Global Pricing Updates in XOP:
Updating Your Product List Pricing Quickly and Easily

Updating your product pricing on a global scale for all of your clients might seem like a daunting task, but XOP offers features that make this something you can easily do in a timely manner. XOP aggregates all of the product pricing into a single place so that you can easily view and update all of the components that go into your prices to ensure you have the safest and best impact on your clients.
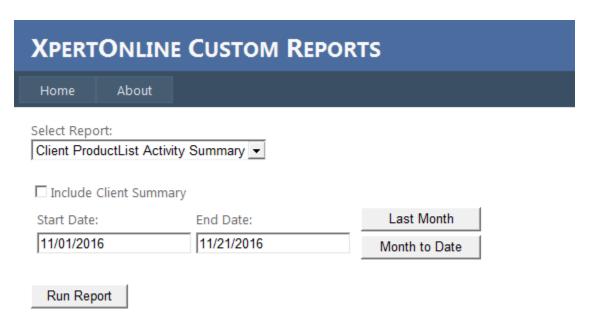
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Step #1: Use the Management Report as Your Guide

Updating product pricing is a big task, so you might ask yourself: where do I start? We have built a management report as a starting point that will guide you through the process. It will help you identify which product lists are most heavily used, as well as which clients use them. This can help you visualize client impact and assist in deciding which product lists you should start with.

Login to XOP, then go to the **File | Management Reports** menu option, and choose **XOL Custom Report Utility**. Login with your provider credentials, then in the drop down list, choose **Client Product List Activity Summary**.

This report is very handy: it shows you all of your product lists, and which of your clients use it. Many of you have product lists that are shared between multiple clients. This report is your roadmap to see which product lists have the most usage between multiple clients. As you probably know, when a product list is shared between clients, this means that you only have to update one product list to increase your pricing for multiple clients.

- **Include Client Summary** – check this checkbox to include client details for each client that is attached to a product list.
- Choose a **Start and End Date** for the dates you want to see activity for.

Click **Run Report**, then you can either view or save the file. It will open in a CSV file in Excel, and you can see your roadmap for your pricing updates.
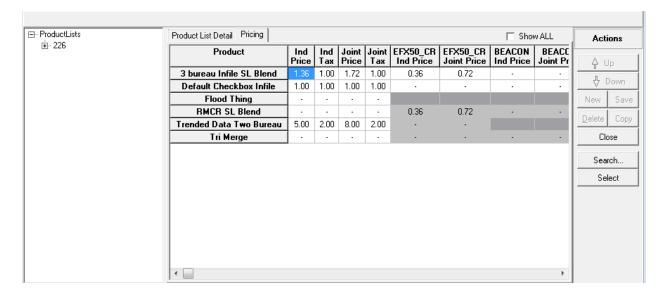
Step #2: Start Updating Your Pricing

Once you have your **Product List Activity Summary** report, you can begin updating your pricing.

Please note that the pricing changes that you make will take effect as soon as you save your changes. Pricing changes are not retroactive. Some options – like second use – are billed at the rate that the option was configured with at the time the request was ordered. So, if you make second use price changes after the request was ordered, the original price will still be billed.

If you want, you can start with the product list that is shared among the most clients, and work your way down through the management report. This will enable you to implement broad price changes and to work faster.

In XOP, go to the **Setup | Clients** menu option, find a client that uses the product list you want to update per the management report information, then move to the **Setup** tab. Click the **Lookup Product List** button, then click OK at the search prompt. The product list will then open. Begin your updates by moving to the **Pricing** tab.
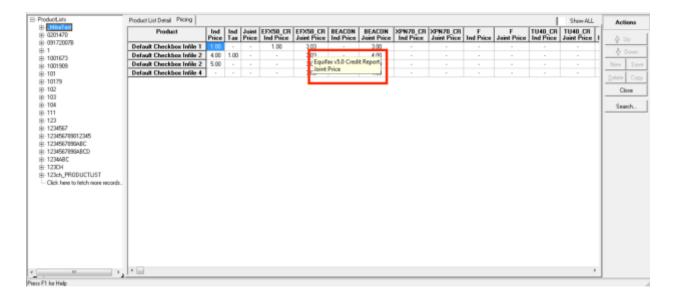
Product	Ind Price	Ind Tax	Joint Price	Joint Tax	EFX50_CR Ind Price	EFX50_CR Joint Price	BEACON Ind Price	BEACO Joint Pr
3 bureau Infile SL Blend	1.36	1.00	1.72	1.00	0.36	0.72	-	-
Default Checkbox Infile	1.00	1.00	1.00	1.00	-	-	-	-
Flood Thing	-	-	-	-				
RMCR SL Blend	-	-	-	-	0.36	0.72	-	-
Trended Data Two Bureau	5.00	2.00	8.00	2.00	-	-		
Tri Merge	-	-	-	-	-	-	-	-

ProductLists
226

Product List Detail | Pricing

Show ALL

Actions — Up, Down, New, Save, Delete, Copy, Close, Search..., Select

Pricing Tab - Grid View Layout and Updating Prices

The **Pricing tab** is presented in a grid-style format that contains all of the products in rows, and all of the product components that you charge for – including individual and joint base product prices, individual and joint bureau access prices, access addon prices, secondary use prices, etc – in columns along the top of the screen. You can scroll to the right to see more pricing.

- All of the products in the product list will be displayed alphabetically in the **Product** column. You can click in any field to update pricing.

- All of the product component pricing information that goes into each product is listed along the top.

- The **Ind Price** and **Ind Tax** columns are the base product price and tax amounts for individual products. You can right-click in either column to increase pricing in this column by a certain dollar amount or percentage.

- The **Joint Price** and **Joint Tax** columns are the main product price and tax amounts for joint orders. You can right-click in either column to increase pricing in this column by a certain dollar amount or percentage.

- The rest of the columns to the right are the pricing components that make up each individual product.

- If you want a human readable view of the pricing columns, simply hover over any of the column headers. This will show you the full name of the product component.
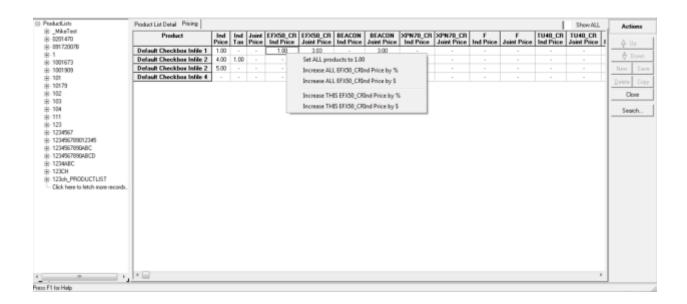

- Check the **Show All** checkbox to view pricing that you have setup in your **Product Options**.
- Use the scroll bar along the bottom to see each pricing component that goes into product pricing.

Right-Click to Quickly Update Pricing

We have built a right-click feature into the **Pricing** tab to allow you to update your pricing with one click across the board for all products and all product components. This lets you update your base product pricing, plus any product component pricing, with just one click of a button.
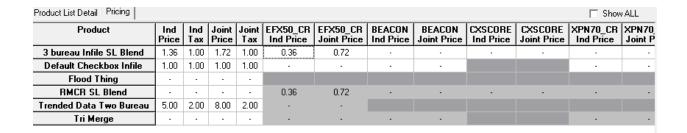
Setting a Price Across All Products

You can right click on any product component, such as the **EFX 50 CR Ind** (see screen shot below) and choose to set every product in that column to a specific dollar amount. To do this, once you have the dollar amount you want entered into a field, you can right-click and choose the **Set ALL Products to 1.00** (see example). This would set your **EFX 50 CR Ind** pricing across all products to $1.00

Increasing a Price Across All Products by a Dollar Amount or a Percentage

If you want to add a specific dollar amount to all of your existing Equifax bureau pricing on every product (say you wanted to add $1.00), you can right-click in the **EFX 50 CR IND** column, and choose the **Increase ALL EFX 50 CR Ind Price by $** option. At the prompt, you would enter $1.00 into the field, and then click OK. This would increase all individual EFX bureau prices by $1.00.

Similarly, to add a percentage to all of your existing Equifax bureau pricing on every product (so you wanted to add 10% to every price), you can right-click in the **EFX 50 CR IND** column, and choose the **Increase ALL EFX 50 CR Ind Price by %** option. At the prompt, you would enter 10% into the field, and then click OK. This would increase all individual EFX bureau prices by 10%.

Product	Ind Price	Ind Tax	Joint Price	Joint Tax	EFX50_CR Ind Price	EFX50_CR Joint Price	BEACON Ind Price	BEACON Joint Price	CXSCORE Ind Price	CXSCORE Joint Price	XPN70_CR Ind Price	XPN70 Joint P
3 bureau Infile SL Blend	1.36	1.00	1.72	1.00	0.36	0.72	-	-	-	-	-	-
Default Checkbox Infile	1.00	1.00	1.00	1.00	-	-	-	-			-	-
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Trended Data Two Bureau	5.00	2.00	8.00	2.00	-	-						
Tri Merge	-	-	-	-	-	-	-	-			-	-

☐ Show ALL

What the Colors Mean

If you happen to see gray colors on your pricing tab, here is what they mean:

- White – if a pricing field is white, it means that this price is available to be applied to the product.
- Light gray – if a pricing field is light gray, it means that this price will be applied to a product only when this is reprocessed, or canceled and repulled.
- Dark gray - if a pricing field is dark gray, it means that this pricing field cannot be applied to the product.