



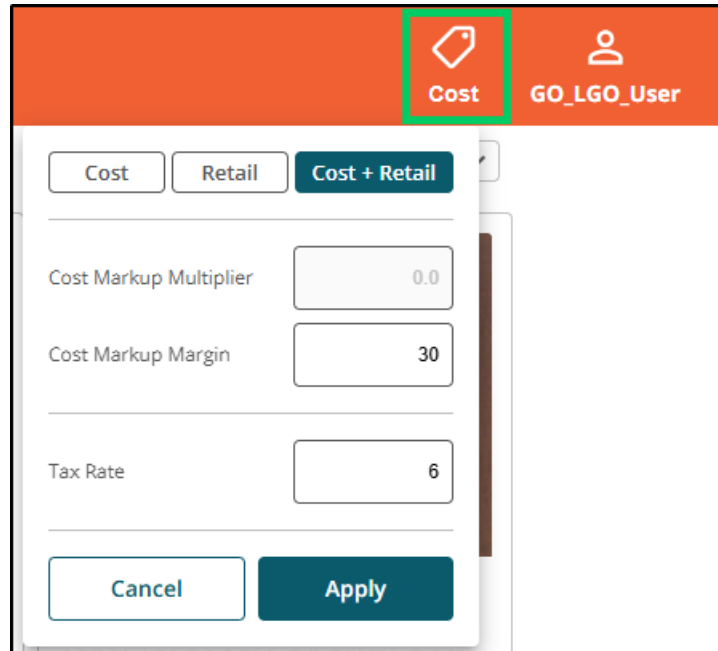
This document outlines the process of customizing displayed prices using the Retail Pricing feature and generating Retail Quotes in Lumbermen’s GO.

Contents

- Contents 1
- Accessing Retail Pricing..... 2
- Understanding the Pricing Display Options 2
- Prerequisites for Creating a Retail Quote 4
- Submitting a Retail Quote 5
- Accessing an Existing Retail Quote..... 7

Accessing Retail Pricing

- 1) Click on the “Price Tag” icon located in the top right corner of the screen next to your username.



The screenshot shows a software interface with an orange header bar. On the right side of the header, there is a 'Price Tag' icon (a white tag with a black outline) and the text 'GO_LGO_User'. Below the header, there are three buttons: 'Cost', 'Retail', and 'Cost + Retail'. The 'Cost' button is highlighted with a green rectangular box. Below the buttons, there are three input fields: 'Cost Markup Multiplier' with a value of 0.0, 'Cost Markup Margin' with a value of 30, and 'Tax Rate' with a value of 6. At the bottom of the form, there are two buttons: 'Cancel' and 'Apply'.

Understanding the Pricing Display Options

- 1) There are three display options: **Cost**, **Retail**, and **Cost + Retail**. These options affect what is displayed on the screen for each item in Lumbermen’s GO.
 - a. **Cost**: Displays the price you pay for each item.
 - b. **Retail**: Displays your custom retail price as calculated using the methods in step #2 below. This can be useful when showing the screen to your customers.
 - c. **Cost + Retail**: Displays both your cost and the retail price along with the profit margin.
- 2) You can set your retail price using one of the following methods:
 - a. **Cost Markup Multiplier**: Sets the retail price by multiplying your cost by a defined factor.
 - b. **Cost Margin Markup**: Sets the retail price to ensure a specific profit margin percentage.
 - c.

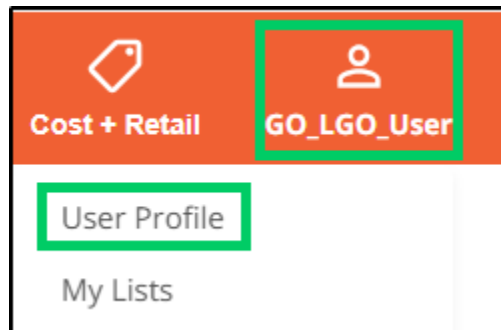
3) **Tax Rate:** Allows you to include sales tax, applied to the final price in your quote or order.

The screenshot displays a software interface with a top navigation bar in orange. On the right side of the bar, there is a 'Cost' icon and a user profile icon labeled 'GO_LGO_User'. Below the bar, the main content area shows a list of products with the text 'Showing 1-48 of 313 Results'. Three product cards are visible, each with a wood-grain image, a title, a model number, and a 'Cost' value. A modal window is open over the products, containing three numbered callouts (1, 2, 3) pointing to different sections. Callout 1 points to a tabbed interface with 'Cost', 'Retail', and 'Cost + Retail' tabs, where 'Cost + Retail' is selected. Callout 2 points to a section with two input fields: 'Cost Markup Multiplier' (value 0.0) and 'Cost Markup Margin' (value 30). Callout 3 points to a 'Tax Rate' input field (value 6). At the bottom of the modal are 'Cancel' and 'Apply' buttons.

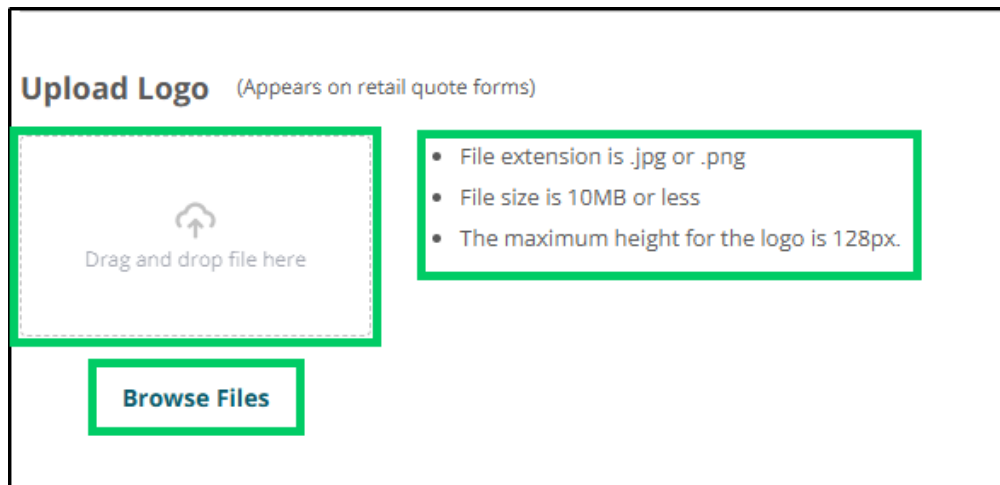
Product Name	Model	Cost
12" X 12' FASCIA ANTIQUE LEATHER 30EA/PL	17T12AL	\$127.40
12" X 12' FASCIA ASHWOOD 30EA/PL	17T12AW	\$146.94
12" X 12' FASCIA BROWN OAK 30EA/PL	17T12BO	\$96.55

Prerequisites for Creating a Retail Quote

- 1) Ensure that your retail pricing is set up as desired. (See “Understanding the Pricing Display Options” section above for more information)
- 2) Determine whether you want to display your company logo on the retail quote (optional).
 - a. Note: The logo is user-specific and does not transfer between user profiles. This means that every user that should have the company logo on their quotes should follow this process.
- 3) Click on your username and select User Profile.



- 4) Locate the section titled Upload Logo.
- 5) Drag and drop your logo into the space provided or click Browse Files to upload it.
 - a. Ensure the logo meets the file format requirements listed on the screen



Submitting a Retail Quote

- 1) When submitting a quote (see Module #3 for a refresher on placing a quote), locate the “Retail Customer Information” section.

The screenshot shows a quote submission form with the following fields and options:

- Subtotal:** \$6,160.82
- Retail Grand Total:** \$9,329.25
- Sales Type:** Required, dropdown menu set to **CUSTOMER PICKUP**
- Ship Via:** dropdown menu set to **PICK UP**
- Ship-To:** dropdown menu set to **Lumbermen's GO Testing #1**
- Ship Complete Order
- Request Ship Date:** Next Available, Request a Date
- PO ID:** text input field with placeholder "Enter PO ID or Verbal"
- Job ID:** text input field with placeholder "Enter Job ID"
- Reference:** text input field with placeholder "Enter Reference"
- Retail Customer Information:** A link highlighted with a green box and a green arrow pointing to it from the right.
- Confirmation Email:**
 - Primary Email: lgouser@lumbermens-inc.com
 - Additional Email: text input field with placeholder "Enter additional email"
 - Saberis Stealth Sync
- Buttons:** Cancel and Submit Quote

- 2) Click on “Retail Customer Information” to open the form and enter the required customer details.

3) Once all applicable fields are completed, click Apply.

Retail Customer Info

Customer ID	Ship-To	
<input type="text"/>	<input type="text"/>	
Customer Name		
<input type="text"/>		
Address 1		
<input type="text"/>		
Address 2		
<input type="text"/>		
City		
<input type="text"/>		
State	Zip	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact Name		
<input type="text"/>		
Phone	Email	
<input type="text"/>	<input type="text"/>	
Reference		
<input type="text"/>		
Tax Rate		
<input type="text" value="0%"/>		
Taxable Charges Desc.	Amount	
<input type="text"/>	<input type="text" value="\$XXXX.XX"/>	
Non Taxable Charges Desc.	Amount	
<input type="text"/>	<input type="text" value="\$XXXX.XX"/>	
Terms		
<input type="text"/>		
Customer Sign-off message		
<input type="text"/>		

4) Review the details of your quote, then click Submit Quote.

Accessing an Existing Retail Quote

- 1) Click on the Quotes tab at the top of your screen.
- 2) Locate the desired quote and click on the Retail icon.

The screenshot shows the Lumbermen's GO web application interface. At the top, the 'Quotes' tab is selected. Below the navigation bar, there are filters for time periods (Today, Yesterday, Last 7 Days, Last Week, Last 30 Days, This Month, This Quarter, This year, Last (1) Year) and status (All, Active, Closed). A search bar is present with the text 'Keyword Search (Last 30 Days)'. Below the search bar, there are checkboxes for 'My Quotes Only' and 'Include All Ship-To's'. A table of quotes is displayed with columns: Quote ID, Reference, PO ID, Quote Date, Sale Type Description, Status, SubTotal, and Total Taxes. The first row shows Quote ID 1463602, Reference, PO ID, Quote Date 04/01/2025, Sale Type Description CUSTOMER PICKUP, Status Open, SubTotal \$274.34, and Total Taxes \$0.00. In the action column for this quote, the 'Retail' icon is highlighted with a green box.

- 3) The quote will be displayed in your browser.
- 4) To download the quote, click the Download button in the top right corner of your screen.

The screenshot shows a customer quote document for quote 1463594. The document includes the Lumbermen's GO logo, the quote number, date, and customer information. A table of items is displayed with columns: Quantity, Item, Price, and Subtotal. The total price is \$391.91, and the tax is 6.0000% (\$23.51).

Customer Quote 1463594
04/01/2025
Awesome Customer
123 Ocean Avenue
Grand Rapids, MI 49548, USA
857-5309
Larry
awesomeuser@email.com

LGO SHIPTO #1
Lumbermen's GO Testing #1

Quantity	Item	Price	Subtotal
1.0	17T12AL 12" X 12" FASCIA ANTIQUE LEATHER 30EA/VPL	\$182.00 EA	\$182.00
1.0	17T12AW 12" X 12" FASCIA ASHWOOD 30EA/VPL	\$209.91 EA	\$209.91

Customer Sign-Off

Total	\$391.91
Tax 6.0000%	\$23.51