7 *CUSTOMPACK*

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.
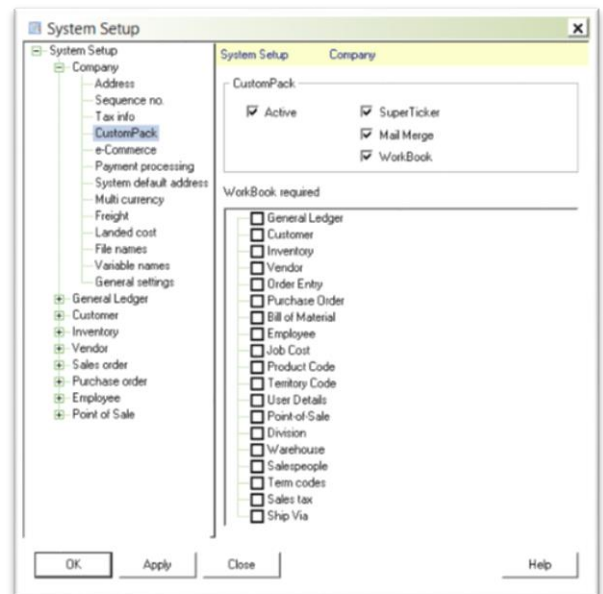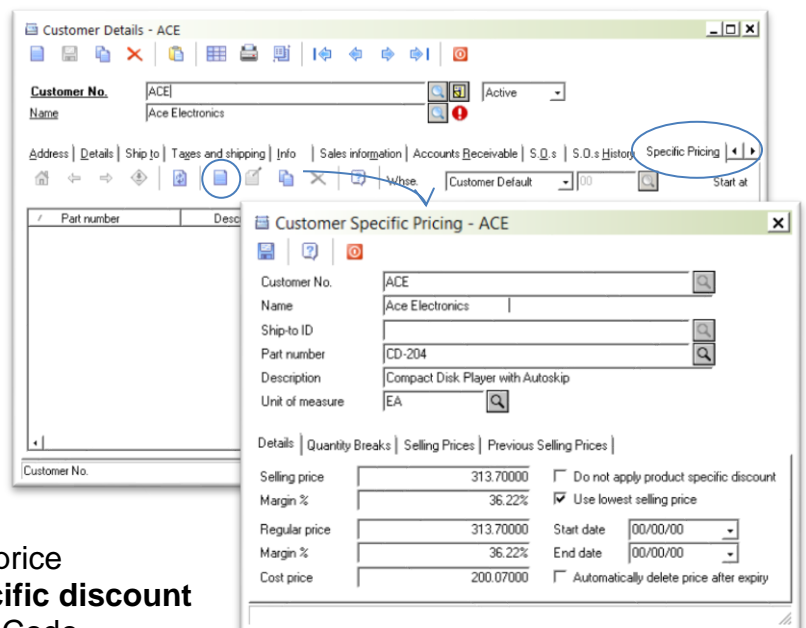
Customer Specific Pricing

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

1. **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
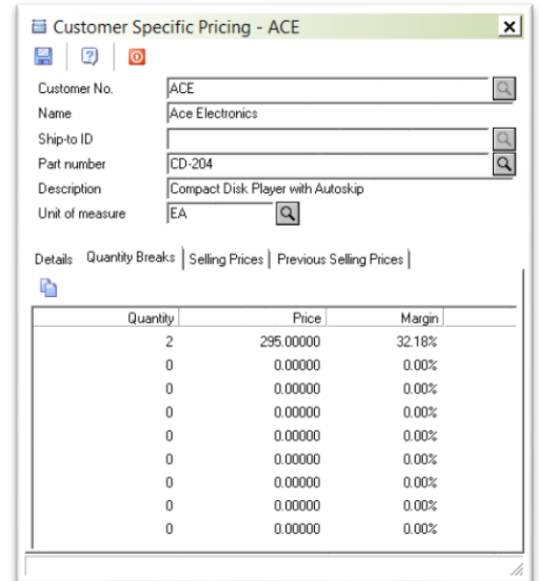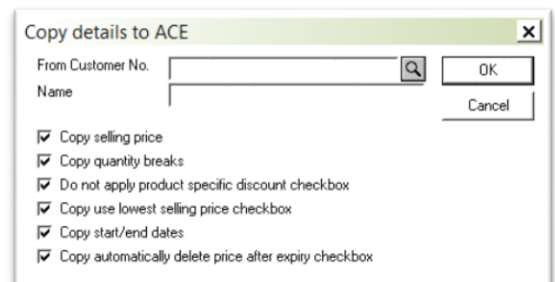
7   *CUSTOMPACK*

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**
  - 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
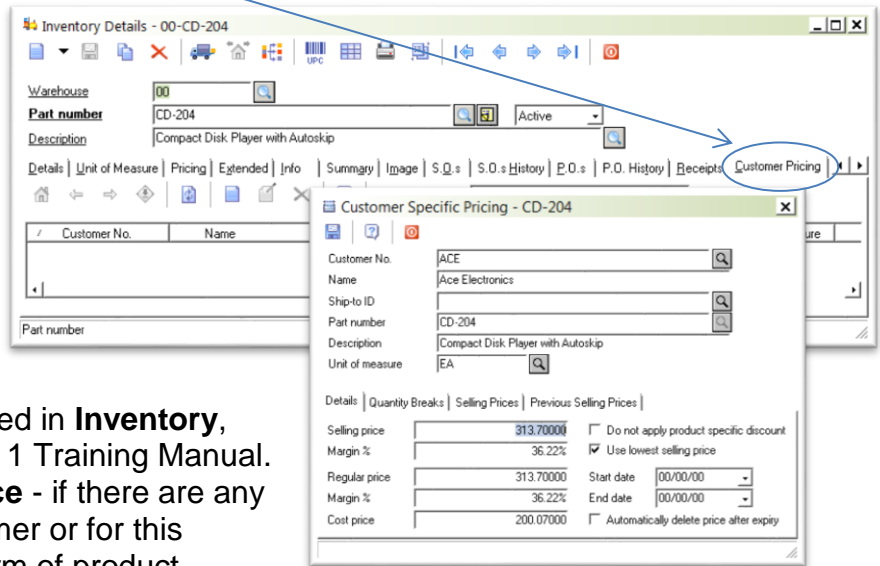 - click on **Copy**

7 *CUSTOMPACK*

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.
- **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
  - o click on **Add**
  - o enter the **Quantity** and the **Price** or enter the **Margin** to populate the **Price**
  - o click on **OK**
  - o **Copy existing** - this will copy the existing quantity break prices from the Inventory details for this item
  - o when all quantity breaks are established, click on **OK**