

Pricebook version 3

Requires: Moneyworks v8

What it does

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

Installation

Double-click the script supplied by Sustainable Solutions. Once it is installed, PriceBookList icon will be available in toolbar of the Product table. To open Product table **Show>Product**



Setting prices

1. Show the product list by choosing **Show > Products**
2. Click the **PriceBookList** button in the toolbar.

Price Book List													
Q=													
4 records; 1 h/t													
Customer Code	Product Code	Special Price	Qty Break1	Price Break1	Qty Break2	Price Break2	Qty Break3	Price Break3	Qty Break4	Price Break4	Expiry Date	Cus Group	Prod Group
ALUMIN	Chrome	10									31/01/2038	1	2
BROWN	CA200	15	10	12	20	10	30	8	50	5	31/01/2038	1	1
North	Bronze	10									31/01/2038	2	2
WHITE	BC100	10	10	8	30	7	50	6	100	5	31/01/2038	1	1

- 3.
4. You'll be asked to select the customer or Group:

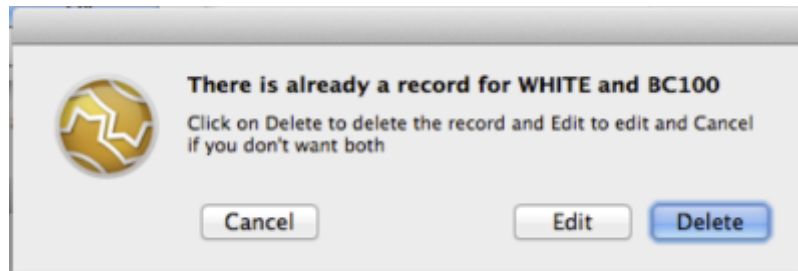
5.

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

8.

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 default future date. You can't leave it blank.
9. You will get an alert if the record is already in the price book. You can choose to delete or edit the record.

10.



Viewing prices

1. To view prices for selected Items, select items in Items list and choose **Pricebook Product table** from the reports menu:
2. To view prices for selected customer, select Customers in Name list and choose **Pricebook for highlighted Customers** from the reports menu:

Price Book											
Customer Code	Product Code	Special Price	Qty Break1	Price Break1	Qty Break2	Price Break2	Qty Break3	Price Break3	Qty Break4	Price Break4	Exp Date
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	31/12/13
BROWN	BA200	65	5	60	10	50					30/11/10
BROWN	BA100	25	3	22	5	20	10	15			31/12/10
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

3.

Using special prices

- There is nothing special you have to do. When entering a sales order or invoice, when you select a combination of custom and product that has special pricing, that pricing will be used. See the previous report example: customer "BSUPP" has a price of \$20 for the product BA100. The price is inserted automatically.

Sales Invoice *

Sales Invoice

Reverse

Info

Fields

Add Note

☐ Hold

☐ Make Recurring

Setup

Debtor: BROWN

Invoice #: 2134

Order #:

To: Brown Suppliers

Description:

User 1:

User 2:

User 5:

User 6:

Amount: 138.00

☐ Deposit

Period: Jan:2015/16 ends 31/01/2016

Date: 31/01/2016

Price Code: A

Due Date: 20/02/2016

Analysis:

Salesperson:

User 3: 002

User 4:

User 7:

User 8:

Colour: None

Flag: ☐

By Account

By Item

Item	Qty	Description	Unit Price	per	Disc.%	Extension	TC	Job	Serial/Batch	Date	Location
CA200	10	Chrome Widget Medium	12.00	ea	0	120.00	G				

Total Cost of Goods: £68.48

Total Margin: £51.52 / 43%

Subtot: 120.00

GST: 18.00

Total: 138.00

Prev

Next

Cancel

OK

-
- If the quantity was increased to above a price break level, the price is updated to the relevant price you've specified.

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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