
BSI Live Price

Welcome

Thank you for your recent purchase of BSoft Integrators' Live Price. We take pride in our products as well as our customer service, so if you have any questions regarding the operation of your new software application that has not been addressed in this manual, please feel free to contact us at ken@bsoftintegrators.com.

Welcome to Live Price!

Overview

The BSI Live Price program is a tool used to provide your company with instant access to part pricing information. Live Price provides both purchase and sales price history, for any part in your BW Inventory, for all customers or specific customers, in one comprehensive screen. The pricing information can be accessed during any BusinessWorks process (or even outside of the context of BusinessWorks processes) in order to facilitate more accurate and responsive customer service. Create quotes, change pricing, give discounts, and convert quotes to orders.

Installation

Please refer to the BSoft Installation Instructions document, for step by step instructions on the downloading and installation process for this application. The instruction manual is available on the BSoft Integrators' website, at www.bsoftintegrators.com.

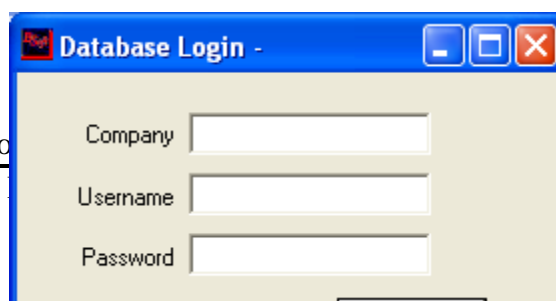
This application was designed to run separately on each individual workstation. Installing it onto the server is *not* recommended because the local data that the application generates is not multi-user safe.

The tool can be uninstalled by going to control panel → Uninstall software

Setup

Once the software has been installed on your computer, the installer will put a shortcut into your startup items folder, so the application will launch when you start up your computer. If you wish to launch it manually – the default install puts a shortcut into the Start→All Programs→Menu.

Double click on the icon to launch the BSI Live Price application. Once the product is registered, you will be prompted to log into your company.



The image shows a screenshot of a 'Database Login' window. The window has a blue title bar with the text 'Database Login' and standard Windows window controls (minimize, maximize, close). The main area is light beige and contains three input fields: 'Company', 'Username', and 'Password', each with a corresponding label to its left.

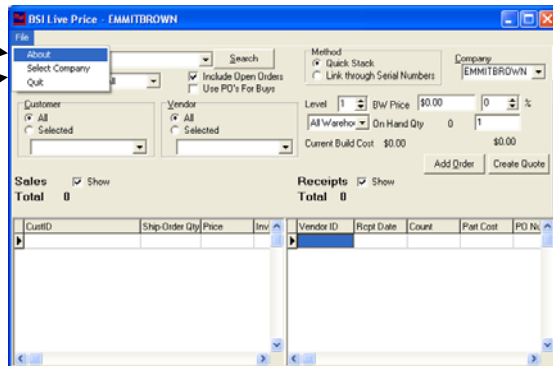
You must login using the Manager username and password. This information is saved in encrypted form on your computer, so that reentry of the information is not required on this computer.

Because the Manager username is used during the initial login, access to all Business Works' companies will be available for use in the Product Build Report, on the computer which has been logged in unless you choose to change the connected company.

Setup

Once you have opened the application, take note of the file menu. The file menu shows three options, the two relevant options are:

- **About**
- **Quit**



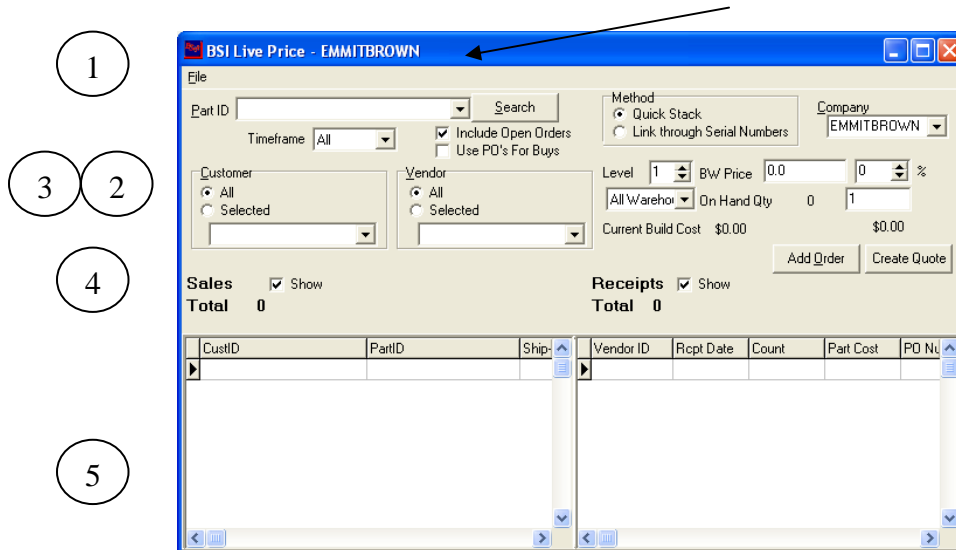
- **About:** This screen will give you your product information including the Build Report version, Business Works version, product license status, and product activation date.



- **Quit:** This option will log you out of the application and close the Live Price application.

Getting Started

Once you have opened the Live Price application the company ID, for the company you are logged into, appears in the title bar. You are now ready to start finding part price information. In order to facilitate your search Live Price has several search options (filters) to or refine your search, based on need, each search option is explained in detail below.



Search/Filter Options:

- 1) Timeframe: this option allows you to limit the data based on time; today, ten days, month-to-date, thirty days, quarter-to-date, year-to-date, year, or all.
- 2) Include Open Orders:jhsdskjfhfj
- 3) Use PO's for Buys:
- 4) Customer:
- 5) Vendor:
- 6) Show Sales:
- 7) Show Receipts:
- 8)

9)

After the application is logged in, it displays the launch screen. The logged in company ID appears in the title bar. Enter a Part ID and click on “Search”.

CustID	Ship-Order Qty	Price	Inv	Vendor ID	Rcpt Date	Count	Part Cost	PO
STANS	4	30	6/2	DUHOFF	6/21/2000	50	9	
SHARPE (Open SO)	20	30	6/2	REMY	6/21/2000	0	9	
RODEBYKE	50	30	6/2	DUHOFF	6/20/2000	0	9	
RODEBYKE	50	30	6/2	REMY	6/19/2000	15	9	
IBS (Open SO)	15	30	6/1	REMY	6/1/2000	24	9	
STANS	4	30	5/1	REMY	4/1/2000	12	9	

Enter the part ID that you would like to search for. If you type the first few letters of the part ID, the menu popup will show BW Parts that match the pattern that you entered.

If you enter no text into the Part ID field and open the popup menu, the menu will include up to the last five items that you searched for followed by a separator followed by however many part ID's you've chosen to add after the separator to the “InvParts.txt” file that you'll find in the folder with the Live Price application.

Choose the Timeframe to limit the search to more recent transactions if you find that the searches are too slow.

The “Include Open Orders” checkbox will include open transactions (denoted by the “Open SO” and “Open PO” comments in the vendor or customer fields) in the search. The number selector next to the “Calculated BW Price” lets you choose the price level to use. The Warehouse popup menu (which will not be visible if multiple warehouses aren't in use) determines where the “on hand qty” is calculated from, but does not affect the transaction listings.

If the “Use PO's For Buys” option is checked the “Receipts” list will show receipts from PO Line Items instead of the actual receipts table from inventory control. This option may not be as accurate from an accounting sense (because items may not be received at

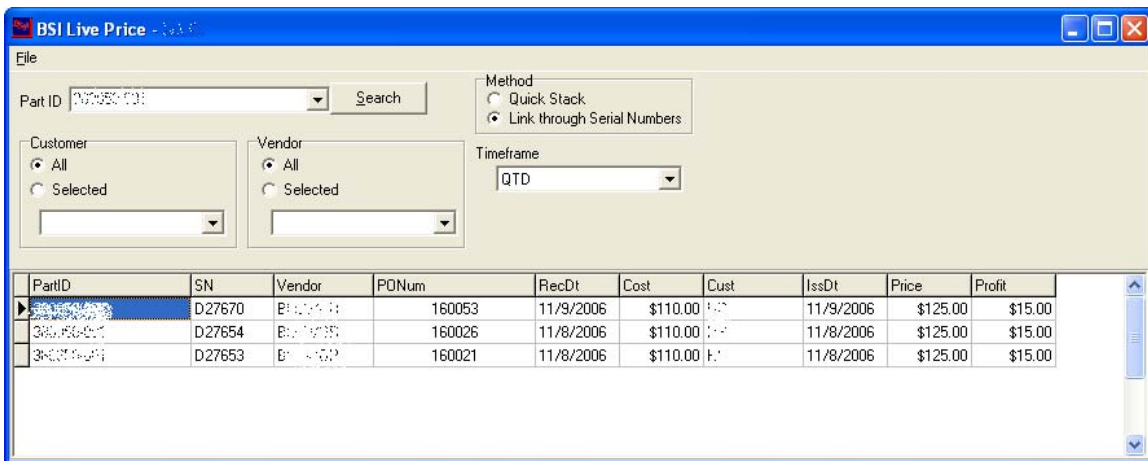
their ordered price) but if the parts in question are not inventory items this option must be checked to show purchases that are more than one month old.

Sales of the item appear in the panel on the left. All purchases appear in the panel on the right. Transactions are sorted by Descending order by date.

If you are only interested in purchases or sales, you can unclick the “Show” checkbox next to the “Receipts” and “Sales” labels to hide the view that you’re not interested in.

Total receipts and issues for the time period are displayed in bold just above the lists.

If you wish the results to include only a certain customer or vendor (if you’re doing customer specific pricing or wish to see the history with a particular vendor) choose the customer or vendor in the selection boxes. You may also “drill” to a customer or vendor’s transactions by double clicking on a line item assigned to them in the transaction lists. You can also right-click on a particular customer and access a feature known as “customer all parts,” and get a list of all the parts that that customer has previously purchased.



The screenshot shows the BSI Live Price application window. At the top, there is a search bar with 'Part ID' set to 'D27653' and a 'Search' button. Below this are two selection boxes for 'Customer' and 'Vendor', both set to 'All'. To the right, there is a 'Method' section with radio buttons for 'Quick Stack' and 'Link through Serial Numbers', with the latter selected. A 'Timeframe' dropdown is set to 'QTD'. Below the form is a table with the following data:

PartID	SN	Vendor	PONum	RecDt	Cost	Cust	IssDt	Price	Profit
D27670	D27670	B...	160053	11/9/2006	\$110.00		11/9/2006	\$125.00	\$15.00
D27654	D27654	B...	160026	11/8/2006	\$110.00		11/8/2006	\$125.00	\$15.00
D27653	D27653	B...	160021	11/8/2006	\$110.00		11/8/2006	\$125.00	\$15.00

If you wish to view the transactions by serial number instead of by separate purchases and sales, switch to the “Link through Serial Numbers” view.

Quick Run

When you are done viewing the prices, minimize the application instead of closing it or simply moving it to the background. There will be an icon for it in the System tray.



If you are in a BW task and wish to access the Live Price utility-
Select and copy (ctrl – c) the part ID in the BW Task

Type	Part
Part #	1001
Description	Part description, line #1
	Part description, line #2

Left click on the “B” icon in the system tray.

Live Price Will Automatically open to the selected part, so if you have a customer or vendor on the phone you can instantly find the pricing history of that part as well as the calculated BW price and on hand qty.

The part ID doesn't have to come from BW (but it does have to match what you have in BW). If a vendor has a website or has sent any kind of file (Excel, Word, PDF, etc) that you can copy from – just copy the part ID and click and the transaction history will pop right up. It could be used in conjunction with the Part Batch Processor (<http://www.bestasc.com/enhance/index.html> - IC-1001) to quickly access transaction history while updating prices.

Quick Quote

There are a couple of other handy features if you're on the phone with a customer quoting a price for product.



The Level control lets you choose the price level to use when getting the calculated BW Price.

The BW Price will default to the price for the part selected at the indicated price level. You may edit this for calculation purposes (edits will not update the *part* price in BW).

The % control lets you calculate a discount or premium.

Below the pct control is a field that you may enter a quantity.

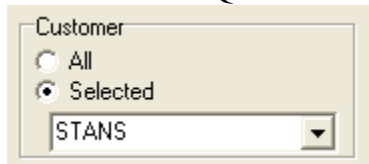
Below the quantity is the calculated line item price -

$$(Price * (1+adjustment) * qty)$$

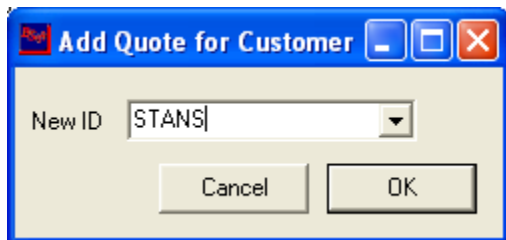
The line item price will update automatically as the source figures change.

If the customer agrees to the price and you would like to create a Quote in BW to reflect the conversation, click on "Create Quote."

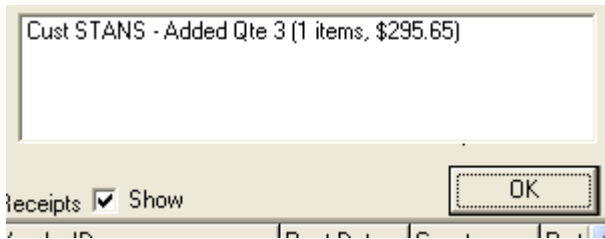
If a customer had been chosen for the filter view, that customer will automatically be selected for the Quote



If no customer has been selected, you will be asked to choose one



After you click “OK”, the line item adjustment data will be replaced with a display showing the results of the quote import



Click “OK” to return to the line item display.

Notes on Quote Import

For the import to work the correct version of **BWGAccess.exe** must be on a mapped drive that is mounted on the computer running Live Price. BWGAccess is installed with BW, so if in doubt, just find it and copy it to “C:\BWAccess”.

LivePrice does not currently support creating multiple line item quotes. Edits to quotes, including adding additional line items, changing the terms or changing the shipping address must happen through “Maintain Quotes” in BW.

Add Order

This feature will allow you to directly place the order for the information that you have entered in for the specific client that you are working on.