# Sage BusinessVision v2015 User Manual volume 2 of 2

## 7 <u>CUSTOMPACK</u>



This dynamic BusinessVision add-on consists of 5 powerful elements: Customer Specific Pricing, WorkBook, Mail Merge, Document Linking, and SuperTicker. Together with BusinessVision32, these packets create an environment for unlimited reporting, pricing, and referencing capabilities.

#### **Activation**

System Setup > Company > CustomPack

click on the Active check box to turn on:

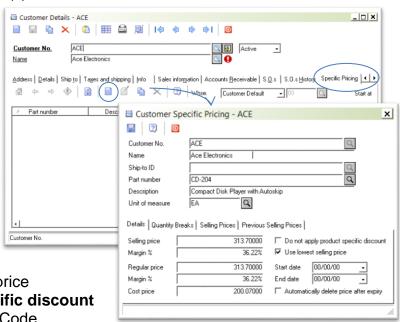
- Customer Specific Pricing
- Document Linking
- additional optional components:
  - SuperTicker
  - Mail Merge
  - WorkBook
- Workbook required check which module(s) require mandatory completion of one or all of any workbook fields created (explained later in this chapter). For example, If the Customer module is checked, no person can save a new customer record without first filling in (one of) the workbook field(s) in that module.

#### System Setup System Setup Seguence no. ☑ SuperTicker Tax info CustomPack Mail Merge e-Commerce ₩ WorkBook Payment processi System default address WorkBook required Multi currency General Ledger General Ledger Customer Invertory Vendor Order Entry Purchase Order Bill of Material Employee Job Cost Product Code Territory Code Landed cost File names Variable names General settings (4) General Ledger Inventory ₩ Vendor Sales order Purchase order Territory Code User Details Division Salespeople Salespeople Sales tax Ship Via Close

### **Customer Specific Pricing**

Customer Specific Pricing can be viewed and maintained in 3 areas:

- Customer Details module select your customer, click on the Specific Pricing tab, and enter pricing in one of two ways:
  - a. New price
    - type in or browse for the Part number
    - overwrite the Selling price or enter the Margin to populate the new Selling price
    - Do not apply product specific discount
      - this relates to the "Product Code



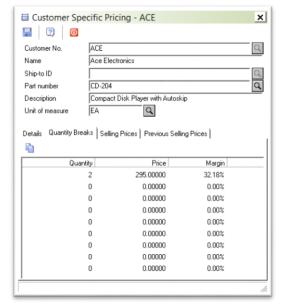
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Discounts" explained in **Inventory**, chapter 5 of the Section 1

- Use lowest selling price if there are any discounts for this customer or for this inventory item, in the form of product specific discounts, quantity discounts, or special prices, they may result in a price that's lower than the customer specific price you're setting up. If you want the customer to always get the lower price, check this box; otherwise, they will always get the Customer Specific price, no matter what.
- Start / End date this function allows to time this specific price
- Automatically delete price after expiry once the price expires based on the End date, the system stops using it, but it stays in the Customer Specific Pricing file as a previous selling price, unless this box is checked; in which case, the price will be deleted from the system
- Quantity Breaks set lower pricing for higher quantities
  - click on Add
  - enter the Quantity and the Price or enter the Margin to populate the Price
  - o click on OK
  - Copy existing this will copy the existing quantity break prices from the Inventory details for this item
  - when all quantity breaks are established, click on **OK**
- Selling Prices displays all 20 current selling prices for the item
- Previous selling prices displays a history of prices for this item that have been given to this customer in the past
- to save all Customer Specific Price settings, click on Save



### b. Copy Price 🗓

- in the Customer Pricing tab, click on the Copy icon
- select the Customer you wish to copy the prices from
- select from the copy options
- click on Copy



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Inventory Details - 00-CD-204

6 ← → ◆ 1 1 ×

Description

Part number

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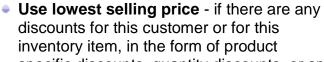


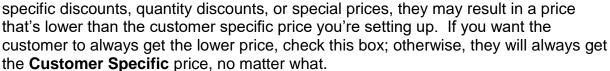
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#### 2. Inventory Details module:

- click on the Customer Pricing tab
- click on New
- type in or browse for the Customer
- overwrite the Selling price or enter the Margin to populate the new Selling price
- Do not apply product specific discount - this relates to the Product

Code Discounts explained in **Inventory**, chapter 5 of the Section 1 Training Manual.





Details | Unit of Measure | Pricing | Extended | Info | Summary | Image | S.O.s | S.O.s History | P.O.s | P.O. History | Receipts Customer Pricing | 1 - 1

Customer Specific Pricing - CD-204

Ace Electronics

Details | Quantity Breaks | Selling Prices | Previous Selling Prices |

Q

313 70000

313.70000 Do not apply product specific dis

Start date 00/00/00

200.07000 Automatically delete price after expiry

36.22% ▼ Use lowest selling price

36.22% End date 00/00/00

CD-204

Customer No.

Name

Ship-to ID

Part number

Description

Margin %

Margin %

Cost price

Regular price

Unit of measur

Compact Disk Player with Autoskip

Start / End date - this function allows to time this specific price

Automatically delete price after expiry - once the price expires based on the End

date, the system stops using it, but it stays in the Customer Specific Pricing file as a previous selling price, unless this box is checked; in which case, the price will be deleted from the system

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