How to apply a Price List for a customer Group?

In Many situations our business offers special prices to a specific group of customers. These groups could be based on geographical location, type of customers (whole seller, retailer, normal customers, instate, outstate) or any other factor.

In HDPOSsmart we can create customer groups an associate a price list to each of the customer group.

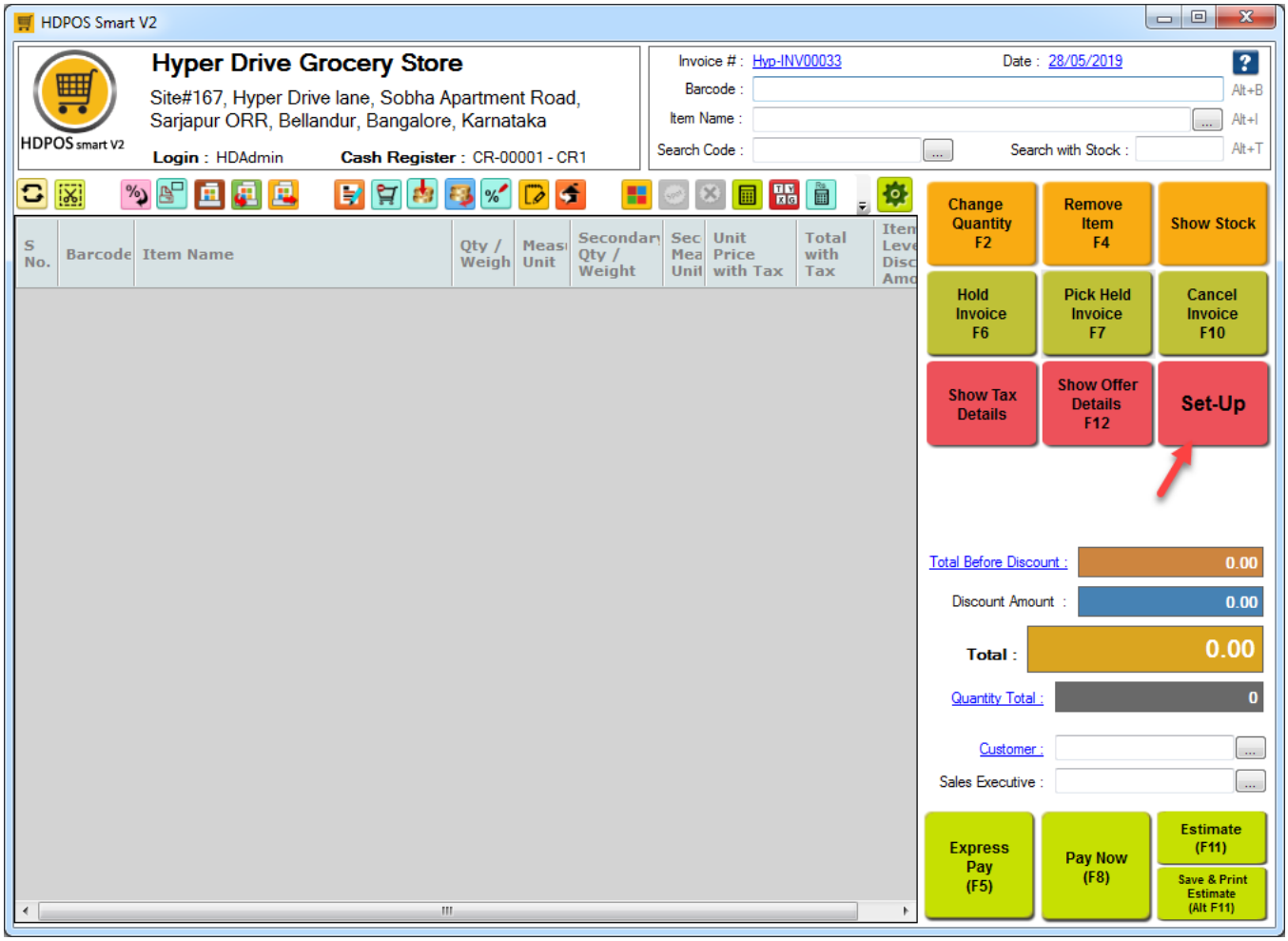
In this document we will cover how to apply a price list to a customer group. To explain this better lets cover the below steps:

1. Create a Customer Group. 2. Assign Customer to a Customer Group. 3. Enable Customer Group Price in Invoice Settings. 4. Create a Price list. 5. How the Price list will reflect in Invoice.

Step 1: How to create a customer Group?

To create a customer group lets follow the below steps:

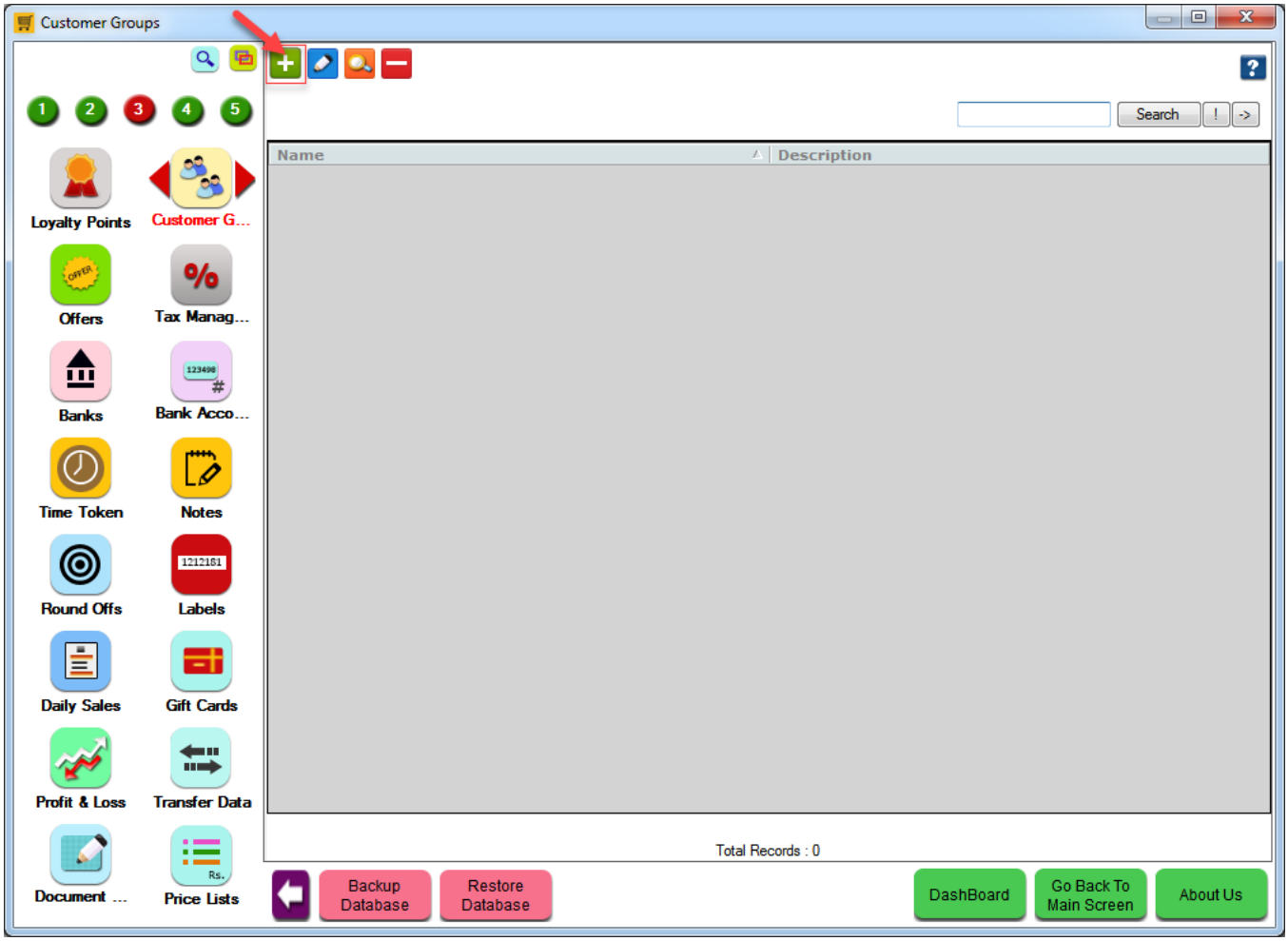
- Run **HDPOS smart**.
- From the **Main Invoice Screen** select **Setup.**



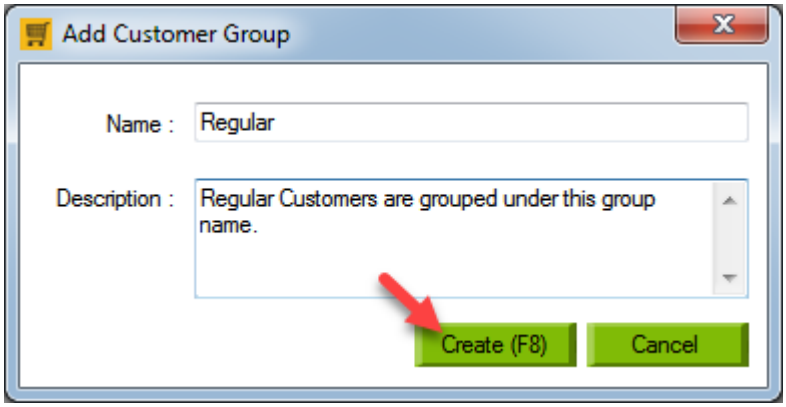
- From the **3rd page of Setup** select Customer Groups.



- From Manage **Customer Group** Tool Strip select **Add button**.



- In the **Add Customer Group** screen enter a **Group Name** & click on **Create.**



Step 2 - Assign Customer to a Customer Group

Now that we have created a **customer Group** lets assign a **customer** to a **Customer Group** . Here is what you need to do.

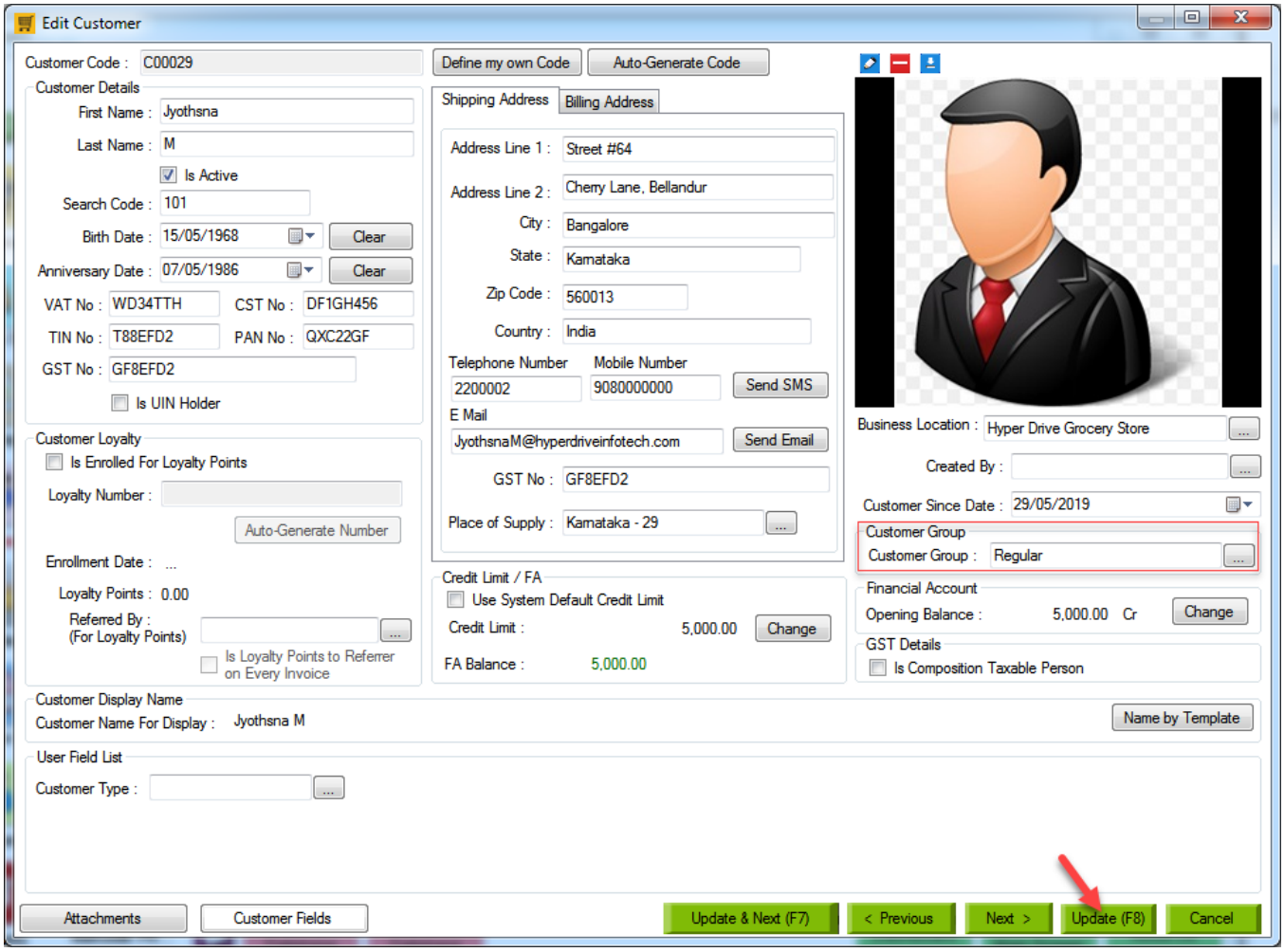
- From **set up** go to **Customer Manager.**



- Click on **Edit option** from the tool strip.



- In the **Edit Customer** screen that opens go to **Customer Group Section** and select the **Customer Group** created.



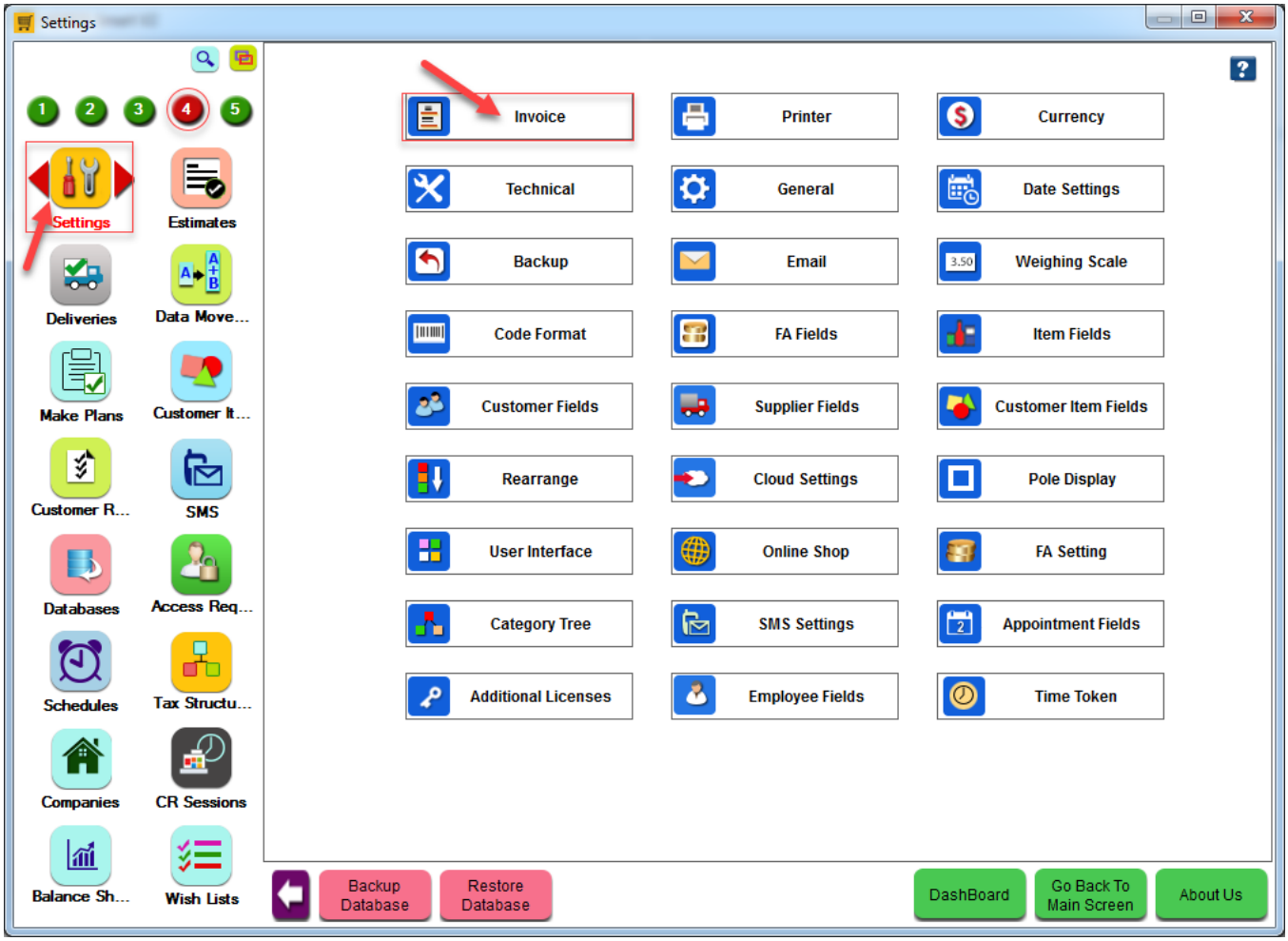
- Click on **Update** to Save the changes.

Step 3: Enable Customer Group Price List

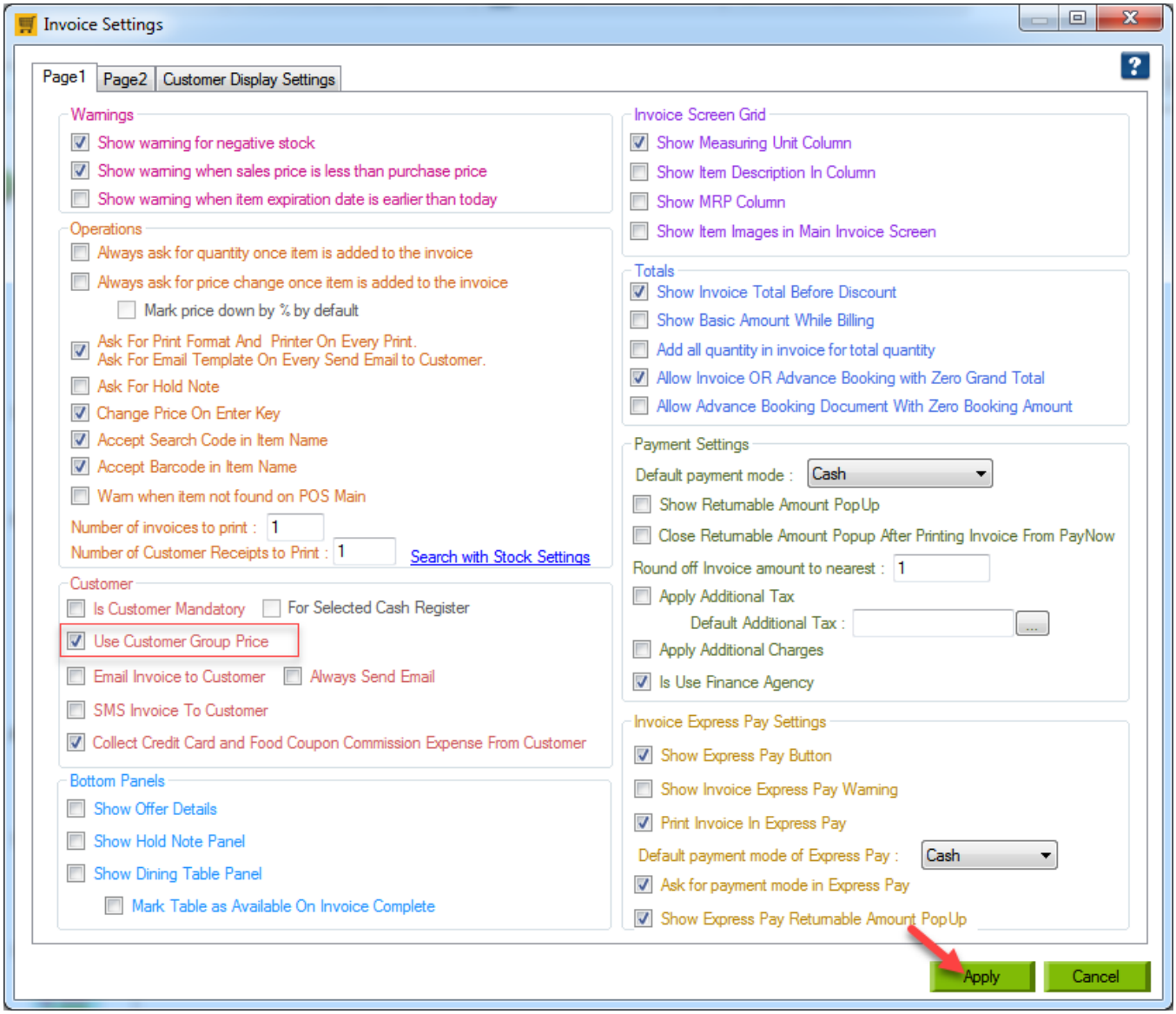
In order to use Customer price list at the time of invoicing we will need to see that **Customer Group price** is enabled in setting.

To check this follow the below steps

- From the **4th page of setup** select **Setting – Invoice setting.**



- In **Invoice Settings** ensure that **Customer Group Price Checkbox** is checked and click on **Apply**.



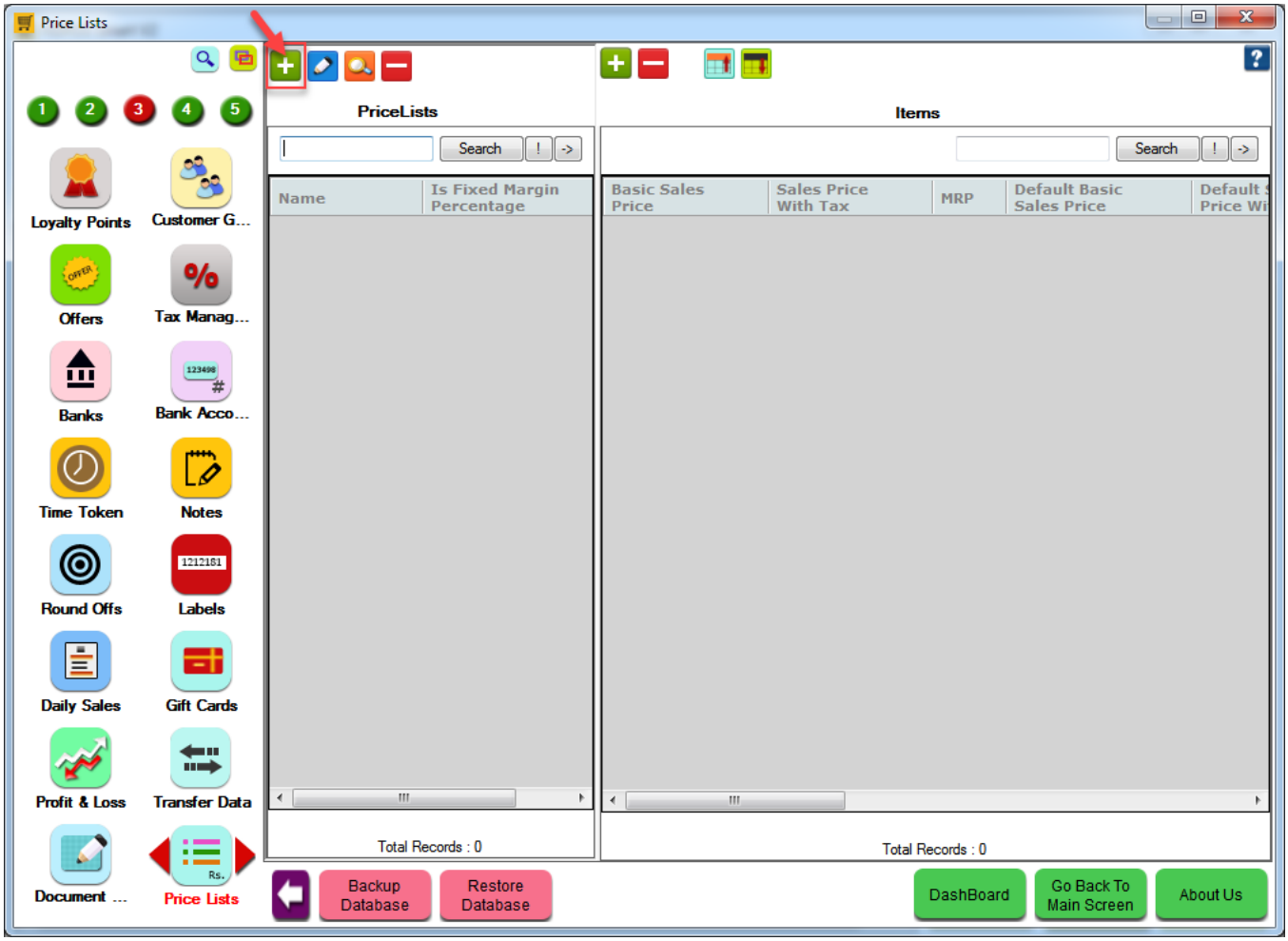
Step 4: Create a Price list

Let us now look at how to create a price list which will be specific to a Customer Group.

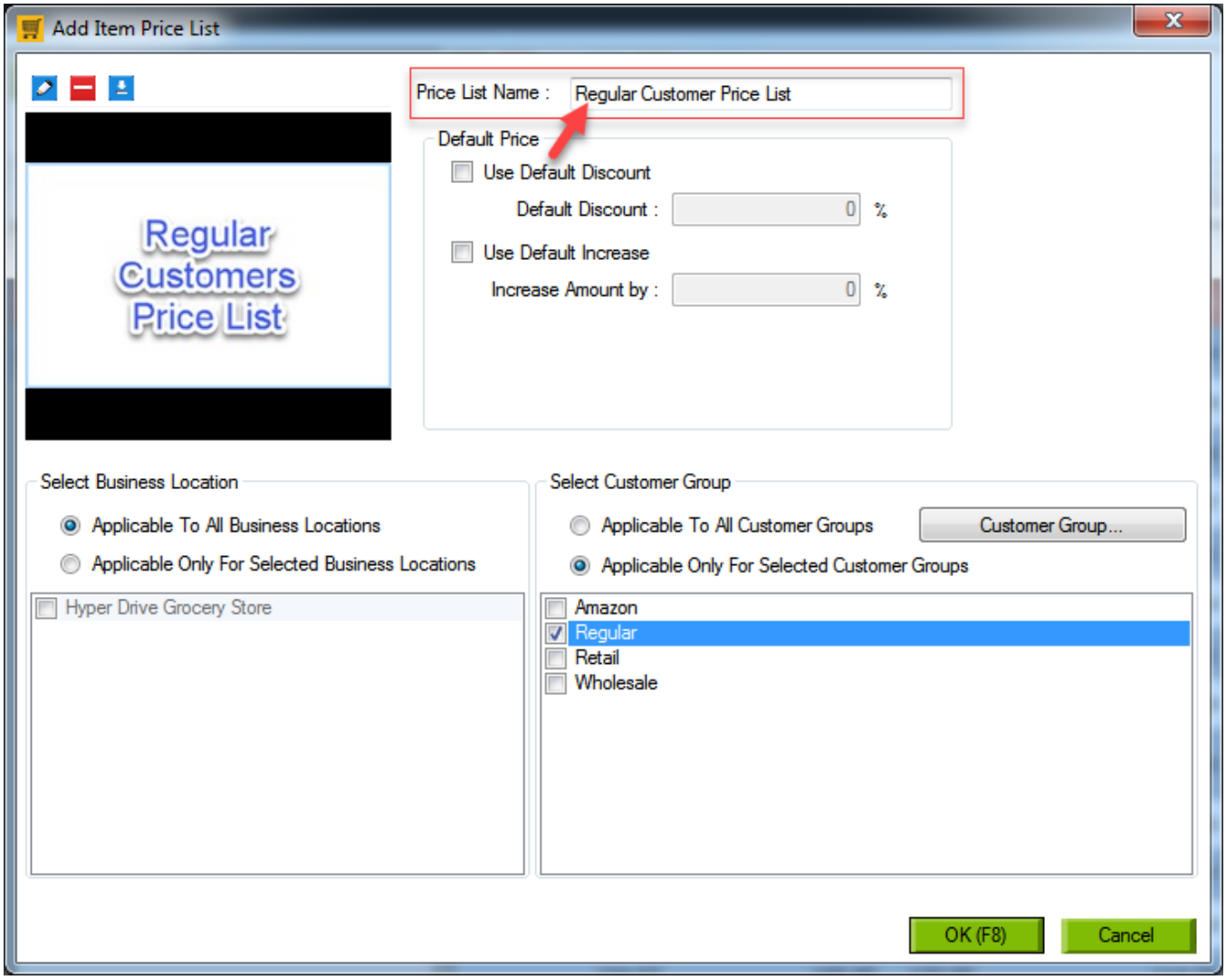
- From the **3rd page of Setup** select **Manage Price list.**



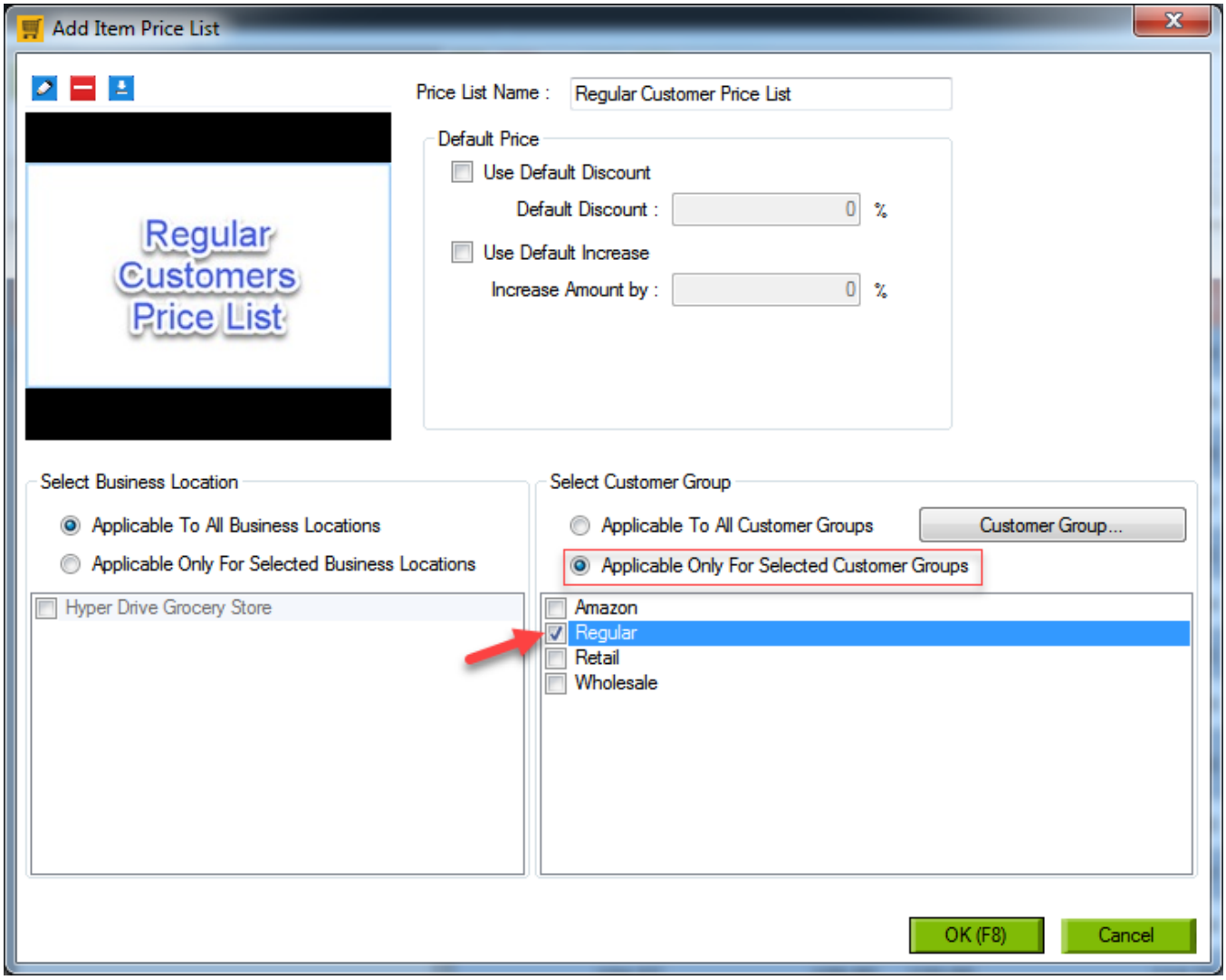
- Click on **Add** option from the **tool strip.**



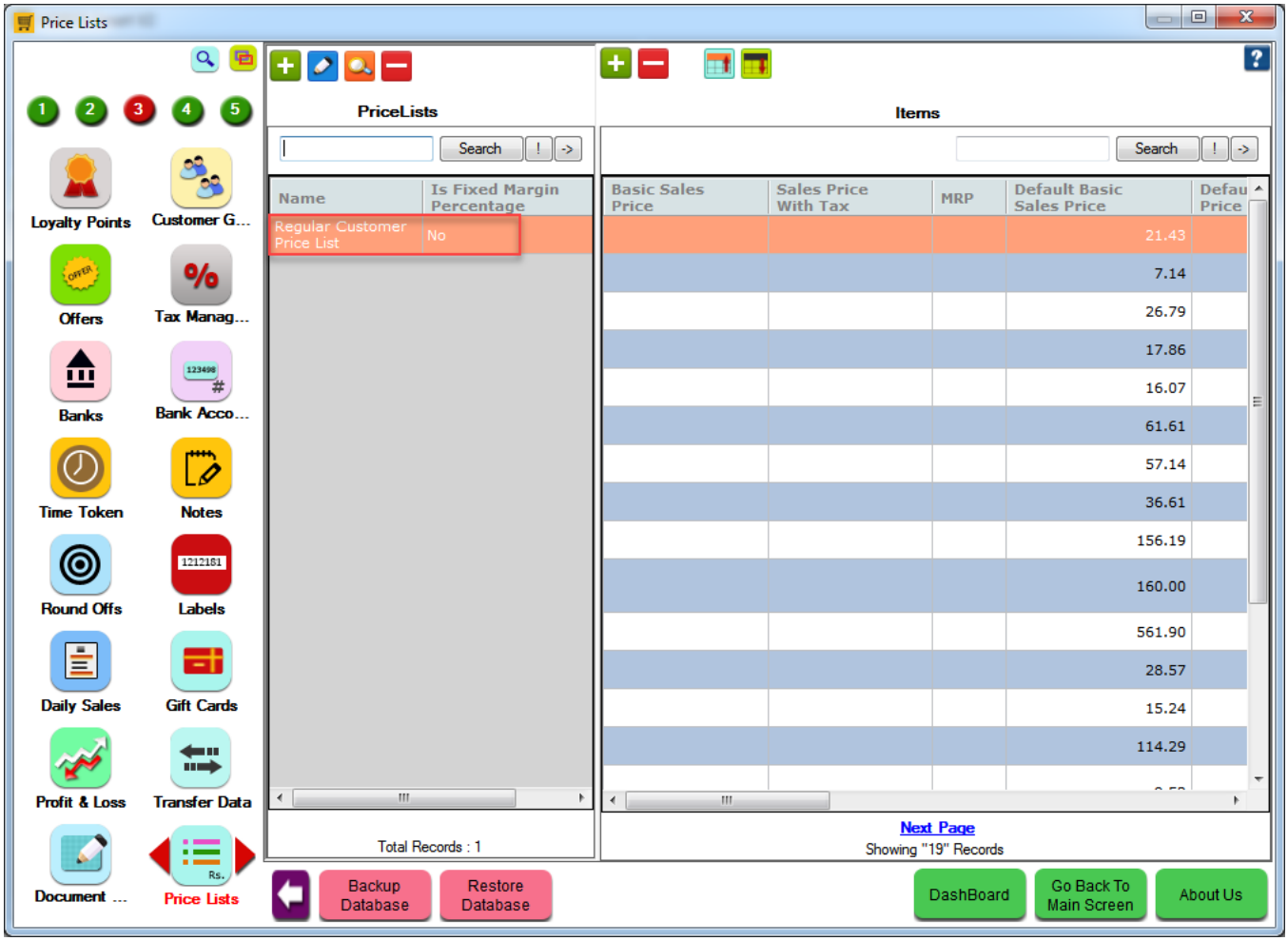
- In the **Add Item Price List** screen that opens enter the **Price List Name.**



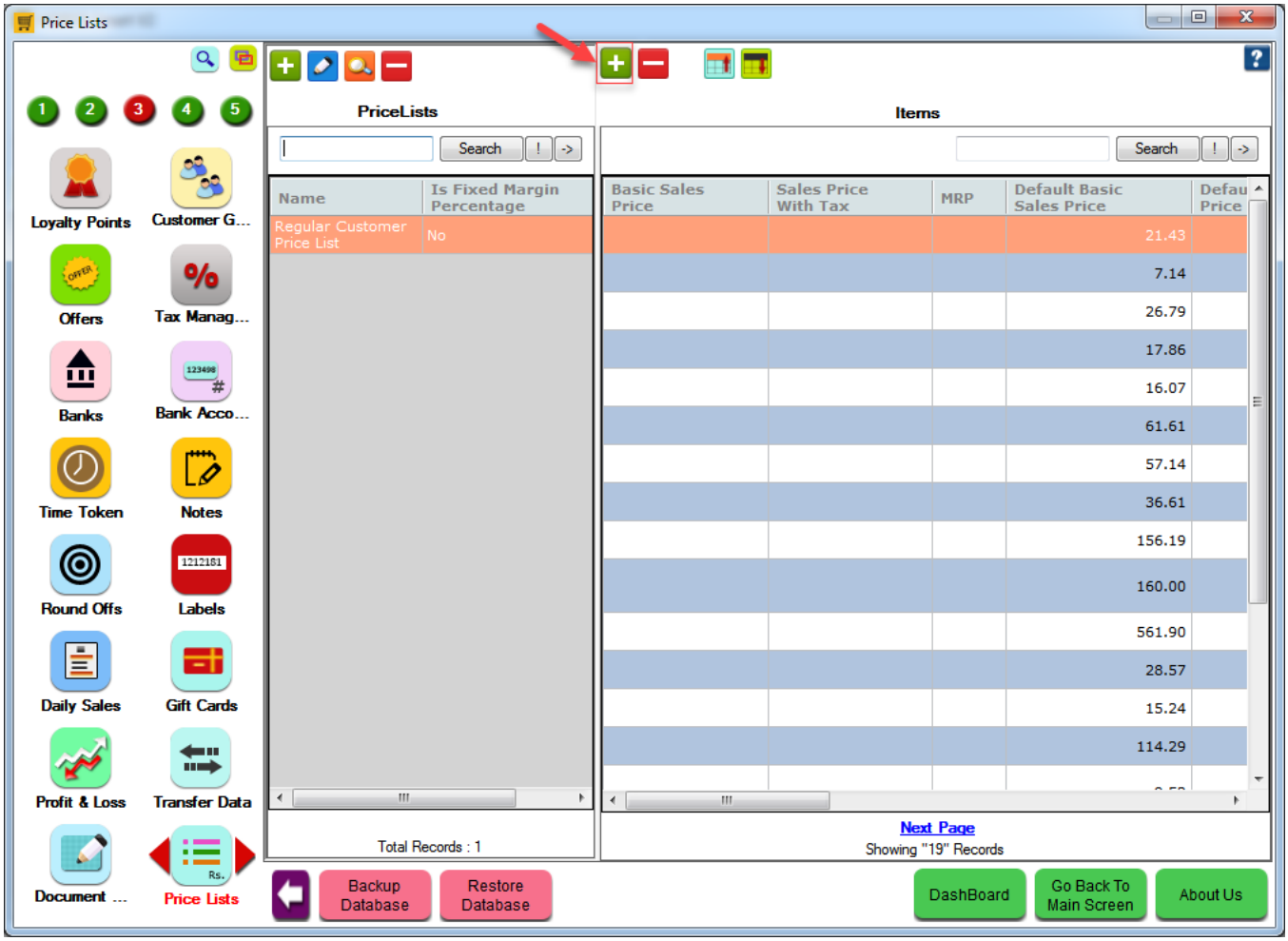
- In **Select Customer Group** section select option **Applicable Only For Selected Customer Group** & select the customer group to which the price list will be applicable.



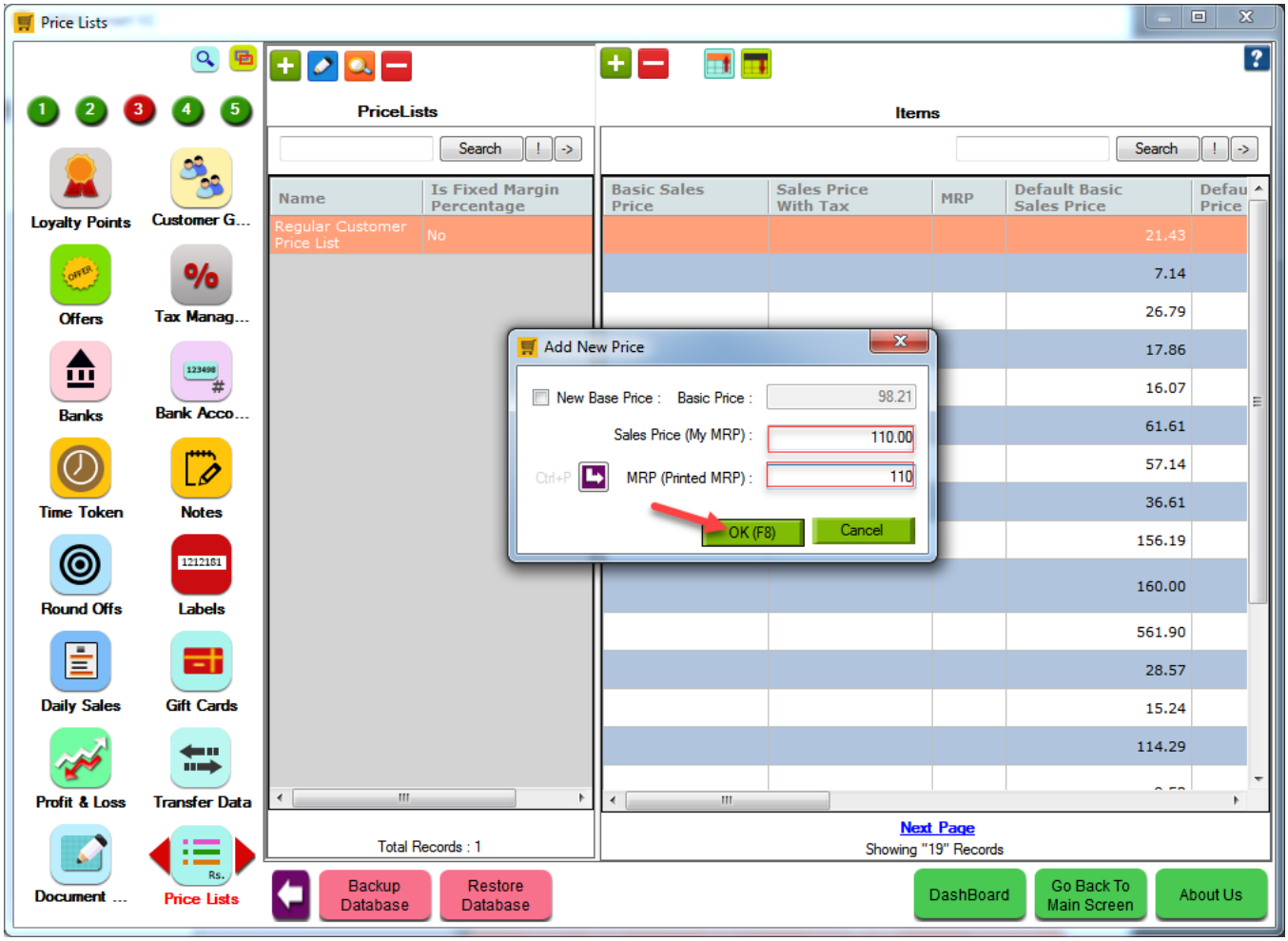
- Click on **OK** button to Create the **Price List** which will appear as below (Price list name to the left and list of all items on the right).



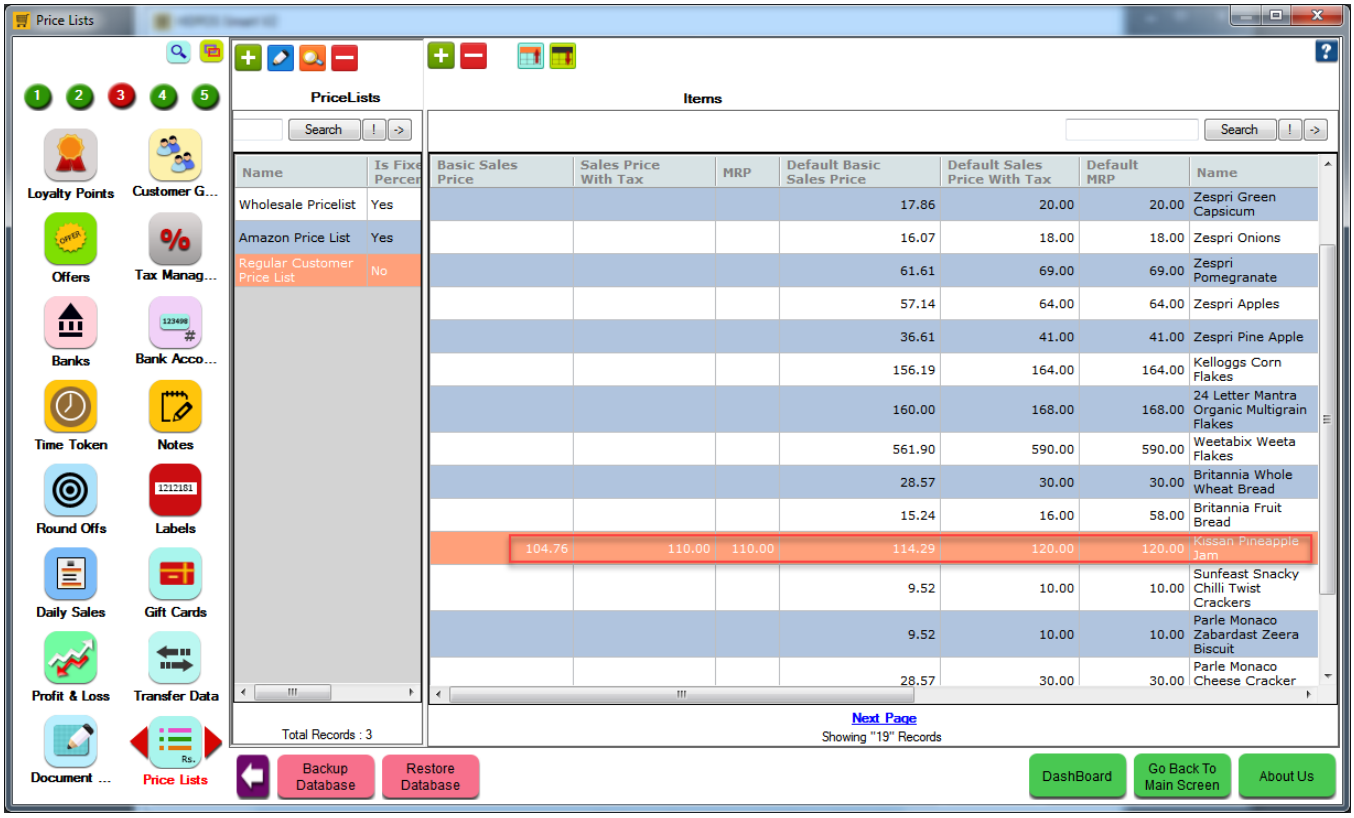
- To the **right of the screen** you will see a **list of all items with their existing Sales price and MRP**. To **add the new price list Sales price and MRP** click **on Add item price** option from the tool strip.



- This will bring up the **Add New Price** screen as show below where you need to enter the new **Sales Price** and **MRP** and click on **OK.**

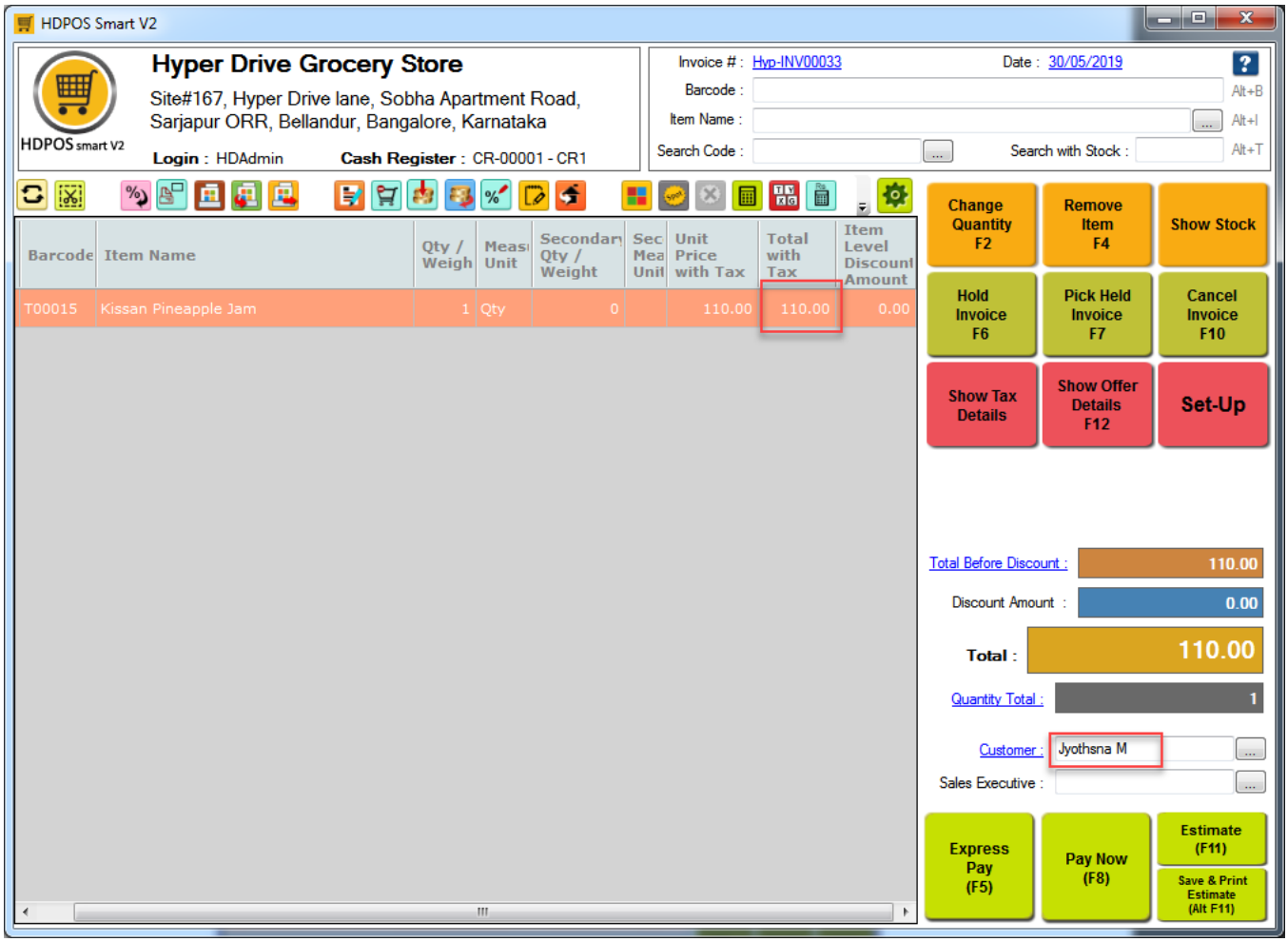


- Below is how the **price list** would appear with the **new Sales price and MRP details.**

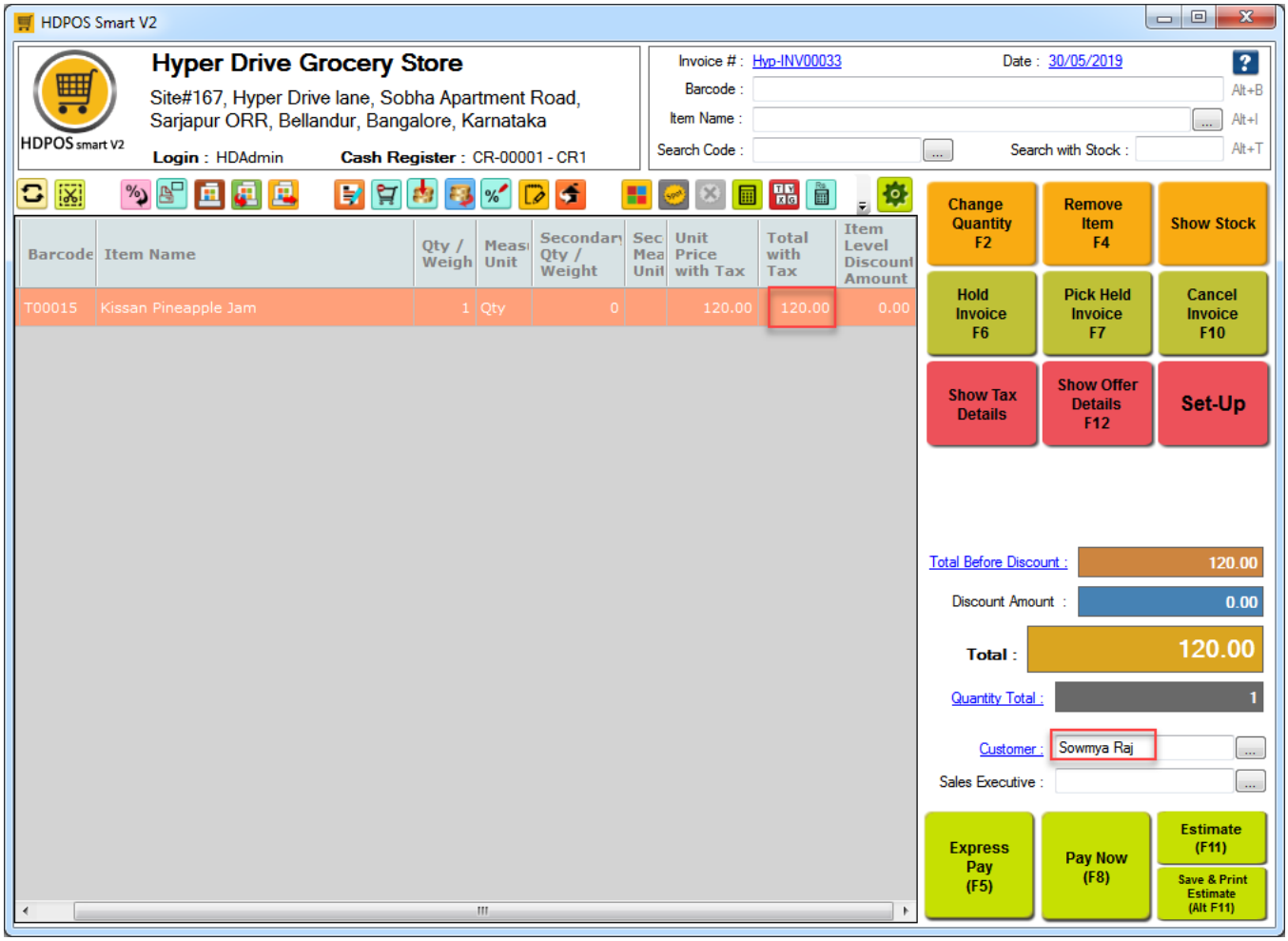


Step 5: How the Price list will reflect in Invoice

- To use **Price list** associated to a **customer group** ensure that you **first select the customer name** in the invoice screen so that prices get applied based on the customer group selected.



- Select the **Customer not related to Regular Customer Price List** then observe the price of item so that prices not applied based on that selected customer.



- Select the items required and notice that price reflecting is the price defined in the price list.