

Per Customer Pricebook version 2

Requires: Moneyworks v7

What it does

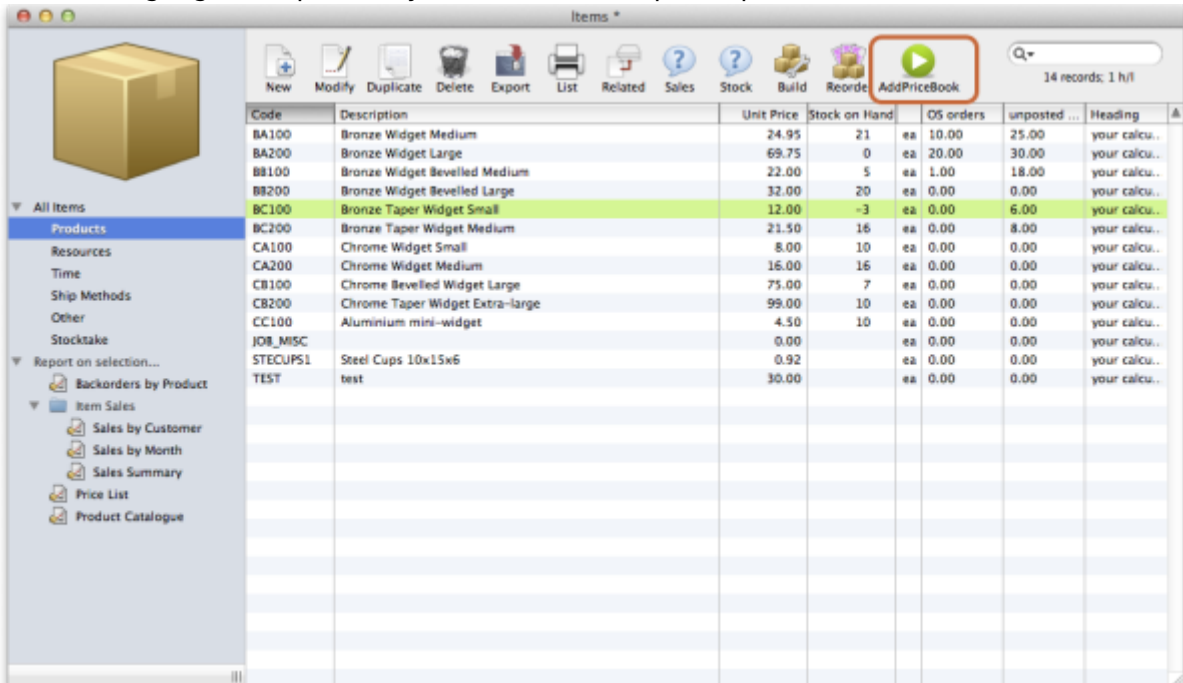
This Moneyworks script allows you to record and use a set of prices for each product for each of your customers. Prices can include price breaks for different quantities.

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

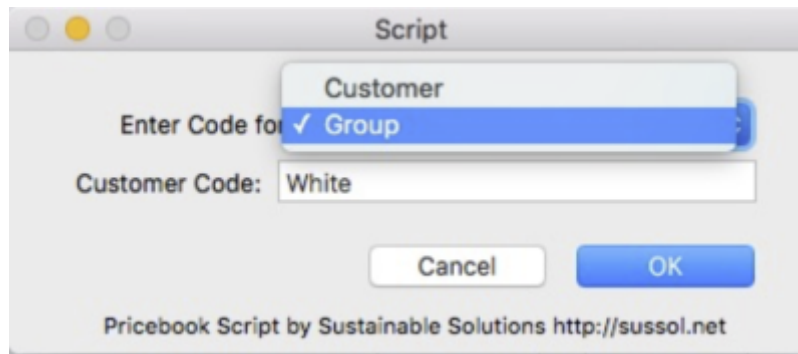
Setting prices for a product

1. Show the product list by choosing **Show > Products**
2. Locate then highlight the product you wish to set a special price for



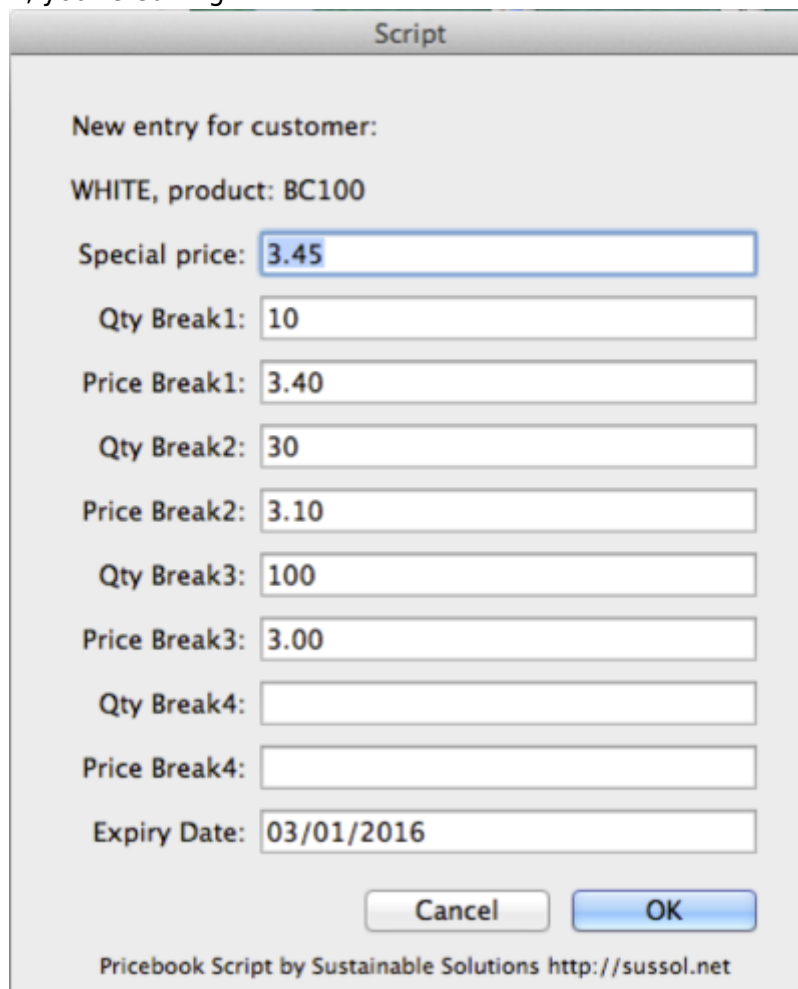
Code	Description	Unit Price	Stock on Hand	OS orders	unposted ...	Heading
BA100	Bronze Widget Medium	24.95	21	ea 10.00	25.00	your calcu...
BA200	Bronze Widget Large	69.75	0	ea 20.00	30.00	your calcu...
BB100	Bronze Widget Bevelled Medium	22.00	5	ea 1.00	18.00	your calcu...
BB200	Bronze Widget Bevelled Large	32.00	20	ea 0.00	0.00	your calcu...
BC100	Bronze Taper Widget Small	12.00	-3	ea 0.00	6.00	your calcu...
BC200	Bronze Taper Widget Medium	21.50	16	ea 0.00	8.00	your calcu...
CA100	Chrome Widget Small	8.00	10	ea 0.00	0.00	your calcu...
CA200	Chrome Widget Medium	16.00	16	ea 0.00	0.00	your calcu...
CB100	Chrome Bevelled Widget Large	75.00	7	ea 0.00	0.00	your calcu...
CB200	Chrome Taper Widget Extra-large	99.00	10	ea 0.00	0.00	your calcu...
CC100	Aluminium mini-widget	4.50	10	ea 0.00	0.00	your calcu...
JOB_MISC		0.00		ea 0.00	0.00	your calcu...
STECUPS1	Steel Cups 10x15x6	0.92		ea 0.00	0.00	your calcu...
TEST	test	30.00		ea 0.00	0.00	your calcu...

- 3.
4. Click the **Pricebook** button in the toolbar
5. You'll be asked to select the customer or Group:



6.

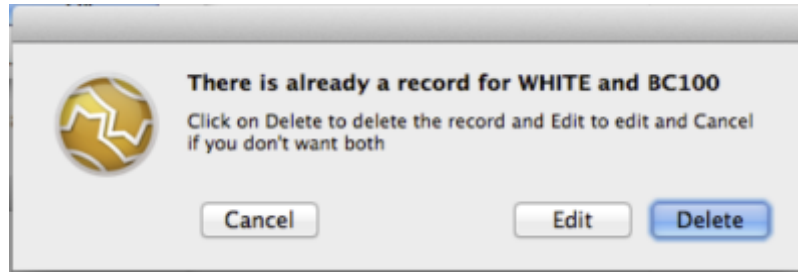
7. Select customer for customer code and Group for customer group code. Customers are grouped by Customer Category 4.
8. You'll be alerted if you enter an invalid code, else if you enter a valid customer code and the values in the window are blank, you're adding a new product/customer combination. If values are already filled in, you're editing:



9.

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 default 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.

11.



Viewing prices

1. To view prices, select items in Items list and choose **Pricebook Product table** 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

2.

Using special prices

- 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.

Sales Invoice *

Hold Make Recurring Setup

Debtor: BROWN Invoice #: 2134 Order #: Period: Jan:2015/16 ends 31/01/2016 Date: 31/01/2016 Price Code: A Due Date: 20/02/2016

To: Brown Suppliers

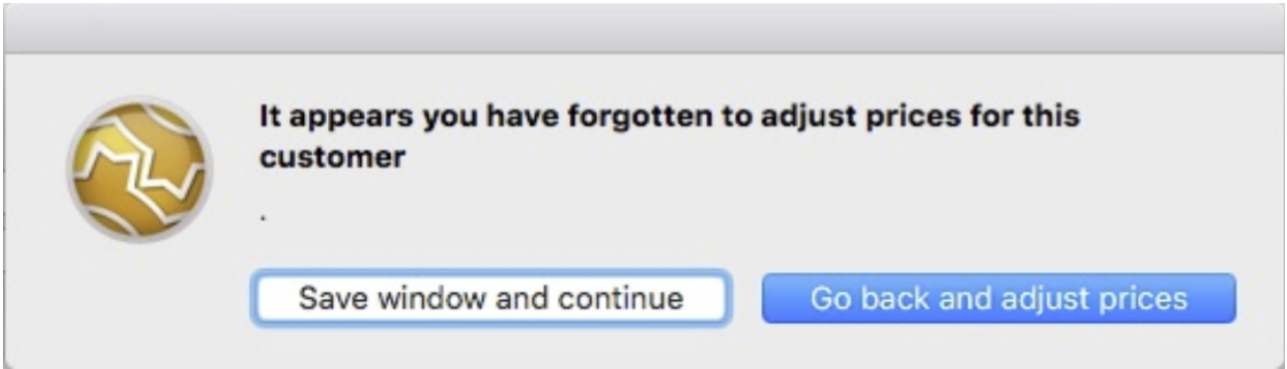
Description: Analysis: Salesperson: User 1: User 2: User 3: 002 User 4: User 5: User 6: User 7: User 8: Amount: 138.00 Deposit: Colour: None Flag: P

Item	Qty	Description	Unit Price	per	Disc.%	Extension	TC	Job	Serial/Batch	Date	Location
CA200	10	Chrome Widget Medium	12.00	ea	0	120.00	G				

Total Cost of Goods: £68.48 Subtot: 120.00
 Total Margin: £51.52 / 43% GST: 18.00
 Total: 138.00

Prev Next Cancel OK

- 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.



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
Float1	The percentage discount for the item when supplied to this customer. Set to zero if special prices, not discounts are to be used

From:

<https://www.docs.sussol.net/> - **Sussol Docs**

Permanent link:

https://www.docs.sussol.net/doku.php/moneyworks:hksdk_per_customer_pricebook?rev=1452684518

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