Custom Special Pricing

Cavallo Support - 2024-11-22 - Sales

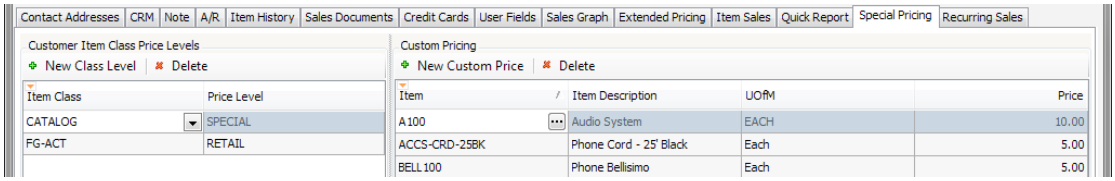
Overview

The special pricing tab on the customer card displays existing special pricing and, with proper security, allows users to change price levels and custom pricing per customer. The special pricing maintenance module allows users to maintain existing customer special pricing and make mass price changes based on search criteria such as item number. Custom pricing can also be created on individual sales documents and imported to the customer card with the custom pricing popup and the sales line special pricing import plugin.

Use

Special Pricing Tab

Existing special pricing can be viewed from the Customer Card Special Pricing tab:

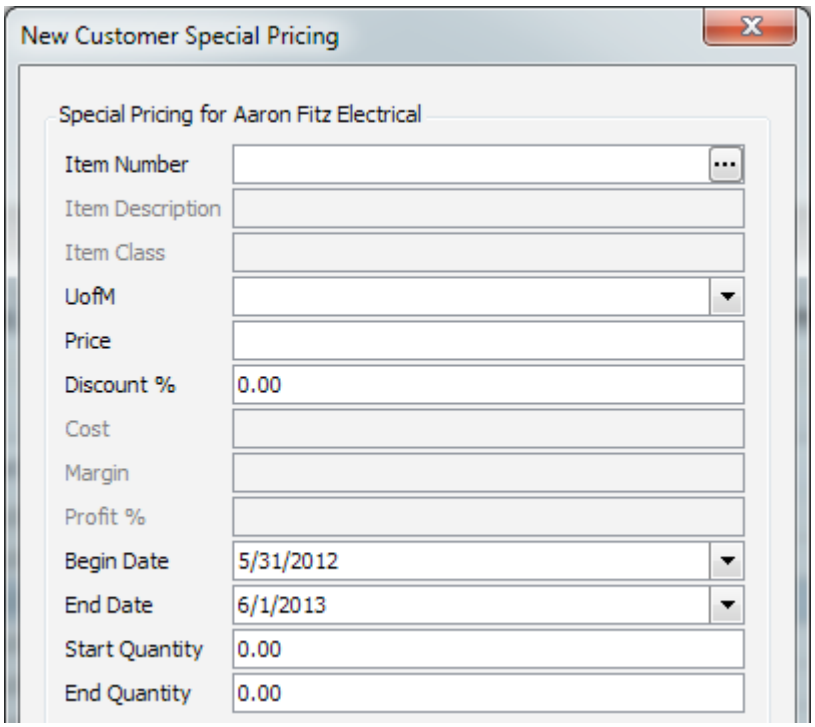


Under Customer Item Class Price Levels, you can set price levels (configured in GP) for specified item classes. Click **New Class Level** to specify a price level for a new item class.

Special pricing for specific item numbers is set up under Custom Pricing. Here you can also specify beginning and end dates, UofM, etc. for the special pricing.

Note: Special pricing entered here overrides GP special pricing.

Click **New Custom Price** to create special pricing for a new item number. In versions prior to 4.0, a new line item will appear, where you will fill out the necessary information in each field on the grid (right-click on the column header and select Column Chooser for more columns). In version 4.0 and later, assuming proper security, the “New Customer Special Pricing” window will appear. Fill out the information in this window and click **OK**:



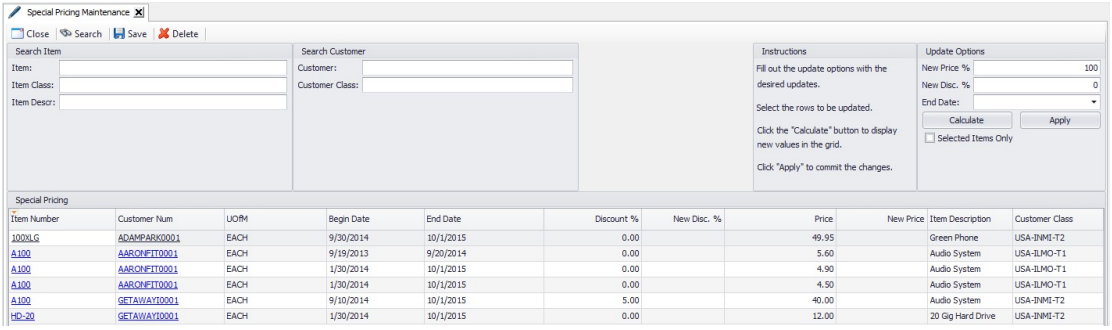
Some versions contain a field called Contract Qty. If a quantity is entered into Contract Qty, sales of the item to the current customer will be subtracted from the contract quantity and the special pricing will be in effect until the full quantity has been subtracted.

Important Note: Save issue in versions prior to 4.0. In order to save properly, special pricing currently must be entered in the following order: Item #, End Date, Begin Date, Qty To (Start Quantity), Qty From (End Quantity), Unit of Measure, Discount %, Price. This also applies to edits made on existing pricing in 4.0. For edits made to existing pricing in 4.0, we recommend deleting the existing pricing and re-entering the information with the changes from the pop-up window.

Special Pricing Maintenance

You can access the Special Pricing Maintenance module by going to Modules > Sales > Special Pricing Maintenance.

Enter any search criteria on the left (for example, searching by item number will show all customers with special pricing for that certain item) and hit Enter or click **Search**:



The search results display items, customers, and existing price/discount.

Double-click each line to view item information through the inventory lookup screen. To change price or discount percentages and/or effective dates:

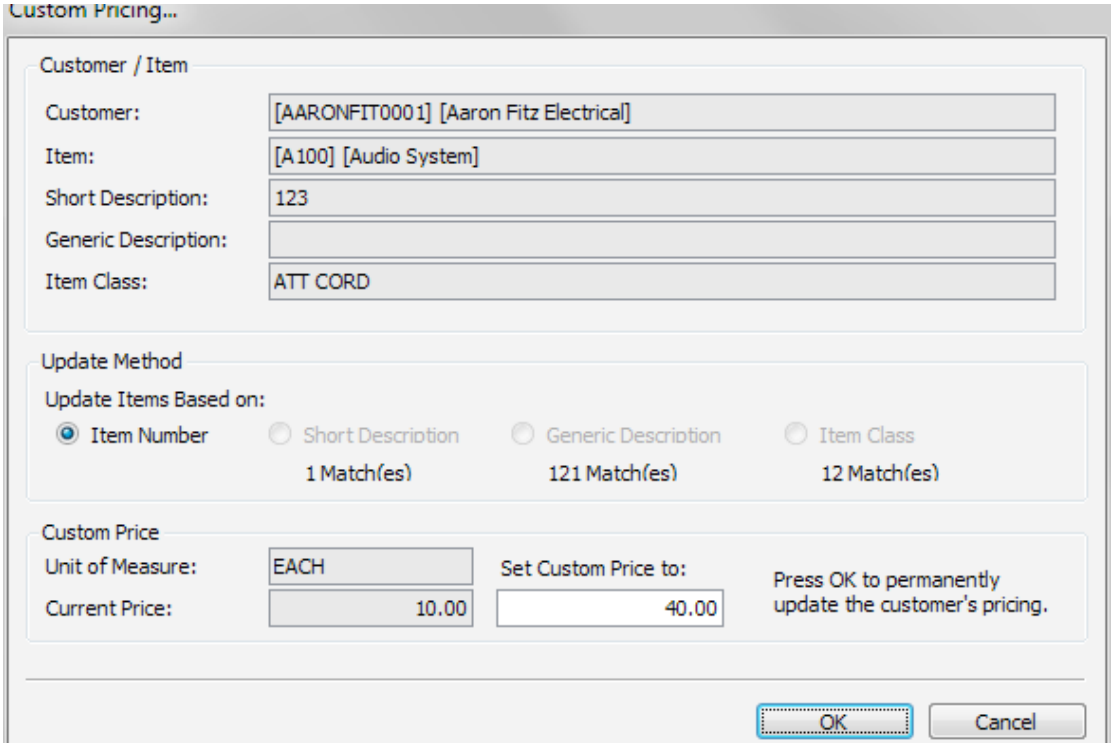
1. Enter the new information in the Update Options section. Updates will apply to all search results unless **Selected Items Only** is checked.
   Note: If the Beg. Date field is available in your version, do not use it. The beginning date cannot be modified; changing it would create duplicate pricings. In versions 4.1 and later, the Beg. Date field has been removed.
2. Click **Calculate**. Calculations will update for each selected line

3. Click **Apply** to apply the updates to the customer(s)

Make sure to click **Save** before exiting the special pricing maintenance module.

Modifying Custom Pricing from a Sales Document

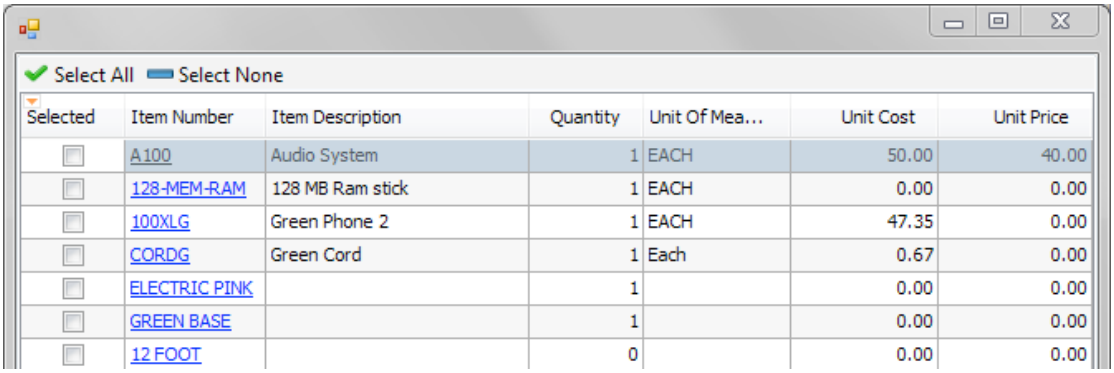
Custom Pricing Popup – If the default price of an item is changed from within a sales document, the custom pricing popup will appear (if the proper settings are enabled).



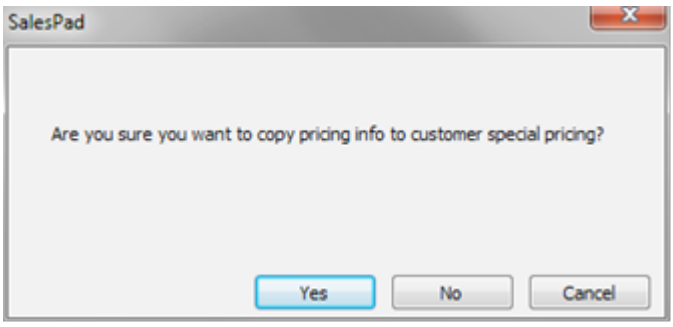
Click **OK** to permanently update customer pricing for the item (this pricing will be visible from the special pricing tab on the customer card upon refresh), or **Cancel** to keep the price change for the current sales document only.

Click **OK** to permanently update customer pricing for the item (this pricing will be visible from the Special Pricing tab on the Customer Card upon refresh), or **Cancel** to keep the price change for the current sales document only.

Sales Line Special Pricing Import – With security enabled, pricing changes made on a sales document can be imported to the customer's customer card using the sales line special pricing import plugin. Open the **Actions** dropdown on the line items tab and select Sales Line Special Pricing Import:



All line items are listed on the popup screen. You can make additional changes to Quantity, Unit of Measure, Unit Cost, or Unit Price. Check the boxes to select the items to import and click **OK** to import the changes onto the customer's special pricing tab. A confirmation message will appear:



Pricing changes will be imported when you click **Yes**.

Security and Settings

Settings

Custom Pricing Enabled - Enables/disables custom pricing (SalesPad Desktop can store customer/item specific pricing).

Confirm UofM Price Changes - When the selling unit of measure is changed on the sales line, the user will be prompted to accept the GP price for the price level and UofM combination.

Reprice When Qty Changes - Set this to TRUE to query if you have tiered quantity price breaks.

Security

Special Pricing Maintenance - Allows users to open the Special Pricing Maintenance module.

Customer Special Pricing - Allows users to view the Special Pricing tab on the Customer Card.

Sales Line Special Pricing Import - Allows users to use the Sales Line action, Sales Line Special Pricing Import.

Custom Pricing - Allows users to edit customer special pricing from a sales document.

New Customer Special Pricing - Allows users to edit custom prices from the customer card.