

Pricebook version 3

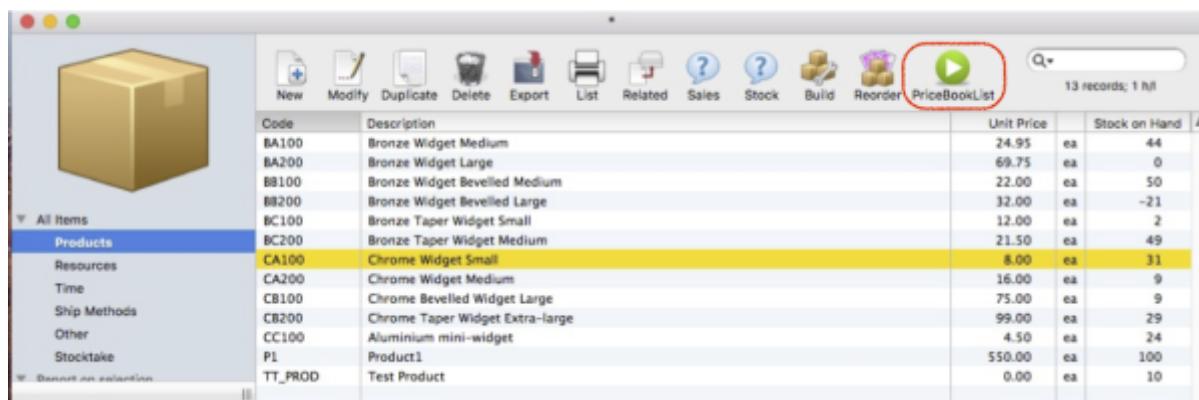
Requires: Moneyworks v8

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

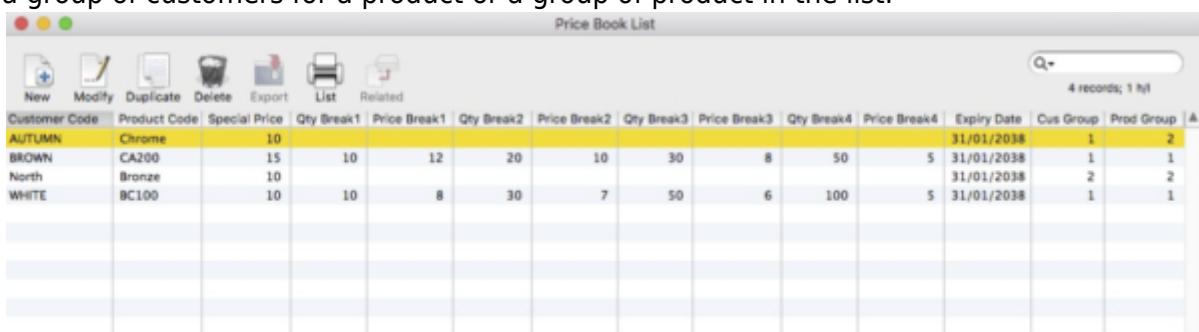
Double-click the script supplied by Sustainable Solutions. Once it is installed, **PriceBookList** icon will be available in toolbar of the Product table. To open Product table **Show>Product**



The screenshot shows the Moneyworks Product table interface. The toolbar includes buttons for New, Modify, Duplicate, Delete, Export, List, Related, Sales, Stock, Build, Reorder, and PriceBookList (which is highlighted with a red circle). The main area displays a list of products with columns for Code, Description, Unit Price, and Stock on Hand. The list includes items like BA100 (Bronze Widget Medium), BA200 (Bronze Widget Large), BB100 (Bronze Widget Bevelled Medium), BB200 (Bronze Widget Bevelled Large), BC100 (Bronze Taper Widget Small), BC200 (Bronze Taper Widget Medium), CA100 (Chrome Widget Small), CA200 (Chrome Widget Medium), CB100 (Chrome Bevelled Widget Large), CB200 (Chrome Taper Widget Extra-large), CC100 (Aluminium mini-widget), P1 (Product1), and TT_PROD (Test Product).

Setting prices

1. Show the product list by choosing **Show > Products**
2. Click the **PriceBookList** button in the toolbar. You can see all the prices set for each customer or a group of customers for a product or a group of product in the list.



The screenshot shows the Price Book List table interface. The toolbar includes buttons for New, Modify, Duplicate, Delete, Export, List, and Related. The main area displays a list of price breaks with columns for 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, and Prod Group. The list includes entries for AUTUMN (Chrome, 10), BROWN (CA200, 15), North (Bronze, 10), and WHITE (BC100, 10). The 'Expiry Date' column shows values like 31/01/2038 and 31/01/2038 for different rows.

3.
4. Click **New** button in the toolbar

Group of Customers
✓ Customer

WHITE
White Contractors

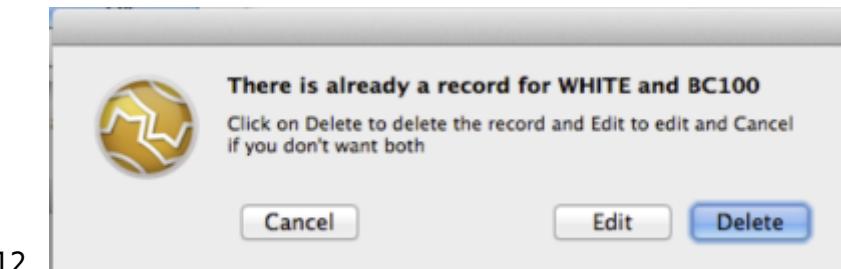
Product BC100
Bronze Taper Widget Small

Special	10		
Qty Break 1	10	Price Break 1	8
Qty Break 2	30	Price Break 2	7
Qty Break 3	50	Price Break 3	6
Qty Break 4	100	Price Break 4	5
Expiry Date:	31/01/2038		

Cancel OK

5.

6. Select **Customer** for customer code and **Group of Customer** for customer group code.
7. Select **Product** for product code and **Group of Product** for product group code.
8. You'll be alerted if you enter an invalid customer/product code.
9. You only have to fill in a **Special price**. Other fields are optional
10. 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.
11. You will get an alert if the record is already in the price book. You can choose to delete or edit the record.



12.

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.

The screenshot shows the 'Sales Invoice' window in Moneyworks. The debtor is 'BROWN' and the invoice number is '2134'. The date is '31/01/2016' and the price code is 'A'. The amount is '138.00'. The item listed is 'CA200 Chrome Widget Medium' with a quantity of '10' and a unit price of '12.00'. The subtotal is '120.00', GST is '18.00', and the total is '138.00'.

- 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

Field	Data stored
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:pricebook_v3?rev=1501131839

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