Per Customer Pricebook version 2

Requires: Moneyworks v7

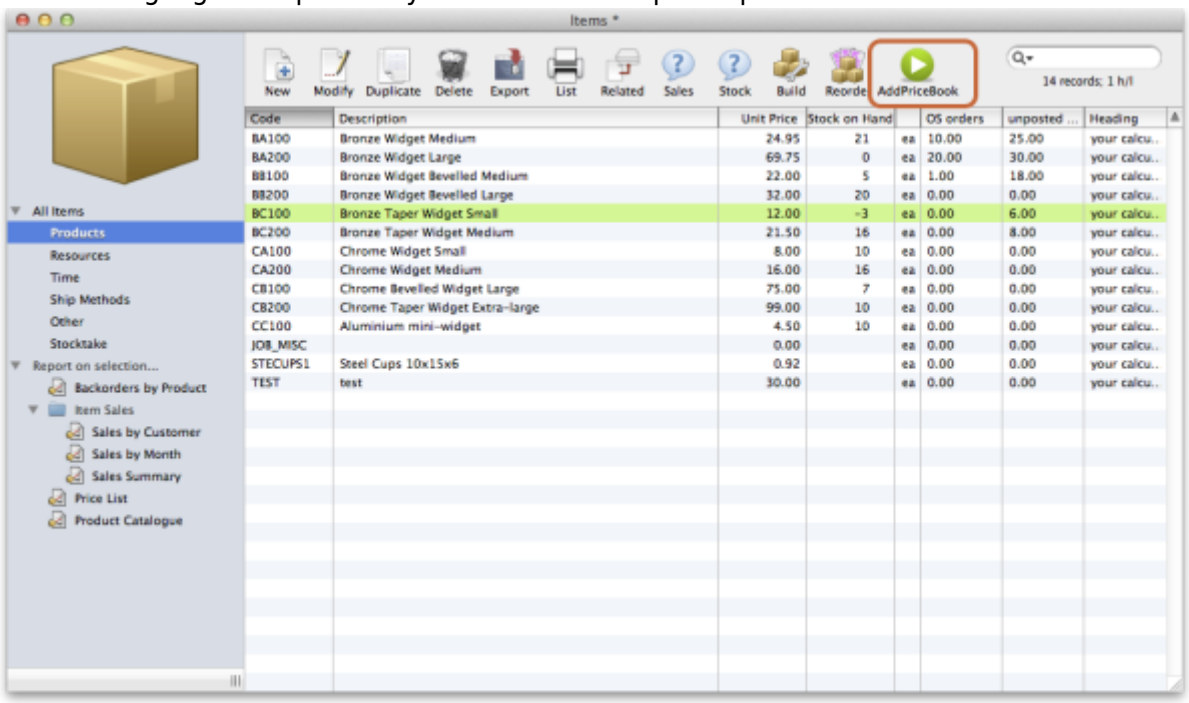
What it does

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.

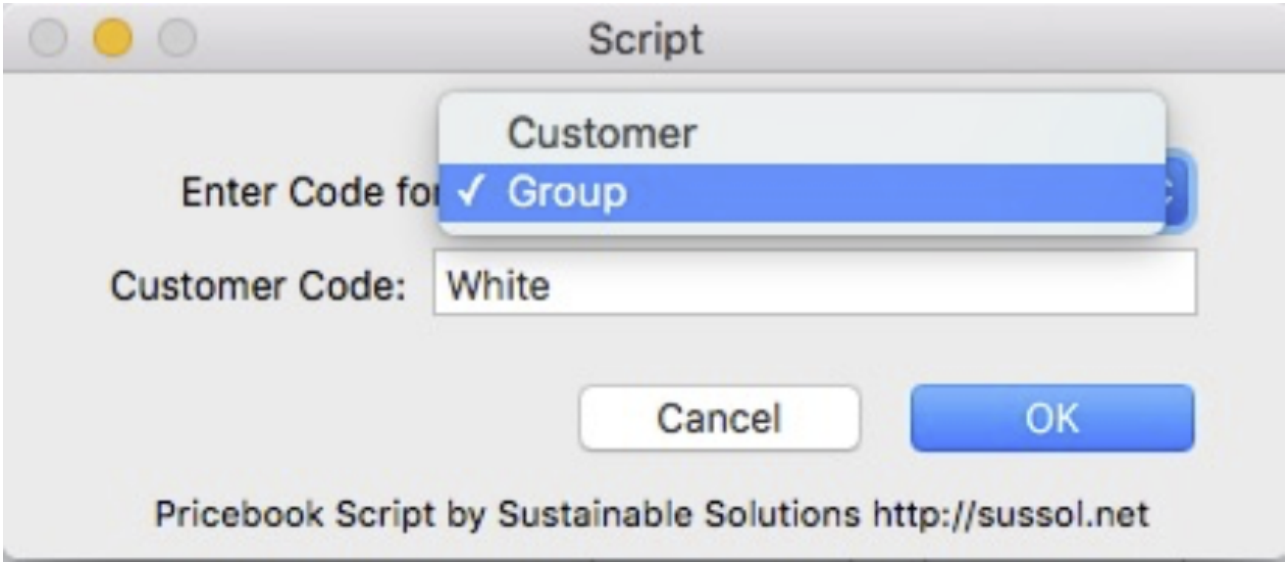
Installation

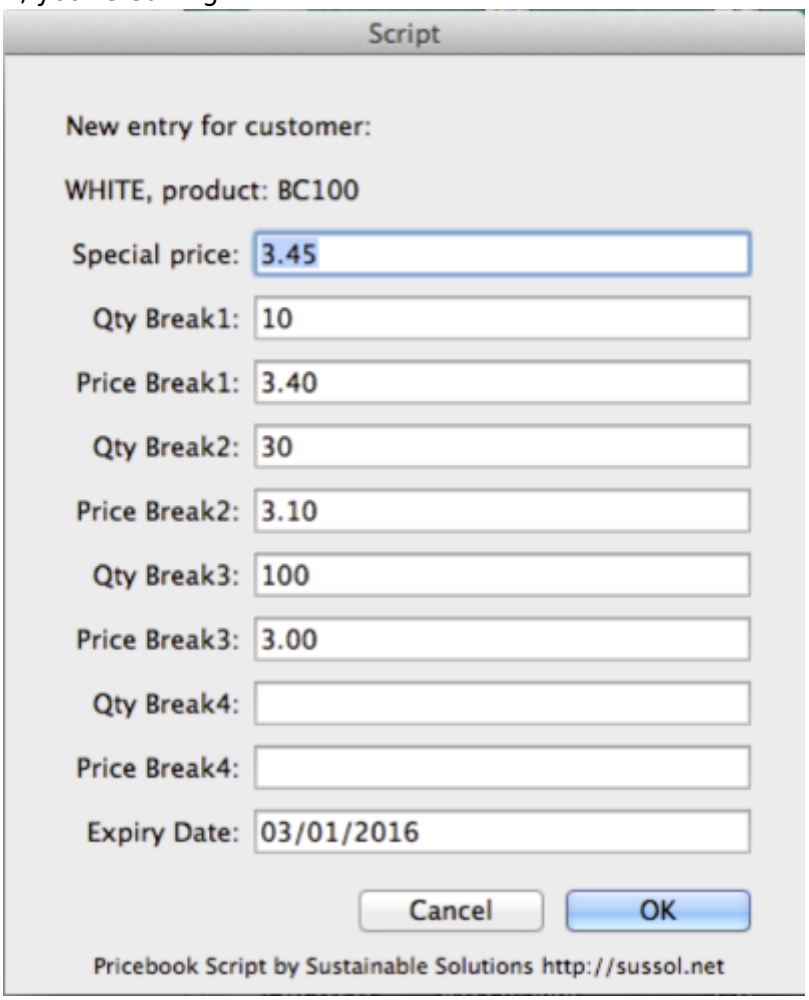
Double-click the script supplied by Sustainable Solutions. That's it. For viewing prices, you need to install the pricebook report we will supply you into the **reports** folder inside your **Moneyworks Custom Plug-ins** folder

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
3. 

4. Click the **Pricebook** button in the toolbar
5. You'll be asked to enter the customer code:

6. 

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). You can't leave it blank.

Viewing prices

1. To view prices, choose **Pricebook Report** from the reports menu:

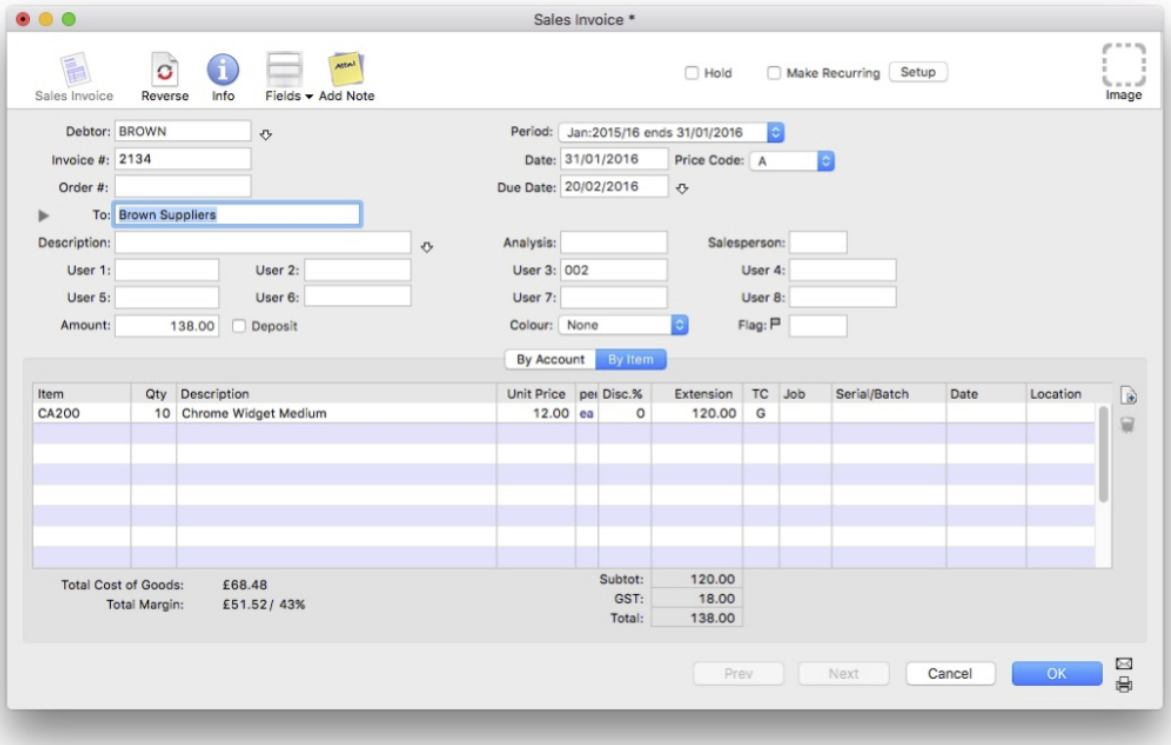
Price Book

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

2.

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.



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

Using Product Groups to Restrict Sales

This script also allows you to restrict the supply of particular groups of products to only certain customers. Once you have assigned a group to a customer, you will only be able to supply that customer with products from the defined group(s)

To put products in groups

- Fill out the “category1” field for each product with the group name for that product.

To assign a group to a customer

- Highlight the customer in the list
- Click the **Add group** button in the toolbar
- Fill in the group name in the window that appears.
- Click **OK**

To Remove a group from a customer

- Follow the steps above to add a group.
- If the group is already assigned to a customer you will be shown an alert window.
- Check the “Remove this product group” checkbox
- Click **OK**

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:
https://docs.sussol.net/doku.php/moneyworks:per_customer_pricebook_v2?rev=1394445419

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