How Item Pricing works in 1place (High Level)

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How Item Pricing works in 1place (High Level)

1place provides numerous ways to price items (or groups of items). The following is a list of the various tools that can be used to automate price calculations on the **Find Parts**, **Quotation**, **Sales Order**, **Invoice**, and **Credit Memo** screens.

- Each **item** has an **Item List Price** field. Note: You can find this on **Item Detail** screen > **Financial** (tab) > **Pricing** (section).
  - The **Item List Price** is typically the 'highest' price or the 'Retail' price for the item.
  - By default when an item is added to a Quote, Sales Order, Invoice, or Credit Memo the **Item List Price** is inserted. The EXCEPTION is if the Customer Detail record has a different price (on the Customers' **Custom Pricing** table) or if the Customer has a **Default Pricing Method** .
- Each **item** can also be given an unlimited # of additional **Item Price Levels**.
  - **Item Price Levels** can be any given name of your choice, such as 'A', 'B', 'C', 1, 2, 3, Wholesales, Retail, or ANY other name you desire to identify the price level.
  - **Item Price Levels** can be assigned as the **Default Pricing Method** for any 1 or more customers.
  - **Item Price Levels** can also be used in Customers' **Custom Pricing** settings (and ' **Custom Pricing** 'templates').
  - Note: To set your **Item Price Levels** (that will appear on the drop down lists when selecting), go to **Settings** > **Items** > **Item Settings** > **Item Pricing Levels** (section).
- Each **item** can also be assigned to **Pricing Category**.
  - This allows you to categorize, (for pricing purposes), 'groups' of items by item type (such as Bumpers, Fenders, Headlamps, etc) or by 'cost' (such as 010-020 if the item cost is between $20-$30, etc).
  - As explained below, you can then select 1 or more of these categories on any Customer's **Custom Pricing** table and price all items in the **Pricing Category** with a particular Discount, Markup, etc...
- Each **Customer** record has a **Default Pricing Method** (field) that can be set to automatically generate each item price (when the item is added to a Quote, Sales Order, Invoice, or Credit Memo). **Default Pricing Methods** include:
  - X Discount off the **Item List Price**.
  - X Multiplier of the **Item Cost**.
  - X Markup above the **Item Cost**.
  - X **Item Price Level**.
  - Item List Price. (This will automatically set all prices quoted for the Customer to the **Item List Price**.
- Each Customer record also has a Custom Pricing table that serve as EXCEPTIONS that always OVER-RIDE the **Default Pricing Method** for any given specific part or groups of parts.
  - The **Custom Pricing** table can have individual items or groups of items (grouped by **Pricing Category**) to

make it quick and easy to assign a particular Discount, Markup, Multiplier, or Item Price Levels to 1 or more unique items or groups of items.
    - If you price items in a similar way for many customers, based on their size or sales volume you can save even more time by creating Custom Pricing 'templates' (containing 1 or more items or **Pricing Categories**) which can be easily assigned (and updated) for 1 or more Customers with a few clicks.

How to Create Pricing Categories

Why Use Item Pricing Categories?

Item Pricing Categories allow you to group similar items so you can apply the same pricing rules to an entire group instead of setting prices individually.

For example:

- You sell Bumpers and want all bumper items to have a selling price that is 40% above cost.
- You sell Headlamps and want all headlamp items to have a selling price that is 30% above cost.

Instead of manually remembering and setting different markups for each item, you can create **Bumpers** and **Headlamps** as Pricing Categories and assign each category to its corresponding items.

You can use the same approach for other item types, such as Fenders, Mirrors, and other auto parts.

How to Create Item Pricing Categories

1. Open any **Item Details** record either from **Item List** or by pressing **F10**.
2. Go to the **Financial** tab.
3. Click the magnifying glass icon next to the **Pricing Category** field.
4. Create a unique name for the **Pricing Category** (e.g., Bumpers, Headlamps, or Fenders).

How to Assign Pricing Categories to Items

You can assign Pricing Categories to items using either of the following methods:

Option 1: Assign Categories Individually

1. Open an **Item Details** record.
2. Go to the **Financial** tab.
3. Select the appropriate **Pricing Category**.

4. Click **Save**.

5. Repeat for each item.

Option 2: Assign Categories Using Excel and the Item Import Wizard

If you need to update multiple items, you can use Excel to assign Pricing Categories in bulk.

1. On the **Item List** screen, export all items to Excel.

2. Add a new column for **Pricing Category** to your spreadsheet.

3. Enter the appropriate Pricing Category beside each item. You can sort your items by type to make it easier to assign the same category to multiple items.

4. Once completed, update your items using either of the following methods:

    - Send the completed spreadsheet to your 1place Customer Support representative for assistance.

    - Use the **Item Import Wizard** and select the **Item Categories** option to import and update the Pricing Categories.

Important: Each Pricing Category entered in your spreadsheet must match an existing Item Pricing Category in 1place. Otherwise, the import may not process the category correctly.

How to Create Pricing Categories

- Why Item Pricing Categories?
    - Suppose you sell Bumpers and want to generate a price (on a Sales Order) that is 40% above your cost for ALL bumpers. Suppose you also sell Headlamps and you want to generate a sales price that is 30% above your cost for ALL Headlamps. Rather than having to remember those different markups, by item type, you can make a Pricing Category called Bumpers and then assign the Bumpers Pricing Category to ALL parts that are Bumpers. You can do the same type of thing for all Headlamps, and all Fenders, etc.
- To create item Pricing Categories:
    - Open any Item Detail record (F10) and click on the Financial tab.
    - Click on the magnifying glass button next to the Pricing Category field.
    - Create a unique Pricing Category name for each type of item.
- To Assign item Pricing Categories to an Item:
    - Option 1, open each item and select a Pricing Category.
    - Option 2, On the Item List screen export ALL of your items to Excel. Then insert a new column next to each item name and type the Pricing Category next to each same. (Hopefully you can sort your items in such a way to make it easy to drag (copy) the same Item Category to many of the same types of items in a matter of seconds). Then send the list to your 1place Customer Support rep, or use the Item Import wizard and select the Item Categories option to import ('update') each of your items with the Item Categories you assigned each item on your spreadsheet. (Note: Each Item Pricing Category must match an actual Item Pricing Category in 1place for it to import properly).

How to Set Up Custom Pricing for a Customer

- **Custom Pricing** allows you to set specific prices for a customer that differ from the default pricing.
- The adjusted prices are determined by the pricing rules defined in a custom pricing template, which are applied to your products or services.

How to Create a Custom Pricing Template

1. From the 1place dashboard, open the **Sales** module and select **Pricing Templates**.
2. Click **New**, then enter the **Template Name** and **Description**.
3. Click **Save**. The **Pricing Table** will appear below, where you can configure the pricing settings.

Parts of the Pricing table

The **Pricing Table** allows you to define how item prices are calculated for a customer. Below is a description of each field:

- **Pricing Category** - The item category or group to which the pricing rule applies (e.g., Bumpers, Fenders, Headlamps, etc.).
- **Specific Item** - Allows you to apply a pricing rule to an individual item listed in the Item List.
- **Price Level** - Allows you to select a predefined price level to apply to the selected items.
- **Discount (off List)** - The set Discount % that will be deducted off the List Price.
- **Markup (Above Cost)** - The set amount that will be added on top of the Item Cost.
- **Multiplier (off List)** - The set multiplier that will be deducted off the List Price.
- **Specific Price** - Allows you to assign a fixed selling price instead of using the item's List Price.
- **Qty Ordered (From)** - The minimum order quantity required for the pricing rule to apply.
- **Qty Ordered (To)** - The maximum order quantity covered by the pricing rule.
- **Actions** - Contains the X (Delete) icon used to remove a pricing category or its associated pricing settings from the table.

Note: Refer to the *How to Set Up Automated Pricing for Your Customers* section below for step-by-step instructions.

- **In Summary** - You can price items '**per Customer**' in any of the following ways:
  - Option 1: You can setup pricing for a Customer where **all** of your items will be set to the **Item List Price**.
  - Option 2: You can setup pricing for a Customer where **all** of your items will be set to **X Discount off the Item List Price**.
  - Option 3: You can setup pricing for a Customer where **all** of your items will be set to **X Multiplier of the Item List Price**.
  - Option 4: You can setup pricing for a Customer where **all** of your items will be set to **X Markup above the Item Cost**.
  - Option 5: You can setup pricing for a Customer where **all** of your items will be set to **X Item Price Level**.

- Option 6: You can setup pricing for a Customer where **1 or more groups of items** will be set to **X Discount off the Item List Price**.
- Option 7: You can setup pricing for a Customer where **1 or more groups of items** will be set to **X Multiplier of the Item List Price**.
- Option 8: You can setup pricing for a Customer where **1 or more groups of items** will be set to **X Markup above the Item Cost**.
- Option 9: You can setup pricing for a Customer where **1 or more groups of items** will be set to **X Item Price Level**.
- Option 10: You can setup pricing for a Customer where **a specific item** will be set to **X Discount off the Item List Price**.
- Option 11: You can setup pricing for a Customer where **a specific item** will be set to **X Multiplier of the Item List Price**.
- Option 12: You can setup pricing for a Customer where **a specific item** will be set to to **Markup above the Item Cost**.
- Option 13: You can setup pricing for a Customer where **a specific item** will be set to **X Item Price Level**.
- Option 14: You can setup pricing for a Customer where **a specific item** will be set to **X Specific Price.**
- Note: See How To instructions below (How to Setup Automated Pricing for your Customers).

How to Setup Automated Pricing for Your Customers

Item Pricing Option 1: How to Price ALL items to a Customer for the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Custom Pricing** tab then on the **Default Pricing Method** drop down list, select **Item List Price**. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the Custom Pricing table by clicking the X icon.

Item Pricing Option 2: How to automatically Price ALL items sold to a Customer for X DISCOUNT OFF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Discount**.
- Type in the **Discount %**. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the Custom Pricing table by clicking the X icon.

Item Pricing Option 3: How to automatically Price ALL items sold to a Customer for X MULTIPLER OF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.

- Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Multiplier**.
- Type in the **Multiplier %**. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the Custom Pricing table by clicking the X icon.

Item Pricing Option 4: How to automatically Price ALL items sold to a Customer for X MARKUP ABOVE the Item COST

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Markup**.
- Type in the **Markup %**. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the Custom Pricing table by clicking the X icon.

Item Pricing Option 5: How to automatically Price ALL items sold to a Customer for X ITEM PRICE LEVEL

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab then on the **Default Pricing Method** drop down list, select **Item Price Level**.
- Select the applicable **Pricing Level** by clicking on the drop down list. Click **Save**.
- Note: Make sure there are no other settings selected on the **Pricing** tab. If there are any, remove the record/s from the Custom Pricing table by clicking the X icon.

Item Pricing Option 6: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X DISCOUNT OFF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Pricing Category** by clicking the drop down list.
- Select the **Specific Item** by clicking the drop down list.
- Type in the **Discount %**. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 7: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X MULTIPLIER OFF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Pricing Category** by clicking the drop down list.
- Select the **Specific Item** by clicking the drop down list.
- Type in the **Multiplier %**. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 8: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X MARKUP ABOVE the Item COST

- Big Picture:

    - You can setup a combination of 'Item Pricing Groups that can be add to 1 or moreCustom Pricing Templates to sell certain items for certain prices (x Markup, or x Discount, etc)
- How to 'Setup' this type of pricing:
    - Make sure every Item has a Cost.
        - Item in Stock for x Cost.
        - Or, Item is OUT OF STOCK, but has a recent PO Cost for the Item (in 1place).
        - Or, Item is OUT OF STOCK, but has 1 or more Vendors (on the Item Vendors tab) on the item, that has a Cost.
        - Or, Item has an 'Average Cost' that can be used if none of the above are available.
        - Last of all, if no cost can be found, the LIST price of the item will be used.
    - Create a 'Pricing Group' for each 'type' of item you want to place into a 'group' for pricing purposes.
        - Some companies like to put all Bumpers in a Group called Bumpers
        - Some companies like to put all Bumpers for Toyotas in a Group called Bumpers-Toyota.
        - Some companies like to to all items that cost between $10-20 in a Group called 010.
    - Assign the proper group to every item in 1place.
        - This way, using the example above, when you sell an item in the 010 group, 1place can go look up the pricing for item in that group, for the exact customer you are selling the item to.
            - How To:
    - Create 1 or more 'Pricing Templates' so you can define the prices (per ItemPricing Group) PER CUSTOMER type.
        - Some companies might have a 'Pricing Template' called 'Large Customers'. Then they build the Pricing Template by selecting ALL of the Item Pricing Groups and defining a Discount % or Markup % or Specific 'Price Level' for THAT group of (Large) Customers.
        - Some companies might have a 'Pricing Template' called 'Small Customers'. Then they build (or copy/duplicate) another Pricing Template with the same set of Item Pricing Groups and select a lower Discount %, or Higher Markup %, or Lower 'Price Level' for THAT group of (Small) Customers.
            - How To:
                -
    - Last of all, each Customer needs to have a Pricing Template assigned to the Customer on the Customer Detail (screen) > Custom Pricing Tab.
        - How to:
            - Press **F3** to look up a Customer record.
            - Click on the **Pricing** tab.
            - On the **Custom Pricing** table, select the **Pricing Category** by clicking the drop down list.
    - Then you can create some Test Quotes.
        - Open the Find Parts screen.
        - Select any Customer that has the Small Customer template assigned to, and sell them a Part that has (using our example above) the Item Pricing Group of 010.
        - Assuming the item Cost $12.50, and assuming the Small Customer template has that 010 group with a 'Markup' of 50%, then the item NET PRICE should calculate out to: $18.75 ($12.50 x 1.5). (300% would be $12.50 x 3)

Item Pricing Option 9: How to automatically Price 1 or more GROUPS of Items sold to a Customer for X ITEM PRICE LEVEL

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Pricing Category** by clicking the drop down list.
- Select the **Specific Item** by clicking the drop down list.

- Select by clicking on the drop down list to choose the **Price Level**. Click **Save**.
- Note: Item Pricing Levels are defined and preset on **Settings**>**Items**>**Item Settings**>**Item Pricing Levels** (table).
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 10: How to automatically Price a SPECIFIC Item sold to a Customer for X DISCOUNT OFF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
- Type in the **Discount %**. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 11: How to automatically Price a SPECIFIC Item sold to a Customer for X MULTIPLER OF the ITEM LIST PRICE

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
- Type in the **Multiplier %**. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 12: How to automatically Price a SPECIFIC Item to a Customer for X MARKUP ABOVE the Item COST

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
- Type in the value (%) on the **Markup** column. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 13: How to automatically Price a SPECIFIC Item to a Customer for X ITEM PRICE LEVEL

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
- Select by clicking on the drop down list to choose the **Price Level**. Click **Save**.
- Note: Item Pricing Levels are defined and preset on **Settings**>**Items**>**Item Settings**>**Item Pricing Levels** (table).
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.

Item Pricing Option 14: How to automatically Price a SPECIFIC Item to a

Customer for X Specific Price

- Press **F3** to look up a Customer record.
- Click on the **Pricing** tab.
- On the **Custom Pricing** table, select the **Specific Item** by clicking the drop down list.
- Type in the value to set the price on the **Specific Price** column. Click **Save**.
- Note: Custom prices that are set on the Custom Pricing table over-ride the Default Pricing Method assigned to that particular customer.