

Setting Up Price Books

Price Books help you create and manage various offers and promotions. Promotions can bring new customers your way while encouraging your existing customers, to spend more.

Objectives

- Adding a Price Book
- Adding a Price Book Rule
- Adding Items to a Rule
- Editing Price Books

Adding a Price Book

From the main menu, select *Products* and then *Pricing* and *Price Books*.

Click the *Add* icon to add a new price book.

Give it a name. Let's call this 'Spring Promotion'. And then, add a description. For example, "Special Promotion for Paint".

You can include or exclude customers, customer price groups or customer tags by using these toggles.

If you want the price book to be active only during a specific period, select the start and end dates here.

Advanced scheduling gives you more options to determine when a price book is active or inactive.

Select *SAVE & ADD RULES* to continue.

Adding a Price Book Rule

A Price Book has rules that drive what items are included and how they are to be discounted.

From the main menu, select *Products* and then *Pricing* and then *Price Books*.

Add a new price book or select an existing price book and edit it.

Click the *Add New* button in the *Rules* section.

Select the rule *type* from this drop-down.

When you select a rule type, a description and an example appear here to help you.

The rule needs a name. Let's call it "Buy One Get One Offer for Paint"

The configurations will differ for each rule type.

You can review the help documentation to learn more about each of these options.

Here are a few things common to most rule types.

Your selection in the ‘*Customer Purchases by*’ drop-down controls *how* qualifying items are selected for your promotion.

For example, if you select *Category* from the drop-down, you will choose one or more categories of items.

You can print or display a custom message on your receipt when a promotion is applied.

You can limit promotions to loyalty customers and even choose the loyalty level required to be eligible for the offer.

If you want to limit the offer to those who present an offer *code* at POS, that is possible too.

Switch this toggle on if you want the items discounted by the current rule to be considered by other rules for discounting.

When the toggle is switched off, the rule is *not* discountable by other rules.

When you are ready, click *SAVE & EDIT* to save the rule and add the promotional products.

Adding Items to a Rule

Now that you have a price book and a price book *rule* created, we can add qualifying items and qualifying details to the promotion.

Select the rule and click the *Edit* icon.

Click the *Add* icon.

What you select in this field changes based on your selection in the *Customer Purchases by* field when you created the rule.

Search and select qualifying items. Customers should purchase items in this list to be eligible for the offer.

Click the *Add Items* button, and then click the *Save* icon.

Click the *CUSTOMER DISCOUNT(S)* tab.

Click the *Add* icon.

Search and select an item, a category, or a tag.

From the *Discount for Purchase(s)* drop-down, select the type of discount. For BOGO, we will select Free.

Click *Add Items*.

To select multiple qualifying items, click *Multi Items*.

Click *Save*.

Customers will now receive two gallons of paint for the price of one.

Editing Price Books

If changes are needed, select *Products* and then *Pricing* and *Price Books*.

Select the price book you want to edit and then click the *Edit* icon.

You can now add, edit, or remove price book rules from the price book.

To make changes to the price book's configuration, click the *Edit Price Book* icon.

When you are ready, click *Save*.

You can also edit your price book rules.

Select the price book you want to edit and then click the *Edit* icon.

When the price book opens, select the rule you want to make changes to and then click the *Edit* icon.

Modify the price book rule, add or remove qualifying items and when you are ready, click the *Save* icon.

Recap

Price books can help you improve return business, promote sales and events or even help move out old stock.

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