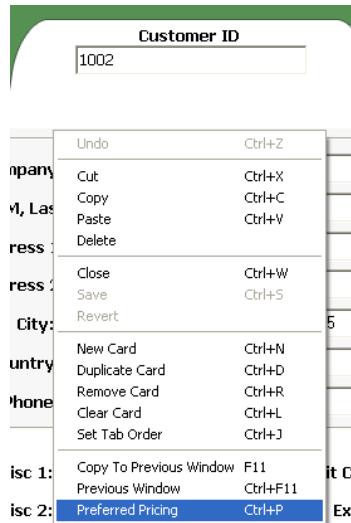


POSIM Premier

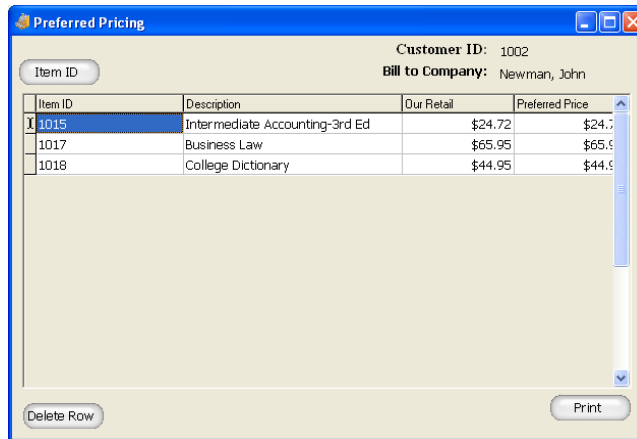
Customer Discounts Using Preferred Pricing

For certain customers the need may arise to consistently offer a specific price for a specific item or matrix quantity item. Preferred Pricing has been added to allow for a specific item price to be tied to one customer. The price can be set as a straight price value, or calculated based on margin percentages. This price will override all other discounts, so you will avoid multiple discounting.

1. **Assigning Preferred Prices for a Customer.** An unlimited number of items can be assigned preferred prices for each customer in your database.
 - a. Locate the Customer Card for the customer who will receive the Preferred Pricing.



- b. Press “Ctrl” + “P”, or right click in the colored area of the card to bring up an additional options menu and choose Preferred Pricing.
 - c. On the Preferred Pricing screen enter the Items to be discounted. This can be done by either typing the Item ID in the corresponding field, or clicking the Item ID button to perform an item search.



- d. Enter the Preferred Price for each item by either typing the margin percentage you need in the margin field, or by typing the specific price in the Preferred Price field. In the

When multiple discounts are defined, which one(s) do you want to use?

Ask the User Which Discounts To Use

Use Price Codes

Use Item Group Discounts

Use Both Price Codes and Item Group Discounts

You can also bring up the four previous options from the Working Invoice by right-clicking on the total button. If you have set up the user control automatically determine how to assess the discount, this provides you a way to manually override if desired.

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Preferred Pricing

You can track the preferred items for a customer, or if the customer has negotiated a special deal for an item. If the customer receives a set price for a specific item, POS•IM will track that price and automatically adjust the invoice if the Preferred Items option is setup. On the [Customer Card](#) click the "Preferred Items" button to set the preferred items and prices available to the customer.

#	Item ID	Description	T	Qty	Unit Price	Tx
1	1015	Intermediate Accounting-3rd Ed	S	1	20.00	1
2	1019	Advanced Accounting	S	1	70.00	1
3						
4						

1. Type or scan the Item ID into the Item ID column. The Item line will automatically be completed.
2. Change the Unit Price to the price you have agreed to sell the item to the customer for.
3. Click OK to save and exit. The Use button will add the items to the current Open Invoice.

Note: There are two import codes for working with preferred items. The APFI import code adds preferred items to a Customer Card, while the DPFI import code deletes all the preferred items from a Customer Card. See [Importing](#) for more information.

On a Working Invoice you can also easily add all the customer's stored preferred items by choosing Invoice >> Get Preferred Items. You can also add the items listed on an invoice to the stored Preferred Items. This is done using Invoice >>> Save as Preferred Items.