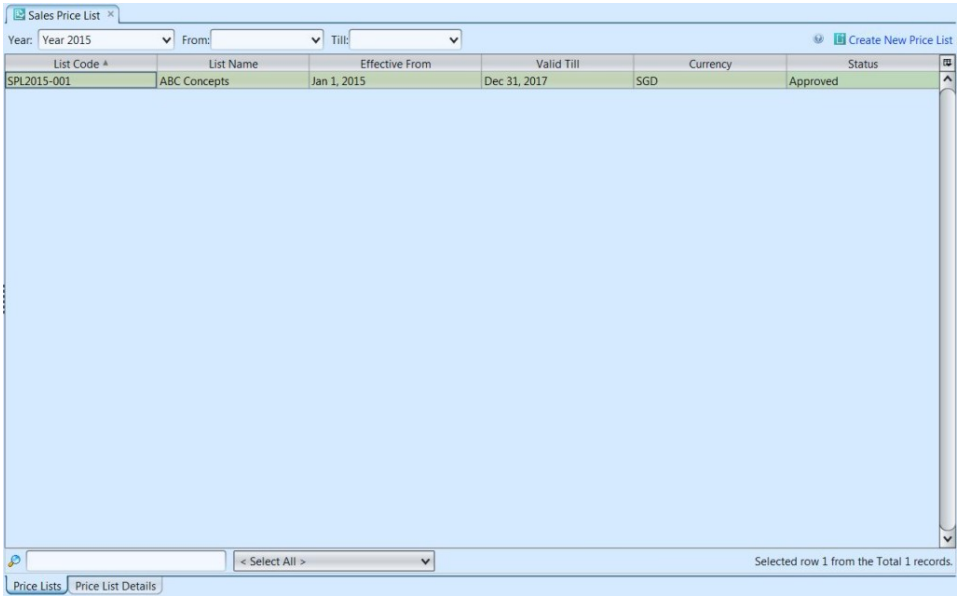
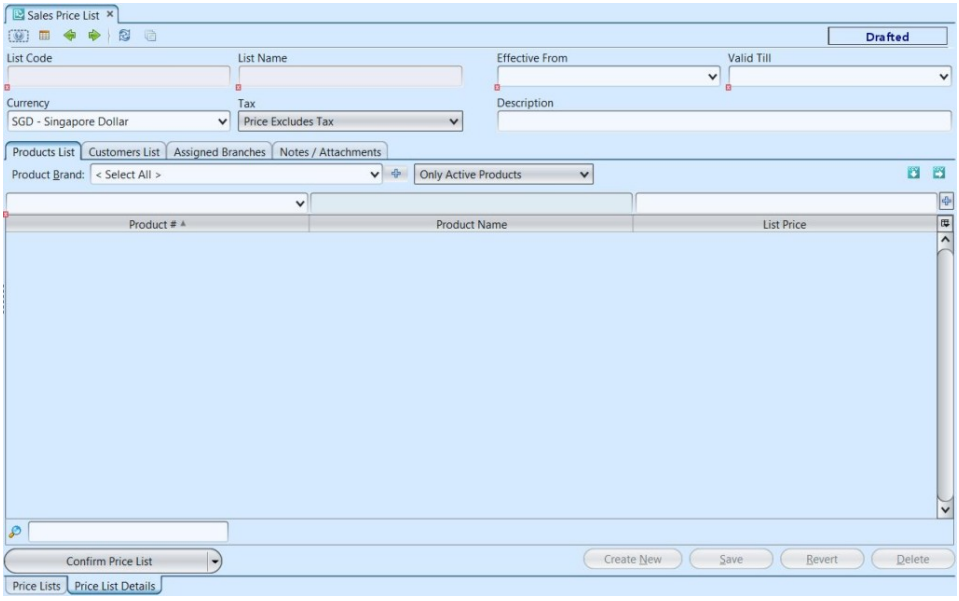
# Sales Price List

Sales Price List view allows user to manage product's selling price list. Below actions are available under ***"Sales Price List":***

- Create new sales price list; update, delete, view and search for sales price list details



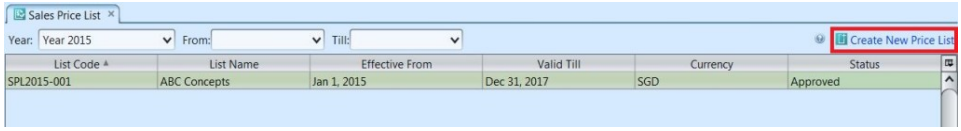




| Field Name | Explanations | Mandatory Information |
|---|---|---|
| List Code | Custom code for the price list | Y |
| List Name | Name of price list | Y |

| | | |
|---|---|---|
| Effective from | Date start for price list | Y |
| Valid till | Date end for price list | Y |
| Currency | Currency to use for the price list | Y |
| Tax | Select whether listed price includes or excludes tax | Y |
| Description | Self-explanatory | N |
| Products List – Product # | Product's code | Y |
| Products List – Product Name | Self-explanatory | Y |
| Products List – List Price | Product's sell price | Y |

# Create New Sales Price List

1. Click ***"Create New Price List"*** at the top right side of ***"Price Lists"*** tab, it will open ***"Price List Details"*** tab with new form.

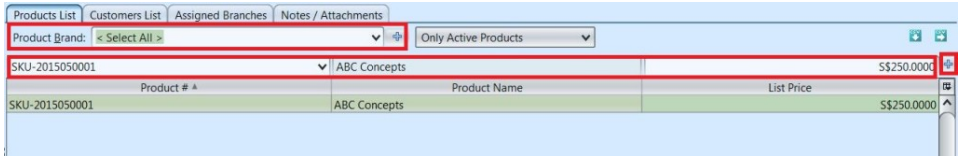



2. Fill up price list's information on top of screen

3. Click ***"Save"*** button at the bottom right side of screen to save

4. Filter the products list by selecting a brand from ***"Product Brand"*** drop-down list. Add product into the price list by searching for the product from the product number drop-down list in the table on ***"Products List"*** tab. Ensure the product is not listed in other sales price lists during the same period for the same customers list

5. Enter the product's ***"List Price"*** info and click  button to add the product into the price list




6. Repeat steps 4-5 to add more products into the

price list

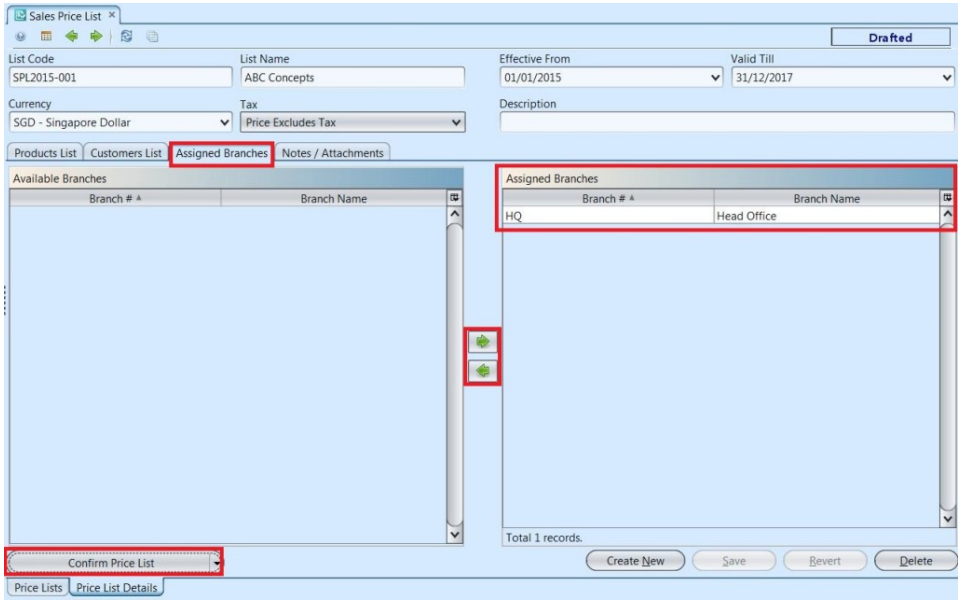
User can enter list price for multiple products of the same brand. Click on  button next to "***Product Brand***" filter, it will show new window to create / update price list. Select a product brand from the list, select a product from the table to create / update the "***List Price***", enter the "***List Price***" value and press ENTER key. Click ***OK*** button when done and to close the window.

7. On ***"Customers List"*** tab, assign business partners for the price list by selecting available partner(s) from the bottom left table and click  button in middle of screen. Hold Ctrl or Shift key then mouse left-click to select multiple partners

8. On ***"Assigned Branches"*** tab, a default branch (e.g. HQ) has been automatically assigned for the new price list. To assign another branch for the price list, select available branch from the bottom left table and click  button in middle of screen

9. Click ***"Save"*** button at the bottom right side of screen to save

10. Click ***"Confirm Price List"*** button at the bottom left side of screen and click ***"Yes"*** button to confirm

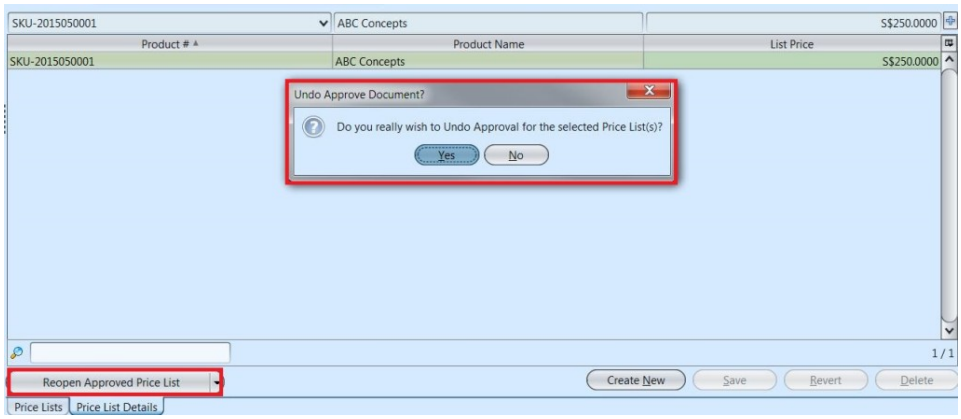



11. Click ***"Approve Price List"*** button at the bottom left side of screen and click ***"Yes"*** button to approve

the price list

## Update Sales Price List Details

1. Double click on price list to be updated, it will bring up the selected price list details on the ***“Price List Details”*** tab. If a price list’s status is ***“Confirmed”*** or ***“Approved”***, right click on the list or click “***Reopen Approved Price List***” button from price list details, and reopen the list first




2. Click ***“Save”*** button at the bottom right side of the screen to save

3. Click ***“Confirm Price List”*** button at the bottom left side of screen and click ***“Yes”*** button to confirm

4. Click ***“Approve Price List”*** button at the bottom left side of screen and click ***“Yes”*** button to approve the price list

## Delete Sales Price List

1. Double click on price list to be deleted, it will bring up the selected price list on the ***“Price List Details”*** tab. If a price list’s status is ***“Confirmed”*** or ***“Approved”***, right click on the list or click “***Reopen Approved Price List***” button from price list details, and reopen the list first

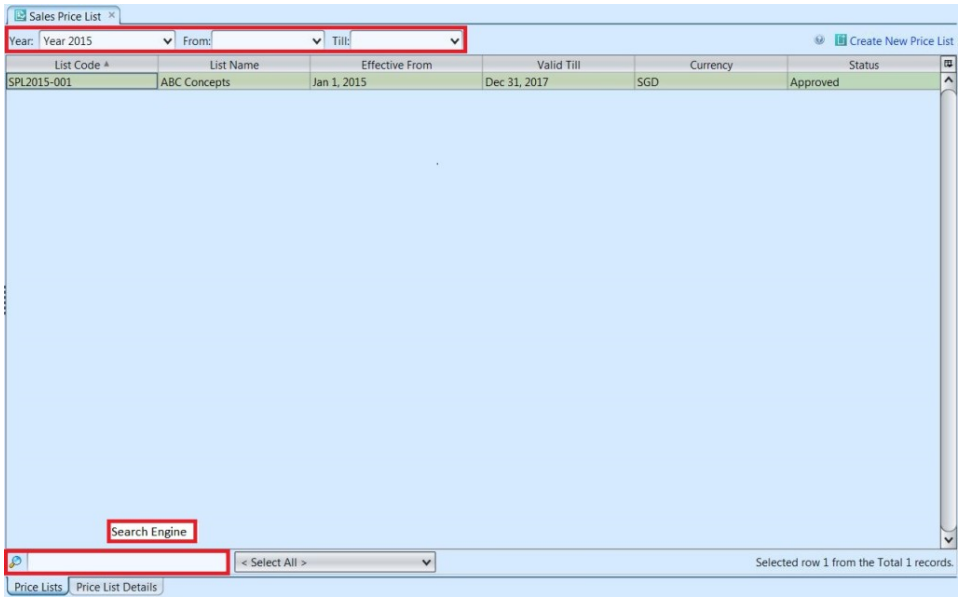
2. Click on ***“Delete”*** button at the bottom right side

of screen

3. Click on ***“Yes”*** button on the pop-up window to confirm price list deletion

## View and Search for Sales Price List Details

1. On ***“Price Lists”*** tab, enter search parameter to filter the result, i.e. type in period of the sales price list in the “***From***” & “***Till***” textfield boxes or select from drop-down lists




2. Result can be sorted alphabetically by clicking the fields’ columns

3. Double click on price list to view full details of the price list, it will bring up the details on ***“Price List Details”*** tab for the selected price list