How to Create and Use Item Pricing Categories

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Overview

Use **Item Pricing Categories** to group items that should follow the same customer pricing rule. For example, you can group bumpers together and apply a markup to that category for a customer.

You'll create a category, assign items to it, and use it in customer pricing.

Create a Pricing Category

1. Open an item's **Item Details** screen.
2. Select the **Financial** tab.
3. Click the **magnifying glass** beside **Pricing Category**.
4. Create a uniquely named category, such as **Bumpers** or **Headlamps**.

Assign the Category to Items

1. Open each applicable item and select **Financial**.
2. Choose its **Pricing Category** and click **Save**.
3. Repeat for the other items in the group.

For bulk assignments, update the items through the Item Import Wizard. Category names in the spreadsheet must match existing categories.

Use the Category in Customer Pricing

1. Open **Customer Details > Custom Pricing**.
2. Add the **Pricing Category** to the customer's pricing table.
3. Enter the applicable pricing rule, such as a discount, markup, or price level.
4. Save and test the result on a quote.

You can also use categories in a **Custom Pricing Template** and assign that template to customers.

Category-specific customer pricing takes priority over the customer's default pricing. A **Specific Item** rule takes priority over a category rule.

Example

Suppose **Bumpers** has a **40% markup above cost** for a customer. An item costing **$100** would sell for **$140**,

provided that this category rule is the applicable pricing rule.