How to Create & Use Pricing Templates

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Overview

Use a **Pricing Template** when multiple customers share the same pricing rules. For example, you can create a **Wholesale** template that gives customers 15% off bumpers and sets a fixed price for a specific headlamp. When you apply the template to a customer, 1place adds its rules to that customer's **Custom Pricing** table.

Steps

1. Create the template

1. Go to Sales > Pricing Templates.
2. Click **New**.
3. Enter a **Template Name** and **Description** that identify who should use the template.
4. Click **Save**. The pricing table appears below the template information.

2. Add pricing rules

1. In the pricing table, add a row for each rule. Choose a **Pricing Category** to cover a group of items or a**Specific Item** to price one item.
2. Enter the pricing value for that row, such as a **Price Level**, **Discount**, **Markup**, **Multiplier**, or **Specific Price**. If the rule applies only to certain order quantities, enter the range in **Quantity Ordered From** and **Quantity Ordered To**.
3. Review the rules before applying the template. For a category rule, confirm that the relevant items have that **Pricing Category** on the **Financial** tab of **Item Details**. For a price level rule, confirm that pricing is set up for the selected level on the items it covers.

3. Apply the template to a customer

1. Open the customer's record and select the **Custom Pricing** tab.
2. Choose the template in **Add Custom Pricing Template**, then click **Go**.
3. Review the rules added to the customer's **Custom Pricing** table.
4. Create a test quote for the customer and add an item covered by the template. Confirm that 1place calculates the expected price.

A **Specific Item** rule takes priority over a **Pricing Category** rule. If neither applies, 1place uses the customer's **Default Pricing Method**. For example, if a bumper lists for $100 and the template gives 15% off bumpers, the quoted price is $85. If the customer also has a **Specific Item** price of $80 for that bumper, the quoted price is $80.

4. Update a template already in use

1. Open the template in **Sales > Pricing Templates** and make your changes.
2. To apply those changes to customers assigned to the template, click **Update All Customers Using This Template**.
3. Open an affected customer's **Custom Pricing** tab and verify that the expected rules were updated.

If a customer has a negotiated price on a row added from the template, use the **padlock** under **Actions** on that customer's **Custom Pricing** tab to protect the row from future template updates.

For an overview of how 1place selects and calculates prices, see How Item Pricing works in 1place (High Level).