

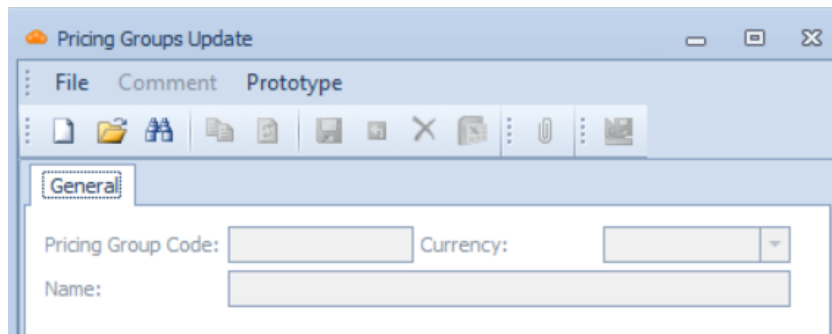
Price Lists

A price list is a convenient way of saving a sold item's price in the system so that it can easily be assigned to a sales order.

Prerequisites: you must have Items and Customers saved in order to create a Price List.

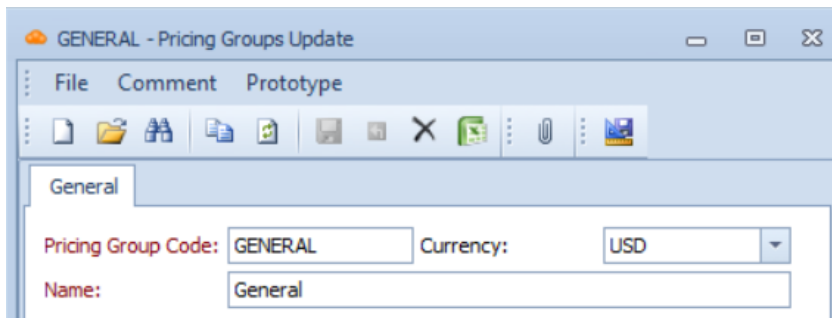
To create a Price List, go to *Master Tables >> Miscellaneous >> Pricing Groups Update*, or simply type **Pricing Groups Update** on the Quick Launch

Select New



The screenshot shows the 'Pricing Groups Update' window with the 'General' tab selected. The 'Pricing Group Code' field is empty, the 'Currency' dropdown is set to 'USD', and the 'Name' field is empty.

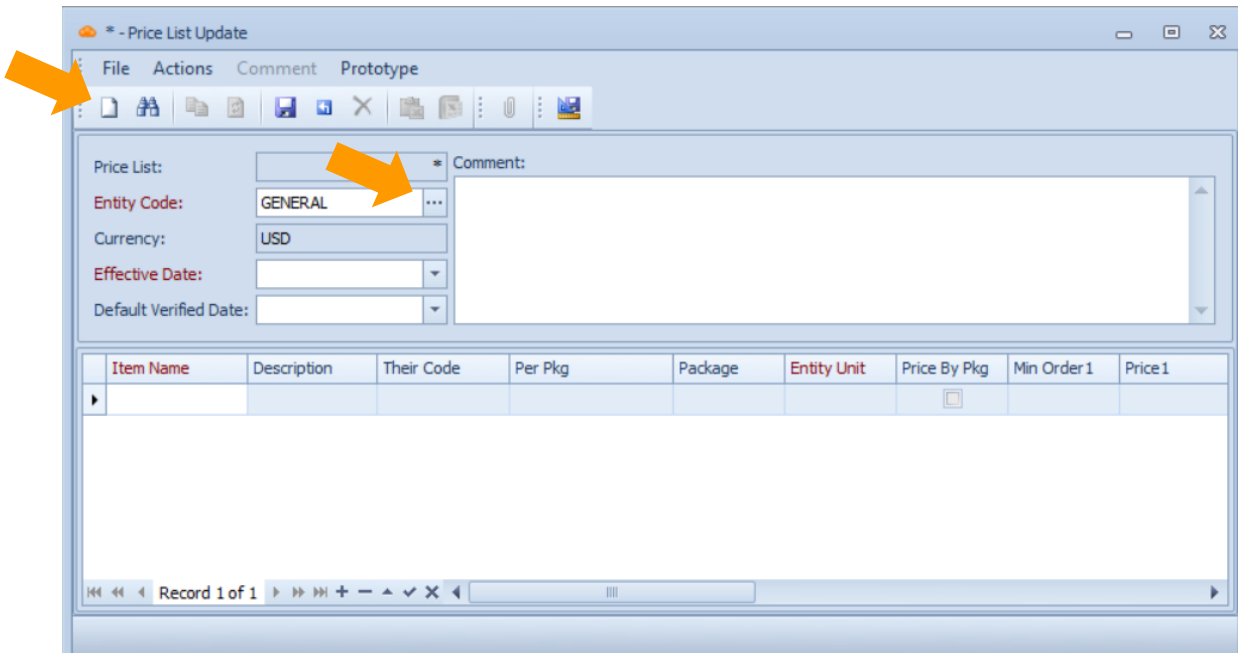
Create a new Pricing Group by filling in all the fields and save it.



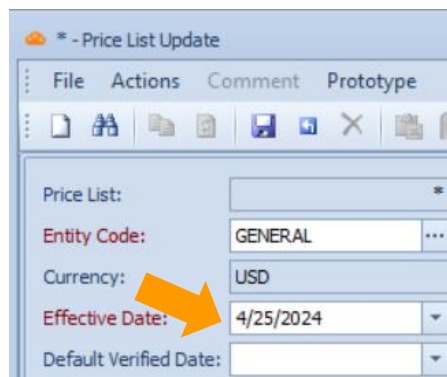
The screenshot shows the 'GENERAL - Pricing Groups Update' window with the 'General' tab selected. The 'Pricing Group Code' field is filled with 'GENERAL', the 'Currency' dropdown is set to 'USD', and the 'Name' field is filled with 'General'.

Go to Price List Update by selecting *Master Tables >> Miscellaneous >> Price List Update*, or simply type Price List Update on the Quick Launch.

Click New and select the menu button on the **Entity Code** field to select the created Pricing Group.



Enter an **Effective Date**



You may now enter information about the item(s) you wish to create a pricing group for.

* - Price List Update

File Actions Comment Prototype

Price List: * Comment:

Entity Code: GENERAL ...

Currency: USD

Effective Date: 4/25/2024

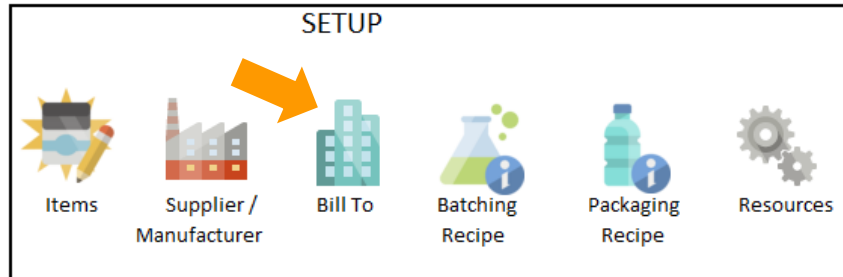
Default Verified Date:

Item Name	Description	Their Code	Per Pkg	Package	Entity Unit	Price By Pkg	Min Order 1	Price 1	Currency	Min Ord
YR002	Salt		20.000 kg	TOTE	kg	<input checked="" type="checkbox"/>		4.0000	USD	
YR003	Blue Food Coloring				kg	<input type="checkbox"/>		8.0000	USD	
▶ YR006	Linseed Oil		10.000 lb	BOTTLE	lb	<input type="checkbox"/>		10.0000	USD	
*						<input type="checkbox"/>				

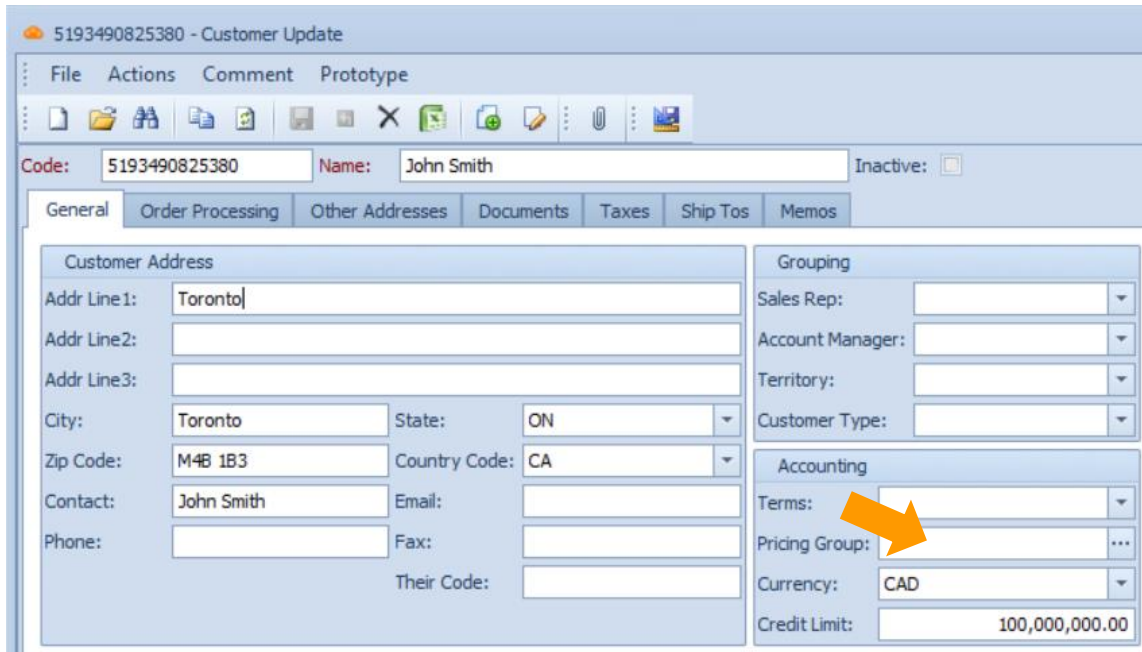
Record 3 of 3

Ensure the information is saved by clicking the **Save** button or Ctrl + S on your keyboard.

Open the Customer form by clicking the icon in the display menu or by selecting *Master Tables >> Entity Update >> Customer Update*



Open an existing Customer. You may assign the created Pricing Group to this Customer by selecting the menu button on the **Pricing Group** field. This assigns the Pricing Group to that specific Customer.



5193490825380 - Customer Update

File Actions Comment Prototype

Code: 5193490825380 Name: John Smith Inactive:

General Order Processing Other Addresses Documents Taxes Ship Tos Memos

Customer Address

Addr Line 1: Toronto

Addr Line 2:

Addr Line 3:

City: Toronto State: ON

Zip Code: M4B 1B3 Country Code: CA

Contact: John Smith Email:

Phone: Fax:

Their Code:

Grouping

Sales Rep:

Account Manager:

Territory:

Customer Type:

Accounting

Terms:

Pricing Group:

Currency: CAD

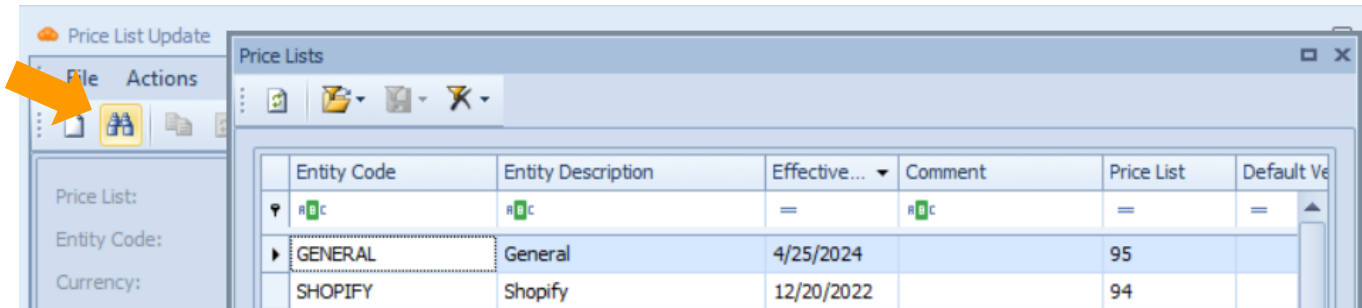
Credit Limit: 100,000,000.00

Save the form.

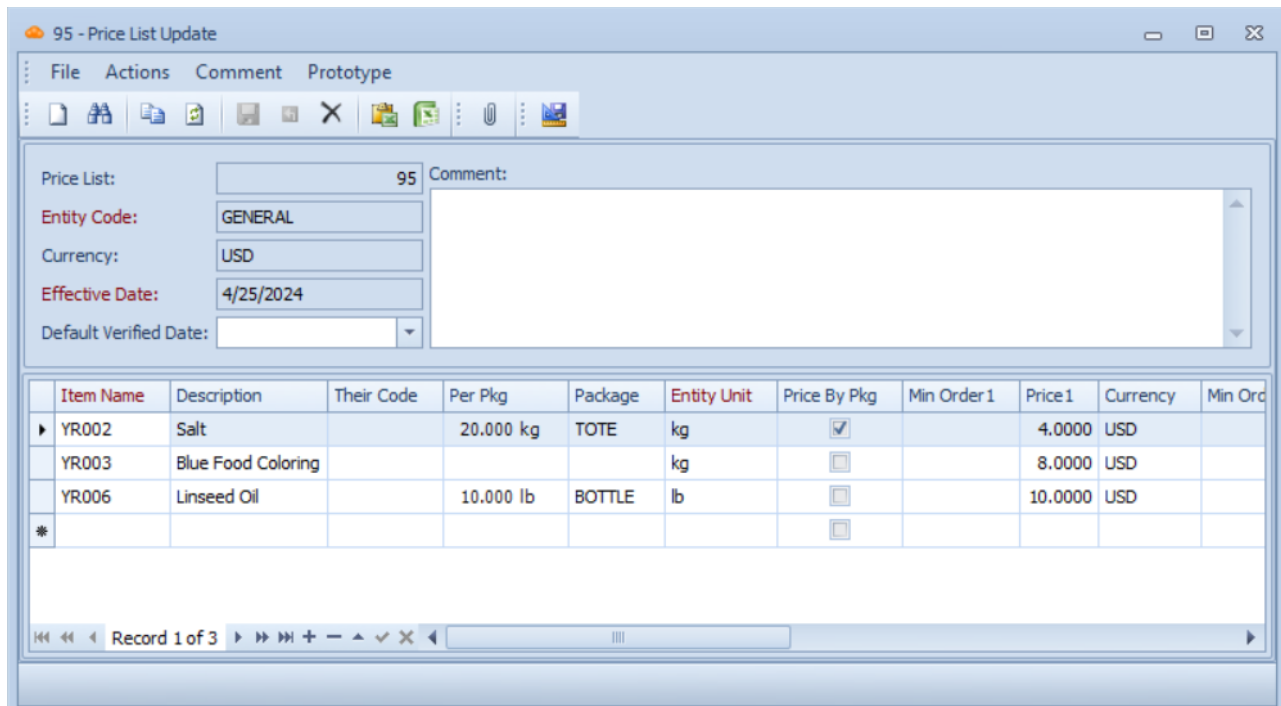
Modifying an Existing Pricing Group

To modify an existing Pricing Group, go to the Price List Update form by selecting *Master Tables >> Miscellaneous >> Price List Update*, or simply type Price List Update on the Quick Launch.

Click **Find** and select the Price List you wish to modify.



You may now modify any information in this form.



95 - Price List Update

Price List: 95 Comment:

Entity Code: GENERAL

Currency: USD

Effective Date: 4/25/2024

Default Verified Date:

Item Name	Description	Their Code	Per Pkg	Package	Entity Unit	Price By Pkg	Min Order1	Price1	Currency	Min Ord
YR002	Salt		20.000 kg	TOTE	kg	<input checked="" type="checkbox"/>		4.0000	USD	
YR003	Blue Food Coloring				kg	<input type="checkbox"/>		8.0000	USD	
YR006	Linseed Oil		10.000 lb	BOTTLE	lb	<input type="checkbox"/>		10.0000	USD	
*						<input type="checkbox"/>				

Record 1 of 3

Ensure the information is saved by clicking the **Save** button or Ctrl + S on your keyboard.