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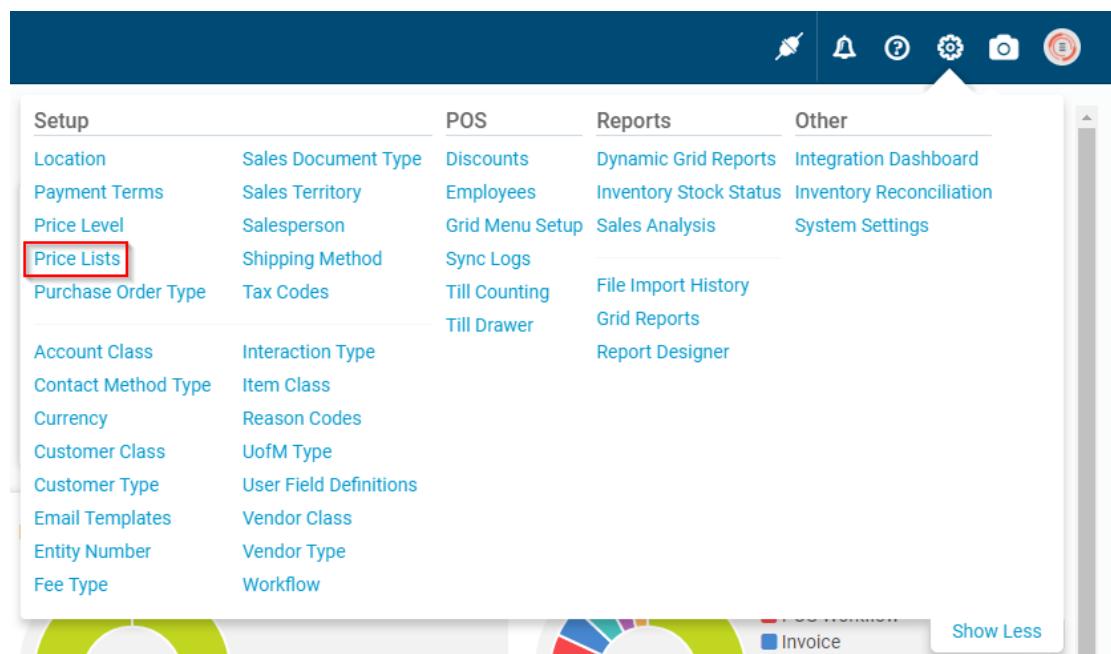
## Price Lists

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.

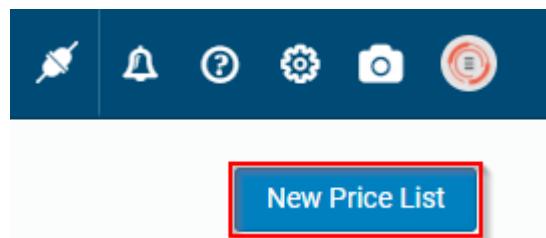


The screenshot shows the Cavallo Settings menu. The 'Price Lists' option is highlighted with a red box. The menu is organized into four main categories: Setup, POS, Reports, and Other. The 'Price Lists' option is located under the 'Setup' category. The 'Reports' category includes 'Dynamic Grid Reports' and 'File Import History'. The 'Other' category includes 'Integration Dashboard', 'Inventory Reconciliation', and 'System Settings'. At the bottom of the menu, there are two buttons: 'Show More' and 'Show Less'. The 'Show More' button is currently active, showing the full list of categories. The 'Show Less' button is visible but inactive.

### 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 screenshot shows the 'Create Price List' drawer. At the top, there is a row of icons: a pen, a bell, a question mark, a gear, a camera, and a circular icon. Below this is a large blue button with the text 'New Price List' in white. The entire drawer has a light gray background.

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

## Create Price List

x

Price List

Price Levels

No Price Levels

Price Type

No Price Type

Currency

No Currency

Seq

 0

Day

No Day

Begin Date

End Date

Customer Required

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

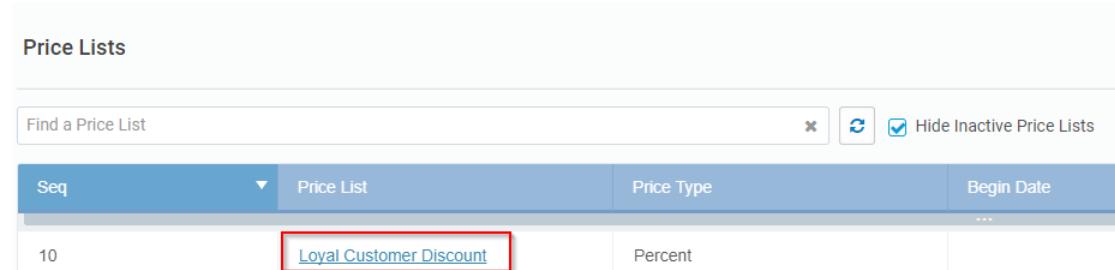
*End Date* - Indicates an end date on which the Price List ceases to be active

*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**.

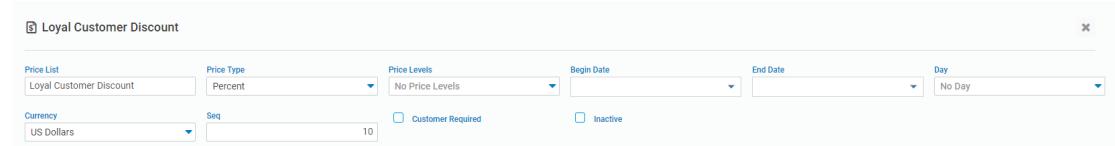
#### Edit a Price List

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



Seq	Price List	Price Type	Begin Date
10	<a href="#">Loyal Customer Discount</a>	Percent	

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.

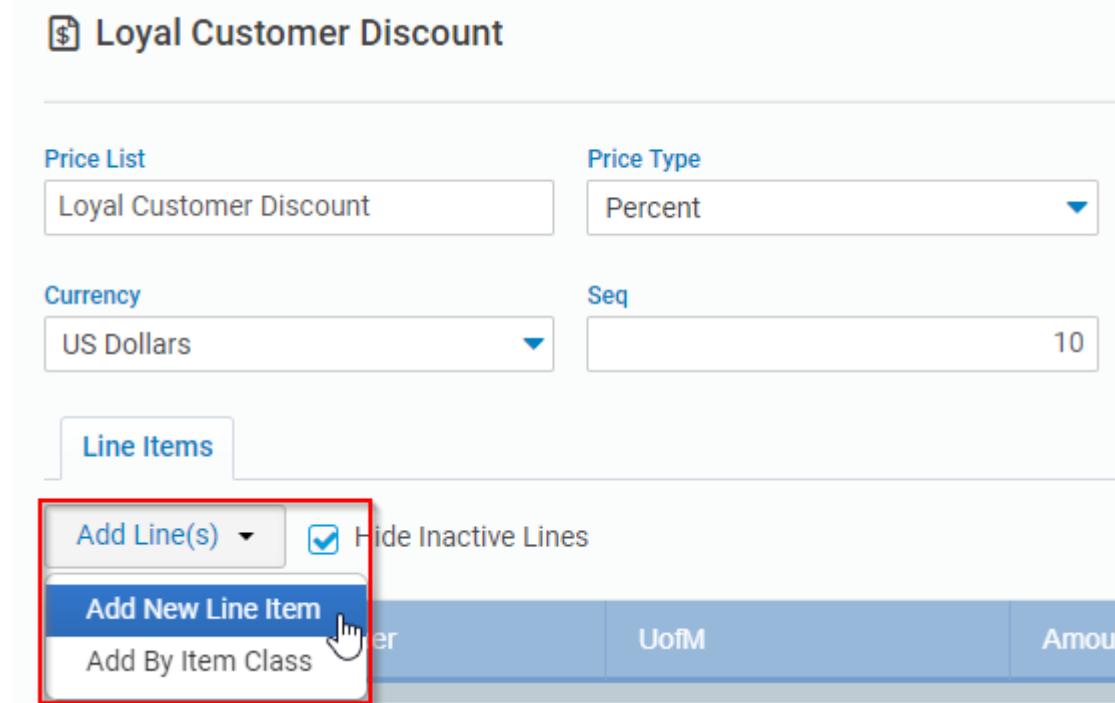


Price List	Price Type	Price Levels	Begin Date	End Date	Day
Loyal Customer Discount	Percent	No Price Levels			No Day
Currency	Seq	Customer Required Inactive			
US Dollars	10				

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#### 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.



Price List	Price Type
Loyal Customer Discount	Percent
Currency	Seq
US Dollars	10

**Line Items**

Add Line(s)  Hide Inactive Lines

Add New Line Item 

Add By 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.