Customer Price Lookup

This utility provides easy access to pricing history for customers and products. It also gives the discountable (effective) unit price which is useful for pricing product returns. This information may also be displayed when adding a customer Invoice.

At *Accounting / Utilities / Customer Price Look Up* select the Customers and Products. Indicate a date range then select **Lookup** to populate the grid.
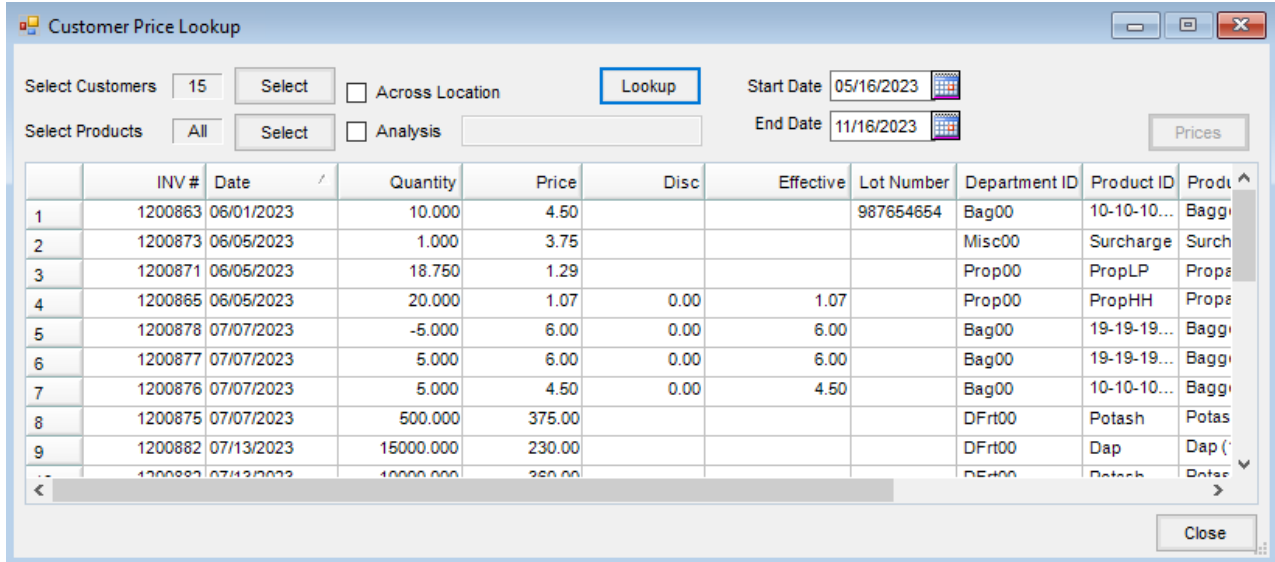
Highlight a row and choose **Prices** to display the current List Price, Price Levels, and Costs, as well as any quoted prices for the customers and product.
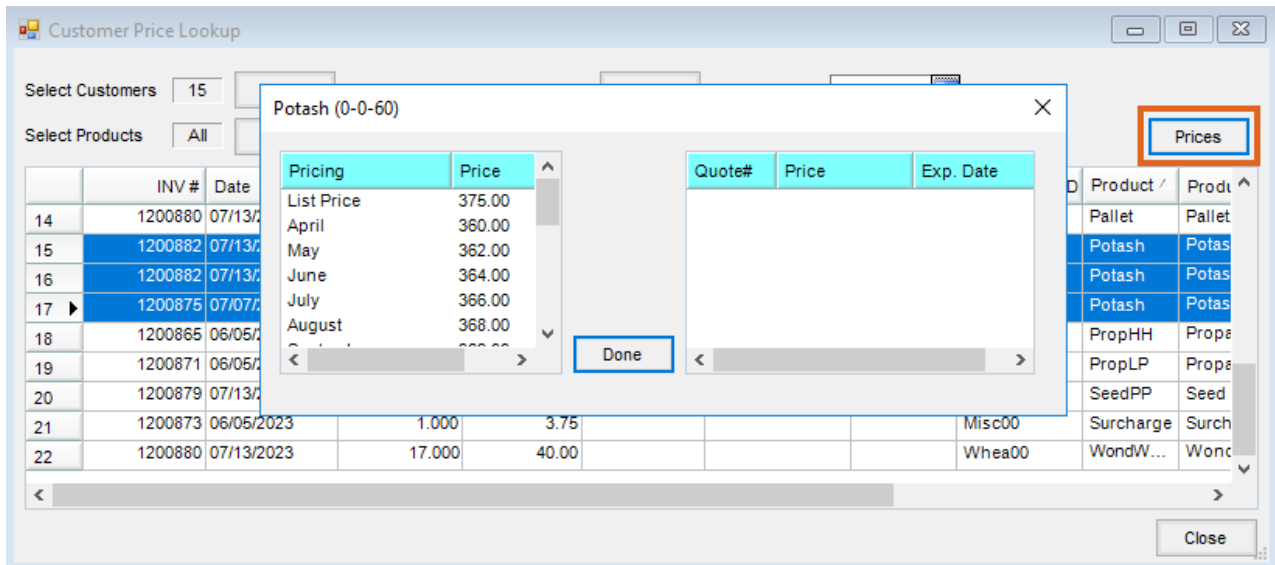
Selecting the *Analysis* option enables the *Analysis* field. Instead of selecting a product, enter the specific analysis to display only Invoices with this analysis.

The *Across Location* option displays pricing history for products across multiple Locations where the Product IDs match within departments with the same Category code.

When adding a customer Invoice, double-click in the *Unit $* field on a product line item and select the **Lookup** button to display pricing history columns. The *Invoice Cust PO* and *Comments* columns display.

Reference information for this utility:

- The *Price* column displays the selling $ price/unit saved with the Invoice.
- The *Disc* column displays the discounted dollar amount per unit.
- The *Effective* column displays the discounted selling $ price/unit.
- Information will not display in the *Disc* or the *Effective* column if payments are not received on the Invoice.
- If the calculated discount is taken when the payment is received, it will be reflected in the*Disc* and the *Effective* columns.
- If an additional discount is entered when the payment is received, it will be reflected in the*Disc* and the Effective columns.
- If the discount is lowered when payment is received, it will be reflected in the*Disc* and the *Effective* columns.
- If partial payment is taken and includes a partial discount, the partial discount will be reflected in the*Disc* and *Effective* columns.

- If no discount is taken when payment is received, the *Disc* column will display *0.00* and the *Effective* column will be the same as the *Price* column.
- If the Invoice is completely prepaid, the information will not display in the *Disc* and *Effective* columns.