

# HOW TO ENTER CUSTOMER PRICING FOR AN ITEM KIT

## Entering Customer Pricing for an Item Kit

If you are returning to an item kit after having initially created the kit, from the Product Switchboard, click Edit Product. Then, click the **Edit** button to open the Item Kit form, and click the **Customer Pricing** tab.

Using the Customer Pricing tab in the Item Kit form allows you to create the third tier of pricing in AdvancePro.

For more detailed information on the pricing structures in AdvancePro.

1. At the **Customer Pricing** tab, click **Create Pricing**.

The screenshot shows the 'Item Kit: Sample Kit 1' form with the 'Customer Pricing' tab selected. The form has several tabs: Serial #s, Commissions, Images/Hyperlinks, Cross Sellers, Product Information, Product Info, Pricing Info, Customer Pricing (highlighted), and Additional Info. Below the tabs is a 'Pricing Exceptions' section with a table for editing pricing. The table has columns for Company Name, Price \$, Markup %, Discount %, and Customer SKU. Below the table are buttons for Select All, Deselect All, Delete All, Delete, and Edit. A 'Create Pricing' button is highlighted in red at the bottom right of the table area. At the bottom of the form are 'Next' and 'Close' buttons.

2. The **Customer Pricing Exceptions** form will open. Select the customer or customers. You can search for customers using the search field up top and then clicking the **magnifying glass**. You can also select all customers or view them by group if desired.

The screenshot shows the 'Customer Pricing Exceptions' form. It has a title bar and a close button. The main content area has a heading 'Apply a special markup/discount to this Product per Customer.' and a sub-heading 'To begin, first locate the customer below.' Below this is a 'Product Info' section with fields for SKU # KIT-001, Base Cost Price \$ 1250.00, Product Name Sample Kit 1, and Base Selling Price \$ 600.00. Below the product info is a 'Select Customer' section with a search field (highlighted in red), a magnifying glass icon, a 'Select All' checkbox, and a 'Category' dropdown menu. Below the search field is a list of customers with checkboxes: All Fresh Vegetables, All Steak Buffet, Apparel Wear (highlighted in blue), Beautify, Beefy Grills, Beefy-Q, Boardz, and Chicken Deli. Below the customer list is a 'Pricing Info' section with a 'Customer SKU #' field, a 'Customer Markup/Discount' field with a percentage sign, a 'Calculate' button, and a 'Selling Price' field. There are also radio buttons for 'Apply Discount' (selected) and 'Apply Markup', and a 'Lock' checkbox. At the bottom of the form are 'Add Pricing' and 'Close' buttons. A footer note states: 'Markup % is added to COST price of products' and 'Discount % is applied to SELLING price of products'.

3. Indicate whether the exception is a discount of the selling price or markup of the cost using the radio buttons on the right.

Discount applies to the selling price and markup applies to the cost.

4. You can either:

- Enter a **price** first and click **Calculate** to determine the discount
- Enter the **discount** and AdvancePro will automatically calculate the price.

5. If desired, create a specific customer SKU.

6. You can also **lock** the price, meaning that it can be changed against future changes of cost price

7. When done, click **Add Pricing**. Repeat this process for as many customer pricing exceptions as you need to create.

Customer pricing exceptions will appear at the **Item Kit > Customer Pricing** tab. To edit an exception, select it and click **Edit**. The Pricing Exceptions form will open and you can edit it following steps above.

To delete an exception, select it and click **Delete**. To delete all exceptions, click the **Delete All** button or click **Select All** and then **Delete**.

8. On the Customer Pricing tab, click **Next** to continue or simply **close** the form.