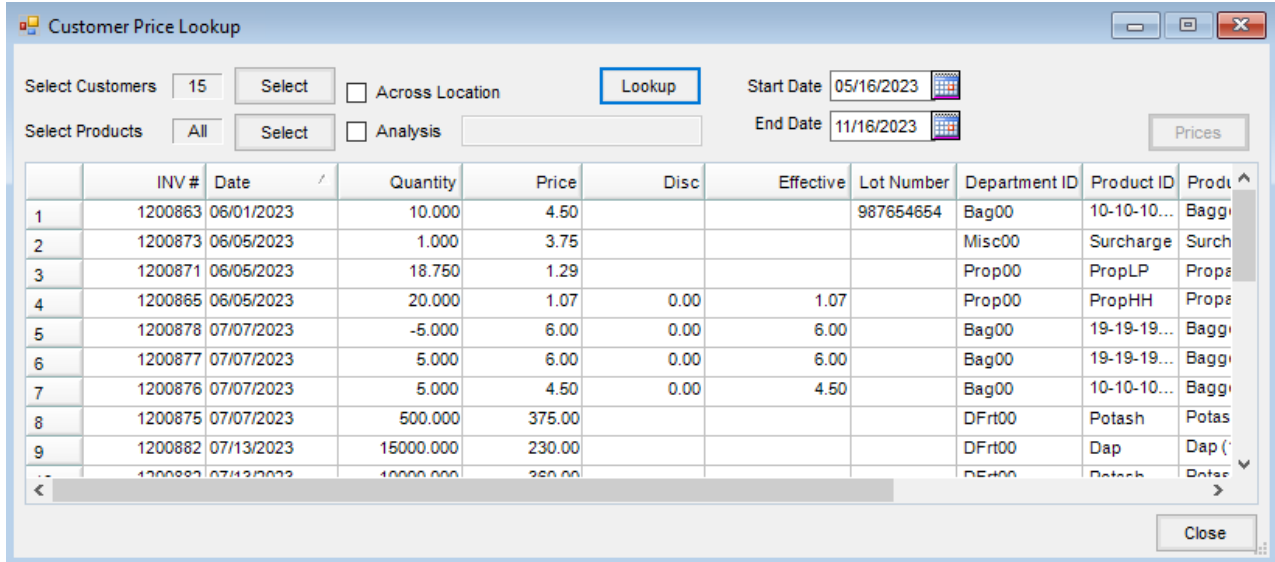


# Customer Price Lookup

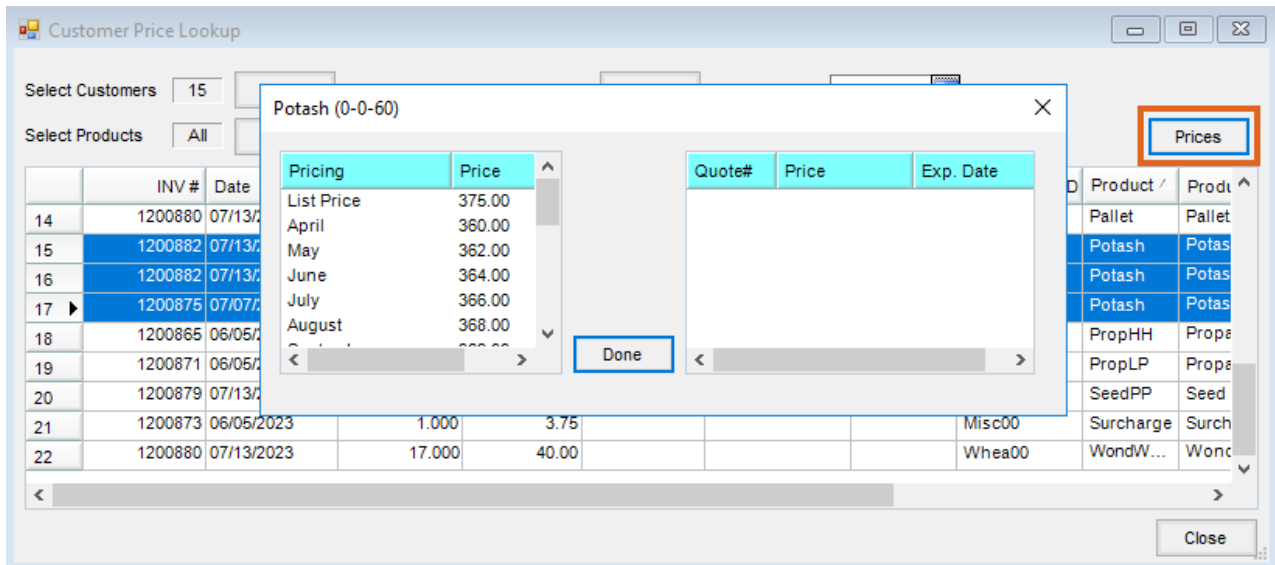
Last Modified on 11/16/2023 9:11 am CST

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.

Select Customers 15   Across Location

Select Products All   Analysis

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.

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Pricing	Price	Current Price	Quote#	Price	Exp. Date
List Price	375.00	375.00			
April	360.00				
May	362.00				
June	364.00				
July	366.00				
August	368.00				
September	370.00				

New Price

Across Location Additional Dataset (None)

	INV #	Date	Quantity	Price	Disc	Effective	Lot Number	Cust PO	Comments
1	1200882	07/13/2023	10000.000	360.00					
2	1200882	07/13/2023	5000.000	375.00					
3	1200875	07/07/2023	500.000	375.00					

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.