74

Upcharge Amount = 12.64

Multiplier %:

My Upcharge = Entered Value/100

Quote Subtotal (List Price) = My Cost * My Upcharge

Upcharge Amount = Quote Subtotal – MyCost

For example:

My Cost = 632.10

Entered Value = 102 %

Quote Subtotal (List Price) = 644.74

Upcharge Amount = 12.64

Header Level vs Effective

The Effective Price calculations can vary based on the number of line items, quantity of line items, and their individual pricing changes.

- **Effective Manufacturer's Discount** = Total discount across all lines / Item Subtotal (MSRP)
- **Effective My Upcharge** = Total Upcharge across all lines / My Cost
- **Effective Additional Discount** = Total Additional Discount / Quote Subtotal (List Price)

Price Adjustments Workbook

The Price Adjustments workbook, located on the **Pricing** Tab, is functionally the same as the **Adjust Price** hyperlink on the **Items** Tab. The workbook enables users to individually modify line items in a single centralized location.

A key function of the Price Adjustments Workbook is that when the Selling Price is modified, that price becomes the end of pricing changes and Sales Portal assumes the adjusted price is the price that the dealer has set for the customer. When modifying the Selling Price, the My Upcharge value for that adjusted line item will change to reflect the price set.

To revert changes made in the Price Adjustments workbook, click **Reset to Defaults** at the top of the Quote Lines or by each line item.