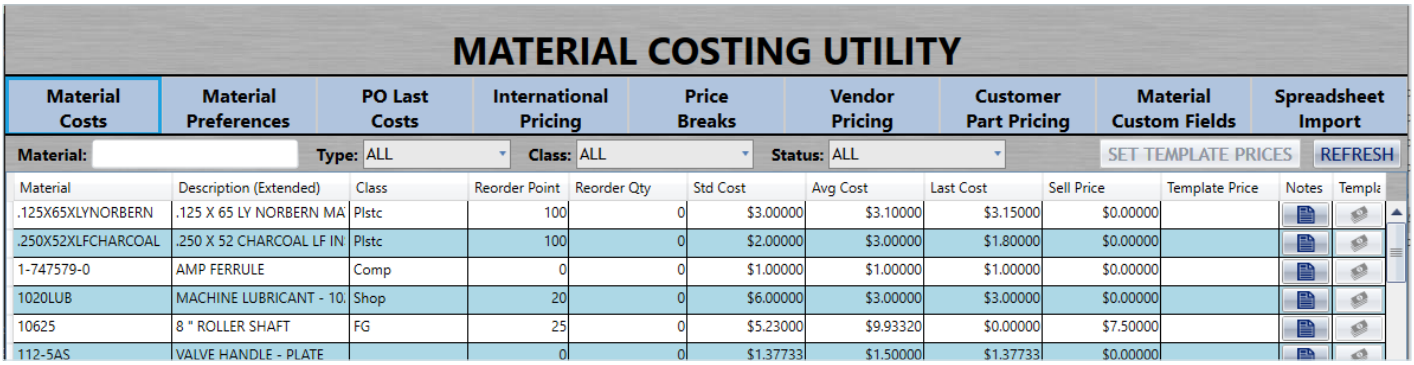
STANDARD AND MATERIAL PREFERENCES VERSIONS

Material Cost and Price Manager

A practical guide to individual edits, Excel updates and checking the results in JobBOSS.



The main workspace. Your installed version determines which additional tabs are available.

Start with the task you need to complete

Your task	Go to
Update a few material costs or selling prices	Page 2
Export records and prepare an Excel update	Page 3 / 4
Import the file and verify the result	Page 5
Change material preferences	Page 6
Maintain other pricing records	Page 7
Understand notes and pricing history	Page 8
Resolve a problem or revisit training	Page 9 / 10

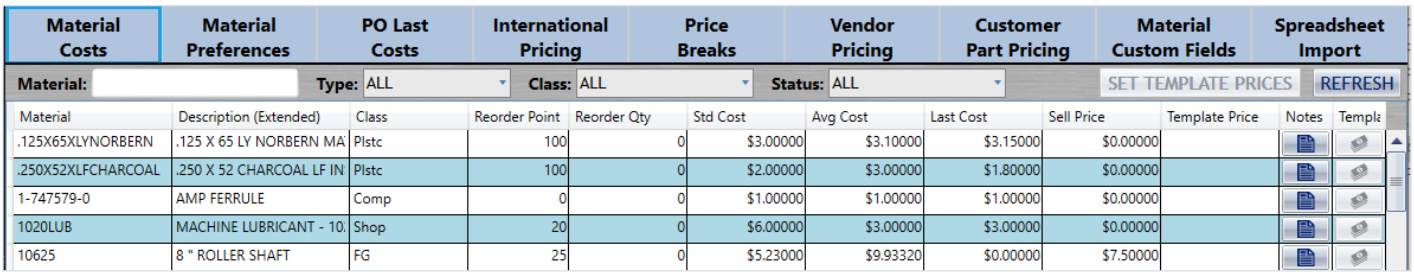
Before you begin: open the installed Neptune utility and confirm that it is connected to the intended JobBOSS database. Make sure you can run the supplied export and historical costing reports in JobBOSS. For a first practice update, use your training database or one agreed test material.

The screenshots show the desktop product's full demonstration interface. Individual screens and available options can vary with your installed configuration.

01 DIRECT CHANGES

Edit a few material records

Use the Material Costs tab when you can enter the changes directly without preparing a workbook.



Material	Description (Extended)	Class	Reorder Point	Reorder Qty	Std Cost	Avg Cost	Last Cost	Sell Price	Template Price	Notes	Templa
.125X65XLYNORBERN	.125 X 65 LY NORBERN MA	Plstc	100	0	$3.00000	$3.10000	$3.15000	$0.00000			
.250X52XLFCHARCOAL	.250 X 52 CHARCOAL LF IN	Plstc	100	0	$2.00000	$3.00000	$1.80000	$0.00000			
1-747579-0	AMP FERRULE	Comp	0	0	$1.00000	$1.00000	$1.00000	$0.00000			
1020LUB	MACHINE LUBRICANT - 10.	Shop	20	0	$6.00000	$3.00000	$3.00000	$0.00000			
10625	8 " ROLLER SHAFT	FG	25	0	$5.23000	$9.93320	$0.00000	$7.50000			

Use the material search and Type, Class and Status filters to narrow the list.

1. **Refresh and find the material**
   Click **REFRESH** to load current values. Search by the beginning of the material number, or use the Type, Class and Status filters. Confirm the material and description before editing.

2. **Edit the intended fields**
   Enter the new value in the relevant cell. You can move between cells on the same row to complete that material's changes.

3. **Complete the row to save**
   Press **Enter** or select another material row to save. Tab within the same row does not complete it. If only one row is shown, click **REFRESH** and accept the save prompt. Routine grid edits have no separate Save button.

4. **Verify the material in JobBOSS**
   Reopen or refresh the material record in JobBOSS and check the updated field. If you need to see a change made by another user, refresh the utility first.

Field	What you are maintaining
Std Cost / Avg Cost / Last Cost	The corresponding cost values on the material master.
Sell Price	The selling price on the material master.
Reorder Point / Reorder Qty	Replenishment thresholds and quantities; these are not on-hand inventory counts.

Scope: ordinary material edits maintain the master record. They do not reprice existing open orders or recost existing jobs and WIP.

02 BEGIN AN EXCEL UPDATE

Export the right JobBOSS data

Start with the supplied Neptune report for the type of data you intend to change.

Report or report family	Use it for
Material Recost Export	Standard, average and last cost; selling price; reorder values and associated notes.
Material Preferences Export	Material defaults and properties in the version with Preferences.
Material Customer Part Export	Customer-specific material or part pricing.
Create Price breaks Exports	Build a worksheet for new quantity price-break rows.
Edit Price breaks Exports	Export existing quantity price breaks for maintenance.
Material Custom Export	Supported material custom fields in the version with Preferences.
Historical Material Costing	Review pricing change history; this is an audit report, not an import template.

1. **Open the report in JobBOSS**
   Find the supplied reports under **User Defined**, or use the report shortcuts prepared for your company. The utility's main grid is not the export route.

2. **Select the material group**
   Choose the report parameters for material type, class and status. In multi-select parameters, move the required values into the selected list before running the report.

3. **Export using Data Only**
   Choose the Excel **Data Only** export option. Keep the remaining export settings supplied for the report, then save a dated working file in an accessible folder.

If the report looks unusual: long notes, white space or squeezed columns in the report preview do not necessarily indicate missing data. These reports are arranged to produce an import-ready Excel file. Open the exported workbook and check its records.

Use a fresh export for each update cycle. Save an untouched copy before editing so you can compare the intended changes with the starting values.

03 EDIT AND REVIEW

Prepare the workbook

Keep the import structure intact and make the scope of the update explicit in the file.

1. **Keep the original data columns**
   Retain the exported header row, column order and material identifiers on the original first worksheet. Adjust column widths for readability. Put calculation or lookup columns to the right of the original columns.

2. **Keep only the intended records**
   Remove rows that are outside this update from your working copy. Filtering or hiding rows in Excel is not a reliable way to exclude them from an import.

3. **Enter or calculate the new values**
   Use Excel to prepare the approved values, then place the finished results into the intended import column. Preserve other values that should remain unchanged.

4. **Review the finished file**
   Check material numbers, numeric values, decimal precision and the number of rows. Keep identifiers such as leading-zero material numbers exactly as exported. Save the file before opening it in the utility.

Example A selling-price increase

To apply a 3 percent increase to a selected product group, calculate **existing selling price × 1.03** in a helper column. If the existing value is in E2, a formula such as **=ROUND(E2*1.03,2)** produces a value rounded to two decimal places. Use the decimal precision appropriate for your products.

Check several results, then copy the calculated values into the existing selling-price column using **Paste Special → Values**. Keep the other material values unchanged and remove records outside the approved product group.

Check	Why it matters
Correct import data set	Pricing, preferences and customer pricing use different layouts.
Unchanged identifiers and column order	The import uses material identifiers and column positions.
Only the intended rows remain	Every included row may be processed, even when it is hidden in Excel.
Numeric cells contain numbers	Text, formula errors and blank required numeric values can fail validation.

04 APPLY THE WORKBOOK

Import and verify the update

Choose the matching import type, run the file and confirm the business result.

1. **Open Spreadsheet Import**
   In the utility, select **Spreadsheet Import**. Choose the matching option, such as **Material Pricing Import** for the Material Recost Export workbook, or the Preferences import for a preferences workbook.

2. **Select the saved Excel file**
   Browse to the workbook you prepared. The Import action becomes available when a valid file path and an import type are selected.

3. **Confirm the column mapping**
   For a workbook produced by the supplied report, keep its standard column mapping. If you have rearranged the data or built your own workbook, check every mapped column before proceeding.

4. **Run Import**
   Click **Import**. The import checks the required records and values before applying the data. If it reports an error, read the material and field details, correct the workbook, save it and try again.

5. **Confirm completion and refresh**
   Wait for the operation to finish. Refresh the relevant utility tab, then reopen or refresh representative material records in JobBOSS.

6. **Check values and history**
   Compare the result with the approved workbook. For cost and price changes, run Historical Material Costing for the relevant date range. Retain the completed workbook with your internal update records.

Start with a controlled first import

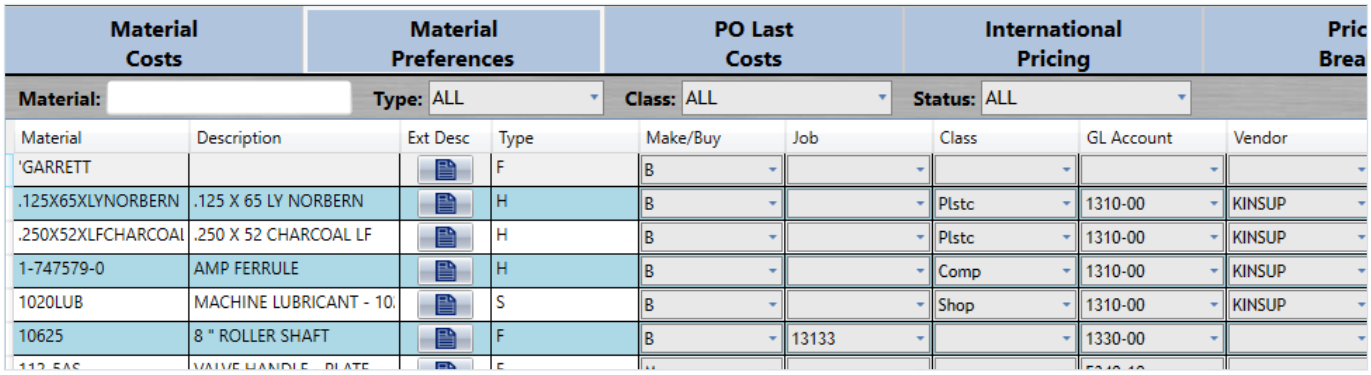
Use one agreed test material and record the original value. Make one clear change, import that single row and confirm the result in JobBOSS and the history report. Restore the value if the exercise was only a test, then proceed with the real update.

If an import stops during processing: check which records were updated before rerunning the file. A failed run should not be treated as proof that no changes were applied.

05 VERSION WITH MATERIAL PREFERENCES

Maintain material preferences

Use this workflow for changes to the material's default properties and administrative fields.



Material Preferences. This detail shows material identity, make/buy, template job, class, GL account and primary vendor.

Field group	Typical use
Class, GL account, sales code and tax code	Standardize how related materials are classified and accounted for.
Primary vendor, pick/buy, make/buy and lead days	Maintain the default purchasing and planning values.
Description, revision and drawing	Keep identifying and reference information current.
Location, status and linked job	Maintain the relevant material defaults and template association.

Example Replace a default vendor

Run **Material Preferences Export** for the relevant material group. In Excel, identify the records using the old primary vendor, keep only the materials that should change and enter the replacement vendor code. Preserve the other exported fields, then use the matching Preferences import and verify several materials in JobBOSS.

For a small change, edit the appropriate field directly in the **Material Preferences** grid and complete the row. For a larger change, follow the export, preparation and import steps on pages 3-5.

Keep untouched values intact. A blank cell in a preferences workbook may clear an existing field; it does not mean “leave unchanged.” The utility maintains existing materials. Creating or deleting materials, changing units of measure and altering dimensional definitions are separate tasks.

06 OTHER PRICING WORKFLOWS

Use the appropriate pricing view

Choose the record type that holds the value you intend to change. Available options depend on the installed configuration.



The full interface separates material values, price breaks, vendor pricing and customer part pricing.

View	Use and approach
Price Breaks	Maintain quantity-based selling-price breaks. Use the Create report when preparing new break rows and the Edit report for existing rows; choose the matching price-break import.
Customer Part Pricing	Maintain the price associated with a customer and material/part combination. Start with Material Customer Part Export and use the corresponding customer pricing import.
International Pricing	Maintain selling prices for configured customer types. Confirm that you are editing the intended customer type as well as the material.
Vendor Pricing	Maintain vendor-specific prices and related quantity or lead-time values. Check the material, vendor and quantity break together.
Material Custom Fields	Included with Material Preferences. Maintain supported material custom fields using the matching custom-field export and import layout.

Keep quantity breaks coherent

Review the complete set of breaks and quantity thresholds for each material. For a vendor-pricing import, include a quantity-zero base price when establishing a new material/vendor combination, then add higher-quantity breaks. Verify the material, vendor and break quantity together.

Template prices are a separate action

The row-level template button copies that material's selling price into its linked template job. Use it when updating one template. **SET TEMPLATE PRICES** is a bulk action for eligible active materials with linked jobs; do not assume the visible grid filter limits its scope. These controls maintain template prices for future jobs.

07 REVIEW AND TRACE CHANGES

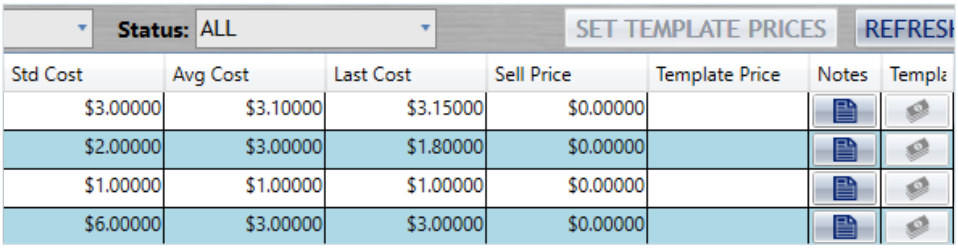
Understand notes and change history

Material notes and the historical costing report serve different purposes.

Two ways to review a pricing change

Material notes can record the user, date and cost or price changes against the material. The setting in **Menu → Settings** controls whether pricing changes are written into the material note field.

Historical Material Costing is the separate report used to review material pricing changes over a date range. Turning off note-field recording does not turn off that historical pricing review.



Std Cost	Avg Cost	Last Cost	Sell Price	Template Price	Notes	Templa
$3.00000	$3.10000	$3.15000	$0.00000			
$2.00000	$3.00000	$1.80000	$0.00000			
$1.00000	$1.00000	$1.00000	$0.00000			
$6.00000	$3.00000	$3.00000	$0.00000			

The Notes icon opens the material notes. Template-price controls are separate.

Note Text and Note Override

Workbook entry	Intended note action
Note Override left blank	Add the supplied note text to the existing note.
Note Override contains a value	Replace the existing note with the supplied note text. Use this only when replacement is intentional.
Pricing change only	Keep the exported note columns intact unless your update deliberately includes note maintenance.

For a note append, replacement or clearing exercise, start with one material and verify the exact result. Check the note-recording setting first. Do not clear note cells or populate Note Override merely to make the workbook easier to read.

Review after a batch

Run the historical costing report for the relevant date range, compare representative old and new values with your workbook, and retain the workbook as your record of the intended update. The pricing history is not an automatic Undo command.

08 SELF-SERVICE REFERENCE

Common questions and troubleshooting

Start with the symptom, check the matching part of the workflow and retry a small, controlled example when needed.

Question or symptom	What to check
The value did not save	Complete the edited row with Enter or by selecting another row. Tab between cells on the same row does not complete the row.
The grid shows an old value	Use REFRESH. The utility loads values when opened or refreshed; it does not continuously track edits made elsewhere.
I cannot find an Export button	Run the supplied export report from JobBOSS User Defined reports. The main utility grid is not the export path.
The report preview looks blank or spread out	Check the selected report parameters, then export as Excel Data Only and inspect the workbook. Long notes can create large gaps in the report.
The import button is unavailable	Choose an import type and a saved Excel file that the current Windows session can access.
Material not found or a numeric validation error	Check the material identifier, selected database, correct import profile and column mapping. Replace formula errors or text in numeric fields with the intended numeric value.
The workbook cannot be opened by the utility	Save and close the workbook. Try a local working folder accessible to the session running the tool, then reselect the file. If the error persists, provide the exact message to Neptune.
A report or tab is missing	Check the installed version and JobBOSS report permissions. Material Preferences and Material Custom Fields belong to the version with Preferences.
The run is taking longer than expected	Check the number of rows in the file. A targeted working copy is easier to review and process than a full material list for a small change.

Need help? Provide the utility name, installed version, JobBOSS version, exact message, the import type or screen, and one material that illustrates the issue. Include a screenshot and describe what you expected to happen.

09 KEEP THIS GUIDE CLOSE

Training resources and final checks

Use the recording for a visual walkthrough and this guide as the reference for your next update.

Watch the recorded Material Cost and Price Manager webinar

The recorded webinar opens through GoTo Webinar registration. Enter the requested registration information to view it.

attendee.gotowebinar.com/recording/5598144103310318593

A useful first practice session

1. **Find and review one material**
   Locate a material, identify its cost and selling-price fields, and confirm the database and current values.

2. **Perform one direct edit**
   Change one approved value, complete the row, then refresh or reopen the material in JobBOSS and verify it.

3. **Perform one spreadsheet update**
   Export through the correct report using Data Only, keep one test row, make one change and import it through the matching profile.

4. **Review the result**
   Verify the material and its pricing history. Restore the original value if the update was only a training exercise.

Before every real batch

- The database, material group and import type are correct.
- The file contains the intended records, identifiers and column structure.
- New values, unchanged fields and note behavior have been reviewed.
- The first-time workflow has been checked with a small example.
- After completion, representative JobBOSS records and pricing history match the intended update.

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