Pricebook version 3

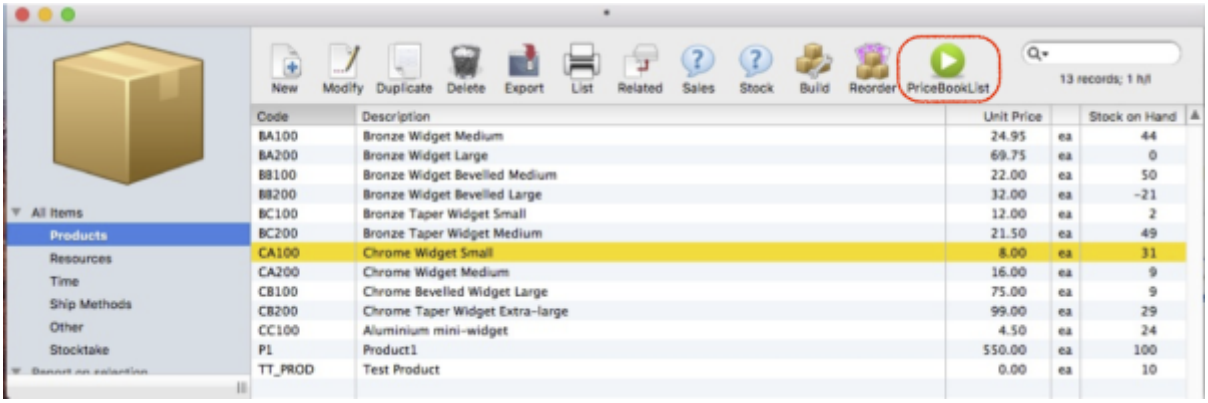
Requires: Moneyworks v8

What it does

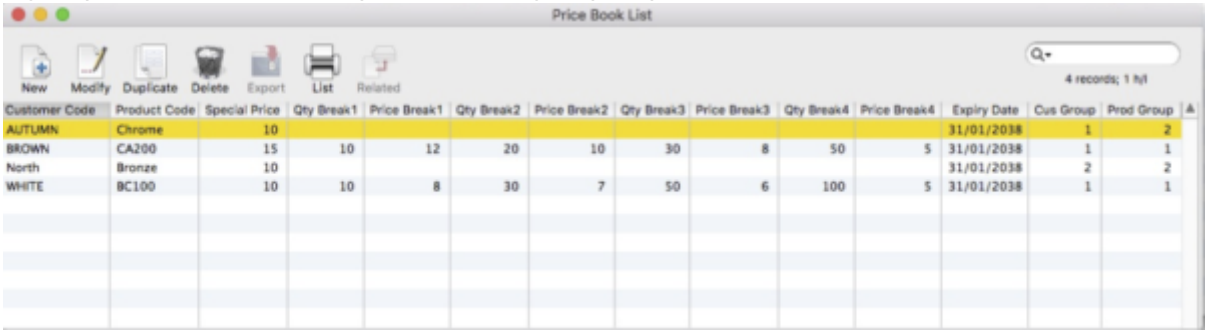
This Moneyworks script allows you to record and use a set of prices for each product or a group of products for each of your customers or a group of customers. Prices can include price breaks for different quantities.

Installation

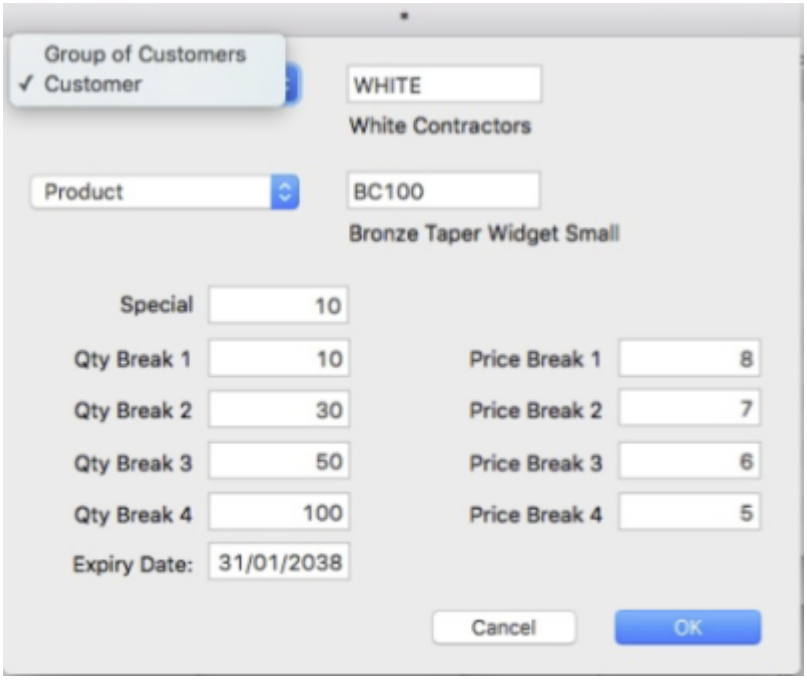
Double-click the script supplied by Sustainable Solutions. Once it is installed, PriceBookList icon will be available in toolbar of the Product table. To open Product table **Show>Product**

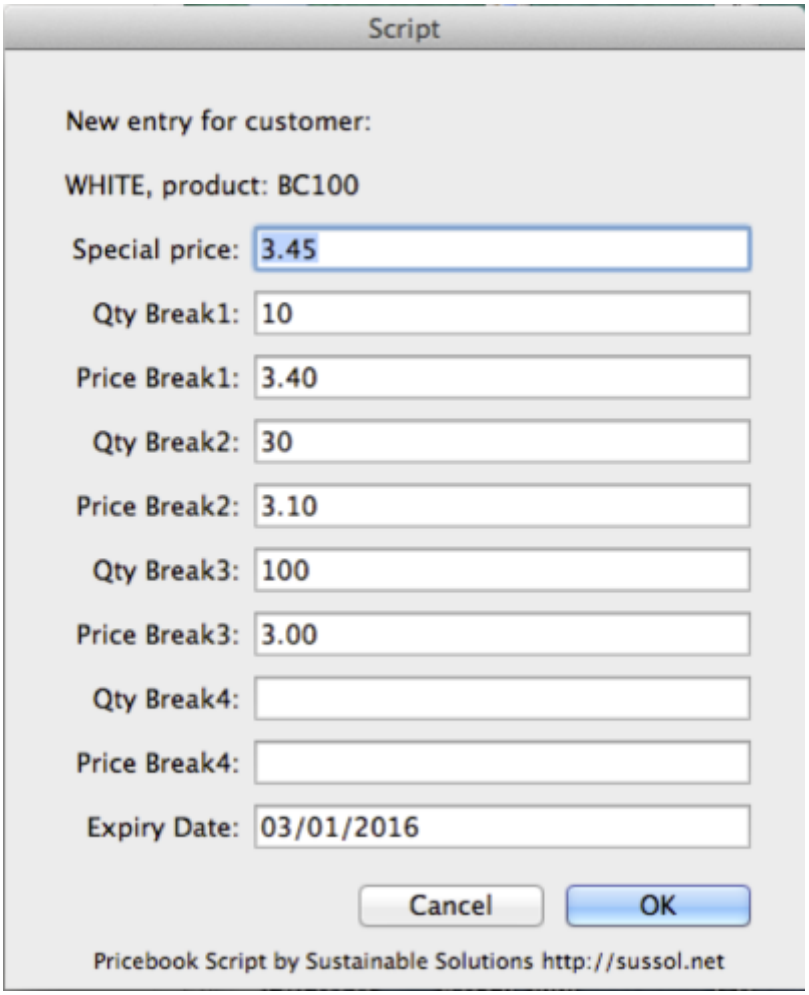


Setting prices

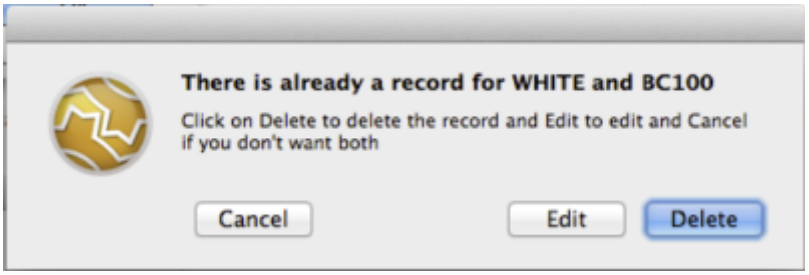
1. Show the product list by choosing **Show > Products**
2. Click the **PriceBookList** button in the toolbar. You can see all the prices set for each customer or a group of customers for a product or a group of product in the list.
3. 

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

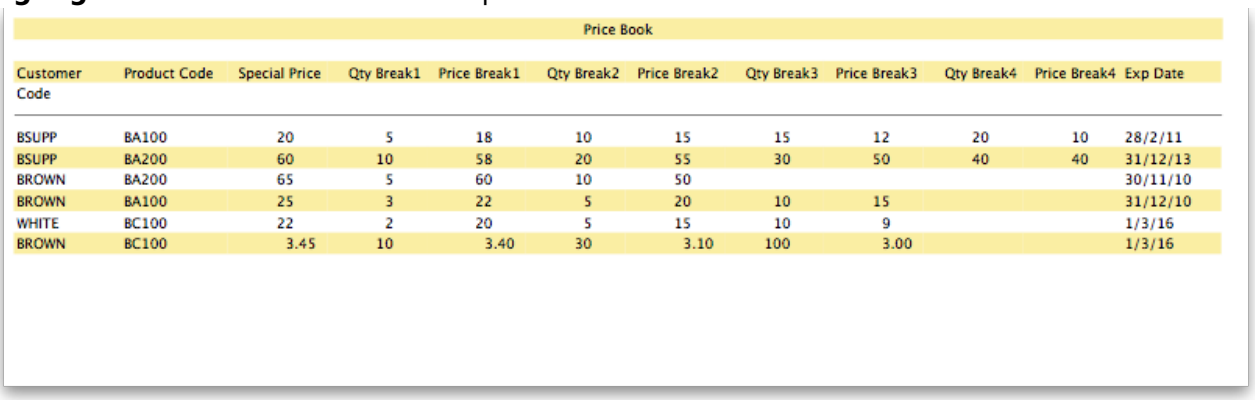
5. 

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 customer group code.
8. You'll be alerted if you enter an invalid customer/product code, else if you enter a valid customer code.
9. 

1. You only have to fill in a **Special 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.
11. 

Viewing prices

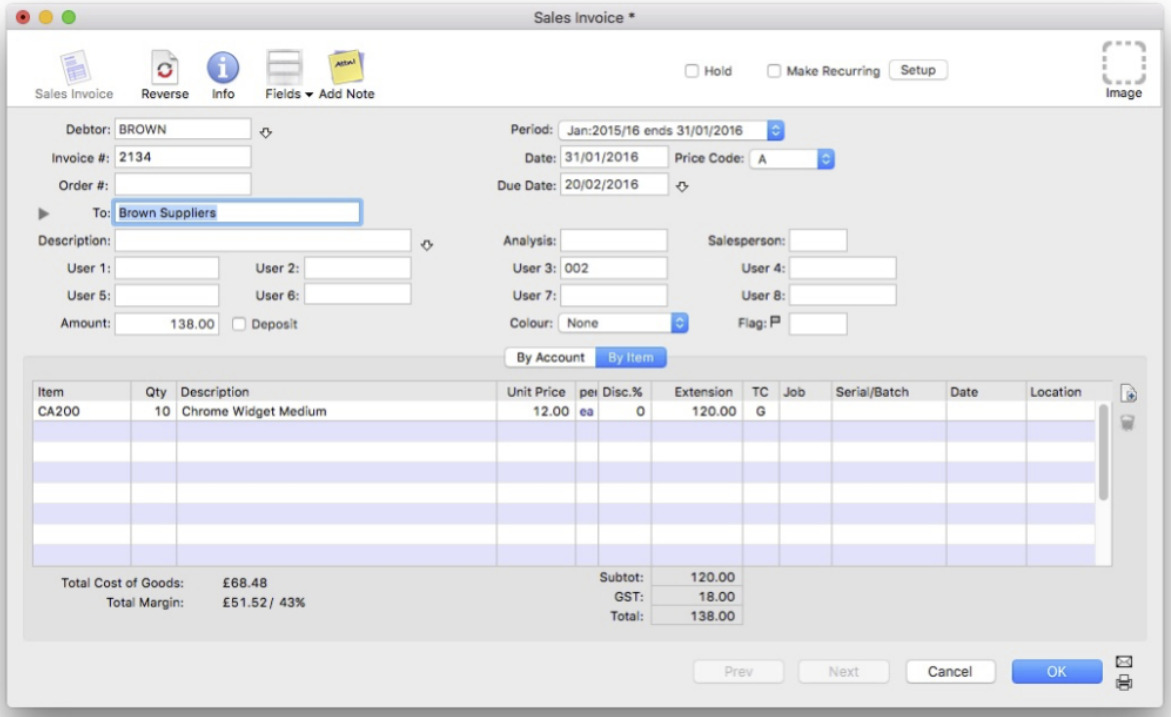
1. To view prices for selected Items, select items in Items list and choose **Pricebook Product table** from the reports menu:
2. To view prices for selected customer, select Customers in Name list and choose **Pricebook for highlighted Customers** from the reports menu:
3. 

Price 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

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.



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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-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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