HKSDK Per Customer Pricebook

Requires: Moneyworks v7

What it does

This Moneyworks script allows you to record and use a set of prices for each product for each of your customers. Prices can include price breaks for different quantities.

Installation

Double-click the script supplied by Sustainable Solutions. That's it. For viewing prices, you need to install the pricebook report we will supply you into the **reports** folder inside your **Moneyworks Custom Plug-ins** folder

Setting prices for a product

- 1. Show the product list by choosing **Show > Products**
- 2. Locate then highlight the product you wish to set a special price for

	New M	odify Duplicate Delete Export	Stock Build	Reorde Ad	dPrie	ceBook 14 records; 1 h/l			
	Code	Description		Unit Price	Stock on Hand		OS orders	unposted	Heading
	BA100	Bronze Widget Medium		24.95	21	ea	10.00	25.00	your cal
	BA200	Bronze Widget Large		69.75	0	ea	20.00	30.00	your cal
	B8100	Bronze Widget Bevelled Medium		22.00	5	ea	1.00	18.00	your cal
	88200	Bronze Widget Bevelled Large		32.00	20	ea	0.00	0.00	your cal
All items	BC100	Bronze Taper Widget Small		12.00	-3	ea		6.00	your cal
Products	BC200	Bronze Taper Widget Medium		21.50	16	48		8.00	your cale
Resources	CA100	Chrome Widget Small		8.00	10	ea		0.00	your cale
Time	CA200	Chrome Widget Medium		16.00	16	ea		0.00	your cale
Ship Methods	C8100	Chrome Bevelled Widget Large		75.00	7	ea		0.00	your cale
Other	CB200	Chrome Taper Widget Extra-large		99.00	10	ea		0.00	your cale
	CC100	Aluminium mini-widget		4.50	10	ea		0.00	your cale
Stocktake	JOB_MISC			0.00		ea		0.00	your cale
Report on selection	STECUPS1	Steel Cups 10x15x6		0.92		ea	0.00	0.00	your calc
Backorders by Product	TEST	test		30.00		42	0.00	0.00	your calc
🔻 🚞 Item Sales									
Sales by Customer									
Sales by Month									
Sales Summary									
- And									
Price List									
Product Catalogue									

- 4. Click the **Pricebook** button in the toolbar
- 5. You'll be asked to select the customer or Group:

	Customer	
Enter Code f	√ Group	
Customer Code:	White	
	Cancel	ĸ

7. Select customer for customer code and Group for customer group code. Customers are grouped by Customer Category 4.

6.

8. You'll be alerted if you enter an invalid code, else if you enter a valid customer code and the values in the window are blank, you're adding a new product/customer combination. If values are already filled in, you're editing:

	Script
New entry for	customer:
WHITE, produc	
Special price:	3.45
Qty Break1:	10
Price Break1:	3.40
Qty Break2:	30
Price Break2:	3.10
Qty Break3:	100
Price Break3:	3.00
Qty Break4:	
Price Break4:	
Expiry Date:	03/01/2016
	Cancel OK
Pricebook Scrip	pt by Sustainable Solutions http://sussol.net

- 1. You only have to fill in a price. Other fields are optional
- 2. If there is no expiry date for the special prices, enter a date well into the future (e.g. 1/1/50) else it will take defaut future date. You can't leave it blank.
- 10. You will get an alert if the record is already in the price book. You can choose to delete or edit the record.



Viewing prices

1. To view prices, select items in Items list and choose **Pricebook Product table** from the reports menu:

Customer Code	Product Code	Special Price	Qty Break1	Price Break1	Qty Break2	Price Break2	Qty Break3	Price Break3	Qty Break4	Price Break4	Exp Date
Code											
BSUPP	BA100	20	5	18	10	15	15	12	20	10	28/2/11
BSUPP	BA200	60	10	58	20	55	30	50	40	40	31/12/1
BROWN	BA200	65	5	60	10	50					30/11/1
BROWN	BA100	25	3	22	5	20	10	15			31/12/1
WHITE	BC100	22	2	20	5	15	10	9			1/3/16
BROWN	BC100	3.45	10	3.40	30	3.10	100	3.00			1/3/16

Using special prices

• Click "Pricebook" icon at the top of sales order and if there is a combination of customer and product that has special pricing, that pricing will be used.

Sales Invoice	e Rever	se Info	Fields - Add No	ote				Hold	C	Make	Recurring Setu	р		C.
Debtor	BROWN		¢				2015/16 er 1/2016	Price Code		0	0			
Order #:			j		Due Date:			₽						
To Description	Brown Su	ppliers		•	Analysis:			Sales	perso	in:				
User 1			User 2:		User 3:	002			User					
User 5 Amount		38.00	User 6: Deposit		User 7: Colour:	Non	0		Flag:					
					By Acc	ount	By Item							
Item CA200		Description Chrome Wi	dget Medium		Unit Pric 12.0	e pe 0 ea		Extension 120.00		Job	Serial/Batch	Date	Location	1
														I
Total Co	ost of Good	s: £68	49				Subtot:	120.00						
	Total Margin		.52/ 43%				GST: Total:	18.00 138.00						
								Pr	ev		Next	Cancel	ОК	

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- If the quantity or item code is changed after pricebook is applied, you will have to update the prices by clicking pricebook button again.
- If you missed to apply pricebook for a combination of customer and product that has special pricing, you will get following alert. You can either go back and apply pricebook or continue as it is.

Important Caveats

If you change the product or name code of an item, the special pricing information will be lost. You will have to re-enter the information for any customer/item combinations that are affected.

Technical information

This script uses Moneyworks' user2 table to store information

Field	Data stored
Key	concatenated product code plus name code
Text	the special price(s) of the item along with the price breaks in format special_price;pricebreak1- specialprice1;pricebreak2-specialprice2;etc (Set to "-1" if the record is no longer needed)
Date1	The expiry date of the price. Set to 1/1/2040 if you don't want the item to expire
Float1	The percentage discount for the item when supplied to this customer. Set to zero if special prices, not discounts are to be used

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Permanent link: http://docs.sussol.net/doku.php/moneyworks:hksdk_per_customer_pricebook?rev=1452684929

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