Special Price List to Send to Perspective New Customers: Setup Customer ID SPECIAL

The user may want to send a price list to a perspective new customer.

STEP #1-----Create a Customer ID: **SPECIAL** in **Customer Maintenance**.

Customer Maintenance				
<u>F</u> ile				
Customer ID SPEC	CIAL 🙀 Lookup			Active
Customer Name SPEC	CIAL PRICES			
		````	,	
<u>1</u> - General	<u>2</u> - Contact	<u>3</u> - Credit	<u>4</u> - Routing	<u>5</u> - Notes
Bill To	SPECIAL PRICES		Sales Rep ID	

STEP #2-----Create a Price List. Choose File from the left hand side of this window, and choose Special Price List:

Customer Maintenance						
File						
<u>C</u> ategory Pricing <u>I</u> tem Pricing	PECIAL					
Special Price List	PECIAL PRICES					
<u>O</u> rder History						
<u>R</u> ecurring Orders						
Item <u>N</u> otes						
Open <u>A</u> R						

At the bottom of the screen, choose the Insert Button

Insert	<u>D</u> elete	<u>P</u> rint	Accept	<u>C</u> ancel	
Customer Special P	rice List - SPECIAL SPEC	CIAL PRICES			

Item ID	Description	Cost	Calc Method	Factor	Current	Future
<b>\$</b> 4			•			

To add an item to the SPECIAL Price List, enter in the Item ID or click on the *item* and search for the item.

**Description**: The item description

**Cost:** The cost of the item.

Customer Speci	ial Price List - SPECIAL SPECIAL PRICES		_			
Item ID	Description	Cost	Calc Method	Factor	Current	Future
10015	TUNA STEAK 4 OZ IQF	4.88	•			
			C G M F			

Calc Method: How to calculate the discounted price. Choices are C, G, M, F

C =Cost Plus: Enter in an amount in the Factor field that will be added to the Market Cost for this Price Level.

 $\mathbf{F}$  = Fixed price: Enter in an amount you want to receive in the Factor field.

G=Gross Profit Percentage: Enter in a Gross Profit Percentage in the Factor field.

M=Markup Percentage: Enter in a Markup Percentage in the Factor field

Enter in Factor Based on Calc Method.

The system will enter in the Current Cost for the Special Price List for the Potential Customer.

🐨 Customer Special Price List - SPECIAL SPECIAL PRICES							
Item ID	Description	Cost	Calc Met	hod	Factor	Current	Future
10015 🙌	TUNA STEAK 4 OZ IQF	4.88	С	-	1.00	5.93	5.88
10551	SHRIMP 13/15 P/D RAW T/ON	8.93	С	-	0.50	9.43	9.43
10731	CRAB CAKES MINI 1 OZ	49.00	G	-	10.00	54.44	54.44
20380	RIBEYE SELECT BONELESS	6.63	G	•	20.00	8.29	8.29

To save the entry, click on the Accept Button at the bottom of the screen.



## **STEP # 3**-----**Print out the Price List** for the Potential Customer



At the bottom of the screen, choose **Print** button

Treast	Delete	Drint	Accent	Cancel
Insert	Delete	Print	Accept	Cancel

The items will print out on a report and can then be faxed to the potential customer.

CUSTPRLIS 1-800-214	r s -5045 Custom	R2SOFTWARE, INC. Mer Special Price Lis	t	08/14/12 Page: 1
Customer	Name: SPECIAL PRICES			
Item #	Description		Price	
10015 10551 10731 20380	TUNA STEAK 4 OZ IQF SHRIMP 13/15 P/D RAW T CRAB CAKES MINI 1 OZ RIBEYE SELECT BONELESS	5/0N	5.88 LB 9.43 LB 54.44 CS 8.29 LB	

*** End Of Report ***