



Price Level

Megan De Freitas - 2024-12-02 - Settings

Overview

Price Levels allow you to give specific [Customers](#) or [Customer Classes](#) special pricing.

To get started, select **Price Level** from the Settings menu.



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Price Level Type

Create a Price Level Type

To create a Price Level, click the **New Price Level Type** button in the upper left-hand corner of the screen.



The Price Level Type drawer will appear. Give your Price Level Type a name, and choose between Fixed Percentage and Per Item for Price Level Type.



Fixed Percentage sets a percentage of list price that will apply to all items on a sales document with this Price Level. This only works, though, if an item has a list price. Check out our [Inventory](#) documentation to learn more about creating items.

Per Item assigns a different price to specific items. This will override the list price for the item.

When you've finished entering your information, click **Save**.

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Edit a Price Level Type

To edit an existing Price Level Type, first select the Price Level Type from the list on the left-hand side of the Price Level Type window.



Once you've selected the Price Level Type you want to edit, make your changes in the

information fields on the right-hand side of the screen. If you selected Fixed Percentage in the Price Level Type dropdown, you can enter that percentage in this window.



If you selected Per Item, you can select the items that have special pricing with this Price Level. Click **New Line**, find the item, and enter the new price in the Amount column.



When you've finished making your changes, click **Save**.

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See it in Action

Price Level dropdowns appear in various places in SalesPad Cloud, including the New or Edit [Customer](#) drawers and on [Sales Documents](#).



Note: Price Levels on a customer card are automatically applied to sales documents created for that customer. Price Levels on a sales document (set either by the customer's Price Level or set separately by whoever created the sales document) apply to each line on a sales document. Sales document Price Levels can be overridden on the line-item level by adding the Price Level column and making changes there.



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