

# Pricebook version 4 for Airtox

Requires: Moneyworks v9

## What it does

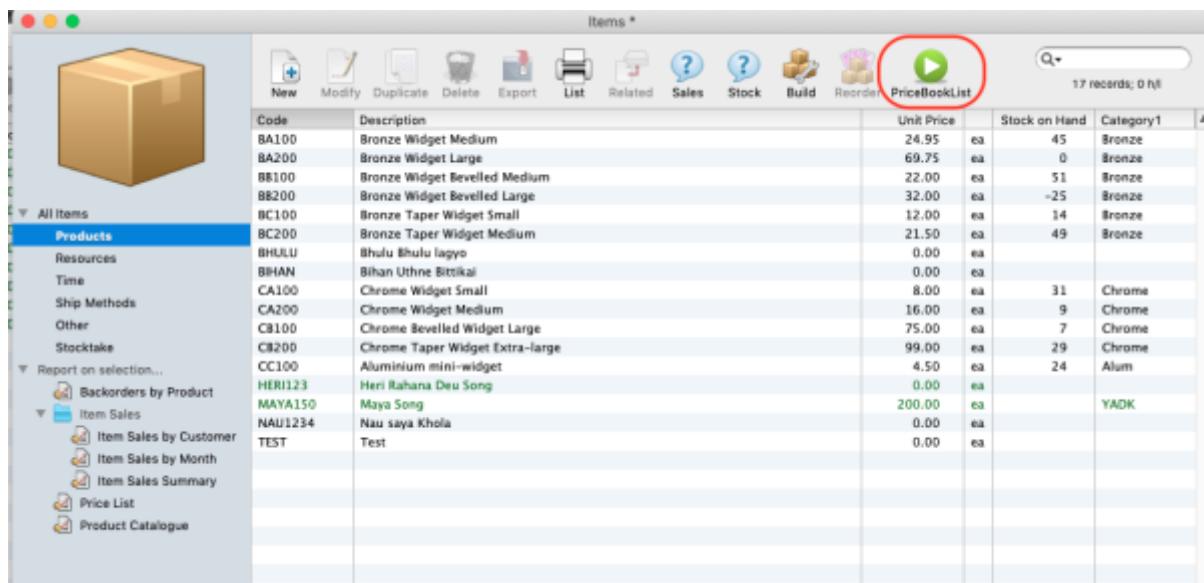
This Moneyworks script allows you to record and use a set of prices for each product or a group of products for each of your customers or a group of customers or allow a special discount for each product for a group of customers.

The script will work with only one option, either with a special discount or special price breaks.

Prices can include price breaks for different quantities.

## Setup and Installation

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



- If you have prices based on Customer group and Product group:
  - Record the customer group code in Name.Category4 field
  - Record the Product group code in the Product.Category1 field.

## Viewing and Setting prices

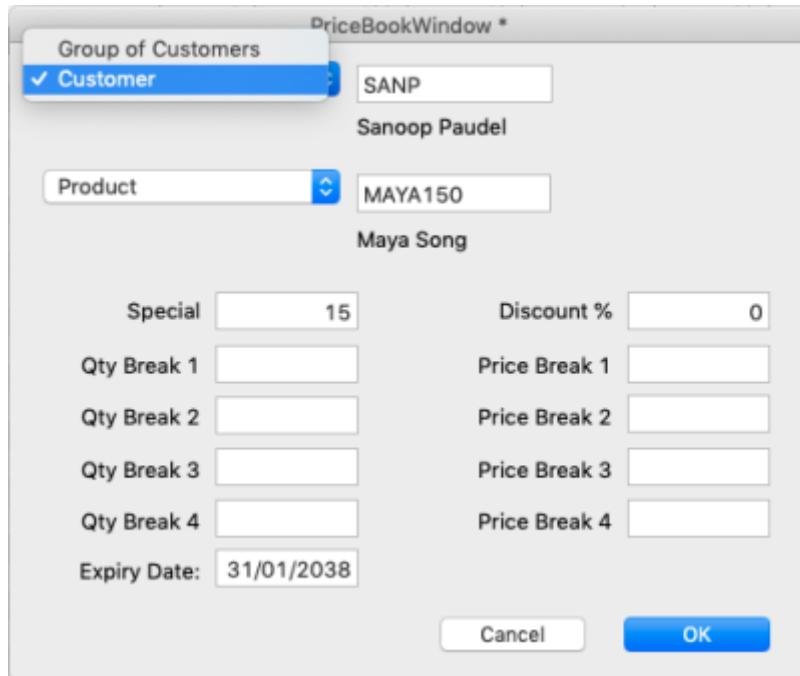
- Show the product list by choosing **Show > Items**
- Click the **PriceBookList** button in the toolbar. You can see all the prices set for each

customer/group of customers for a product/group of products in the list.

Customer Code	Product Code	Discount	Special Price	Qty Break1	Price Break1	Qty Break2	Price Break2	Qty Break3	Price Break3	Qty Break4	Price Break4	Expiry Date	C.up	Pr.up
BROWN	Bronze	0	100	10	95	20	80	30	70	50	40	31/01/2038	False	True
SANP	MAYA150	0	15									31/01/2038	False	False
SAMB	MAYA150	0	20									31/01/2038	False	False
KALP	HERI123	0	30									31/01/2038	False	False
MANR	HERI123	10	0									31/01/2020	False	False
ALMR	HERI123	0	10									31/01/2038	False	False
SANP	HERI123	0	20									31/01/2038	False	False
YADK	NAU1234	0	40									31/01/2038	False	False
YADK	HERI123	0	40									31/01/2038	False	False

3.

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



5.

6. Select **Customer** for customer code and **Group of Customer** for customer group code.
7. Select **Product** for product code and **Group of Products** for a 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** or **Special Discount %**. Other fields are optional, the quantity break and price break will work with Special price only.
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 or print the record.
12. Avoid using "Duplicate" option. This creates duplicated record but if you don't change the record(name and item), it will create same record in pricebook data. In that case, script will not update price from pricebook because of conflict.

## Using special prices

- There is nothing special you have to do. Enter items in the sales order window and click Pricebook button in the window, then depending upon your combination of customer and product that has special pricing or discount, that pricing or discount will be used. See the example: customer "SANP" has a price of \$15 for the product MAYA150. The price is inserted once pricebook button is clicked.

The screenshot shows the 'Sales Order' window with the following details:

- Customer:** SANP
- Quote/SO #:** 0012
- Order #:** (empty)
- To:** Sanoop Paudel
- Description:** (empty)
- Cluster:** (empty)
- User 2:** (empty)
- User 5:** (empty)
- User 6:** (empty)
- Date:** 31/01/2025
- Due Date:** 31/01/2025
- Price Code:** A
- Analysis:** (empty)
- Salesperson:** (empty)
- User 3:** (empty)
- User 4:** (empty)
- User 7:** (empty)
- User 8:** (empty)
- Colour:** None
- Flag:** (empty)
- Order Total:** 86.25

**Order Lines:**

Item	Order	SOH	Ship	B/O	Done	Description	Unit Price	per	Disc.%	Extension	TC	Job	Serial/Batch	Location
MAYA150	5	-	5	0	0	Maya Song	15.00	ea	0	75.00	G			BKT

**Freight Code:** (empty) **Docket:** (empty) **Freight Amt:** 0.00

**Total Cost of Goods:** £50.00 **Subtot:** 75.00

**Total Margin:** £25.00 / 33% **VAT:** 11.25

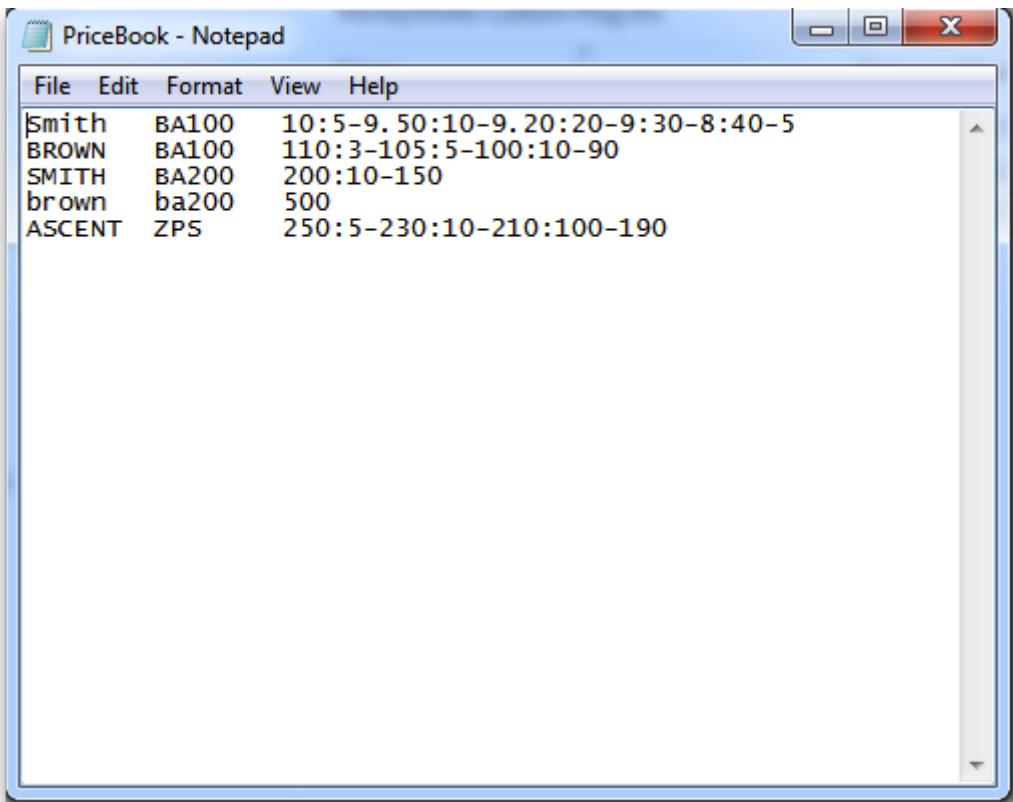
**Line Item Margin:** £25.00 / 33% **Shipment Total:** 86.25

**Process Order:** Enter Order  Quote  Sales Order **OK** **Cancel** **Next** **Prev**

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

## Importing prices in bulk

- If you have a lot of prices to be uploaded into Moneyworks at once, you can import them from text file in following format.
- To import **Command>Import PriceBook**
- Select prices text file and click on **Open**
- Test file format
  - 4 columns separated by tabs (press the tab key, not the space bar)
    - customer/customer Group code
    - item/Item Group code
    - special price(s) for use when this product is supplied to this customer
    - Expiry Date. It can be blank, if there is no expiry data. Moneyworks will assign future date
  - Format of price breaks
    - a colon between qty-price pairs
    - a hyphen between qty and price
    - So in the example below the customer SMITH will pay for item BA100
    - \$10 if the quantity is less than 5
    - \$9.50 if the quantity is greater than or equal to 5
    - \$9.20 if the quantity is greater than or equal to 10
    - etc.



```
Smith BA100 10:5-9.50:10-9.20:20-9:30-8:40-5
BROWN BA100 110:3-105:5-100:10-90
SMITH BA200 200:10-150
brown ba200 500
ASCENT ZPS 250:5-230:10-210:100-190
```

## 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 Name SequenceNumber/Name group Code plus product SequenceNumber/product group code
Text1	Name Code/Name group Code
Text2	Product Code/Product group Code
Text	The special price(s) of the item along with the price breaks in a string with this format: special_price; pricebreak1-specialprice1; pricebreak2-specialprice2; pricebreak3-specialprice3; pricebreak4-specialprice4;
float3	discount
Date1	The expiry date of the price. Set to 1/1/2040 if you don't want the item to expire

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