# 7 <u>custompack</u>



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.

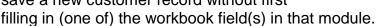
#### **Activation**



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

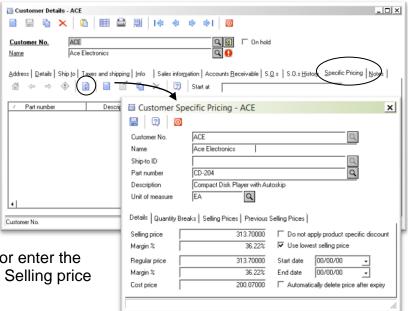
save a new customer record without first



### **Customer Specific Pricing**

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

- 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





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- 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.
- 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 咱

- 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

Copy details to ACE	×
From Customer No.	OK Cancel
Copy selling price     Copy quantity breaks     Do not apply product specific discount checkbox     Copy use lowest selling price checkbox     Copy start/end dates     Copy automatically delete price after expiry check	

Customer Specific Pricing - ACE

ACE Ace Electronics

CD-204

Details Quantity Breaks Selling Prices Previous Selling Prices

EA

Quantity

2

0

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0

0

0

0

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Compact Disk Player with Autoskip

Q

Price

295.00000

0.00000

0.00000

0.00000

0.00000

0.00000

0.00000

0.00000

Margin

32.18%

0.00%

0.00%

0.00%

0.00%

0.00%

0.00%

0.00%

0.00%

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Customer No.

Name

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Ship-to ID

Part number

Description

Unit of measure

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Compact Disk Player with Autoskip

Details | Unit of Measure | Pricing | Extended | Info | Summary | Image | S.O.s | S.O.s | Bistory | P.O.s | P.O. History | Receipts

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Customer No.

Name

Ship-to ID

Part number

Description

Selling price

Regular price

Margin %

Margin %

Cost price

Unit of measur

Customer Specific Pricing - CD-204

Ace Electr

CD-204

Compact Disk Player wi

Details Quantity Breaks Selling Prices Previous Selling Prices

CD-204

Inventory Details - CD-204

Part number

Customer No.

Description

Part number

## 7 <u>CUSTOMPACK</u>



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Customer Pricing

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00/00/00

36.22% ▼ Use lowest selling price

313.70000 Start date 00/00/00

End date

36.22%

200.07000

- 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.

- 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**

Customer Spee	cific Pricing - ACE		×		
Customer No. Name Ship-to ID Part number Description Unit of measure	ACE Ace Electronics CD-204 Compact Disk. Player with A EA	utoskip	Q		
Details Quantity Breaks   Selling Prices   Previous Selling Prices					
Quanti	ty Price	Margin			
	2 295.00000	32.18%			
	0 0.00000	0.00%			
	0 0.00000	0.00%			
	0 0.00000	0.00%			
	0 0.00000	0.00%			
	0 0.00000	0.00%			
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	0 0.00000	0.00%			
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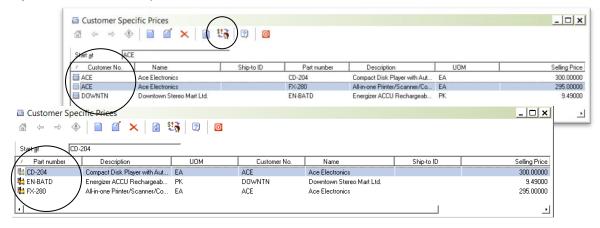
## <u>CUSTOMPACK</u>



- 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 III

#### 3. Utilities > Customer Specific Pricing

Add, modify or delete Customer Specific Prices here, and toggle view 25 by Customer, or by Inventory Item, and follow procedure as outlined in 1. or 2. above.



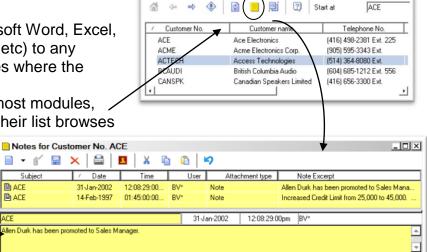


Link any type of document (Microsoft Word, Excel, images, audio files, website links, etc) to any record or transaction in all modules where the Notepad or Notes is accessible.

Access through the Notes tab in most modules. and through the Notepad icon in their list browses

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



Customer Mini Browser

New Attachment – click

the downward arrow beside the New icon, and select New Attachment

• ()<sup>\*</sup>

ACE

Subject ACE

**Operation** - using the down arrow, select from the following options:

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Help

 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

Operation

Subject

Folder

File name

Template

Select template

Nev

ΠK

Attachment type

Create & Attach

✓ Use template

ACE

Edit

Cancel

Microsoft Word Document

c:\businessyision\Documents

CUSTACE20020617175214

- 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



#### <u>WorkBook</u>

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 within those sections.

The WorkBook can be found in all modules, beside the record browse buttons, and on the top icon menu

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