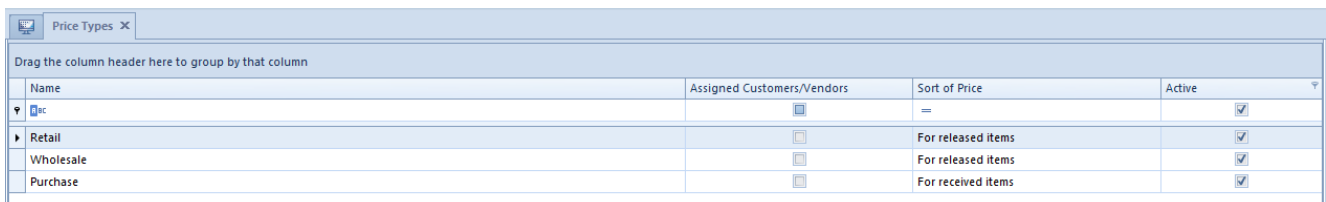# Introduction to price types

Each price list available in the system is based on previously defined price types which can be used in sales or purchase path.

A list of price types is available from the level of:

- *Configuration → (Trade/Warehouse) → Price Types*
- *Sales → Price Types,* where only prices for released items are presented
- *Purchase → Price Types,* where only prices for received items are presented

List of price types

The list of price types presents:

- price type name
- parameter informing whether customers are assigned to a price type
- parameter informing whether a price type is active
- When defining a price type from the level of tab *Configuration,* an additional column appears, indicating sort of price type — for received and for released items.

When creating a new database, the system automatically adds:

- two price types for released items for sales — *Retail* (default) and *Wholesale*
- one price type for received items for purchase — *Purchase* (default)

A price type can be set as default in configuration of a center, from the level *Configuration -> Company Structure -> Object Availability.* A price type marked as default in a center/company is, by default, set on documents issued within that center.

Note
Regardless of the number of price types defined by a user, only one price type for released items and one price type for received items can be set as default for a center.
In case a price type is deactivated, the system does not update price type and prices on documents issued with such a price type. For documents with status:

- unconfirmed — if a price type is changed directly by an operator, it is not possible to select the inactive price type again
- confirmed — a deactivated price type and price are transferred on generated documents and it is not possible to set that price type again after an operator modifies price type manually.

Two operator groups are added automatically to predefined price types: *b2_admin* and *b2_default.* It is possible to attach and detach other operator groups to <<all price types>> but at least one operator group must be assigned to a price type.

Defining price types

In order to define new price type, it is necessary to click on button [**Add**] which is available above the list of price types.

A price type form is composed of the header and the following tabs:

- Vendors, Vendor Groups, Operators, Attributes — for a <<price type for received items>>
- Customers, Customer Groups, Operators, Attributes for a <<price type for released items>>

Name: Type name	☑ Active

Sort of Price: For released item ⌄   Precision: 4   ⌄

Customers | Customer Groups | Operators | Attributes

➕ ✕ 🔧 ▾

Drag the column header here to group by that column

Code	Name
🔲 ꓼꓺc	ꓼꓺc

✕ ✔   Edit Filter

Price type form

A price type form contains the following fields:

- **Name** — allows for entering up to 50 characters (letters or digits) defining a unique price type name
- **Sort of Price:** — field indicating for which type of

documents (for released or for received items) a price list created on the basis of a given price type should be available

- **Precision** – field defining price precision, that is an admissible number of decimal places after a comma which could be entered for a given price in the price list created on the basis of this price type

Customers/Vendors – the tab allows for attaching customers/vendors to a selected price type. In the case of prices:

- for released items – attaching customers results also in associating those customers with price lists created on the basis of that price type and gives them exclusive access to those price lists
- for received items – attaching vendors allows only to assign them to a selected price list, but it does not mean that every price list created on the basis of that price type will be available to all vendors assigned to that price type

Customer groups/Vendor groups – the tab allows for attaching a group of customers/vendors to a selected price type

Operators – the tab allows for attaching and detaching selected operators from <<a given price type>>

Note
An operator logged-in to a given center can see only those price types which are assigned to that center and, at the same time, are associated with a group or groups of operators to which that operator belongs.

Access to price types

For an operator to be able to use a price type, it is necessary to assign that price type to his/her operator group and to the company/center to which that group belongs.

In this way it is possible to limit the access to price types for selected operator groups.

Note
If an operator issues a document for a center different from the center to which he/she is logged-in, then he/she can only use those price lists, whose price type is associated with the operator group of that operator and with the center for which a document is being issued.
It is possible to add and remova an assotiation between a price type and an operator group from the level of:

- *Sales/Purchase → Price Types -> tab Operators*
- *Configuration (Trade/Warehouse) → Price Types → tab Operators*
- *Configuration → Company Structure → Operator Groups → tab Price Types*

Such an operation can be performed with the use of buttons [**Attach Group**]/[**Detach Group**]

To assing a price type to a company/center, it is necessary to go to *Configuration -> Company Structure -> Rights Structure -> Object Availability*

Then, from the list of objects, select option *Price Types* and attach or detach particular price types.

Hint
In child centers, parameter *Get From Parent Center* is checked by default. It disables the possibility of attaching and detaching price types. If only a part of price types from a

parent center is supposed to be available in a child center, the parameter should be unchecked – then buttons used for attaching and detaching are activated.

Note
No price types which are not available for the direct parent centers can be attached to child centers.

Example
Operator groups available in the system: b2_admin, b2_default, Group_1, Group_2
Price types available in the system:

PT1, PT2, PT3

Centers types available in the system:

Company (parent), NYC (subsidiary to Company), RICH (subsidiary to Company and equivalent to NYC)

Operator groups assigned to particular centers:

- **Company** – b2_admin, b2_default, Group_1, Group_2
- **NYC** – Group_1
- **RICH** – Group_1 and Group_2

Price types available in particular centers:

- **Company** – PT1 (default), PT2, PT3
- **NYC** – PT3 (default)
- **RICH** – PT2 (default) nad PT3

Price types available for particular operator groups:

- **PT1** – b2_admin, Group_1
- **PT2** – b2_admin, Group_1
- **PT3** – Group_2

Situation 1:

Depending on an operator group, an operator will have access to the following price types while logging in to Company

center:

- **b2_admin** → PT1, PT2
- **Goup_1** → PT1, PT2
- **Group_2** → PT3
- b**2_default** → no price types available

If an operator belongs to Group_1 and Group_2 at the same time, he will have access to price types PT1, PT2 and PT3.

Situation 2:

Only operators from Group_1 can log in to center NYC. However, price types available for Group_1 are not available in center NYC. Price type available in center NYC is not available for Group_1.

Therefore, an operator logging in to center NYC will not have access to any price type.However, while issuing a document in center NYC, the system will set price type PT3, which is default for center NYC.

Situation 3:

Operator OP_1 belong to groups:

- **Group_1**
- **Group_2**

Operator OP_1 logs in to center RICH

In center RICH, operator OP_1 has access to the following price types:

- **PT2,** because this price type is available for Group_1 and center RICH
- **PT3,** because this price type is available for Group_2 and center RICH

Operator OP_1 has no access to price type PT1 in center RICH as this price type is not available for this center.

Price types for released items

On a customer form, in tab Trade, in section Price Types for Released Items, there is a list of price types for released items which are available for a given customer, that is prices to which:

- a given customer is assigned
- no customer is assigned

Each active and newly defined price type for released items is automatically added to forms of existing customers, provided that no customer has yet been assigned to that price type. In case a customer is assigned to a newly added price type, then such a price type is available only for the selected customer.

Section Price Types for Released Items on customer form

If any price type available for a customer is not available for a logged-in operator or is not available in a given

company/center, then it is not displayed in the section. For this reason, depending in which company/center and by which operator the list is being displayed, it may contain different data.

The following parameters are available in the section:

- Default – allows for selecting <<default price type>> for a customer which is different from the price type defined globally for a center. If a user does not indicate a default price type, then it is retrieved from a center. Prices from price lists set on that price type are retrieved in the first place on documents issued for that customer.
- Lowest price on documents for released items – upon checking this parameter, the lowest price from available and active price lists created on the basis of price types for released items available for a given customer within a given company/center.

Hint
If the parameter Lowest price for released items is checked on a customer form, then in a document issued for such a customer:
a price type, to which a logged-in operator does not have access, may be suggested

price may exceed the range of minimum and maximum price available for an item and the operator (if parameter <<Check minimum and maximum regular price in documents has been checked>>)

The order of retrieving prices in the case of unchecked parameter Lowest price in documents for released items is described in <<article>>

Note
If customers are assigned to a price type for released items

and such a price type is not a default type in a given center, then only those customers can use each price list created on the basis of that price type.

Price types for received items

For a customer assigned to a given price type to be able to use a price list created on the basis of that price type, they must be assigned to the price list as well.

Price types which are not marked as default and do not have any customer assigned, are available for all customers.

Note
If a price type does not have any customers assigned and it gets marked as default in a given center, then, a newly added customer is automatically assigned to that price type.
It is possible to limit access to information regarding costs of purchase of items for selected user groups. A parameter allowing for handling visibility of purchase prices is available from the level of *Configuration → Company Structure → edition of selected operator group → Other Permissions → parameter Access to purchase prices.* Unchecking the parameter results in:

- hiding purchase and acquisition prices, as well as purchase and acquisition values on lists and document forms
- hiding payments relating to ride documents for received items (PI, PIQC, PIVC, APIVC)
- hiding purchase price on generic directories objects –

items forms, warehouses and equipment's

Hiding consists in hiding appropriate columns and displaying signs dashes ("—") in fields where it is not possible to hide whole columns. The parameter *Access to purchase prices* is checked by default.