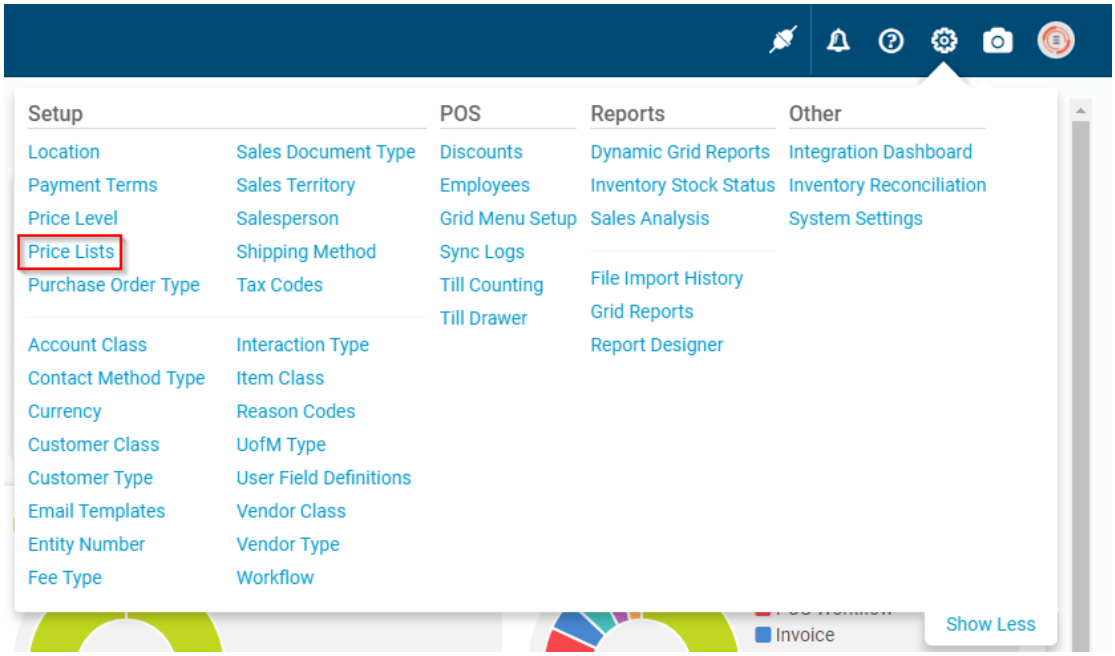
Price Lists

Cavallo Support - 2025-06-10 - Settings

Overview

Price Lists allow you to set up special pricing for certain customers during a specified time period.

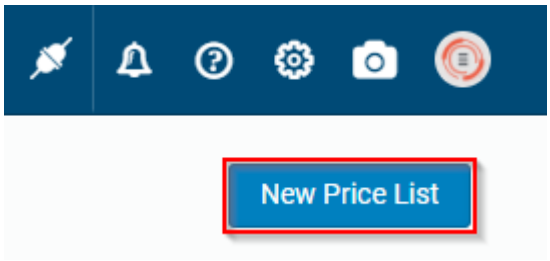
To get started, select **Price Lists** from the Settings menu.



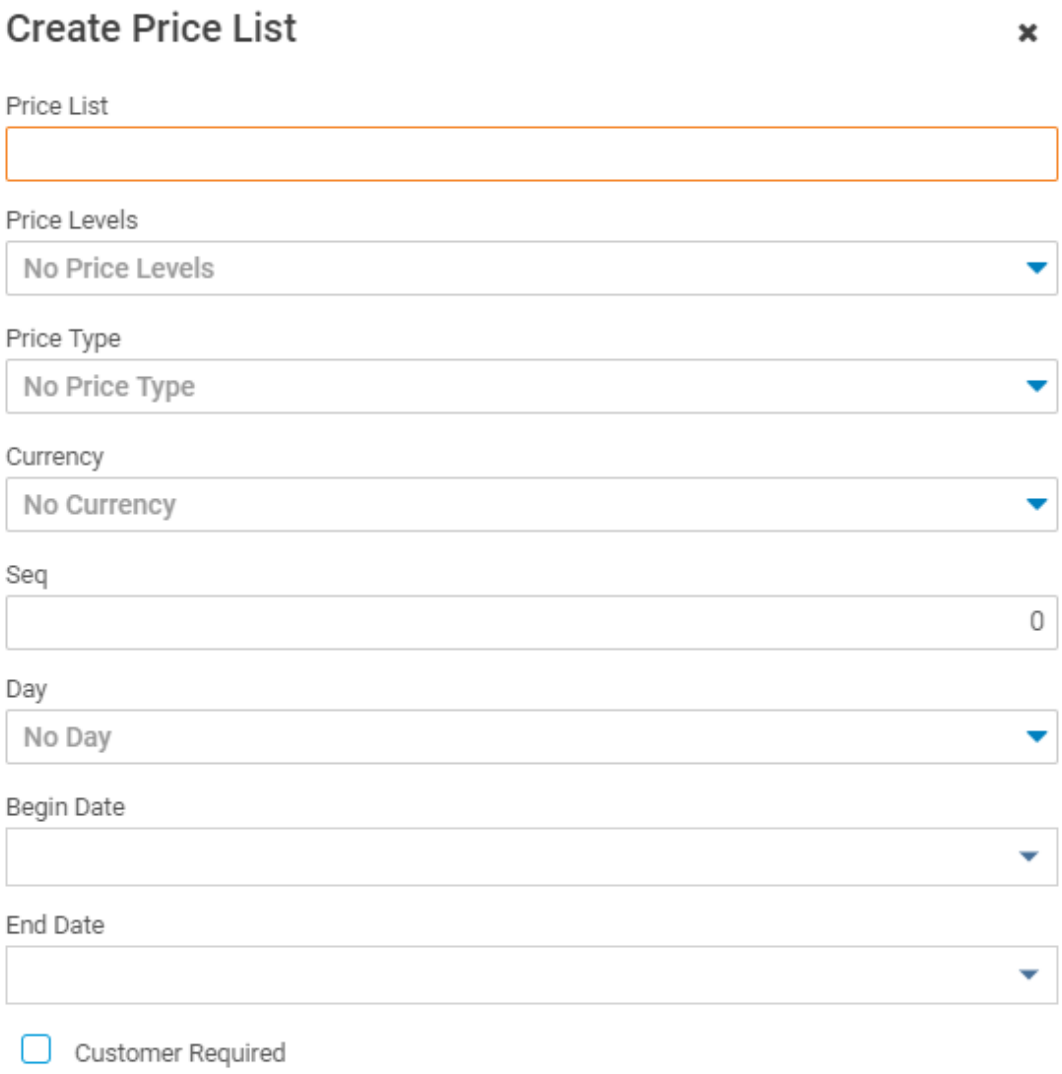
Price Lists

Create a Price List

To create a Price List, click the **New Price List** button in the upper right-hand corner of the screen.



The Create Price List drawer will appear. Fill in the information fields in this drawer.



For a brief explanation of the different information fields in the Create Price List drawer, click here:

Create Price List

Price List - Allows you to give the Price List a name

Price Levels - Allows you to choose a Price Level to use for this Price List

Price Type - Specifies whether this Price List is for a specific amount, a percentage, a discount amount, or a discount percentage

Currency - Specifies which currency this Price List is associated with

Seq - Indicates where on the list of Price Lists this Price List falls

Day - Indicates a day of the week in which this Price List is active

Begin Date - Indicates a start date on which the Price List is active

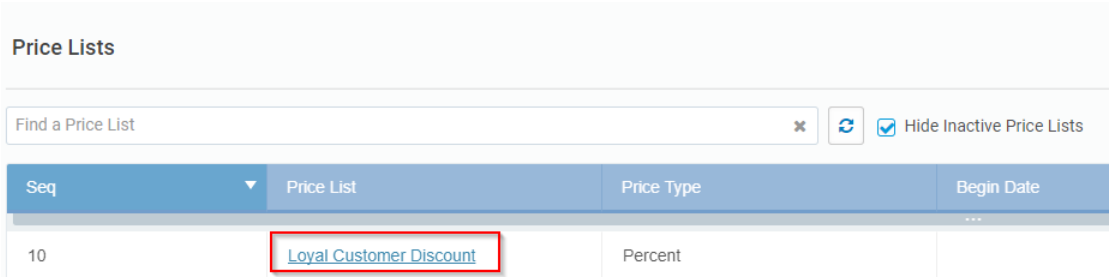
End Date - Indicates an end date on which the Price List ceases to be active

Customer Required - If checked, a customer must be present for the terms of the Price List to apply

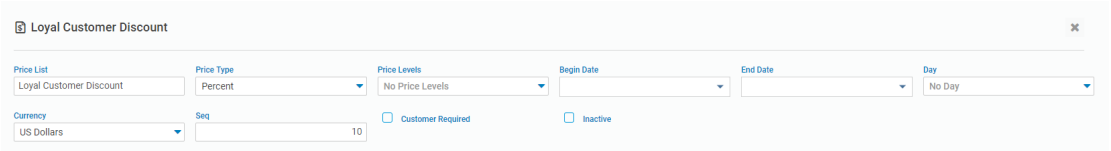
When you've finished entering your information, click **Save**.

Edit a Price List

To edit an existing Price List, select that Price List from the grid on the Price Lists screen.



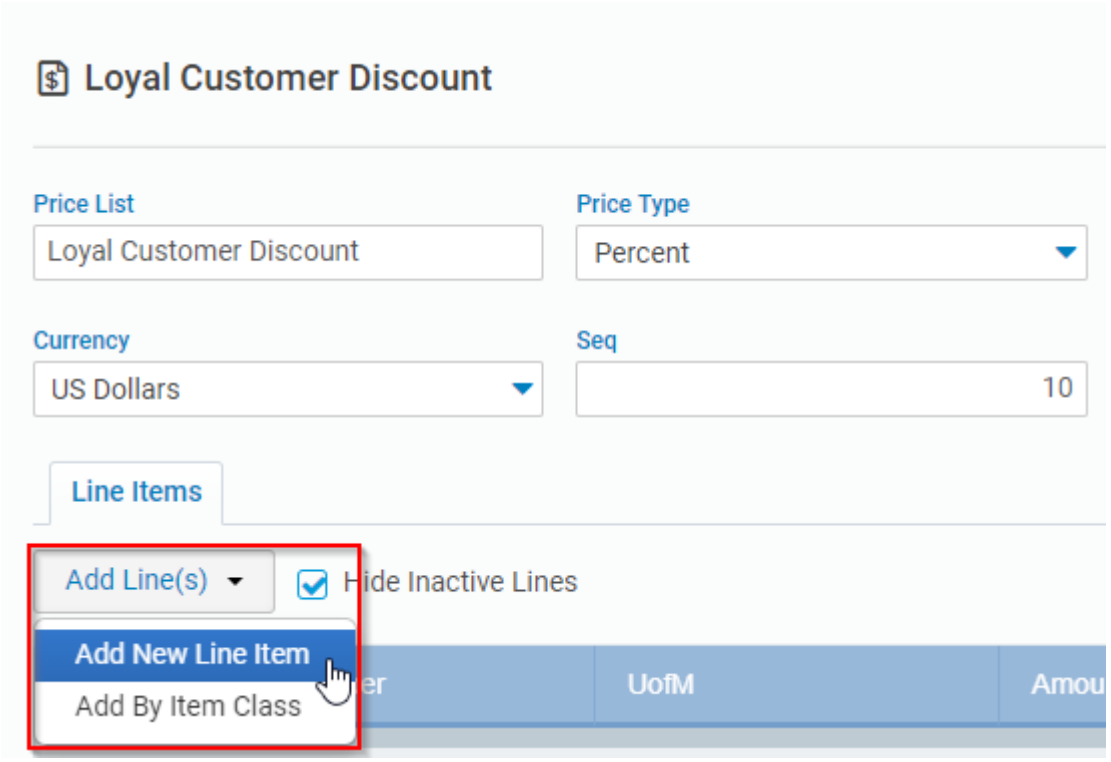
Once you've selected the Price List you want to edit, the Price List card will open. Make your changes in the information fields on this card.



Back to Navigation Menu

Add Specific Items to a Price List

If you want your Price List to only apply to specific inventory items, simply add those items to the Line Items tab on the Price List card. You can add items individually, or you can add all items from an Item Class.



See it in Action

Price Lists work behind the scenes. If the qualifications for a Price List are met, that Price List will automatically

be applied to a sales document.