

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:-

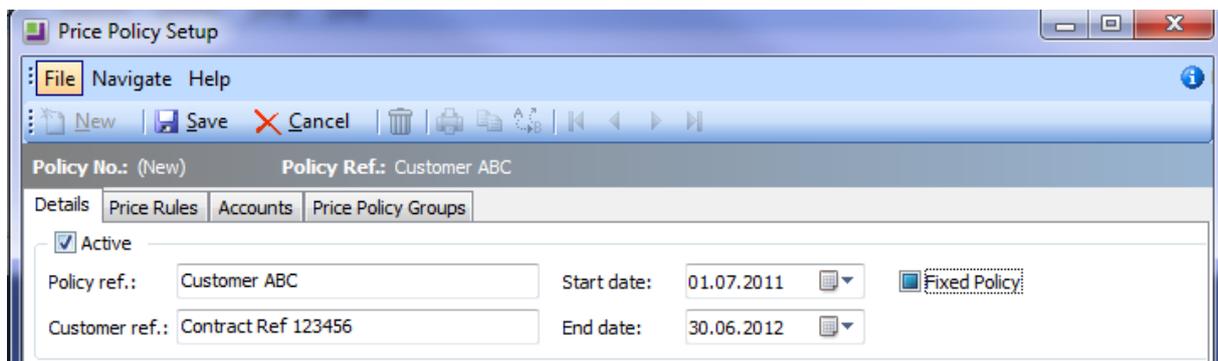
- ✓ Flexible Pricing of Products for a specific customers, or group of customer
- ✓ Specials or Promotions that start & finish on specific dates
- ✓ Clearance of Items
- ✓ Much more...

Step 1 – Create a New Price Policy

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



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



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

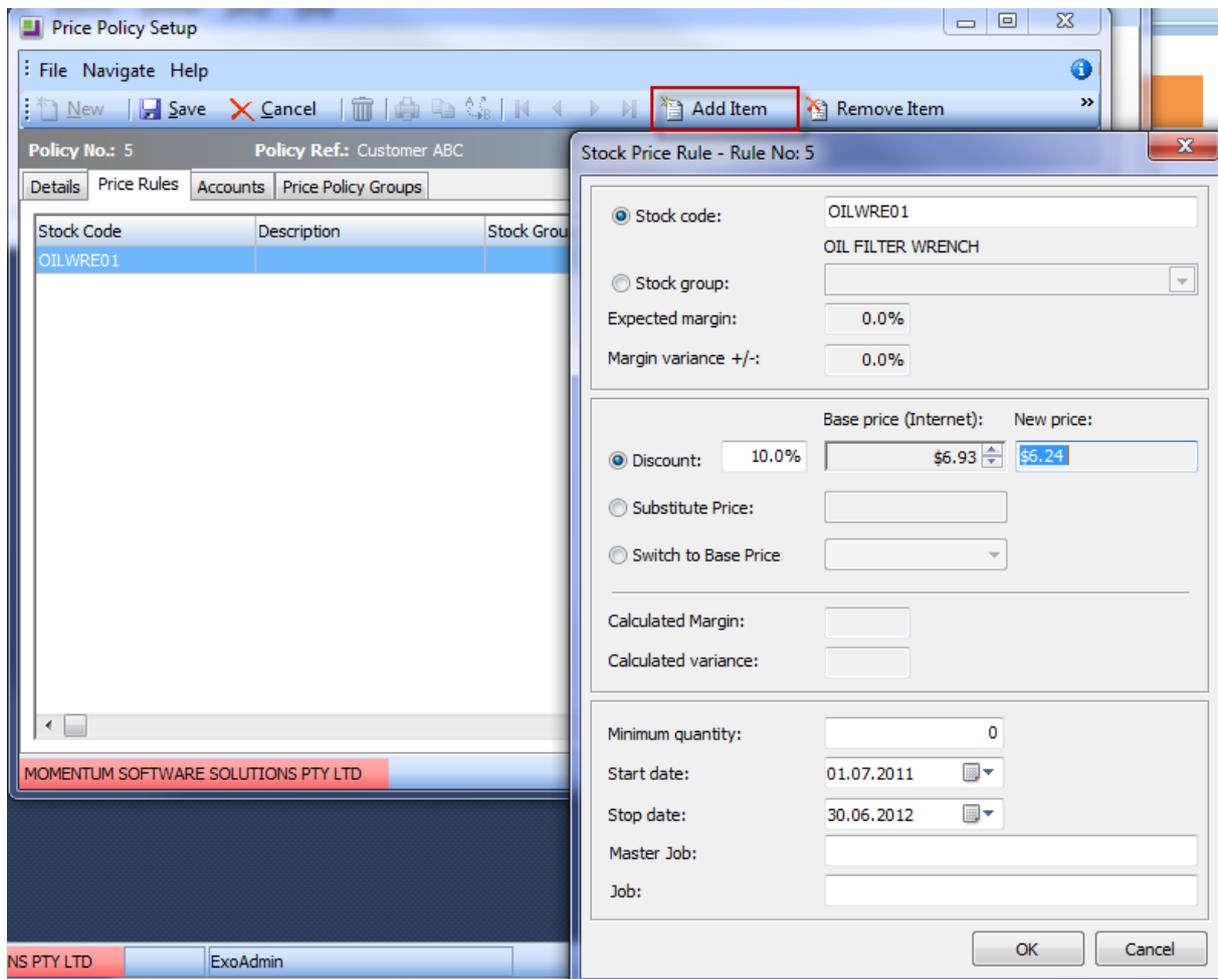
Step 2 – Set Price Rules

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

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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		Policy Ref.: Customer ABC				
Details Price Rules Accounts Price Policy Groups						
Stock Code	Description	Stock Group	Start Date	End Date	Min. Qty.	
		5. EXHAUST	01.07.2011	30.06.2012	0	
AIRFIL05	PRO-STLYE AIR FILTER		01.07.2011	30.06.2012	0	
OILWRE01	OIL FILTER WRENCH		01.07.2011	30.06.2012	0	

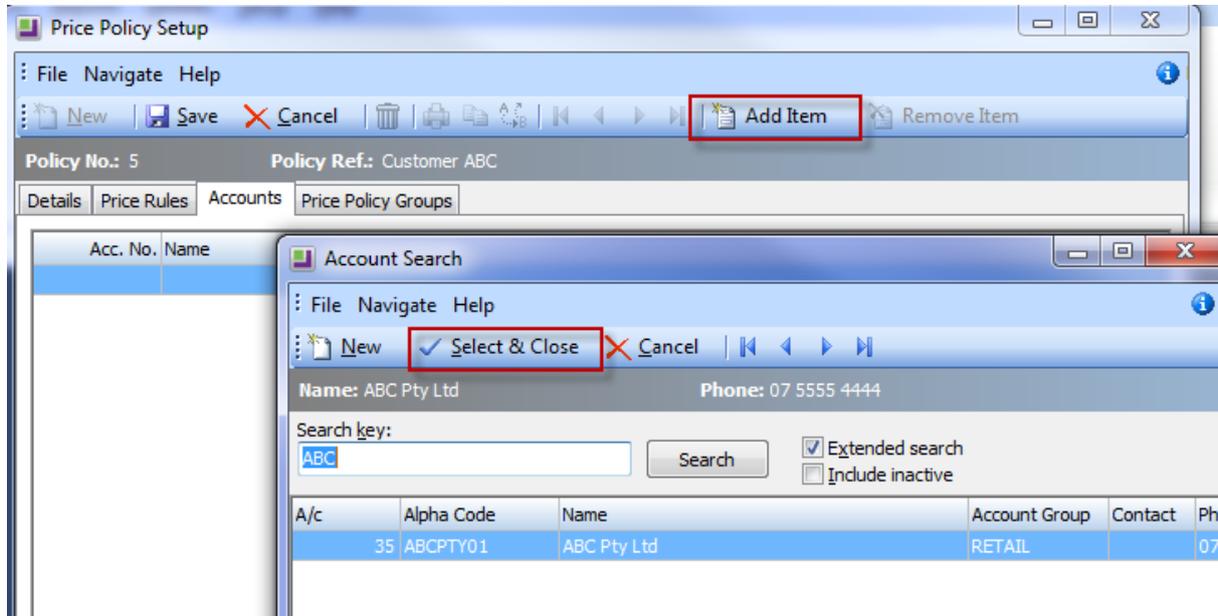
Step 4 – Assign a Customer/s to this Policy

Option A

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



Note: You can add multiple customers to a price policy

Step 5 – Assign a Customer Group to this Policy

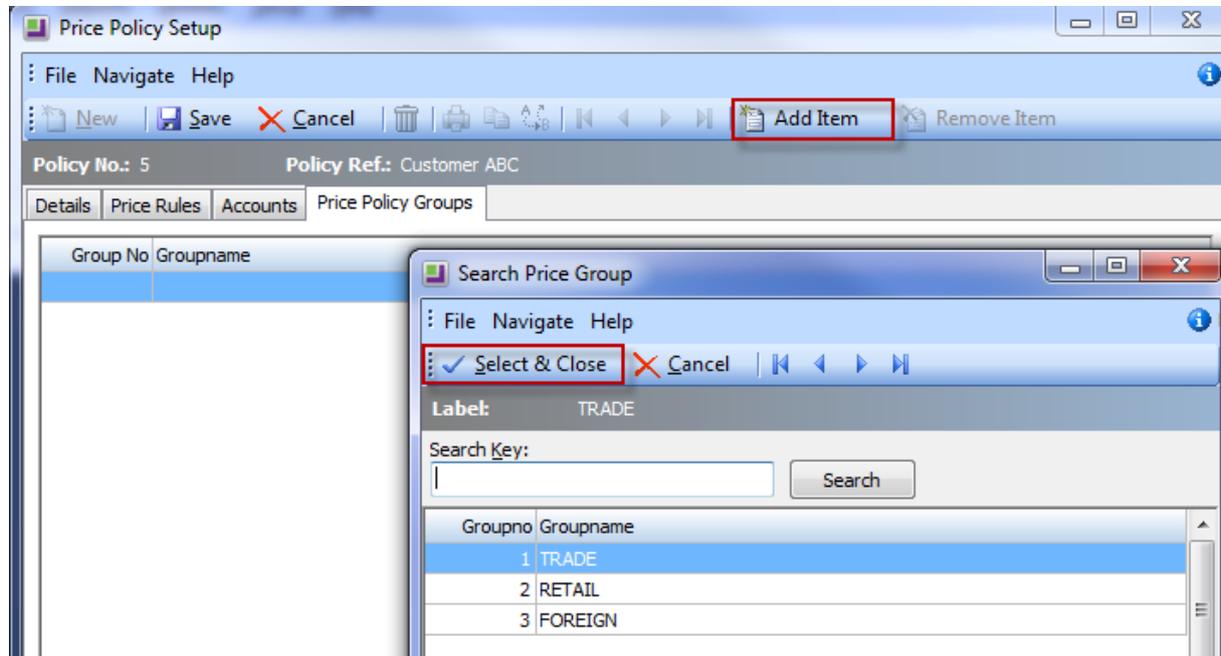
Option B

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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Note: How do Customer Price Groups get assigned? Go to 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



Customisation Options

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