PROSELECT
Video Training Reference

This AI-generated document is intended to accompany the video "Setting up Pricing for Prints Using Spreadsheets" as a written reference. While it provides details of the techniques and processes demonstrated in the video, it is not a comprehensive training guide. You may find printing this document helpful for quick reference.

For a more detailed understanding of this topic, please consult the ProSelect Online Help Guide.

Setting up Pricing for Prints Using Spreadsheets

Introduction: This guide details how to set up print pricing in ProSelect using spreadsheets, which is the second of three methods available in the software. This method is ideal for those who prefer a detailed, customizable approach to pricing management.

Background: Three methods exist for setting up pricing for prints in ProSelect:

- Using supplier collections.
- Importing information from spreadsheets.
- Creating pricing directly within ProSelect.

This video focuses on the second method, using spreadsheets. Before proceeding, it's beneficial to review tutorials for all methods to choose the best fit for your needs.

Preparation: Ensure you have a spreadsheet application capable of exporting CSV files, such as Microsoft Excel, Apple Numbers, or Google Sheets.

Steps to Set Up Pricing Using Spreadsheets:

1. **Start in ProSelect:**

    - Open ProSelect.
    - Navigate to the top menu and select "Products" followed by "Product & Pricing Manager."

2. **Prepare the Spreadsheet:**

    - Select the "Prints" tab.
    - On the folder panel on the left, click any folder.

- In the "Prints panel" on the right, click the "Options" button and choose "Generate Print Import Spreadsheet" from the drop-down list.

3. **Configure Spreadsheet Options:**

- If you have existing Presentation Options, check those you wish to include.
- If not, under 'Additional Items,' choose how many new Presentation Options you wish to add.
- Decide whether to create separate files for each Presentation Option or combine them into one spreadsheet.
- Check the paper sizes of the prints you intend to sell, ensuring all sizes you plan to offer are included. Use the 'Manage' button to add any sizes not shown on the list.
- Choose your pricing method, typically 'Fixed Price', which will be your selling price.

4. **Generate and Save the Spreadsheet:**

- Click 'Generate.'
- Select a location to save your CSV file.

5. **Edit the Spreadsheet:**

- Open the saved CSV file in your chosen spreadsheet application (e.g., Apple Numbers).
- Rename columns to reflect your actual Presentation Options, such as "Bonded Canvas," "Metal Print," "Textured," and "Wood Print."
- Add prices next to each print size and finish. Leave cells blank where a size is not available for a specific finish.
- If needed, copy and paste pricing from another spreadsheet or link cells from different sheets depending on your expertise. Ensure no currency symbols are included; set cell type to "Number" to clean the data.

6. **Export the Edited Spreadsheet:**

- For Apple Numbers, go to "File," select "Export To," then "CSV," and ensure "include table names" is NOT checked before saving.
- For Google Sheets, go to "File," "Download," and select "Comma-Separated Values (CSV)," then save.
- For Microsoft Excel, go to "File," "Export," click "Change File Type," select "Comma-Separated Values (CSV)," and then save as by replacing your existing file.

7. **Import Spreadsheet Back into ProSelect:**

- Return to ProSelect's Product & Pricing Manager.
- Close the "Generate Spreadsheet" dialog.

- Go to "Options" and select "Import Prints."
- Locate and open the CSV file you exported.
- The import dialog will default to the first column from the spreadsheet. Create a new folder for each Presentation Option as you import them, matching the folder names with your presentation option names.

8. **Complete the Import Process:**

- Assign a supplier and other details during this step.
- Click "Import" for each Presentation Option, confirming each by selecting the appropriate folder and clicking "Import" again.
- Once completed, close the dialog.

Conclusion: Following these steps, you will have successfully integrated new pricing into ProSelect using the spreadsheet method. This allows for extensive customization and precise control over your pricing strategy.

For additional reference material, consult the "Product & Pricing Manager - Prints" section in the ProSelect online manual, available under the "Help" menu by selecting "Open Online Help Guide."

This guide is designed to complement the video tutorial, ensuring a comprehensive understanding and efficient setup of pricing for prints within ProSelect.