

Price Levels

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The Price Levels profile list helps you set up and track discounts (reductions) and markups (increases) of your regular pricing for the goods and services you sell. With it, you can:

- Set up volume discounts so that customers can get a price break by buying in greater quantity.
- Give a special discount to a particular Customer Type.
- Temporarily adjust pricing in response to market conditions (e.g. a brief markup due to product scarcity).
- Do special time-intensive promotions on products or groups of products.
- Set prices for a specific currency.
- Set add-on prices, allowing your customers to purchase accessories or related items for a discount as part of a kit.

Just as with other profile lists, the list of current Price Levels is set to the left, with the actual fields on the right:

Commercial Industrial Door Replacement Special Kitchen Upgrade Package Pretell Real Estate Rates Government	Name: <input type="text" value="Relatives"/>	<input type="checkbox"/> Price Level is inactive
	Type: <input type="text" value="Customer Discount"/>	<input type="checkbox"/> Send to QuickBooks

Note, that when setting discounts and markups, you have a special button that lets you determine how percentage increases and decreases are rounded off. To globally set your rounding preferences, simply click the toolbar button called Rounding Pref.



Click the Copy button to duplicate an existing price level, then change the name to create a new price level.

Types of Price Levels

Depending on the Type you've chosen, however, the rest of the tab will vary greatly. There are nine kinds of price

level types:

- **Add-on Prices.** This is used when there's a kit on the sales order, and then additional items are added.
- **Company Wide.** The Company Wide price level applies a specified discount to the price after all other price levels have been applied. Only one 'Company Wide' price level can exist.
- **Currency Price.** A discount or markup can be applied to individual items when purchased in a different currency, often useful for off-setting the costs of international banking or keeping your prices more in line with local markets. This list references the **Currencies** profile list. **NOTE:** When currency prices are not set, All Orders will convert the standard price using the foreign exchange rate defined in the Currency Profile List.
- **Customer Discount.** The Customer Discount applies a specific discount (or markup) to the price after all item level price levels have been applied. The Customer Discount will be applied to all items' standard prices for a specific customer. Once created, go to the Customers List to apply a customer discount to a specific customer.
- **Customer Item By Percentage.** The Customer Item By Percentage is a list of percentage based markups or markdowns for all items for a specific customer. The Customer Item By Percentage allows more flexibility than the Customer Markup or Customer Discount, as a specific positive or negative percentage can be set for each item for a customer with the created price level. Once created, go to the Customers List to apply a customer price to a specific customer.
- **Customer Item Discount.** This is similar to the Customer Discount, except that you can set a percentage on a per Item Group basis. Additionally, this discount remains true to its name as a discount-only feature - you can only reduce the standard price, not raise it.
- **Customer Item Price.** The Customer Price is a list of prices for all items for a specific customer. The Customer Price allows more flexibility than the Customer Markup or Customer Discount, as a specific price can be set for each item for a customer with the created price level. Once created, go to the Customers List to apply a customer price to a specific customer.
- **Customer Markup.** The Customer Markup is a markup % that can be applied to the cost of an item for a specific customer. Once created, go to the Customers List to apply a customer markup to a specific customer.
- **Customer Pricing Group.** The Customer Pricing Group can be used to aggregate multiple customer specific price levels into a single price level which can be assigned to a customer. When finding a price for a customer, if more than one of the price levels in the group have an assigned price for a specific item, the group can select the price based on which one is the lowest, which one is the highest, or the last one found based on the order of the price levels in the group.
- **Item Markup.** The Item Markup is a markup % that can be applied to the cost of specific items. Only one Item Markup price level could exist.
- **Volume Discount.** The Volume Discount is a discount that can be applied to a subset of an item's from the company's inventory. By specifying a quantity minimum and maximum, all items included in the Volume Discount that fall into one of the quantity ranges will receive the discount specified by the appropriate range. For example, a Volume Discount is created that specifies a discount of 10% for quantities from 10 to 15 and 20% for quantities from 16 to 20. If the item "Screw" is added to the new Volume Discount and 13 are shipped, that item may have a 10% discount applied to it. **Important** - Each item in a company's

inventory can only exist on a single price level at a time.

How All Orders Applies Price Levels

When All Orders applies pricing to Items, it follows the following routine:

Discount that apply to all customers and all items

This Price Level will item prices by %

Working with the Price Levels fields

For example, if doing an across-the-board discount, you're likely to encounter only a few fields:

Specific prices per item

<input checked="" type="checkbox"/>	Name/Number	Description	Standard Cost	Standard Price	New Price
<input type="checkbox"/>	Cabinets	Cabinets	0.00	0.00	0.00
<input type="checkbox"/>	Cabinets:Cabinet Pulls	Cabinet Pulls	0.00	0.00	
<input checked="" type="checkbox"/>	Cabinets:Light Pine	Light pine kitchen cabinet wall unit	1,500.00	1,799.00	1,709.10
<input type="checkbox"/>	Door Frame	standard interior door frame	12.00	0.00	
<input type="checkbox"/>	Hardware		0.00	0.00	0.05
<input type="checkbox"/>	Hardware:Brass hinges	standard interior brass hinge	3.00	0.00	
<input type="checkbox"/>	Hardware:Doorknobs Std	Standard Doorknobs	27.00	30.00	
<input checked="" type="checkbox"/>	Hardware:Lk Doorknobs	Locking interior doorknobs	34.95	38.00	36.20
<input type="checkbox"/>	Wood Door	Doors	0.00	0.00	
<input type="checkbox"/>	Wood Door:Exterior	Exterior wood door	105.00	120.00	
<input type="checkbox"/>	Wood Door:Interior	Interior wood door	60.00	72.00	
<input type="checkbox"/>	Appliance		0.00	0.00	
<input type="checkbox"/>	Cabinets - Custom		0.00	0.00	
<input type="checkbox"/>	Counter	Custom made counter top	1,750.00	1,999.99	

Check All

Adjust price of marked items to be % than its

Round to the nearest Rounding Direction

Just choose whether will increase or decrease, and by what percentage, and you're done. If, however, you're discounting certain products and not others, a much more complicated block of fields will appear:

You first need to select the item(s) to which you want to apply the special pricing by clicking to the left of item's name/number. A green checkbox will appear. For each item, you then need to specify the discount or markup that applies. This can be done in one of two ways:

1. If you have an exact dollar figure in mind, just click once in the New Price field and enter an amount.

OR

2. If you prefer a percentage of the Standard Price, actual Cost, or Current Custom Price, just enter a percentage into the field marked "Adjust price of marked items to be..." and then specify Lower (for a discount) or Higher (for a markup). If you wish to round off the new prices, select the nearest unit of currency you wish to round to (cent, dime, dollar, etc.), and then choose a rounding direction (Up, Down, or Nearest). While rounding preferences can be set globally (see the Rounding Pref. button), these rules apply only to the current Price Level.

Each price level can also be assigned starting and ending dates. This allows the user to "set it and forget it." Say there is promotional pricing that will be giving for a specific month of the year. That price level can now be setup

well in advance with the correct starting and ending dates preventing it from being used when it is not available.

Finally, a word about setting volume discounts. When you choose Volume Discount as your price level type, you'll provided a window that looks like this:

From	To	Discount %	Delete
1	4	0	<input type="checkbox"/>
5	14	5	<input type="checkbox"/>
15	49	7	<input type="checkbox"/>
50	99	10	<input type="checkbox"/>
100	199	15	<input type="checkbox"/>
200	And Above		<input type="checkbox"/>

To fill it in, simply click in the first "From" field, and enter the minimum quantity for your first discounted pricing tier. Then enter a discount percentage. Repeat to fill in the rest of your pricing tiers. Note that the "To" fields will automatically fill themselves in as you go. You can remove a tier at any point by clicking its delete button (), and the previous tier's "To" field will self-adjust to take up the slack.

Once you've set up your tiers, click the Apply to Items button just below this table to select those Items to which you want to apply the volume discount.
