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**

Price Book List

Sottina	nricoc	

CA200

BC100

- 1. Show the product list by choosing **Show > Products**
- 2. Click the **PriceBookList** button in the toolbar.

15

	New Mod	fy Duplicate Delete Export List Related Sales Stock Build Reorder PriceB	ookList	13 M	ecords; 1 h/l
	Code	Description	Unit Price		Stock on Har
	BA100	Bronze Widget Medium	24.95	ea	44
	BA200	Bronze Widget Large	69.75	ea	0
	B8100	Bronze Widget Bevelled Medium	22.00	ea	50
	88200	Bronze Widget Beveiled Large	32.00	ea	-21
▼ All Items	BC100	Bronze Taper Widget Small	12.00	ea	2
Products	BC200	Bronze Taper Widget Medium	21.50	ea	49
Resources	CA100	Chrome Widget Small	8.00	ea	31
Time	CA200	Chrome Widget Medium	16.00	ea	9
	CB100	Chrome Bevelled Widget Large	75.00	ea	9
Ship Methods	C8200	Chrome Taper Widget Extra-large	99.00	ea	29
Other	CC100	Aluminium mini-widget	4.50	ea	24
Stocktake	P1	Product1	550.00	ea	100
V Deport on relaction	TT_PROD	Test Product	0.00	ea	10

4. You'll be asked to select the customer or Group:

Q.-

Cus G

Expiry Date

31/01/2038

31/01/2038

31/01/2038

	Cust	tomer	
Enter Code fo	u √ Grou	dr	
Customer Code:	White		
		Cancel	ОК

- 6. Select customer for customer code and Group for customer group code. Customers are grouped by Customer Category 4.
- 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:

in you're callingi	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 OK
Pricebook Scrip	ot by Sustainable Solutions http://sussol.net

1. You only have to fill in a price. Other fields are optional

8.

- 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.
- 9. 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 e	
Cancel	Edit	Delete

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:

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

Using special prices

3.

• 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.

Debtor:	BROWN		4			Period:	Jan:	2015/16 er	nds 31/01/2016	6					
Invoice #:	2134					Date:	31/0	1/2016	Price Code	n A		0			
Order #:						Due Date:	20/0	2/2016	4						
	Brown Su	ppliers							Ť						
Description:				_	0	Analysis:			Sales	perso	n:				
User 1:			User 2:			User 3:	002			User					
User 5:			User 6:			User 7:				User	B:				
Amount:		38.00	Deposit			Colour:		0		Flag: F					
						By Acc	ount	By Item							
Item	Qty	Description	n			Unit Pric	e pe		Extension	TC	Job	Serial/Batch	Date	Location	
CA200			lidget Medium				0 ea		120.00						ī.
															4
															1
															U
Total Cos	t of Good	s. 66	3.48					Subtot:	120.00						
	otal Margi		1.52/ 43%					GST:	18.00						
								Total:	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
	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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Last update: 2017/07/26 08:48