

Pricebook version 3

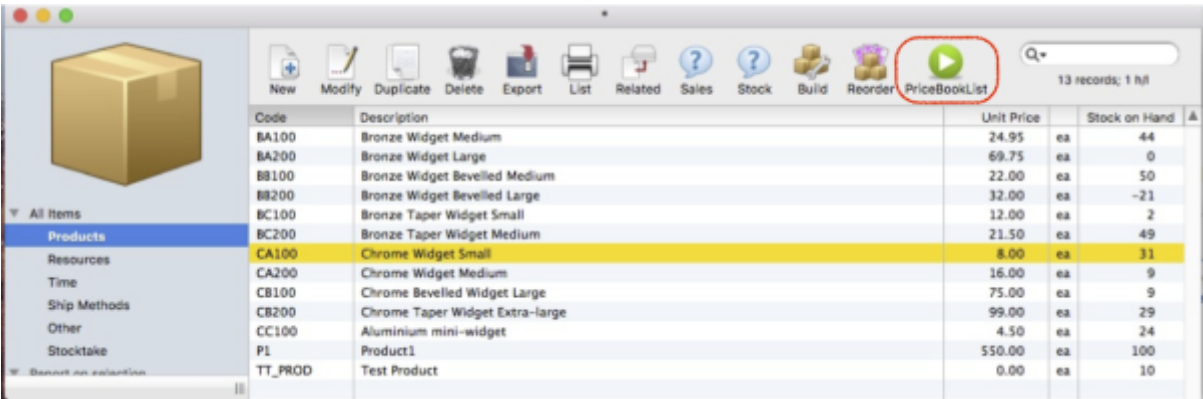
Requires: Moneyworks v8

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.

A screenshot of the 'Price Book List' window. It features a toolbar with 'New', 'Modify', 'Duplicate', 'Delete', 'Export', 'List', and 'Related' buttons. The table below shows pricing details for different customers and products. The following table represents the data shown in the screenshot:

| 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 |
|---------------|--------------|---------------|------------|--------------|------------|--------------|------------|--------------|------------|--------------|-------------|-----------|------------|
| ALUTUMN | 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:

Script

Enter Code for ☒ Customer ☒ Group

Customer Code:

Pricebook Script by Sustainable Solutions <http://sussol.net>

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:

Script

New entry for customer:

WHITE, product: BC100

Special price:

Qty Break1:

Price Break1:

Qty Break2:

Price Break2:

Qty Break3:

Price Break3:

Qty Break4:

Price Break4:

Expiry Date:

Pricebook Script by Sustainable Solutions <http://sussol.net>

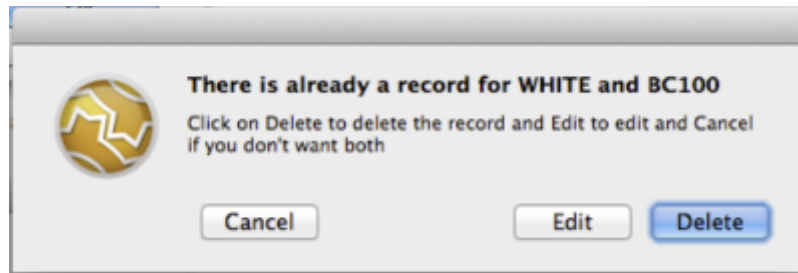
8.

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 5:

Amount: 138.00

☐ Deposit

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

Date: 31/01/2016

Due Date: 20/02/2016

Price Code: A

Analysis:

User 3: 002

User 7:

Colour: None

Salesperson:

User 4:

User 8:

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 | | | | |
| | | | | | | | | | | | |
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| | | | | | | | | | | | |

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 |

From:

<http://docs.sussol.net/> - **Sussol Docs**

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