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.

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## 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** 

|                       | New Mor                                  | ity Duplicate Delete Export List Related Sales Stock Build Reorder PriceBookList | 13 records; 1 h/l |  |  |  |  |  |
|-----------------------|--|--|-------------------|--|--|--|--|--|
|                       | Code                                     | Description Unit Price   | Stock on Hand     |  |  |  |  |  |
|                       | BA100                                    | Bronze Widget Medium 24.95   | ea 44             |  |  |  |  |  |
|                       | BA200                                    | Bronze Widget Large 69.75  | ea O              |  |  |  |  |  |
|                       | B8100                                    | Bronze Widget Bevelled Medium 22.00  | ea 50             |  |  |  |  |  |
|                       | 88200                                    | Bronze Widget Bevelled 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                                    | CA200 Chrome Widget Medium 16.00   |                   |  |  |  |  |  |
|                       | CB100 Chrome Bevelled Widget Large 75.00 |  |                   |  |  |  |  |  |
| 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             |  |  |  |  |  |
|                       | 10                                       |  |                   |  |  |  |  |  |

# **Setting prices**

- 1. Show the product list by choosing **Show > Products**
- 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.

| New      |      |              | Delete Export |            | Related      |            |              |            |              |            |              |             |           | ndis; 1 h/l |
|----------|------|--------------|---------------|------------|--------------|------------|--------------|------------|--------------|------------|--------------|-------------|-----------|-------------|
| 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 | Prod Group  |
| AUTUMN   |      | Chrome       | 10            |            |              |            |              |            |              |            |              | 31/01/2038  | 1         | 2           |
| BROWN    |      | CA200        | 15            | 10         | 12           | 20         | 10           | 30         | 8            | 50         | 5            | 31/01/2038  | 1         | 1           |
| North    |      | Bronze       | 10            |            |              |            |              |            |              |            |              | 31/01/2038  | 2         | 2           |
| WHITE    |      | BC100        | 10            | 10         | 8            | 30         | 7            | 50         | 6            | 100        | 5            | 31/01/2038  | 1         | 1           |
|          |      |              |               |            |              |            |              |            |              |            |              |             |           |             |
|          |      |              |               |            |              |            |              |            |              |            |              |             |           |             |

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

| Group of Custor<br>✓ Customer |            | WHITE<br>White Contractors |          |    |
|-------------------------------|------------|----------------------------|----------|----|
| Product                       | •          | BC100                      |          |    |
|                               |            | Bronze Taper Widg          | et Small |    |
| Special                       | 10         |                            |          |    |
| Qty Break 1                   | 10         | Price B                    | reak 1   | 8  |
| Qty Break 2                   | 30         | Price B                    | reak 2   | 7  |
| Qty Break 3                   | 50         | Price B                    | reak 3   | 6  |
| Qty Break 4                   | 100        | Price B                    | reak 4   | 5  |
| Expiry Date:                  | 31/01/2038 |                            |          |    |
|                               |            | Cancel                     |          | ОК |

- 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.

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- 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 defaut 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.

|        | ecord for WHITE and BC100<br>the record and Edit to edit and Cancel |
|--------|---|
| 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:

3.

|                  |              |               |            |              | Price B    | ook          |            |              |            |              |          |
|------------------|--------------|---------------|------------|--------------|------------|--------------|------------|--------------|------------|--------------|----------|
| Customer<br>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**

• 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.

| Debter       | BROWN      |             | -             |   | Declard              | land. | 0.15 110       | nds 31/01/2016  |         | 3   |              |      |          |     |
|--------------|------------|-------------|---------------|---|----------------------|-------|----------------|-----------------|---------|-----|--------------|------|----------|-----|
| Invoice #:   |            |             | \$            |   |                      |       | 1/2016 er      | _               |         | -   |              |      |          |     |
| Order #:     | 2134       |             |               |   | Due Date:            |       |                | Price Code      | : A     |     | 0            |      |          |     |
|              | Brown Su   |             |               |   | Due Date:            | 20/0  | 2/2010         | 4               |         |     |              |      |          |     |
|              | Brown St   | ppliers     |               |   | An el tradeción      |       |                | Colum           |         |     |              |      |          |     |
| Description: |            |             | 11 2          | 4 | Analysis:<br>User 3: | 000   |                | Sales           |         |     |              |      |          |     |
| User 1:      |            |             | User 2:       |   |                      | 002   |                |                 | User    |     |              |      |          |     |
| User 5:      |            |             | User 6:       |   | User 7:              |       |                |                 | User    |     |              |      |          |     |
| Amount:      |            | 138.00      | Deposit       |   | Colour:              | None  | 0              | 0               | Flag: F | ·   |              |      |          |     |
|              |            |             |               |   | By Acc               | ount  | By Item        |                 |         |     |              |      |          |     |
| Item         |            | Description |               |   | Unit Price           |       |                | Extension       |         | Job | Serial/Batch | Date | Location |     |
| CA200        | 10         | Chrome W    | lidget Medium |   | 12.0                 | 0 ea  | 0              | 120.00          | G       | -   |              |      |          | 1 8 |
|              |            |             |               |   |                      |       |                |                 |         |     |              |      |          |     |
|              |            |             |               |   |                      |       |                |                 |         |     |              |      |          |     |
|              |            |             |               |   |                      |       |                |                 |         |     |              |      |          |     |
|              |            |             |               |   |                      |       |                |                 |         |     |              |      |          |     |
|              |            |             |               |   |                      |       |                |                 |         |     |              |      |          |     |
| Total Cos    | st of Good | s: £68      | 3.48          |   |                      |       | Subtot:        | 120.00          |         |     |              |      |          |     |
| т            | otal Margi | n: £51      | 1.52/ 43%     |   |                      |       | GST:<br>Total: | 18.00<br>138.00 |         |     |              |      |          |     |
|              |            |             |               |   |                      |       | Total.         | 135.00          |         |     |              |      |          |     |

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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.

#### **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-<br>specialprice1;pricebreak2-specialprice2;etc<br>(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://www.docs.sussol.net/doku.php/moneyworks:pricebook\_v3?rev=1501131978



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