



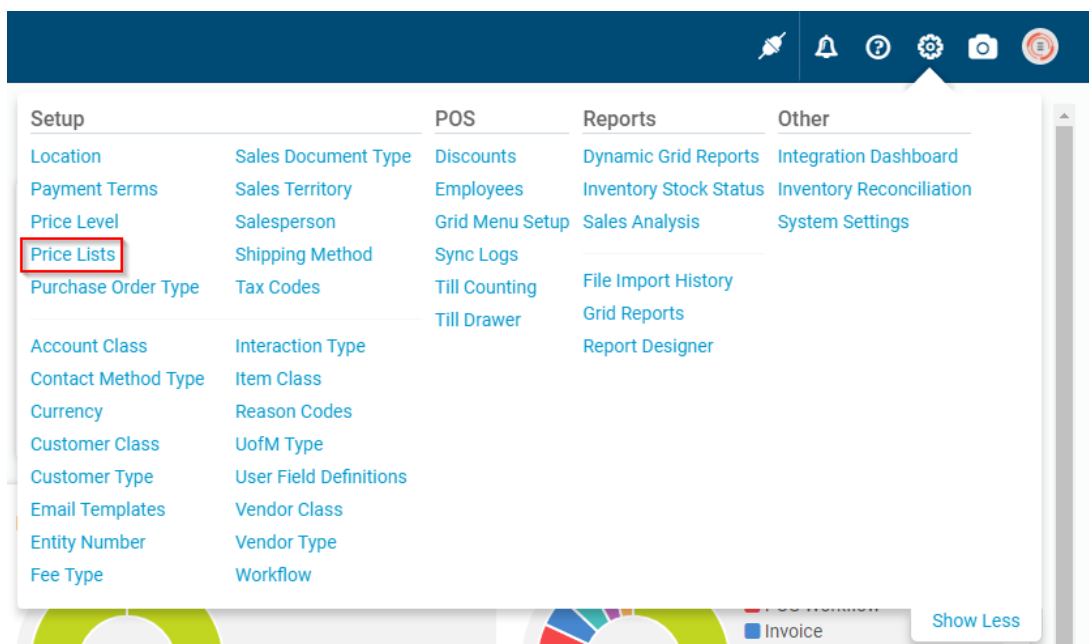
## Price Lists

Megan De Freitas - 2025-06-10 - Settings

### Overview

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

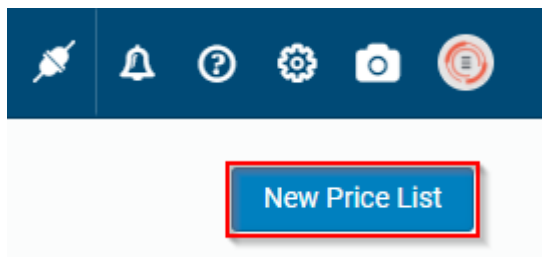
To get started, select **Price Lists** from the Settings menu.



### 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.

## Create Price List



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

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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.

Price Lists				
<div>Find a Price List <span>✕</span> <span>↺</span> <input checked="" type="checkbox"/> Hide Inactive Price Lists</div>				
Seq	Price List	Price Type	Begin Date	
10	Loyal Customer Discount	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.

Loyal Customer Discount ✕

Price List

Loyal Customer Discount

Price Type

Percent

Price Levels

No Price Levels

Begin Date

End Date

Day

No Day

Currency

US Dollars

Seq

10

☐ Customer Required

☐ Inactive

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.

Loyal Customer Discount

Price List

Loyal Customer Discount

Price Type

Percent

Currency

US Dollars

Seq

10

Line Items

Add Line(s)

Add New Line Item

Add By Item Class

☒ Hide Inactive Lines

er

UofM

Amou

#### 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.