



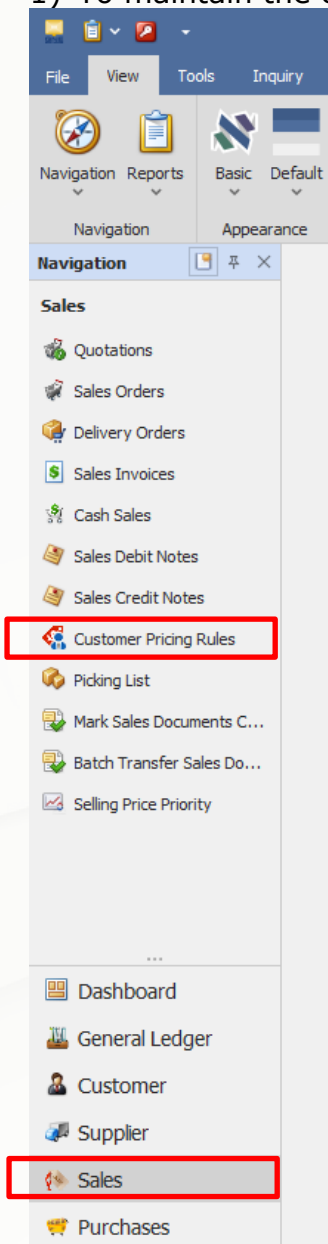
How to set up Customer Pricing Rules

Overview:

Customer Pricing Rules enables the users to customize item pricing and discount for each Customer, Customer Group or across all Customer Type. It also allows for the establishment of pricing validity and required item quantities as needed

Procedures:

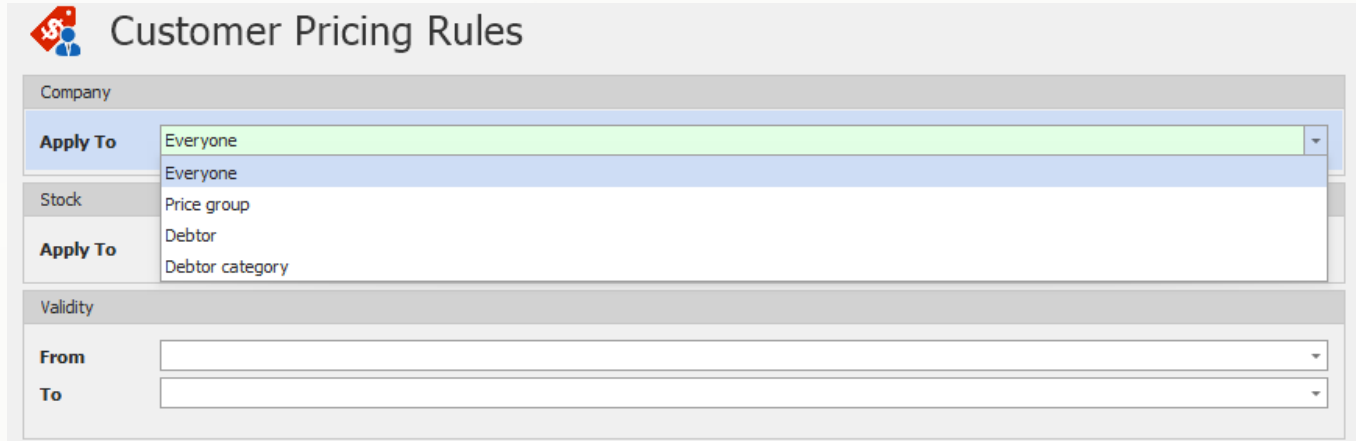
1) To maintain the customer pricing rules, go to Sales > Customer Pricing Rules



2)Following for set up:

Under Company (Customers) – select to whom the set pricing will be applicable

- Everyone – All Customers
- Price Group – Certain Customer Group
- Debtor – Specific Customer
- Debtor Category – Certain Customer Category



Customer Pricing Rules

Company

Apply To Everyone

Stock Price group

Apply To Debtor
Debtor category

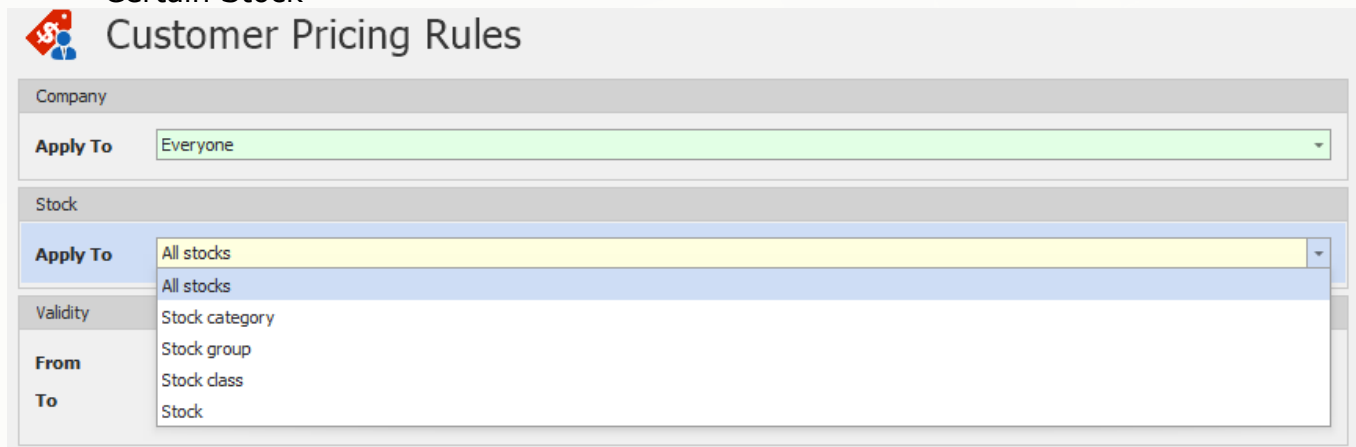
Validity

From

To

Under Stock – select to which item the set pricing/discount will be applied

- All Stocks
- Certain Stock Category
- Certain Stock Group
- Certain Stock Class
- Certain Stock



Customer Pricing Rules

Company

Apply To Everyone

Stock

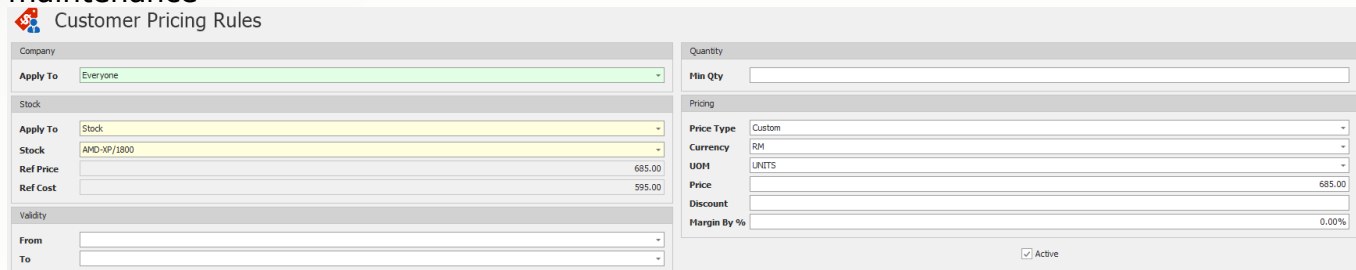
Apply To All stocks

Validity

From Stock category

To Stock group
Stock class
Stock

Once a specific stock is selected, ref price and ref cost will be displayed. This will serve as a guide for the user in setting new price or discount. The ref price and ref cost are based on the selling price and purchase price maintained under stock maintenance



Customer Pricing Rules

Company

Apply To Everyone

Stock

Apply To Stock

Stock AMD-XP/1800

Ref Price 685.00

Ref Cost 595.00

Validity

From

To

Quantity

Min Qty

Pricing

Price Type Custom

Currency RM

UOM UNITS

Price 685.00

Discount

Margin By % 0.00%

☒ Active

Under Validity – Validity period of the set pricing (leave it blank if there is no validity)

Under Quantity:

Min qty - required item quantity to be acquired for the set pricing to apply (leave it blank if the pricing will be applied regardless of the availed quantity of the customer)

Under Pricing:

Pricing Type

- Customer – follow the set price
- Highest price – follow the highest selling price based on the item sales history
- Lowest price – follow the lowest price

Currency – currency used in the set pricing

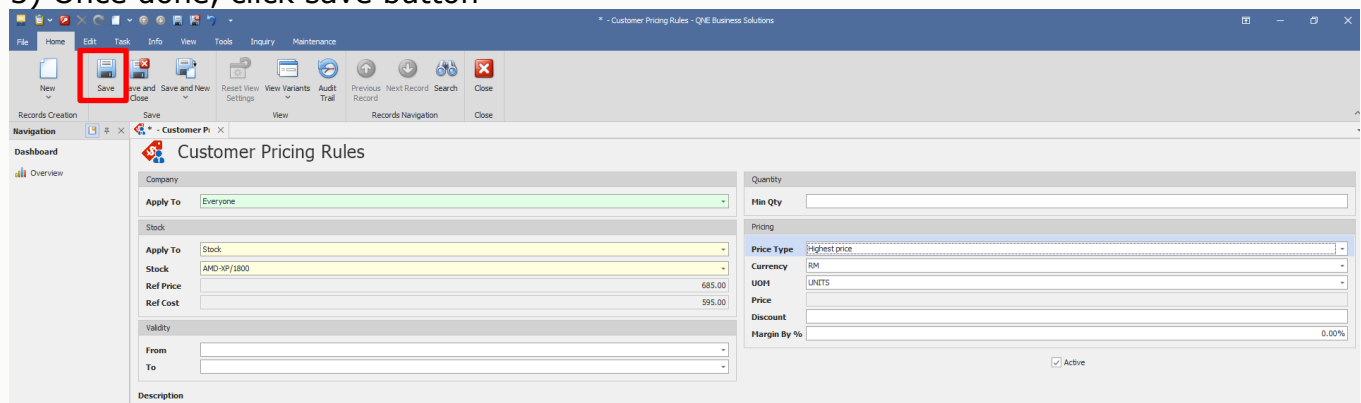
UOM – pertains to the item unit of measurement

Price – set item discount

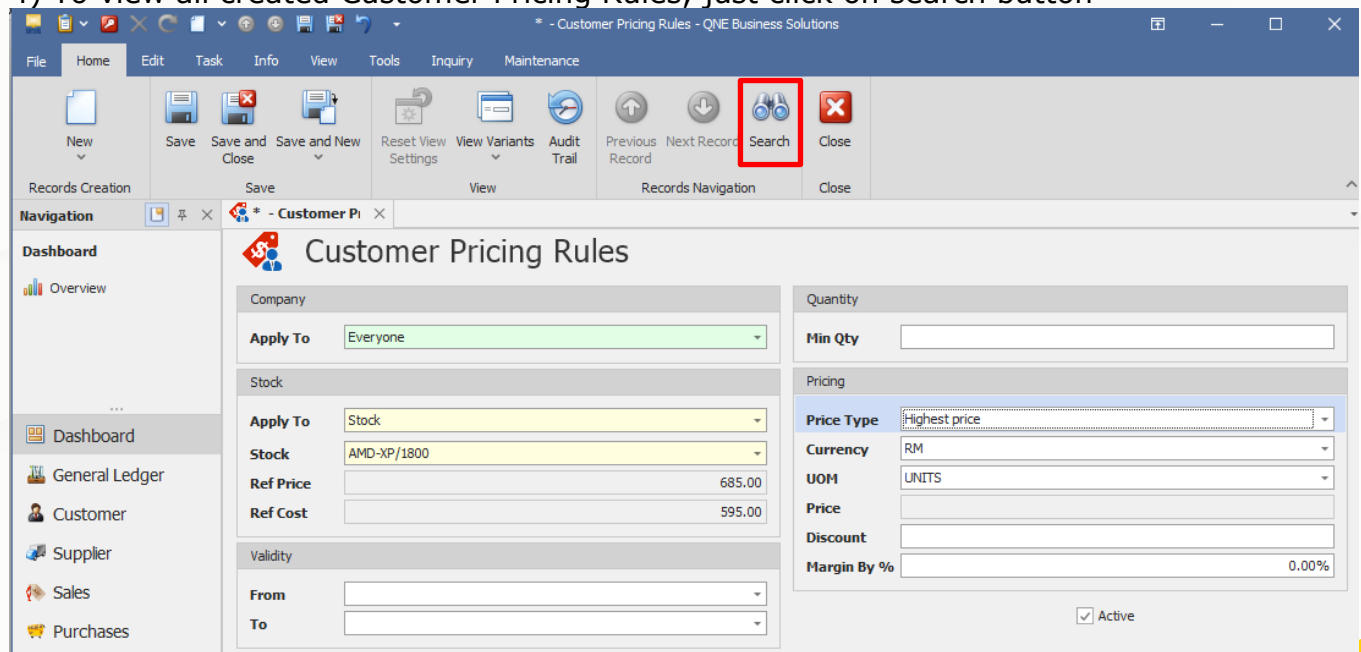
Margin by % - pertains to markup percentage

Do not forget to tick the Active option for the pricing to take effect


3) Once done, click save button



4) To view all created Customer Pricing Rules, just click on search button



List of all Customer Pricing Rules will show

 Customer Pricing Rules

Price Group	Customer	Category	Stock Category	Stock Class	Stock Group	Stock	UOM	Ref Price	Ref Cost	Custom Price	Discount	Currency	Margin By %	Min Qty	From	To	Active
	700-M001					AMD-XP/1800	UNITS	685.00	595.00			RM	5.00%				<input checked="" type="checkbox"/>
						APPLE	UNIT(S)					RM	5.00%				<input checked="" type="checkbox"/>

For more details can refer below link for guidance

Video: <https://www.youtube.com/watch?v=RG3-cavmO-s&t=237s>