

Items - Pricing How To's

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

High Level Item Pricing Concepts

- Each **Item** has an **Item List Price** field.
 - The **Item List Price** is typically the 'highest' price or the 'Retail' price for the item.
 - By default, (unless another pricing method overrides it) when an item is added to a **Quote**, **Sales Order**, **Invoice**, or **Credit Memo** the **Item List Price** is inserted.
 - Note: You can find this on **Item Detail** screen > **Financial** (tab) > **Pricing** (section)
- 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 a **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**, including:
 - **Discount**. Sell all items to the customer for x Discount off the **Item List Price**.
 - **Markup**. Sell all items to the customer for x Markup above the **Item Cost**.
 - **Multiplier**. Sell all items to the customer for x Multiplier of the **Item List Price**.
 - **Item Price Level**. Sell all items to the customer for x Price Level (such as the A price, or B price, etc)
 - **Item Price Level + Discount**. Sell all items to the customer for x Price Level (such as the A price, or B price, etc)+ x additional Discount.
 - **Item Price Qty**. Sell all items to the customer for x Price Level (based on the Qty purchased). If the Customer buys between 1-5 the price might be \$100. If between 6-10 the price might be \$90, etc.
 - **Item List Price**. Sell all items to the Customer for the **Item List Price**.
- Each **Customer** record also has a **Custom Pricing** table that can have pricing options that over-ride the Default Pricing Method.
 - 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 assign a Default Pricing Method to a Customer

- Open the **Customer** record.
- Click on the **Custom Pricing** (tab).
- Select a **Default Pricing Method**.

How to assign prices to a Customer (for individual items, or groups of items) that over-ride the Default Pricing Method for that Customer.

- Open the **Customer** record.
- Click on the **Custom Pricing** (tab).
- Select a Pricing Category, or an individual Item, and then select how you want to price that item or group of items.

Parts of the Pricing table

- **Pricing Category** - This is the category group that is linked to the items.
- **Specific Item** - The specific item or part listed in your Items List (that is available to be purchased by your customers) which will be defined in the Pricing Table.
- **Price Level** - A general type of pricing which you can define for all of your goods or services.
- **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 List Price.
- **Multiplier (off List)** - The set multiplier that will be deducted off the List Price.
- **Specific Price** - The specific amount to be set as the new price instead of the List Price.
- **Qty Ordered (From)** - The minimum quantity set for volume discounts.
- **Qty Ordered (To)** - The maximum quantity set for volume discounts.
- **Actions** - Contains the **X** icon (or delete icon) used when removing Pricing Item Categories and settings on the Pricing Table.

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 give a group of Customers the same prices

- After discovering how powerful the Customer Pricing options are for each customer, you may decide that you would like to create a **Custom Pricing 'Template'** that can be quickly assigned to all customers that are a particular type or size.

How to Create a Custom Pricing Template

- On the **MainMenuBar** (left pane section of the dashboard), click on **Sales > Pricing Templates**.
- Click on **New**, type in the **Template Name** and the **Description** of the template. Click **Save**.
- A table (called the **Pricing Table**) will show just below it where you can input the Price settings.

Ideas of How to Price Items 'Per Customer':

- Option 1: Sell all items for the **Item List Price**.
- Option 2: Sell all items for x **Discount** off the **Item List Price**.
- Option 3: Sell all items for x **Markup** above the **Item Cost**.
- Option 4: Sell all items for x **Multiplier** of the **Item List Price**.
- Option 5: Sell all items for x **Item Price Level**. (A price, or B price, etc)
- 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 **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).

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 **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 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 4: How to automatically Price ALL items sold to a Customer for X MULTIPLIER 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 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 added to 1 or more Custom 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 put 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 Item Pricing 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 MULTIPLIER 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.

Related Articles: [*How to Set Up Customer Prices*](#) / [*How to Automatically Price ALL Items Per Customer \(Based on the Item Cost\)*](#) / [*How to Automatically Price a Specific Item Sold to a Customer \(Based on the Item Cost\)*](#) / [*How to Auto Create Part 'Pricing Groups' \(Depending on the Type of Part\)*](#) / [*How to Auto Update Item List Prices in Mass \(For ALL Customers Using the Pricing Template\)*](#)
