

# Create Price List

Create Price List makes it easy to create and send individualized price lists to customers.

Just open the program, select the customer, select a range of inventory items, and click the Load button to get item prices, then click the Save button to create a spreadsheet with the individual customer's prices. The program uses the customer's I/C price list selection, customer type, and contract pricing.

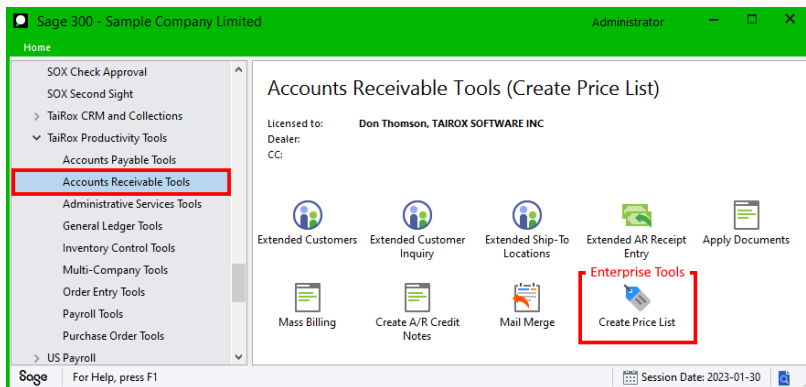
The program generates a spreadsheet with customer prices that you can edit, save, and send to the customer.

## Create Price List is a Productivity Tools Enterprise Program

Note that the Create Price List icon will appear only if you have an Enterprise License for TaiRox Productivity Tools.

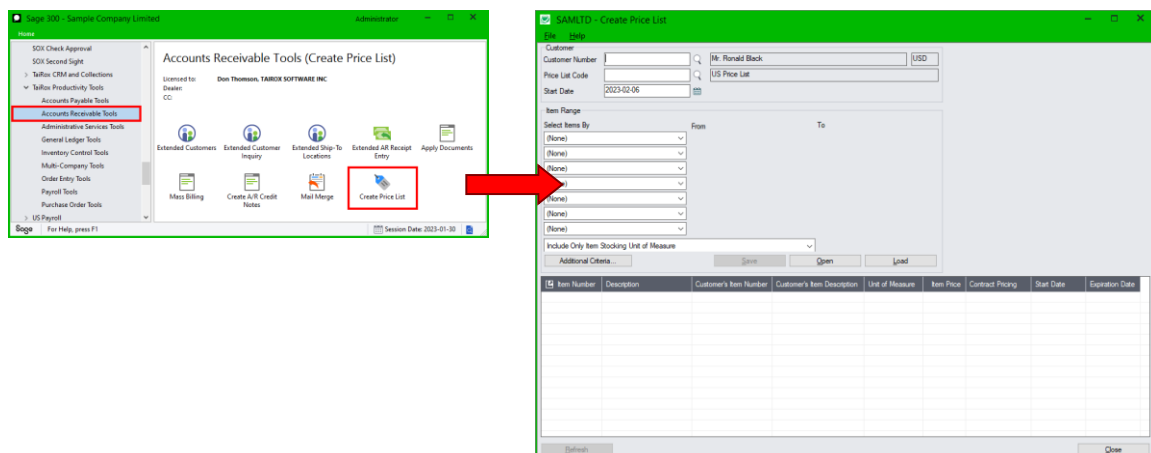
## Running Create Price List

The Create Price List icon appears under **TaiRox Productivity Tools > Accounts Receivable Tools** on the Sage 300 desktop and can be copied to other menu locations.



*Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.*

## Open TaiRox Productivity Tools > Accounts Receivable Tools > Create Price List



## Customer prices loaded by Create Price List

Create Price List loads and displays the customer prices for a selected customer and price list, taking into account the price list selection, the customer type, and any contract pricing that is available to the customer.

Note the following points regarding prices:

- The program uses the same logic as the Order Entry program to determine item prices for a customer.
  - It uses the customer price list code in the A/R customer account record by default; however, you can specify a different price list.
  - It provides contract pricing that is available on the “Start Date” that you enter.
  - It skips items that don’t have a price. (In Order Entry, the program would return an error message and let you enter a price.)

If you need to add an item that is missing a price, you can insert the item in the grid, or open a price list spreadsheet that already includes the item, and then use the Refresh button to refresh prices.
  - The program also lets you include only the stocking unit of measure in the price list, or list all units of measure.

The program provides “per unit of measure” prices. It does not list discounts based on volume.
- You can delete lines in the grid or insert inventory items into the grid that are missing.
- You can edit item descriptions, customer’s item numbers and descriptions, units of measure, item prices, and each items’ contract pricing status, start date, and expiry date.
- Click the Save button to save the price list options and items to a spreadsheet.
- Click the Open button to open an existing price list spreadsheet, and click the Refresh button to update the item pricing using the currently-selected customer options.

Open and Refresh lets you use saved spreadsheets as templates. You can open an existing spreadsheet, change the customer or price list at the top of the screen, then use “Refresh” to update the item list with the current prices.

This means that you don’t have to reselect items again using the range fields – especially useful if you manually edited the previous list of items.

Note that if you change the customer or the price list and use the Refresh button, the program will keep the same list of items in the grid but update the prices for the new customer or price list.

Also note the following points regarding item pricing. Refer to the Sage 300 documentation for details.

- Price list codes may or may not be relevant. Item pricing can be by price list or by category. If both are in use, item price takes precedence over category price.
- Not sellable or inactive items will not appear on the list.
- If you use kits, set the default kit number, or the program will use the last kit number (in key order).
- Prices may include or exclude taxes.

**Users require security permissions for entering an order in O/E to use Create Price List.**

## Loading customer prices to create a new price list

Follow these steps to create a new customer price list and save it to a spreadsheet. To update an existing spreadsheet with new prices, see [Opening an existing price list spreadsheet to refresh prices.](#)

### To create a new customer price list:

- Enter the number of the customer for whom you want to create a price list.

- Select the price list code. By default, the program will use the code in the A/R customer record.
- Specify a start date for contract pricing. The program defaults to today's date.
- Specify the range of items for the price list, or skip the range fields to include all items on the selected price list that are active, sellable, and have a price, or that are priced by category or subject to contract pricing.

You can select items by item number, structure code, category, account set code, default price list code, or by a range of item optional field values.

- Choose whether to list prices for all units of measure or just for the stocking unit of measure.

- Select additional selection criteria to select items using additional item record fields.
- Click the Load button to load the selected items and prices into the grid.

Item Number	Description	Customer's Item Number	Customer's Item Description	Unit of Measure	Item Price	Contract Pricing	Start Date	Expiration Date
A1-103/0	Fluorescent Desk Lamp	DESK LAMP CASE		Ea.	38.30	No		
A1-103/0	Fluorescent Desk Lamp	DESK LAMP CASE		Case	919.20	No		
A1-103/0	Fluorescent Desk Lamp	DESK LAMP CASE		Crate	1,600.00	Yes	2023-01-17	2023-03-24
A1-103/0	Fluorescent Desk Lamp	DESK LAMP CASE		Dozen	459.60	No		
A1-105/0	13W Mini Fluorescent Bulb	LIGHT BULB 13W	Light bulb mini	Ea.	6.25	No		
A1-310/0	Halogen Desk Light			Ea.	45.25	No		
A1-320/0	50W/12V Halogen Bulb	LIGHT BULB 50W	Light bulb	Ea.	5.75	No		
A1-400/0	Desk Note Book			Ea.	15.75	No		
A1-400/0	Desk Note Book			Box	1,134.00	No		
A1-400/0	Desk Note Book			Carton	567.00	No		
A1-400/0	Desk Note Book			Dozen	189.00	No		
A1-401/0	Desk Calendar Pad			Ea.	10.25	No		
A1-401/0	Desk Calendar Pad			Box	738.00	No		
A1-401/0	Desk Calendar Pad			Carton	268.00	No		

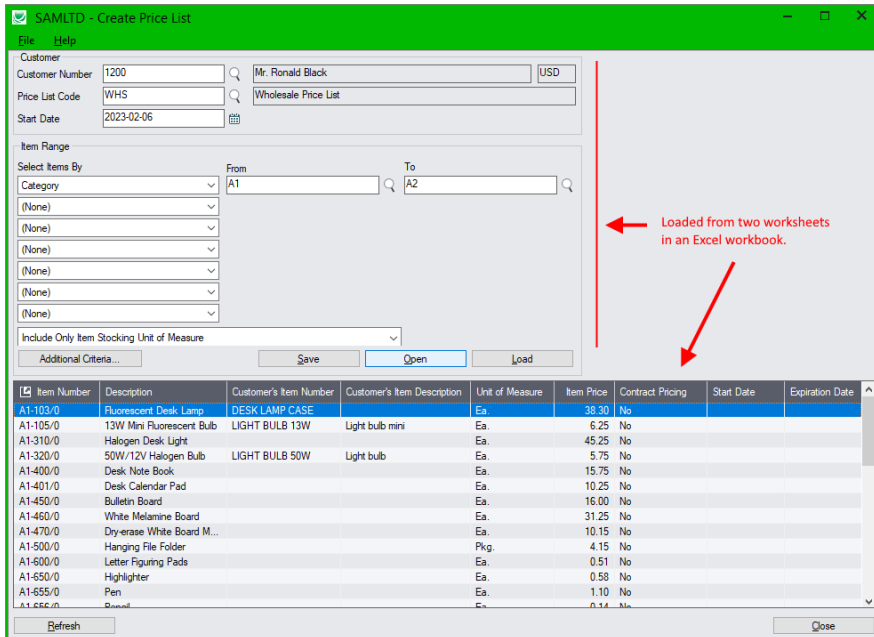
You can:

- Click the Item Number column heading to drill down to the I/C item record.
- Double-click within the grid to edit a column for any item.
- Use the insert key to add items to the bottom of the grid.
- Change the customer information and click the Refresh button.
- Click the Save button to save the pricing details in a spreadsheet.

### Opening an existing price list spreadsheet to refresh prices

- Click the Open button to open an existing price list spreadsheet.

The program will load the grid with data from the spreadsheet, and also load the customer and item selection options from the spreadsheet into the fields at the top of the screen.



- Click the Refresh button to update the item pricing using the currently-selected customer options – Customer Number, Price List, and Start Date for contract pricing. The program will apply the new prices to the existing list of items.

Open and Refresh lets you use saved lists of items as templates for new price lists. You can open an existing spreadsheet, change the selected customer or price list at the top of the screen, then use “Refresh” to update the loaded item list with the new prices.

This means that you don’t have to reselect items again using the range fields – especially useful if you manually edited the previous list of items – such as for a sale.

**Remember:** If you change the customer or the price list in the Customer fields at the top of the screen and then click the Refresh button, the program will keep the same list of items in the grid, and look up the prices for each entry. If an item does not have a price, it will keep the line, but leave the price blank, allowing you to fill it in manually.

### Viewing the saved price list in Excel

The saved Excel spreadsheet has two tabs:

- The Items tab displays all of the items from the Create Price List grid.
- The Customer tab displays the criteria used to select the items and prices in the item list.

