

Take your business to the next level

How to Manage Customer Special Pricing in EXO Business

(Price Policies)

What are Price Policies?

Price Policies are one of the strongest features in MYOB EXO Business. They enable price 'rules' to be automated meaning manual price lists can be eliminated. Price Policies can be used for:-

- ✓ Flexible Pricing of Products for a specific customers, or group of customer
- \checkmark Specials or Promotions that start & finish on specific dates
- ✓ Clearance of Items
- ✓ Much more...

Step 1 – Create a New Price Policy

Drop Down Menu -> Utilities -> Debtors Utilities -> Setup Price Policies

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Debtors Utilities		<u></u>	Invoice Number Search	F7		
	Sales Order Utilities	•		Prompt Pay Discount Calculation		
	Stock Utilities	•		Time Billing		
	Purchase Order Utilities	•		Setup Price Policies		

Click New -> Enter Policy Ref, Start Date, End Date

Price Policy S	etup				
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Policy No.: (New	/) Policy Ref.: Customer ABC				
Details Price Ru	les Accounts Price Policy Groups				
Active					
Policy ref.:	Customer ABC	Start date:	01.07.2011	Fixed Policy	
Customer ref.:	Contract Ref 123456	End date:	30.06.2012		

Note: 'Fixed Policy' means the system will use prices in this policy even if pricesin other policies are cheaper

Step 2 – Set Price Rules

Price Policy Setup -> Price Rules Tab -> Click 'Add Item' -> Add the Stock Item or Stock Group / Category for which you wish to setup the price rule -> select one of 'Discount', 'Substitute Price', 'Switch to Base Price' -> Enter / Update Minimum Quantity and Start / Stop Dates.

Then Press OK

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

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Price Policy Setup	
File Navigate Help	Add Item Market Remove Item
Policy No.: 5 Policy Ref.: Customer ABC Details Price Rules Accounts Price Policy Groups Stock Code Description Stock Grou OILWRE01	Stock Price Rule - Rule No: 5 Image: Stock code: OILWRE01 OIL FILTER WRENCH Image: Stock group: Image: Expected margin: 0.0% Margin variance +/-: 0.0% Base price (Internet): New price: Image: Discount: 10.0% Image: Substitute Price: Image: Stock of the stock of
MOMENTUM SOFTWARE SOLUTIONS PTY LTD	Switch to Base Price Calculated Margin: Calculated variance: Minimum quantity: 0 Start date: 01.07.2011 T Stop date: 30.06.2012
NS PTY LTD ExoAdmin	Master Job: Job: OK Cancel

Note: Price Rules can be used for Quantity or 'break' discounts (eg Buy 5 get 5% off, buy 10 get 10% off etc).

Step 3 – Repeat Step 2 until all required items or groups have a Price Rules

Policy No.: 5	P	olicy Ref.: Customer /	ABC				
Details Price Rules	Accounts	Price Policy Groups					
Stock Code	D	escription	Stock Group	Start Date	End Date	Min. Qty.	*
			5. EXHAUST	01.07.2011	30.06.2012	0	
AIRFIL05	P	RO-STLYE AIR FILTER		01.07.2011	30.06.2012	0	
OILWRE01	C	IL FILTER WRENCH		01.07.2011	30.06.2012	0	

Step 4 – Assign a Customer/s to this Policy Option A

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Price Policy Setup -> Accounts Tab -> Click 'Add Item' -> search for the Customer -> click 'Select and Close

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Policy No.: 5 Po	licy Ref.: Customer ABC			
Details Price Rules Accounts	Price Policy Groups			
Acc. No. Name	Account Search			×
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Note: You can add multiple customers to a price policy

Step 5 – Assign a Customer Group to this Policy Option B

If you wish to assign a large number of Customers to a Price Policy (eg Trade Pricing, or a Special) you can put Customers into 'Price Groups' and assign the Price Group to the Policy

Price Policy Setup -> Price Policy Groups Tab -> Click 'Add Item' -> search for the Customer -> click 'Select and Close

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Price Policy Setup	
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Details Price Rules Accounts Price Policy Groups	
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	RETAIL
	FOREIGN

Note: How do Customer Price Groups get assigned? Go the any Debtor Account -> Discounts / Prices Tab -> Select the Price Policy Group from the Drop-Down.

Price Policy Groups are maintained by your system administrator in the EXO COnfigurator

	Debtor Account Details
	File Navigate Help
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	A/C No: 35 Name: ABC Pty Ltd
	Details 1 Details 2 Contacts Transactions Orders Extra Fields Serials Discounts/Prices Jobs Notes History Notes Documents Analysis
	Price Policies for this account: Price Policy Group :

Customisation Options