

Managing price lists

In BMS, price list is used to define the prices of the products in the system. There can be a Standard price list or a special price list for every customer can be created if this is a case.

In the price lists it is possible to create a Cost price list and a Tax price list.

Introduction

This Quick guide will show you how to manage your product price lists.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software.

On the last page it is described how to set up the Security and/or System options to activate, view and edit the described feature.

Standard price list

Standard price list exists in the system and it is where the system can map standard gross prices for the products to use for value calculations.

1 Open Price Lists

Click on the "Price Lists" icon on the navigation ribbon to open the list of the price lists.



2 Select Standard Price List

Click on the "Gross prices" selection and select the "Standard Price List" to open the corresponding window in the main screen.



3 Standard price list window

In the window we can add product(s) (manually or import from a file) and edit Gross prices, Retail prices and from-to dates when the price for the specific product is valid.

NB! One product can be added several times and get several prices for different from-to dates.

| Origin | Item number | Product name | Display | From Date | To Date | Gross Price (Sales units) | Gross Price (Consumer units) | Retail price (price/cst) | Multi-buy... | Retail price (no... | Multi-buy (no... | Retail price (cst/... | Multi-buy (cst/... | Retail price (cst/... | Product state | Consumer units... | Brand Name | Pro | |
|--------|-------------|--------------------|-------------------------------------|------------|------------|---------------------------|------------------------------|--------------------------|--------------|---------------------|------------------|-----------------------|--------------------|-----------------------|---------------|-------------------|-------------------|-----------------|-----|
| User | 1000 | Shampoo Normal | <input checked="" type="checkbox"/> | 01-01-2016 | 04-12-2017 | 300,00 | 30,00 | 24,95 | 0 | 0,00 | 0 | 0,00 | 0 | 24,95 | Active | 12 | Excellent Essence | Hai | |
| User | 1000 | Shampoo Normal | <input type="checkbox"/> | 05-12-2017 | 31-12-2027 | 0,00 | 0,00 | 0,00 | 0 | 0,00 | 0 | 0,00 | 0 | 0,00 | Active | 12 | Excellent Essence | Hai | |
| User | 1001 | Shampoo Color... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 360,00 | 36,00 | 24,95 | 0 | 0,00 | 0 | 0,00 | 0 | 24,95 | Active | 12 | Excellent Essence | Hai | |
| User | 1002 | Shampoo Shiny | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 360,00 | 36,00 | 24,95 | 0 | 0,00 | 0 | 0,00 | 0 | 24,95 | Active | 12 | Excellent Essence | Hai | |
| User | 1003 | Shampoo Dry | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 360,00 | 36,00 | 24,95 | 0 | 0,00 | 0 | 0,00 | 0 | 24,95 | Active | 12 | Excellent Essence | Hai | |
| User | 2000 | TOMIATO Kats... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 284,00 | 28,40 | 19,95 | 0 | 0,00 | 1 | 0,00 | 1 | 19,95 | Active | 12 | Excellent Food | Sau | |
| User | 2001 | TOMIATO Kats... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 418,80 | 41,88 | 28,43 | 0 | 0,00 | 1 | 0,00 | 1 | 28,43 | Active | 12 | Excellent Food | Sau | |
| User | 3000 | LIQUID Cleaner ... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 279,36 | 27,936 | 23,28 | 0 | 0,00 | 0 | 0,00 | 1 | 19,95 | Active | 12 | Excellent Clean | Cle | |
| User | 3001 | LIQUID Cleaner ... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 279,36 | 27,936 | 23,28 | 20,00 | 0 | 0,00 | 0 | 0,00 | 1 | 19,95 | Active | 12 | Excellent Clean | Cle |
| User | 3002 | LIQUID Cleaner ... | <input type="checkbox"/> | 01-01-2016 | 31-12-2027 | 279,36 | 27,936 | 23,28 | 20,00 | 0 | 0,00 | 1 | 0,00 | 1 | 19,95 | Active | 12 | Excellent Clean | Cle |
| User | 3003 | LIQUID Cleaner ... | <input type="checkbox"/> | 01-01-2029 | 31-12-2027 | 179,40 | 17,940 | 15,90 | 0 | 0,00 | 0 | 0,00 | 1 | 24,95 | Active | 6 | Excellent Clean | Cle | |



The guide may contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.

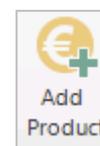


Questions & Answers note relevant to the topic at hand.

4 Add Product(s) manually

From the navigation ribbon click on the icon "Add Product" to open the corresponding window with a full list of products in the system. Select the product you want to add and click "Add and close" to add the products in the product list.

NB! Because the system allows you to add a product several times, be careful which product you select to add, in order to avoid duplicated records on the list.



5 Delete Product(s)

Select the product(s) you want to remove from the list and from the navigation ribbon and click on the icon "Remove Product". A confirmation window will open asking you to verify the action.

NB! Because a product may be added several times to the list, make sure you delete the correct line of the product, or make sure all the lines of the product are removed.



Price list

More than one standard price list can be created in the system in order to connect it to specific customer that might have a different price list for the products they buy.

1 Create a Price Lists

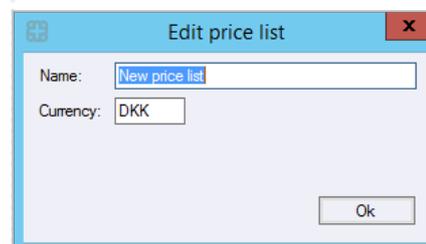
Click on File, then New and click on "Pricelist" icon to create and open a new price list.



2 Name the Price List

When the tab of the new price list opens, a window will pop up to type in the name of the price list (e.g. Lidl pricelist 2018).

You can also type in the Currency, but this is used only for information.



3 Add in the prices

In the window we can add product(s) (manually or import from a file) and edit Gross prices, Retail prices and from-to dates when the price for the specific product is valid.

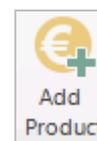
NB! One product can be added several times and get several prices for different from-to dates.

| Origin | Item number | Product name | Display | From Date | To Date | Gross Price (Sales units) | Gross Price (Consumer units) | Retail price (pricelist) | Multi-buy... | R |
|--------|-------------|--------------------|-------------------------------------|------------|------------|---------------------------|------------------------------|--------------------------|--------------|---|
| User | 1000 | Shampoo Normal | <input checked="" type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 1001 | Shampoo Color... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 1002 | Shampoo Shiny | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 1003 | Shampoo Dry | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 2000 | TOMATO Ketch... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 2001 | TOMATO Ketch... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 3000 | LIQUID Cleaner ... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 7006 | Chocolate Stick... | <input checked="" type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 8000 | Flower-pot Ø22... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |
| User | 8001 | Stool-Wooden ... | <input type="checkbox"/> | 14-06-2018 | 31-12-2028 | 0.00 | 0.00 | 0.00 | 0 | 0 |

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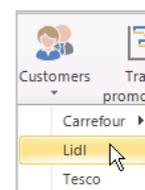


Assign the Price list to a customer

When you create a price list for specific customer(s), you have to go to the customer and link it with the corresponding price list.

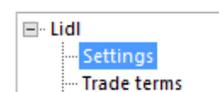
1 Select the customer

Click on the Customers icon on the navigation ribbon and select to open the customer you want to assign the specific price list to.



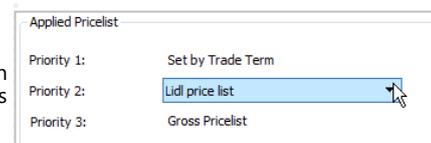
2 Find settings

On the left click on Settings from the tree menu.



3 Apply Price list

In the main window is the Applied Pricelist area, in Priority 2 you can select from the drop down list the price list you want to assign to this customer.



Edit Price lists

You can change/edit the price lists and the products in it.

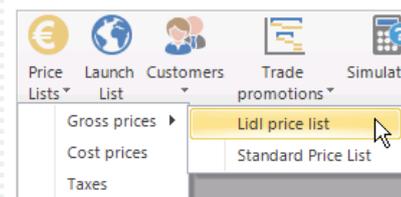
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2 Select a Price List

Click on the "Gross prices" selection and the select the "Standard Price List" to open the corresponding window in the main screen.



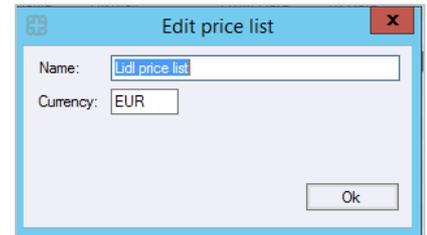
3 Edit products

Add or remove products by clicking on the corresponding icon on the navigation ribbon.



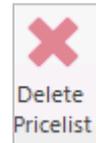
4 Edit Price list name

Select the small icon below the icon "Print Pricelist" to open the window to edit the name and the currency.



5 Delete a Price list

Click on the "Delete Pricelist" icon on the navigation ribbon to delete the price list.



Security - User Roles

For a user to view and edit the Price lists and Prices, access needs to be granted from Security settings by a super-user/admin.

Security

From "File" select "Security" and the window with all the users in the system and the roles assigned to each one will open. Select a role to open the corresponding settings.



Allow View Price lists and Prices

Under the section of "Prices view" mark the check-box "Listprices", "COGS" and "Tax" to allow the user-role to see the corresponding data in Price lists and product module.



Allow Edit Price lists and Prices

Under the section of "Prices edit" mark the check-box "Listprices", "COGS" and "Tax" to allow the user-role to edit the corresponding data in Price lists and product module.

