How to Set a Default Pricing Method for a Customer

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Overview

Use the **Default Pricing Method** to tell 1place how to price items for a customer on sales transactions. For example, you can give a customer 10% off list price or use the prices set up for a **Wholesale** item price level. If an item has a matching rule in the customer's **Custom Pricing** table, 1place uses that rule first.

Steps

1. Open the customer's record in **Customer Details**.
2. Select the **Custom Pricing** tab.
3. Open the **Default Pricing Method** dropdown and select a method from the table below.

4. Complete the fields for the method you selected. For example, if you choose **Discount**, enter the discount percentage. If you choose **Item Price Level**, select the customer's level in **Pricing Level**.
5. Save the customer record.
6. Verify the result on a new quote or sales order for the customer. Use an item without a matching custom pricing rule so you can check the default method. If you selected an item price level, use an item with pricing set up for that level.

Default Pricing Methods

Method	How 1place calculates the price
Discount	Reduces the item's list price by the percentage you enter. A 10% discount on a $100 list price gives a price of $90.
Markup	Increases the item's cost by the percentage you enter. A 25% markup on a $60 cost gives a price of $75.
Multiplier	Multiplies the item's list price by the percentage you enter. A multiplier of 120% on a $100 list price gives a price of $120.
Item Price Level	Uses the price set up on the item for the customer's selected **Pricing Level**, such as Wholesale.
Item Price Level + Discount	Applies an additional discount to the price from the selected item price level.
Item Price Quantity	Uses item price level pricing based on the quantity ordered.
Item List Price	Uses the item's standard list price.

When a custom price applies

1place checks for a matching **Specific Item** rule first, then a **Pricing Category** rule. If neither applies, it uses the customer's **Default Pricing Method**. For example, if the customer's default is 10% off list price but a specific item has a fixed price of $85 in the customer's **Custom Pricing** table, 1place uses $85 for that item.

For an overview of how 1place calculates item prices and applies customer pricing rules, see How Item Pricing works in 1place (High Level).