# Custom Pricing Templates - How To's

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## Overview

Custom Pricing Templates allow you to create reusable pricing rules that can be assigned to multiple customers.

A template can be used when multiple customers have similar pricing requirements. Instead of creating the same pricing rules for each customer individually, create the rules once in a template and assign the template to the appropriate customers.

## How Custom Pricing Works

1place pricing uses several components that work together:

**Item Price Levels** define predefined pricing levels that can be used when pricing items.

**Pricing Categories** group similar items together for pricing purposes.

**Custom Pricing Templates** define how items or groups of items should be priced.

**Customers** are assigned the appropriate Custom Pricing Template.

The overall process is:

**Item Price Levels**

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**Pricing Categories**

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**Assign Pricing Categories to Items**

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**Create Custom Pricing Template**

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**Add Pricing Rules to Template**

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**Assign Template to Customers**

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**Test Pricing**

# 1. Set Up Item Price Levels

Item Price Levels are predefined pricing levels that can be used when pricing items.

Examples of Price Levels include:

- Retail
- Wholesale
- Dealer
- A
- B
- C

The names of the Price Levels can be customized to fit the company's pricing structure.

## To access Item Price Levels:

**Settings → Items → Item Settings → Item Pricing Levels**

Item Price Levels can be used as a customer's Default Pricing Method or within Custom Pricing.

# 2. Create Pricing Categories

Pricing Categories are used to group items together for pricing purposes.

For example, a company could create categories such as:

- Bumpers
- Headlamps
- Fenders
- Toyota Bumpers
- Items within a specific cost range

A Pricing Category does not represent a price. It identifies a group of items that can later be assigned a pricing rule through Custom Pricing.

### To create a Pricing Category:

1. Open an **Item Detail** record.
2. Click the **Financial** tab.
3. Locate the **Pricing Category** field.
4. Click the **magnifying glass** next to the Pricing Category field.
5. Create a unique Pricing Category name.

# 3. Assign Pricing Categories to Items

After creating the Pricing Categories, assign the appropriate category to each item.

## Assign a Category to an Individual Item

1. Open the **Item Detail** record.
2. Click the **Financial** tab.
3. Select the appropriate **Pricing Category**.

## Assign Categories to Multiple Items

For a large number of items, the source documentation describes using an Excel export and the Item Import Wizard:

1. On the **Item List** screen, export the items to Excel.
2. Add a column for the Pricing Category.
3. Enter the appropriate Pricing Category for each item.
4. Use the **Item Import Wizard** to update the items.
5. Make sure each Pricing Category in the spreadsheet matches an existing Pricing Category in 1place.

# 4. Create a Custom Pricing Template

Once the required Pricing Categories and items are set up, create a Custom Pricing Template.

### To create a template:

**Main Menu → Sales → Pricing Templates**

1. Click **New**.
2. Enter the **Template Name**.
3. Enter the **Description**.
4. Click **Save**.

A **Pricing Table** will appear below the template information.

Examples of templates could include:

- Large Customers
- Small Customers
- Dealer Customers
- Wholesale Customers

# 5. Add Pricing Rules to the Template

The Pricing Table defines how the items will be priced.

A template can contain pricing rules based on:

- **Pricing Category**
- **Specific Item**
- **Price Level**
- **Discount**
- **Markup**
- **Multiplier**
- **Specific Price**
- **Quantity Ordered From**
- **Quantity Ordered To**

## Example

A **Large Customers** template could contain:

| Pricing Category | Pricing Rule |
|---|---|
| Bumpers | 40% Markup |
| Headlamps | 35% Markup |
| Fenders | 30% Markup |

A **Small Customers** template could use different pricing for the same categories:

| Pricing Category | Pricing Rule |
|---|---|
| Bumpers | 50% Markup |
| Headlamps | 45% Markup |
| Fenders | 40% Markup |

This allows the same groups of items to be priced differently depending on the customer's pricing arrangement.

# 6. Assign the Template to Customers

After the Custom Pricing Template has been configured, assign it to the customers who should use those pricing rules.

The source documentation indicates that the template is assigned from the **Customer Detail → Custom Pricing** area.

> **Note:** The source does not provide enough detail to document the exact clicks for assigning a template to a customer. Confirm the current 1place screen before adding the detailed procedure.

# 7. Test the Pricing

After assigning a template to a customer, create a test Quote to verify that the pricing is being calculated correctly.

For example:

- Item Cost: **$12.50**
- Pricing Category: **010**
- Customer Template: **Small Customers**
- Markup: **50%**

Expected price:

**$12.50 × 1.5 = $18.75**

The source documentation uses this example to demonstrate testing a Pricing Template.

# Important: Default Pricing vs. Custom

# Pricing

Each customer has a **Default Pricing Method** that determines how items are normally priced.

Default Pricing Methods include:

- Item List Price
- Discount
- Multiplier
- Markup
- Item Price Level

Custom Pricing provides exceptions to the customer's Default Pricing Method.

When Custom Pricing is configured for an applicable item or group of items, it overrides the customer's Default Pricing Method.

## Example

A customer could have:

**Default Pricing:** 20% Discount

But their Custom Pricing Template could specify:

**Bumpers:** 30% Discount

The Custom Pricing rule for Bumpers overrides the customer's normal 20% Discount for those items.

# Pricing Structure

The Custom Pricing process consists of the following components:

- **Item Price Levels** — Define available pricing levels.
- **Pricing Categories** — Group items for pricing purposes.
- **Custom Pricing Templates** — Define pricing rules for items or item groups.
- **Customers** — Are assigned the appropriate Custom Pricing Template.
- **Sales Transactions** — Apply the applicable pricing rules when calculating item prices.