

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



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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

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	Everyone
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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

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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

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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

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

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List of all Customer Pricing Rules will show

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	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	То	Active
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For more details can refer below link for guidance Video: <u>https://www.youtube.com/watch?v=RG3-cavmO-s&t=237s</u>

