

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

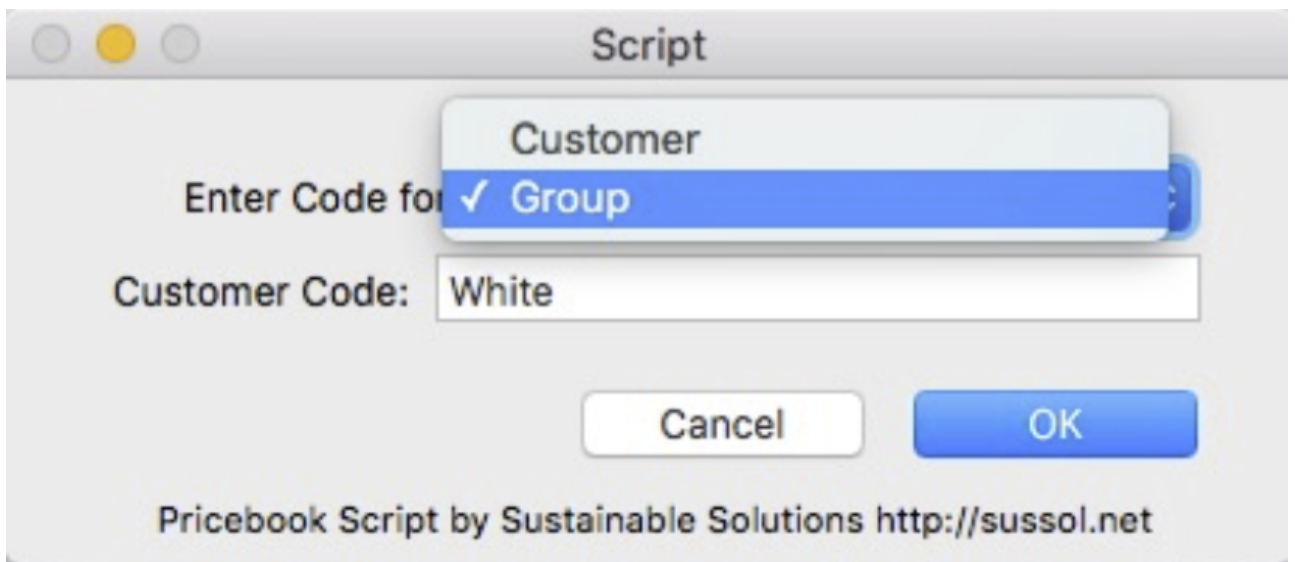
Setting prices for a product

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

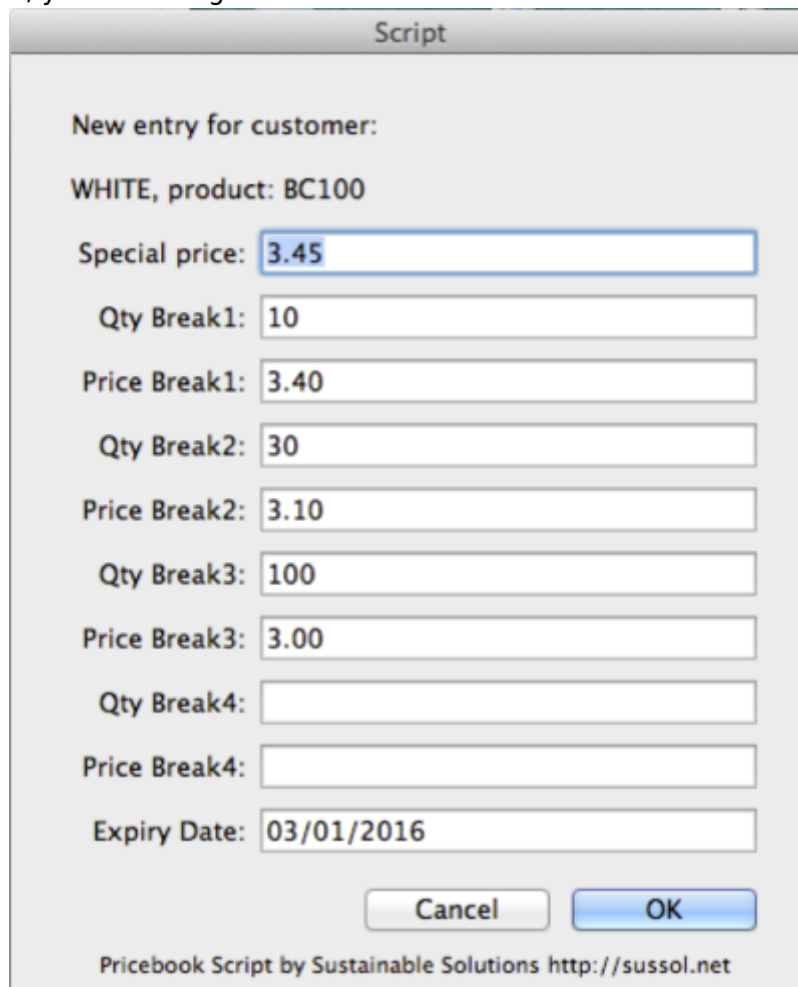


| Code | Description | Unit Price | Stock on Hand | OS orders | unposted ... | Heading |
|----------|---------------------------------|------------|---------------|-----------|--------------|---------------|
| BA100 | Bronze Widget Medium | 24.95 | 21 | ea 10.00 | 25.00 | your calcu... |
| BA200 | Bronze 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 enter the customer code:



- 6.
- 7. 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:



- 8.
 - 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). You can't leave it blank.

Viewing prices

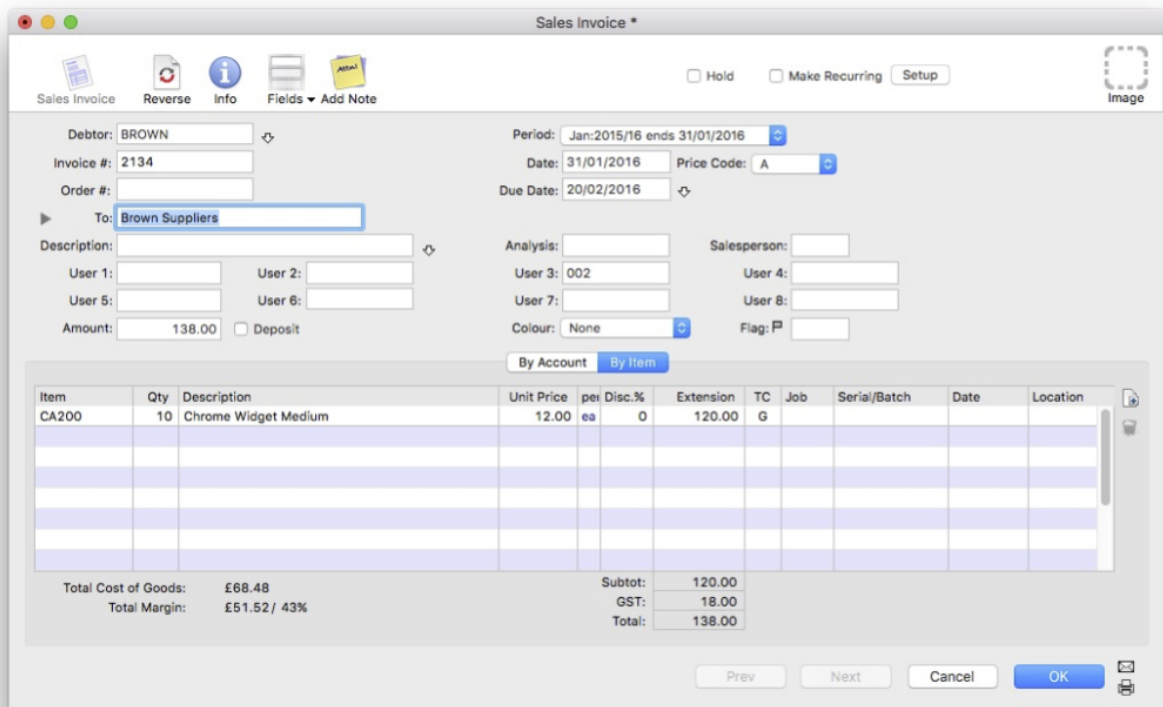
1. To view prices, choose **Pricebook Report** from the reports menu:

| 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

- 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.



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

Technical information

This script uses Moneyworks' user2 table to store information

| Field | Data stored |
|--------|--|
| Key | concatenated product code plus name code |
| Float1 | the special price of the item. (Set to -1 if the record is no longer needed) |

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

Permanent link:
https://www.docs.sussol.net/doku.php/moneyworks:per_customer_pricebook_v2?rev=1387839736

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