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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

	New M	New Modify Duplicate Delete Export List Related Sales Stock Build Reorde AddPriceBook						ceBook	14 rec	ords; 1 h/l	
	Code	Description				Unit Price	Stock on Hand		OS orders	unposted	Heading
	BA100	Bronze Widget Medium				24.95	21	ea		25.00	your cal
	BA200	Bronze Widget Large				69.75	0	ea		30.00	your cale
	B8100	Bronze Widget Bevelled				22.00	5	ea	1.00	18.00	your cale
	88200	Bronze Widget Bevelled				32.00	20	ea	0.00	0.00	your cale
All items	BC100	Bronze Taper Widget Sn				12.00	-3	ea		6.00	your cale
Products	BC200	Bronze Taper Widget M	edium			21.50	16	48		8.00	your cale
Resources	CA100	Chrome Widget Small				8.00	10	ea		0.00	your calc
Time	CA200	Chrome Widget Medium				16.00	16	ea		0.00	your calc
Ship Methods	C8100	Chrome Bevelled Widge				75.00	7	68		0.00	your calc
Other	CB200	Chrome Taper Widget E	-			99.00	10	ea		0.00	your calc
	CC100	Aluminium mini-widget	1			4.50	10	62		0.00	your calc
Stocktake	JOB_MISC					0.00		ea		0.00	your calc
Report on selection	STECUPS1	Steel Cups 10x15x6				0.92		ea		0.00	your calc
Backorders by Product	TEST	test				30.00		62	0.00	0.00	your calc
🔻 🚞 Item Sales											
Sales by Customer											
Sales by Month											
Sales Summary											
- And											
Price List											
Product Catalogue											

- 4. Click the **Pricebook** button in the toolbar
- 5. You'll be asked to select the customer or Group:

	Cust	omer	
Enter Code fo	I √ Grou	ıp	
Customer Code:	White		
		Cancel	ОК

- 7. Select customer for customer code and Group for customer group code. Customers are grouped by Customer Category 4.
- 8. 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 o	customer:
WHITE, produc	t: BC100
Special price:	3.45
Qty Break1:	10
Price Break1:	3.40
Qty Break2:	30
Price Break2:	3.10
Qty Break3:	100
Price Break3:	3.00
Qty Break4:	
Price Break4:	
Expiry Date:	03/01/2016
	Cancel
Pricebook Scrip	pt by Sustainable Solutions http://sussol.net

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

-	record for WHITE and e the record and Edit to ea	
Cancel	Edit	Delete

Viewing prices

- 1. To view prices, 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:

Customer Code	Product Code	Special Price	Qty Break1	Price Break1	Qty Break2	Price Break2	Qty Break3	Price Break3	Qty Break4	Price Break4	Exp Date
CODE											
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

Using special prices

3.

• Click "Pricebook" icon at the top of sales order and if there is a combination of customer and product that has special pricing, that pricing will be used.

							Jales	Urder -								
	Revers	se in) nfo	Fields	Add N	lote Pricebook		(Hold	Make Ro	currir	ng Set	tup			
BR	OWN		<	,												
21	56						Date:	31/01/2016	Price Cod	e: A	0					
							Due Date:	31/01/2016								
Bro	own Sur	ppliers														
						0	Analysis:		Sal	esperson						
			U	ser 2:			User 3:									
30	.00						Colour:	None	0	Flag: P						
	Order	SOH	Ship	B/D	Done	Description	All Order Line	Backorders	•	Unit Price	per l	Disc.%	Extension	тс	doL	
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	21 Bro	Revent BROWN 2156 Brown Sug 30.00 Order	Reverse In BROWN 2156 Brown Suppliers 30.00 Order SOH	Reverse Info BROWN 2156 Brown Suppliers U 30.00 Order SOH Ship	Reverse Info Fields	Reverse Info Fields + Add N BROWN 2156 Brown Suppliers User 2: 30.00 Order SOH Ship B/O Done	Reverse Info Fields + Add Note Pricebook BROWN 2156 Brown Suppliers User 2: 30.00 Order SOH Ship B/O Done Description	Reverse Info Fields + Add Note Pricebook BROWN 2156 Date: Due Date: Brown Suppliers User 2: User 3: 30.00 Colour: All Order Line Order SOH Ship B/D Done Description	Reverse Info Fields + Add Note Pricebook BROWN 2156 Date: 2156 Due Date: 31/01/2016 Brown Suppliers User 2: User 2: User 3: Colour: None All Order Lines Backorders	Reverse Info Fields + Add Note Pricebook BROWN 2156 Date: 31/01/2016 Brown Suppliers Due Date: 31/01/2016 Brown Suppliers Analysis: Salid User 2: User 3: Colour: None Salid Order SOH Ship B/O Date: Salid	Reverse Info Fields + Add Note Pricebook BROWN Image: Stress -	Reverse Info Fields + Add Note Pricebook BROWN	Reverse Info Fields + Add Note Pricebook BROWN	Reverse Info Fields + Add Note Pricebook BROWN Date: 31/01/2016 Price Code: A Colour: None Flag: Flag: All Order Lines Backorders Order SOH Ship B/O Done Description Unit Price pei Disc.% Extension Order SOH Ship B/O Done Description Unit Price pei Disc.% Extension	Reverse Info Fields + Add Note Pricebook BROWN	Roverse Info Fields + Add Note Pricebook BROWN

- If the quantity or item code is changed after pricebook is applied, you will have to update the prices by clicking pricebook button again.
- If you missed to apply pricebook for a combination of customer and product that has special pricing, you will get following alert. You can either go back and apply pricebook or continue as it is.

R	It appears you have forgotten to a customer	djust prices for this
	Save window and continue	Go back and adjust prices

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
	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: http://docs.sussol.net/doku.php/moneyworks:hksdk_per_customer_pricebool



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