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## 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:

Contact Addresses   CRM   Note   A/R   Item History   Sales Documents   Credit Cards   User Fields   Sales Graph   Extended Pricing   Item Sales   Quick Report   Special Pricing   Recurring Sales									
Customer Item Class Price Levels					Custom Pricing				
◆ New Class Level ✖ Delete					◆ New Custom Price ✖ Delete				
Item Class		Price Level			Item / Item Description		UoM		Price
CATALOG		SPECIAL			A100		Audio System		10.00
FG-ACT		RETAIL			ACCS-CRD-25BK		Phone Cord - 25' Black		5.00
					BELL 100		Phone Bellissimo		5.00

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, UoM, 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**:

**New Customer Special Pricing**

Special Pricing for Aaron Fitz Electrical

Item Number:

Item Description:

Item Class:

UoM:

Price:

Discount %:

Cost:

Margin:

Profit %:

Begin Date:

End Date:

Start Quantity:

End Quantity:

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**:

Special Pricing Maintenance

Close Search Save Delete

Search Item: Item:  Item Class:  Item Descr:

Search Customer: Customer:  Customer Class:

Instructions: Fill out the update options with the desired updates. Select the rows to be updated. Click the "Calculate" button to display new values in the grid. Click "Apply" to commit the changes.

Update Options: New Price %:  New Disc. %:  End Date:

Calculate Apply

☐ Selected Items Only

Item Number	Customer Num	UoM	Begin Date	End Date	Discount %	New Disc. %	Price	New Price	Item Description	Customer Class
1000LG	ADAMPARK0001	EACH	9/30/2014	10/1/2015	0.00		49.95		Green Phone	USA-INM-T2
A100	AAROFETT0001	EACH	9/19/2013	9/20/2014	0.00		5.60		Audio System	USA-ILMO-T1
A100	AAROFETT0001	EACH	1/30/2014	10/1/2015	0.00		4.90		Audio System	USA-ILMO-T1
A100	AAROFETT0001	EACH	1/30/2014	10/1/2015	0.00		4.50		Audio System	USA-ILMO-T1
A100	GETAWAY10001	EACH	9/10/2014	10/1/2015	5.00		40.00		Audio System	USA-INM-T2
HD-20	GETAWAY10001	EACH	1/30/2014	10/1/2015	0.00		12.00		20 Gg Hard Drive	USA-INM-T2

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:

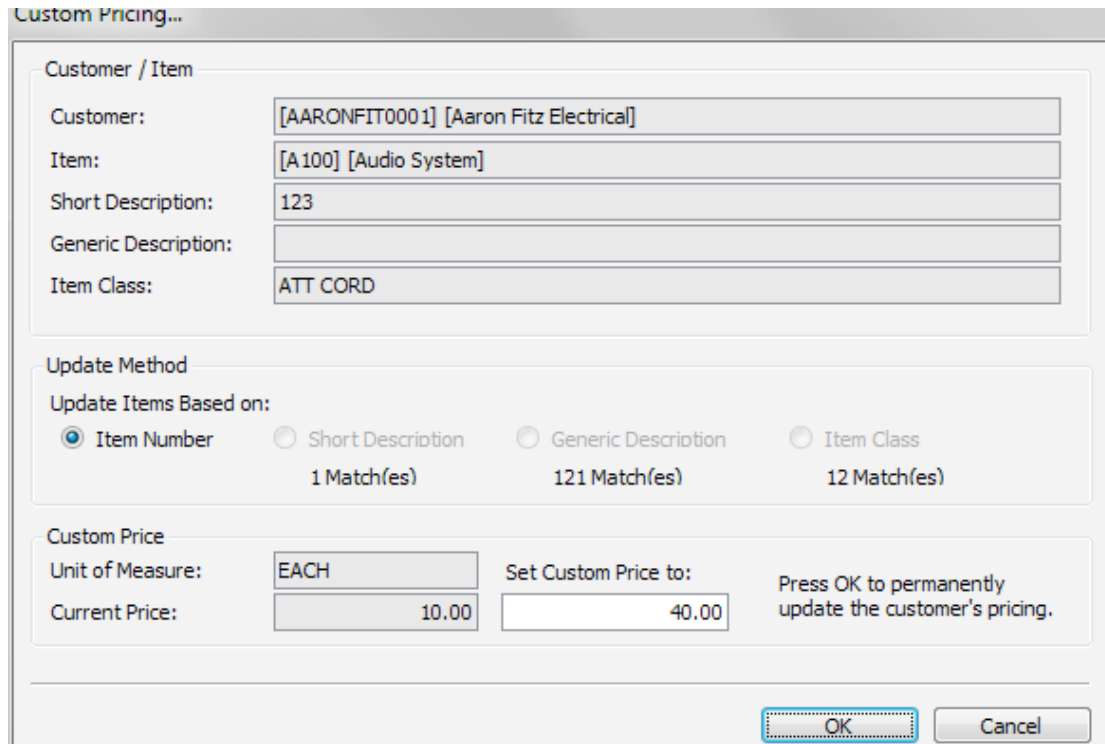
1. Enter the new information in the Update Options section. Updates will apply to all search results unless **Selected Items Only** is checked.  
**Note:** If the Beg. Date field is available in your version, do not use it. The beginning date cannot be modified; changing it would create duplicate pricings. 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).



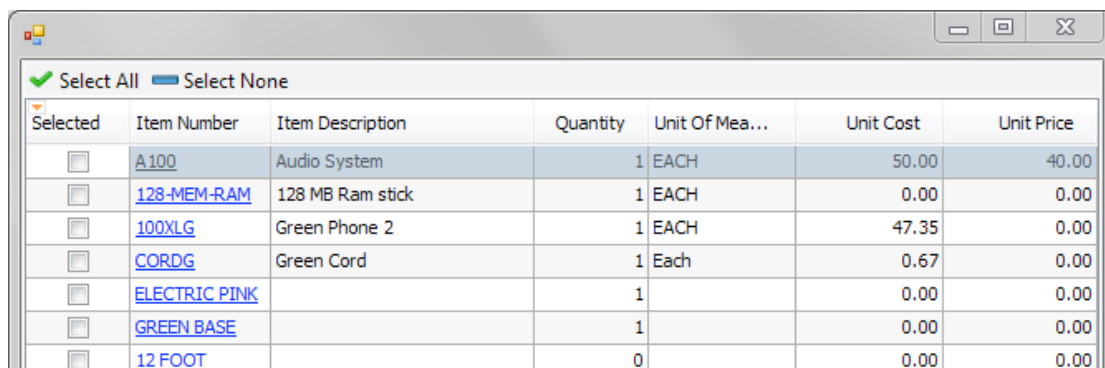
The 'Custom Pricing...' dialog box is used to modify pricing for a specific customer and item. It contains the following sections:

- Customer / Item:** Fields for Customer (AARONFIT0001 [Aaron Fitz Electrical]), Item (A100 [Audio System]), Short Description (123), Generic Description, and Item Class (ATT CORD).
- Update Method:** Radio buttons to select the update basis: Item Number (selected, 1 Match(es)), Short Description (121 Match(es)), Generic Description, or Item Class (12 Match(es)).
- Custom Price:** Fields for Unit of Measure (EACH), Current Price (10.00), and Set Custom Price to (40.00). A note states: 'Press OK to permanently update the customer's pricing.'
- Buttons:** OK and Cancel.

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.

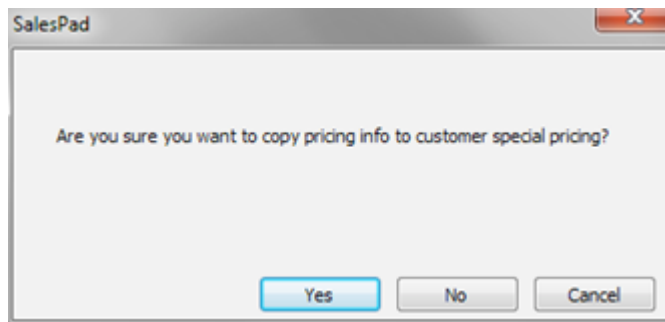
Sales Line Special Pricing Import - With security enabled, pricing changes made on a sales document can be imported to the customer's customer card using the sales line special pricing import plugin. Open the **Actions** dropdown on the line items tab and select Sales Line Special Pricing Import:



The 'Sales Line Special Pricing Import' dialog box displays a table of line items with checkboxes for selection. The table has the following columns: Selected, Item Number, Item Description, Quantity, Unit Of Mea..., Unit Cost, and Unit Price.

Selected	Item Number	Item Description	Quantity	Unit Of Mea...	Unit Cost	Unit Price
<input type="checkbox"/>	A100	Audio System	1	EACH	50.00	40.00
<input type="checkbox"/>	128-MEM-RAM	128 MB Ram stick	1	EACH	0.00	0.00
<input type="checkbox"/>	100XLG	Green Phone 2	1	EACH	47.35	0.00
<input type="checkbox"/>	CORDG	Green Cord	1	Each	0.67	0.00
<input type="checkbox"/>	ELECTRIC PINK		1		0.00	0.00
<input type="checkbox"/>	GREEN BASE		1		0.00	0.00
<input type="checkbox"/>	12 FOOT		0		0.00	0.00

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 UoM 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 UoM 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.