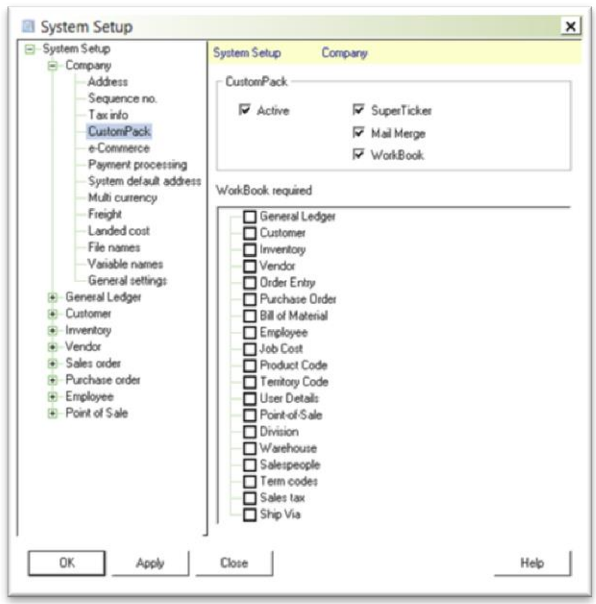
7 ***CUSTOMPACK***

This dynamic BusinessVision add-on consists of 5 powerful elements: Customer Specific Pricing, WorkBook, Mail Merge, Document Linking, and SuperTicker. Together with BusinessVision32, these packets create an environment for unlimited reporting, pricing, and referencing capabilities.

Activation

System Setup > Company > CustomPack

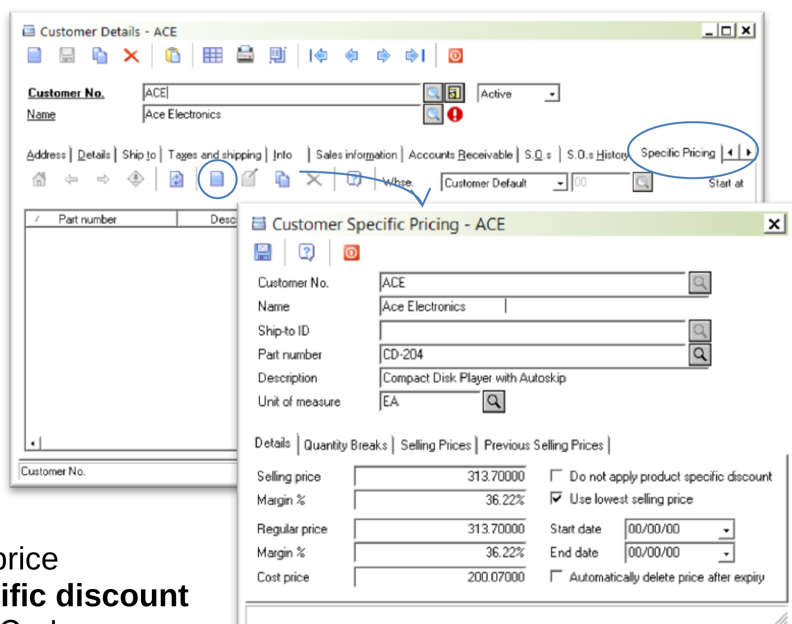
- click on the **Active** check box to turn on:
  - **Customer Specific Pricing**
  - **Document Linking**
- additional optional components:
  - **SuperTicker**
  - **Mail Merge**
  - **WorkBook**
- **Workbook required -** check which module(s) require **mandatory** completion of one or all of any workbook fields created (explained later in this chapter). For example, If the **Customer** module is checked, no person can save a new customer record without first filling in (one of) the workbook field(s) in that module.



Customer Specific Pricing

Customer Specific Pricing can be viewed and maintained in 3 areas:

1. **Customer Details** module – select your customer, click on the **Specific Pricing** tab, and enter pricing in one of two ways:
   a. **New price**
      - type in or browse for the **Part number**
      - overwrite the **Selling price** or enter the **Margin** to populate the new Selling price
      - **Do not apply product specific discount** - this relates to the "Product Code



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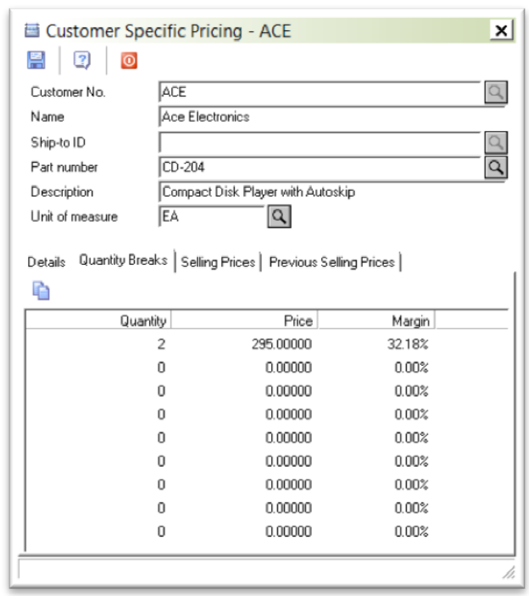
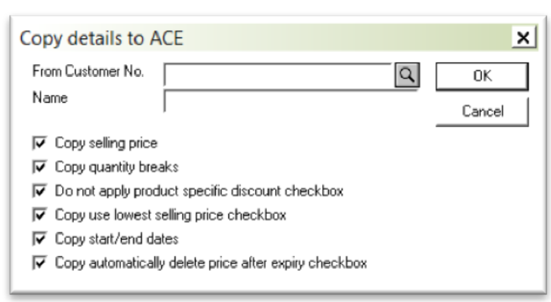
Discounts" explained in **Inventory**, chapter 5 of the Section 1

- **Use lowest selling price** - if there are any discounts for this customer or for this inventory item, in the form of product specific discounts, quantity discounts, or special prices, they may result in a price that's lower than the customer specific price you're setting up. If you want the customer to always get the lower price, check this box; otherwise, they will always get the **Customer Specific** price, no matter what.
- **Start / End date** - this function allows to time this specific price
- **Automatically delete price after expiry -** once the price expires based on the **End date**, the system stops using it, but it stays in the Customer Specific Pricing file as a previous selling price, unless this box is checked; in which case, the price will be deleted from the system
- **Quantity Breaks** - set lower pricing for higher quantities
    - click on **Add**
    - enter the **Quantity** and the **Price** or enter the **Margin** to populate the **Price**
    - click on **OK**
    - **Copy existing** - this will copy the existing quantity break prices from the Inventory details for this item
    - when all quantity breaks are established, click on **OK**
- **Selling Prices** displays all 20 current selling prices for the item
- **Previous selling prices** displays a history of prices for this item that have been given to this customer in the past
- to save all Customer Specific Price settings, click on **Save**



b. Copy Price

- in the **Customer Pricing** tab, click on the **Copy** icon
- select the Customer you wish to copy the prices **from**
- select from the copy options
- click on **Copy**



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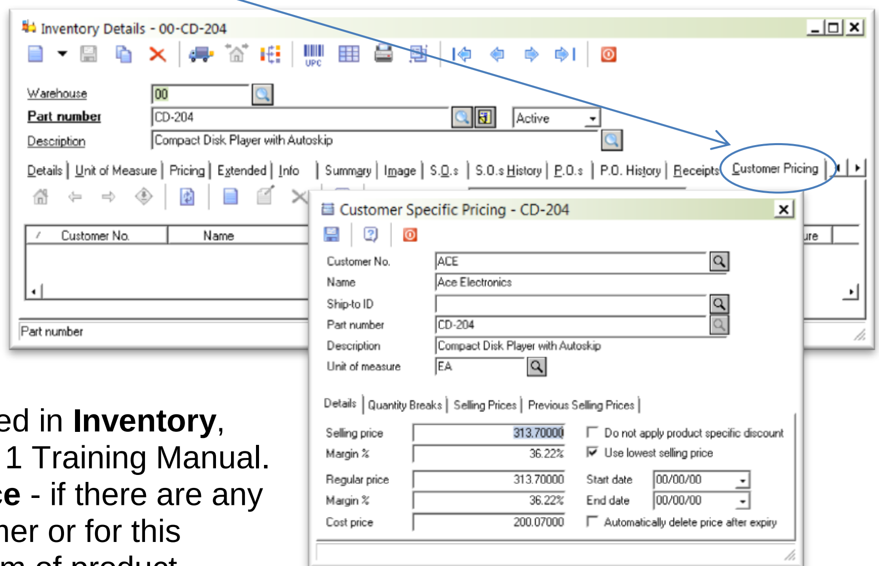
2. Inventory Details module:

- click on the **Customer Pricing** tab
- click on **New**
- type in or browse for the **Customer**
- overwrite the **Selling price** or enter the **Margin** to populate the new Selling price
- **Do not apply product specific discount** - this relates to the Product Code Discounts explained in **Inventory**, chapter 5 of the Section 1 Training Manual.



- **Use lowest selling price** - if there are any discounts for this customer or for this inventory item, in the form of product specific discounts, quantity discounts, or special prices, they may result in a price that's lower than the customer specific price you're setting up. If you want the customer to always get the lower price, check this box; otherwise, they will always get the **Customer Specific** price, no matter what.
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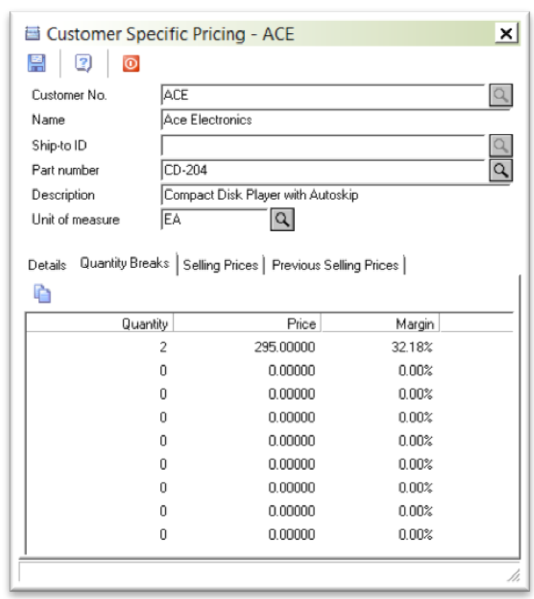

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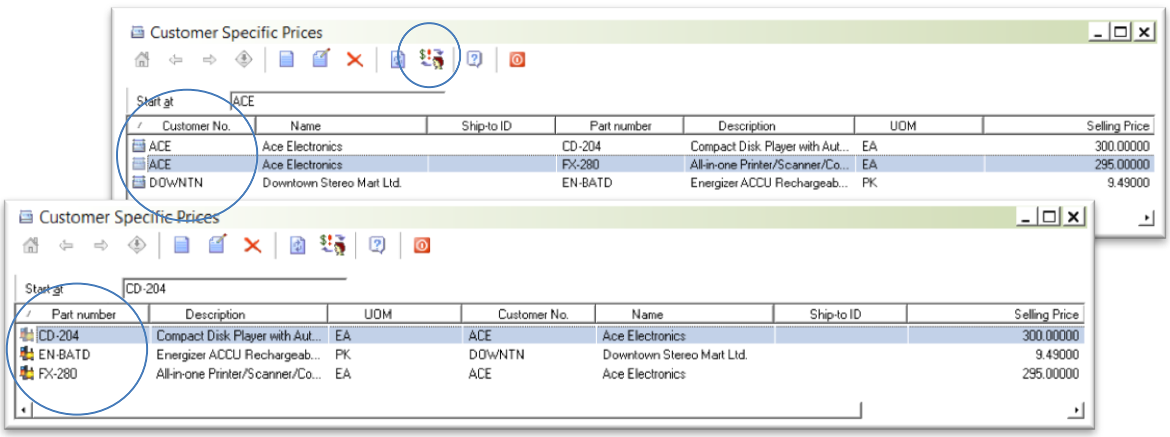
- **Selling Prices** displays all 20 current selling prices for the item
- **Previous selling prices** displays a history of prices for this item that have been given to this customer in the past
- to save all Customer Specific Price settings, click on **Save**

3. Utilities > Customer Specific Pricing

Add, modify or delete Customer Specific Prices here, and toggle view by Customer, or by Inventory Item, and follow procedure as outlined in **1.** or **2.** above.



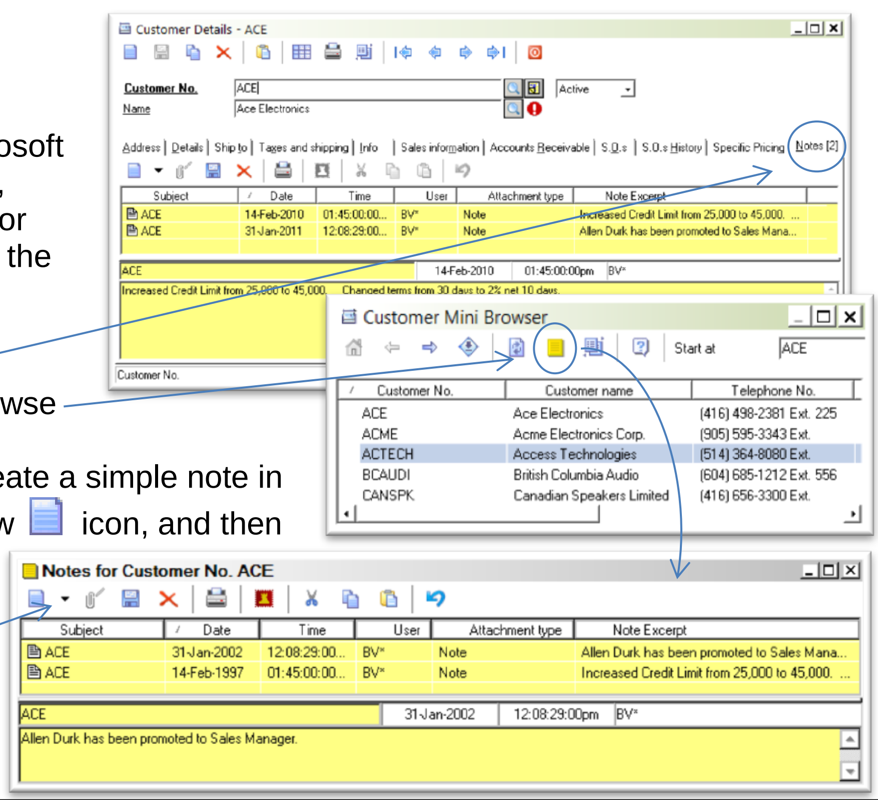
Document Linking

Link any type of document (Microsoft Word, Excel, images, audio files, website links, etc) to any record or transaction in all modules where the Notepad or Notes is accessible.

Access in one of 2 ways:

1. **Notes** tab in most modules
2. **Notepad** icon in their mini browse lists

- **New Note** - if you want to create a simple note in the Notepad, click on the New icon, and then type into the lower section of the window
- **New Attachment** – click the downward arrow beside the **New** icon, and select **New Attachment**



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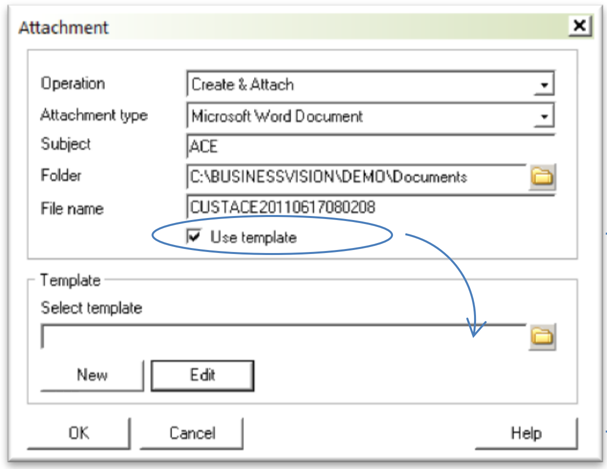
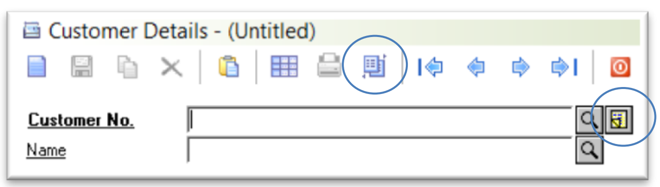
- **Operation** - using the down arrow, select from the following options**:**
  - **Create & Attach** - opens up the program associated with the **Attachment type** selected so you can create a new document, spreadsheet, image, etc., and it will automatically attach when you save it
  - **Attach** - lets you browse your computer or network for the file you wish to attach
  - **Create only** - opens up the program associated with the **Attachment type** selected so you can create a new document, spreadsheet, image, etc., but it will not attach



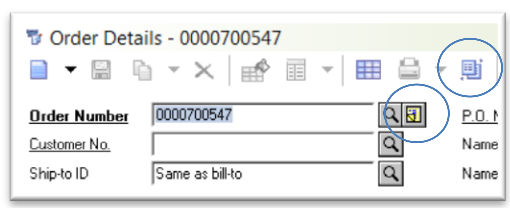
- **Attachment type** – for any of the Create options above, choose from the following file types:
  - **Microsoft Word Document**
  - **Microsoft Excel Worksheet**
  - **Text Document** (uses Microsoft WordPad or Notepad)
  - **Bitmap Image**
- **Subject** - this field brings in the code for the record you are creating the attachment for, which may be edited
- **Folder** - the default folder is <u>c:\businessvision\Documents</u>, but this can be changed
- **File name** - the system gives each new attachment a name/number, which may be edited
- **Use template** - when selected, template options become available, where you can create and use a **New** template, or **Select template** to use, with the option of editing it first.
- once all options are selected, click on **OK**

WorkBook



The WorkBook is used to create additional information fields throughout the BusinessVision modules, used for reference, and / or for setting into customized reports and forms. Each module's WorkBook consists of up to 5 WorkSheets (tab pages), and up to 50 fields across those sections.

Access - in all modules, on the top icon menu, and beside the record browse buttons



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- **New WorkSheet** - each WorkSheet is a separate section in the WorkBook with its own tab, and its own set of fields
  - open the **WorkBook Browse** using or
  - click on **New WorkSheet**
  - click on **Properties**
  - click into the **Label** field and type in the desired name of the new tab
  - click **OK**
- **New WorkBook Field**
  - click **New** from the **WorkSheet Properties** window
  - **Field name** - used in customizing reports and forms
  - **Field Properties**
    - **Field name** – type in the identifier name
    - **Label** - the name that displays to users who access the WorkBook (can be the same as “Field name”)
    - **Field Type**

      1. TextBox - includes the following field categories:
      - **Numeric** - makes available some formatting and validating options, such as decimal places, and negative number appearance

        Validation/Formatting - you can set a minimum and/or maximum value for entry into that field.
      - **Currency** - makes available the formatting and validating options as the "Numeric" category does, with the addition of the option to use the currency setup established with the BusinessVision MultiCurrency program.
      - **Percent** - gives you only the option to assign a maximum or minimum value for entry into that field.
      - **Date** - makes available alignment options and format options such as DD/MM/YY or MM/DD/YYYY