

2015

CONTRACT PRICING WITH ProTrac

Date based contracts
with or without Rebates

Our customer's competition from Web sites and other suppliers in the market caused PDSI to completely revamp ProTrac's Contract Pricing Module.

ProTrac Contract Program handles

Contracts that let the distributor's price change as the cost of a contract item changes, through the life of the contract

Contracts that set the sell price regardless of a change in the product's Cost

Contracts that track Rebates for a specific vendor and a reporting process to use ProTrac to claim rebates

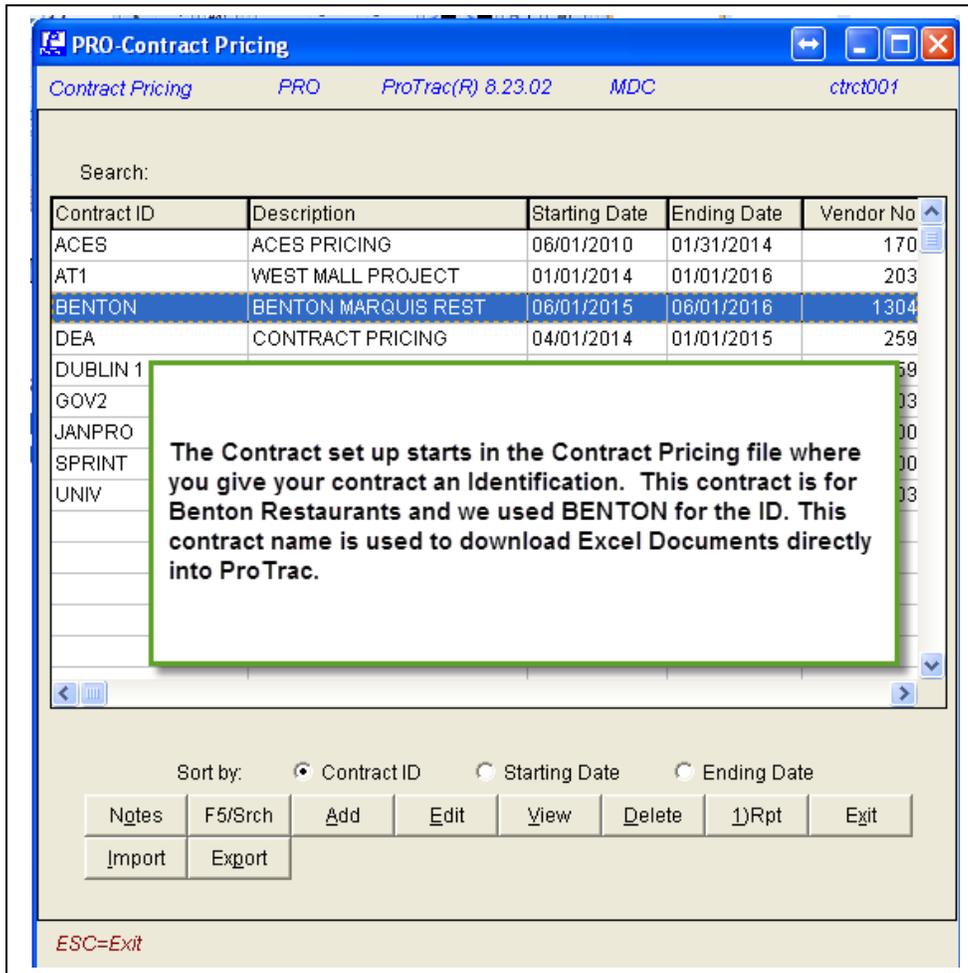
Contracts that can give a different commission rate for Contract sales

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A ProTrac contract can start with a quote to a customer. You key in all of the items with its pricing. If you win the bid you do not have to rekey the information into the contract, you would create an Excel Document directly from ProTrac's quotes. That document can be uploaded directly into ProTrac's Contract Pricing Module.

We have set up a CONTRACT with BENTON'S NEW MARQUIS RESTAURANT



The Set up for this contract starts in the Contract Pricing File. We have given the Contract a name, Description, and a Starting and Ending Date.

The vendor number is only important if this Contract is with a specific vendor and that vendor is giving you a rebate for some or all of the items. The contract that we are using does not have a rebate attached.

Just assign a vendor to set up the contract.

Note: We have set up a contract for just one of Benton's two restaurants. The New Marquis Restaurant in Phoenix is the only one on the contract. **You can set up a contract for all of Benton's restaurants.**

At this time you would Down Load from an Excel Document the items that are on this contract. **That number has no limit.** The customer's contract can be a simple few items or be 1000's of items with special Contract Pricing

You can set across the board discount pricing for a vendor or you can set specific pricing for individual items. The program is very flexible.

For this contract we started with an Excel document with the items that we want to include on this contract. The next graphic shows a portion of the list. This document represents 30 plus items on the contract.

The contract that we are setting up allows your cost to float up with price increases from your vendor. This is indicated in

Column D - % or \$ – I chose percentage. If I had chosen “\$” then the selling price would not vary regardless of your cost

Column E – The Cost that we are using for achieving our sell price is Standard Cost

Column F - The selling price is 138% of the Standard Cost

Column G - If your cost for this item is lower because the vendor is going to rebate dollars back to you then you would once again put in a “D “For a Dollar amount.

Column H – If your cost was going to change then you would tell ProTrac which cost you are using. It could be that you want ProTrac to use, Current Cost, or Average Cost for this calculation

Column I – Whatever Cost you choose you would tell ProTrac what dollar amount or % if you have chosen a percentage to use for this calculation

Column J – If the vendor is giving you a REBATE you would indicate with a yes or a no - **In this case** - No rebate is being offered and you are using 100% of the Std Cost for these items

Column K – Commissions – Because you are giving away more margin to get this business you may use a different commission structure for a contract. This column indicates a 2 % commission rate across the board. *This commission rate can vary by item.*

BENTON Contract PRICING.csv											
	A	B	C	D 1	E 2	F 3	G 4	H 5	I 6	J 7	K 8
1	CNTRACT ID	PROD LINE	ITEM #	% OR \$	COST	SELL % MRGN	% OR \$	COST	% OF CST	REBATE	COM %
2	BENTON	RSP	ALLT103	P	STD CST	138.5	P	STD CST	100	NO	2
3	BENTON	RSP	ALLT104	P	STD CST	138.5	P	STD CST	100	NO	2
4	BENTON	RSP	ALLT112	P	STD CST	138.5	P	STD CST	100	NO	2
5	BENTON	RSP	ALLT114	P	STD CST	138.5	P	STD CST	100	NO	2
6	BENTON	RSP	ALLT115	P	STD CST	138.5	P	STD CST	100	NO	2
7	BENTON	RSP	ALLT133	P	STD CST	138.5	P	STD CST	100	NO	2
8	BENTON	RSP	ALLTMC1	P	STD CST	138.5	P	STD CST	100	NO	2
9	BENTON	RSP	ALLTSET1	P	STD CST	138.5	P	STD CST	100	NO	2
10	BENTON	AH	80013	P	STD CST	138.5	P	STD CST	100	NO	2
11	BENTON	AH	80018	P	STD CST	138.5	P	STD CST	100	NO	2
12	BENTON	AH	80019	P	STD CST	138.5	P	STD CST	100	NO	2
13	BENTON	AH	80021	P	STD CST	138.5	P	STD CST	100	NO	2

THE BENTON RESTAURANT CHAIN HAS 46 RESTAURANTS
 They have negotiated a 38.5 mark up from standard cost, across the board for their new Marquis Restaurant in Phoenix. Should your cost go up on an item, this contract is set to change the cost for that item. However, you will be keeping the same Margin %. You can also negotiate a set dollar amount that will not change during the course of the contract.

Once this Excel document is configured with these column headings, you are ready to download the entire contract into ProTrac.

Price changes: If pricing changes through the duration of the contract (and you can change the cost per item on your contract) all electronic price updates will impact the cost on a contract

Price changes: If you have used a flat dollar amount in the contract, electronic inventory price changes will not impact the price calculated by the contract

Price changes: If you want to review all prices in a contract export the contract to an Excel document. Make any price changes that you want (or can) and you can import the new prices right back into ProTrac.

To Create, Change, or Delete a Contract requires Permission from the System Administrator

Contract Pricing Det PRO

ID: BENTON BENTON MARQUIS REST

Search:

P/L	Item Number	T	Price Level	Price \$ or %	T	Price Level	Cost \$ or %	/	Rbt	Comm%
AH	80013	P	STD CST	138.50	P	STD CST	100.0000	E	No	2.00
AH	80018	P	STD CST	138.50	P	STD CST	100.0000	E	No	2.00
AH	80019	P	STD CST	138.50	P	STD CST	100.0000	E	No	2.00
AH	80021	P	STD CST	138.50	P	STD CST	100.0000	E	No	2.00
AH	80023	P	STD CST	138.50	P	STD CST	100.0000	E	No	2.00
AH	80226X	P	STD							00
AH	802278X	P	STD							00
AH	822U	P	STD							00
AH	83037A	P	STD							00
AH	86334-13	P	STD							00
AH	86338	P	STD							00
AH	8828U	P	STD							00
CBC	TDB-24-48	P	STD							00
CBC	TDB-24-48-1-G-1	P	STD							00

ADD: If you have clearance you can add a line to a contract at any time or delete and item at any time.
COPY: If you have another customer who you are bidding the same products you can copy this contract and assign it to another customer
CALC: If you need to recalculate and item on the contract, with clearance you can recalculate the selling price for an item without having to redo the entire contract.

Next Prev F5/Srch Add Edit Copy Delete 1)Rpt Calc \$ Exit

ESC=Exit

Contract Pricing Detail Report

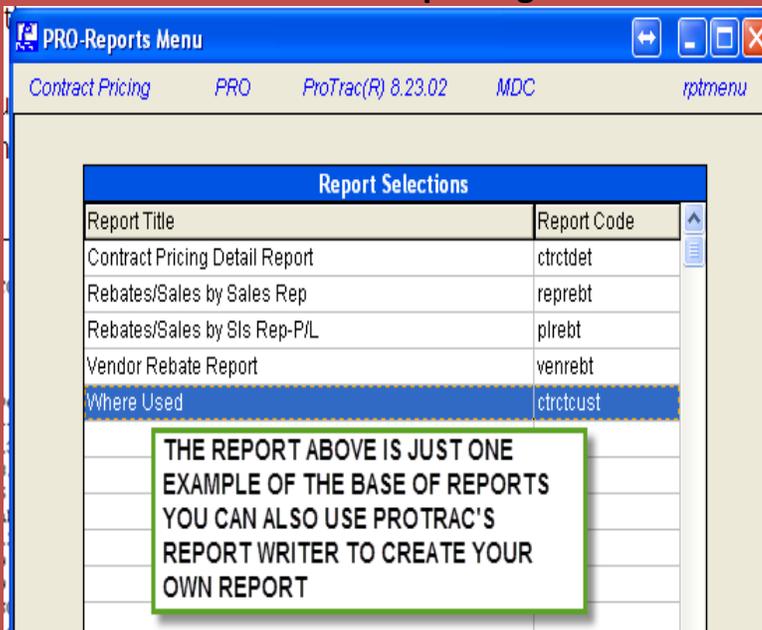
Contract ID: BENTON BENTON MARQUIS REST
 Starting Date: 06/01/2015
 Ending Date: 06/01/2016

THIS REPORT WAS RUN OUT OF ProTrac's CONTRACT PROGRAM

P/L Item Number	Description	Price T Level	Price \$ or %	Calc Price	Price T Level	Cost \$ or %	Calc Cost	Reb	Comm %
AH 80013	13 OZ RED WINE GLASS (24)	P STD CST	138.5000	65.43	P STD CST	100.0000	47.2400	No	2.00
AH 80018	8.5 OZ WINE FLORENTINE (24)	P STD CST	138.5000	62.66	P STD CST	100.0000	45.2400	No	2.00
AH 80019	6 OZ FLUTE CHAMPAGNE GLASS (24)	P STD CST	138.5000	65.43	P STD CST	100.0000	47.2400	No	2.00
AH 80021	ALL PURPOSE WINE GLASS (24)	P STD CST	138.5000	65.43	P STD CST	100.0000	47.2400	No	2.00
AH 80023	11 OZ WATER FLORENTINE (24)	P STD CST	138.5000	37.56	P STD CST	100.0000	27.1200	No	2.00
AH 80226X	9 OZ MARTINI (12)	P STD CST	138.5000	38.32	P STD CST	100.0000	27.6700	No	2.00
AH 802278X	9 OZ CELEBRATE MARTINI (12)	P STD CST	138.5000	40.37	P STD CST	100.0000	29.1500	No	2.00
AH 822U	SQUARE ASHTRAY (72)	P STD CST	138.5000	4.64	P STD CST	100.0000	3.3500	No	2.00
AH 83037A	14 OZ MOCHA MUG (6)	P STD CST	138.5000	24.03	P STD CST	100.0000	17.3500	No	2.00
AH 86334-13	PLATTER SWEDISH MODERN (16)	P STD CST	138.5000	33.43	P STD CST	100.0000	24.1400	No	2.00
AH 86338	GLASS SUGAR PACKET HOLDER (12)	P STD CST	138.5000	16.97	P STD CST	100.0000	12.2500	No	2.00

You can set the Price column to be whatever margin you work with on contracts. You can use List less or Cost Plus. For this example we used a 38.5% Mark up from standard cost standard cost. You can use a percentage or a flat dollar rate. If you do not assign a different commission to the contract then the standard sales person's commission for a product will be the rate for commission.

Standard Reporting



This program was developed by working with our customers. If you have specific needs or requirements, PDSI is willing to make modification and add new features.

We set out to give our customers a way to control an endless list of special contracts that they have to keep track of in their day to day. If you have a different need, give us a call and your suggestion may be the next **"NEW THING"** that we add to ProTrac
 Mel Carney