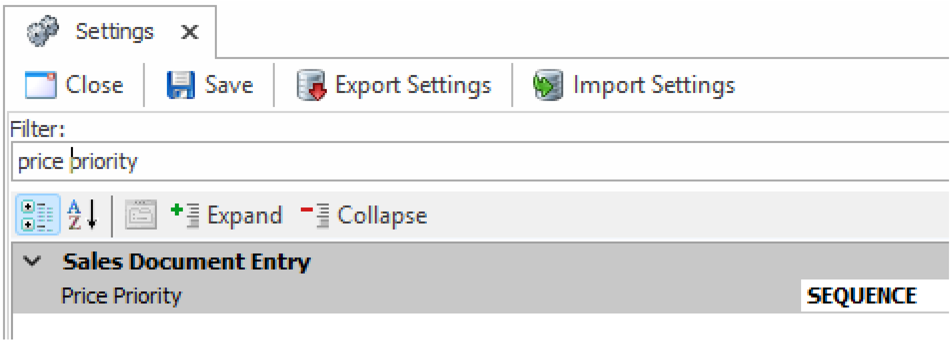
Contract Pricing

Cavallo Support - 2026-03-17 - Sales

Overview

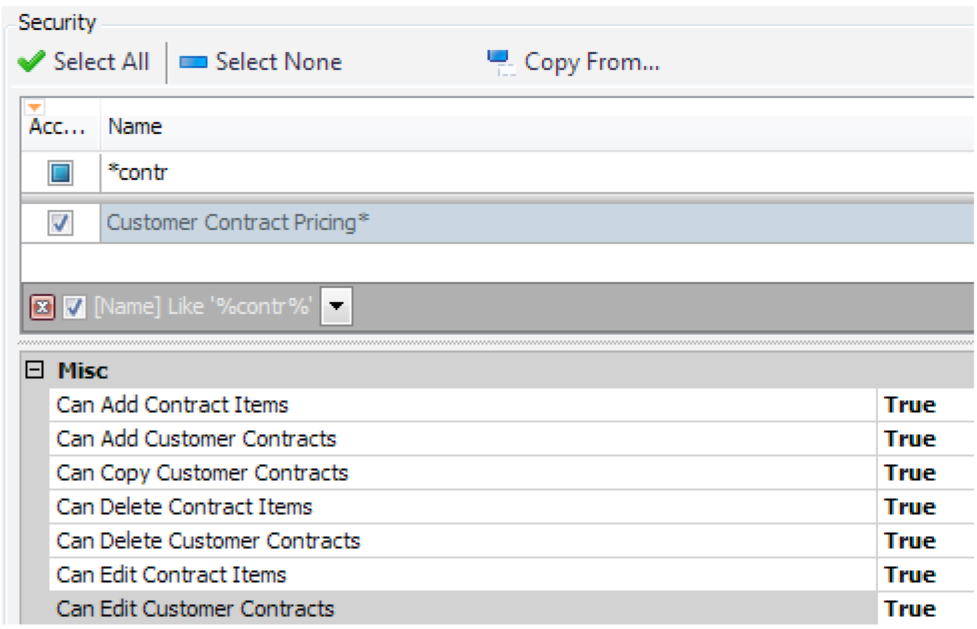
The Contract Pricing tab on the customer card allows users to set up a contract with a customer for a set price on an item or items, with a specified quantity and date range. The Contract Pricing function will keep track of the quantity of each contracted item a customer has bought, until the contract quantity has been reached.

Note: If your Pricing Priority is set to *SEQUENCE,* Contract Pricing will be prioritized over other SalesPad supported pricing methods. Learn more about the sequence pricing priority Order in Which Pricing is Applied in SalesPad.



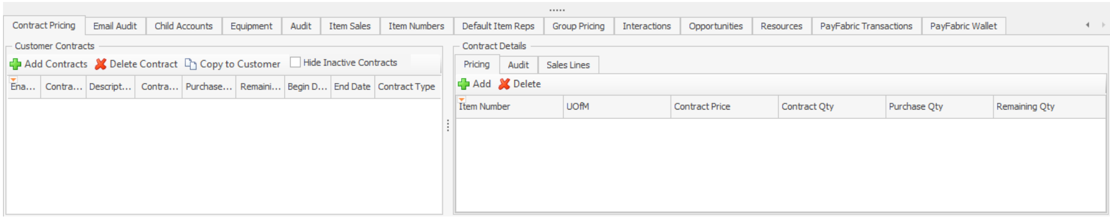
Security

Customer Contract Pricing must be enabled in the Security Editor. Set the Misc. sub-settings as needed:



Use

Open the customer card and go to the Contract Pricing tab:



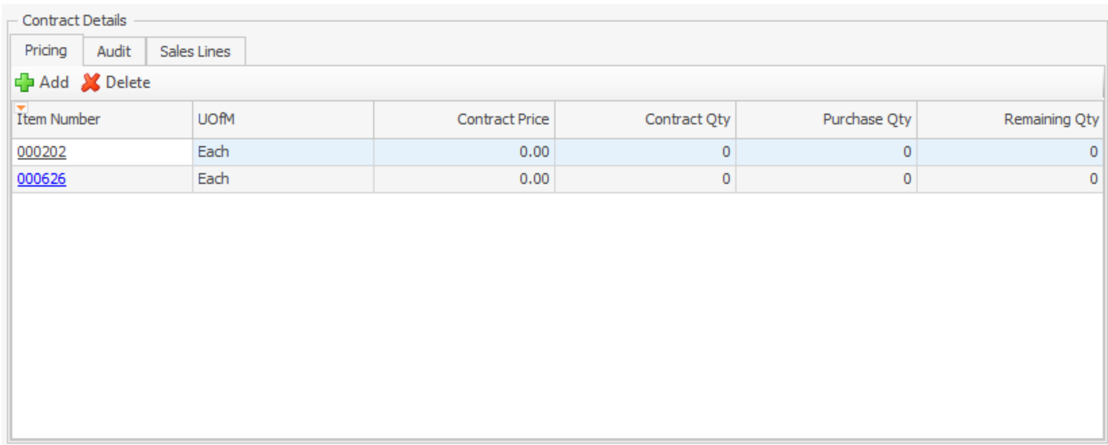
Any existing Contracts for the customer will display on the left, under Customer Contracts, and the individual items on the selected contract, and their pricing, will display on the right, under Contract Pricing.

The Enabled column displays with a check box displaying whether or not the contract is currently enabled. Check or uncheck the box to enable or disable existing contracts.

With proper security, contracts and items can be deleted and fields on existing contracts can be edited.

Contract and Purchased Quantities can be manually adjusted. If a document is later voided or returned, the quantity will be automatically updated.

In the Contract Details section of the customer card, there are three tabs: Pricing, Audit, and Sales Lines. When viewing information in the Contract Details section, make sure you have the correct contract selected in the Customer Contracts section.



The Pricing tab displays pricing information for items included on the contract. The Audit tab displays a history of contract pricing activity for this customer. The Sales Line tab displays any active sales lines associated with this contract.

CONTRACT TYPES

There are two Contract Types: Grouped and Detail.

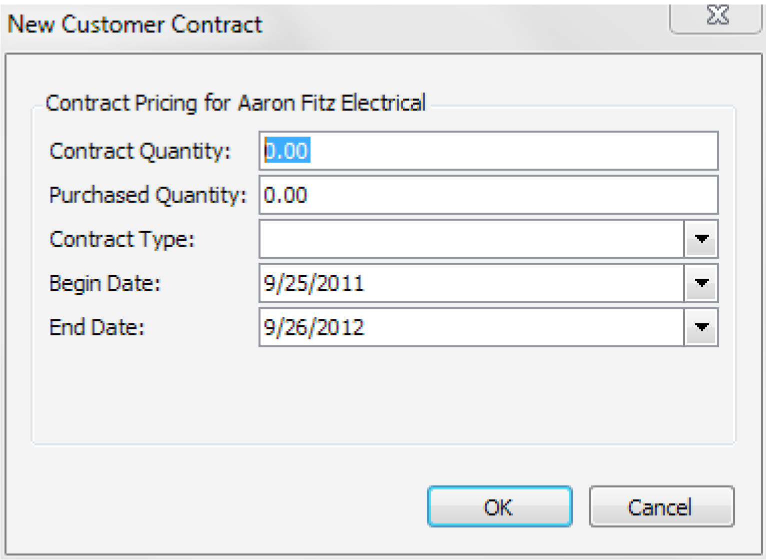
Grouped - A Grouped contract counts a customer's purchases of multiple items toward a total contract quantity. The Grouped contract type is useful for a contract with multiple items of the same type that have different item numbers. For example, if you have one Grouped contract for HD-20 and HD-40 with a contract quantity of 100, the customer can buy 100 HD-20s, or 100 HD-40s, or a combination of HD-20s and HD-40s totaling 100 before the contract price expires.

Detail - A Detail contract counts only one item number toward the total contract quantity. The Detail contract type is useful for individual item contracts, or for using the same contract quantity and date range for multiple items. For example, if you have one Detail contract for HD-20 and HD-40 with a contract quantity of 100, the customer can buy 100 HD-20s before the HD-20 contract price expires *and* 100 HD-40s before the HD-40 contract price expires.

ADDING NEW CONTRACTS

First, add a new Customer Contract:

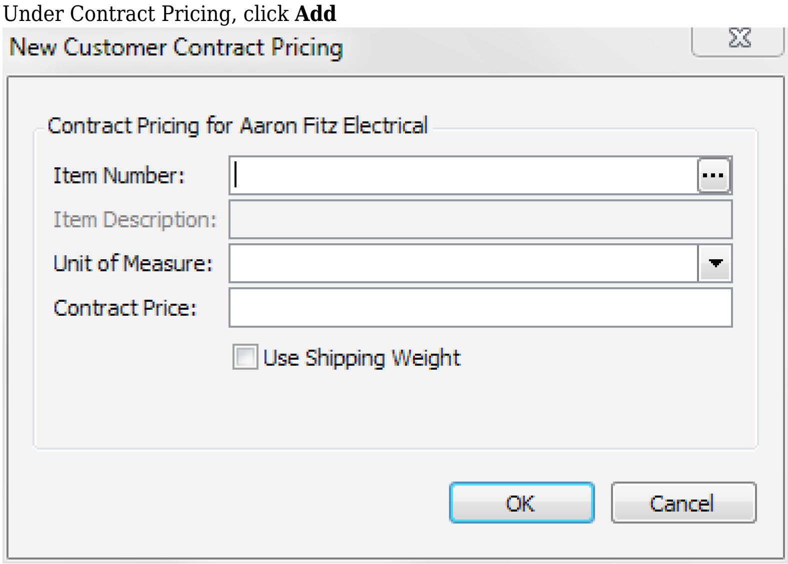
1. Click **Add Contract**



2. Complete the information for all fields
3. Click **OK**

Next, add items and pricing to the contract:

1. Make sure the contract you are adding to is highlighted on the Customer Contracts grid
2. Under Contract Pricing, click **Add**



3. Complete the information for all fields:

Item Number – Enter the item number or click the ellipsis (**...**) to select an item from the Inventory Lookup screen (*Sales Inventory Lookup* must be enabled in the Security Editor). The Item Description will automatically appear once entered.

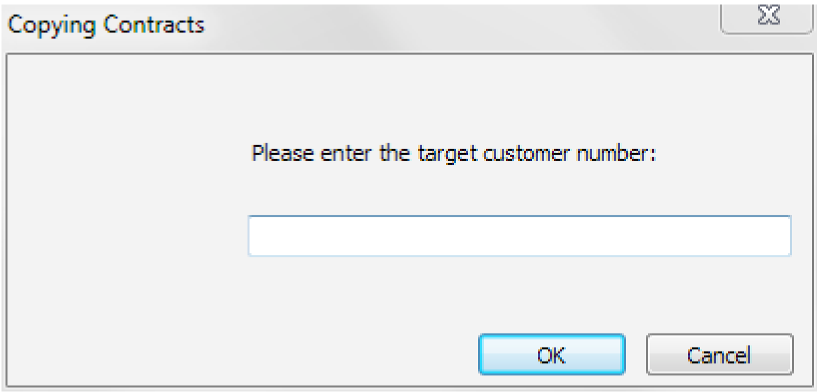
Use Shipping Weight – Check this box if the item should be multiplied by the shipping weight to calculate the purchased quantity.

Note: The unit of measure is forced to upper case – Dynamics GP should be modified to reflect this.

COPYING A CONTRACT

To copy a contract to another customer:

1. Select a contract to copy and click **Copy**
2. Enter the customer number to copy to:



3. Click **OK**. The selected contract will now appear on the customer card for the customer number entered

You can also copy multiple contracts or all contracts to a customer by using Shift+Select or Control+Select.

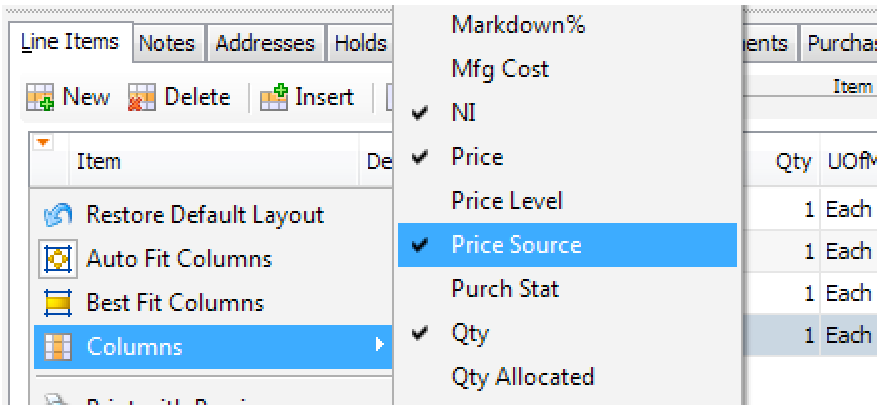
ENTERING CONTRACT ITEMS ON A SALES DOCUMENT

Create a sales document for the customer and add a contracted item number to the line items. For a contract item, the Price column will display the contract price instead of the standard price.

If the quantity entered exceeds the quantity contracted, a prompt will appear to confirm that the contract quantity will be exceeded. If you accept, the item quantities will be split into two lines - one with the contract price, and one with the remaining quantity at regular price:

Item	Description	NI	Qty	UOfM	Price
A100	Audio System	☐	100	Each	14.95
A100	Audio System	☐	30	Each	39.95

The Price Source column will indicate whether or not a line item is part of a contract. (You may need to add this column. You can do so by clicking the orange triangle in the top left corner of the grid, and then selecting Columns, followed by Price Source.) If there are multiple contracts for the item, a dropdown will appear at the line level, allowing you to choose the correct contract.



When a contract item is added to an order, the purchased quantity is immediately updated on the customer's Contract Pricing tab (click **Refresh** on the customer card). If the line item or the document is changed or deleted, the quantities will again be immediately updated on the customer's Contract Pricing tab to reflect removal of the quantity.