Price Type

Module Guide: Price Type

Module Location

Settings > System Settings > Price Type

Module Purpose

The **Price Type** module serves as master data to define the various types or levels of prices applicable within the company. The goal is to create standard price categories (e.g., Retail Price, Wholesale Price, Distributor Price) that can be used in sales transactions, the creation of price lists, and for analysis in reporting.

1. Main View (Price Type List)

The main page displays all the price types that have been registered in the system.

View Explanation

- **List Table**:
  - **Price Name**: The name of the price type.
  - **Price Category**: The category or code that represents the price type.
  - **... No Data ...**: This message appears if no price types have been created yet.

- **Action Buttons**:
  - **New Price**: Opens the form to create a new price type.

2. New Price Page

This form is used to add a new price type to the system.

View Explanation

- **All Fields Required**: A note indicating that all the fields below it are mandatory.
- **Price Name**: A field to enter the descriptive name of the price type (e.g., `Jakarta Retail Price`).
- **Price Category**: A field to enter a code or short category for the price type (e.g., `RETAIL_JKT`).
- **Buttons**:
  - **Save**: To save the new price type data.
  - **Cancel**: To cancel the process.

3. Steps to Add a New Price Type

1. From the main page, click the **New Price** button.
2. Fill in the **Price Name** and **Price Category** fields.
3. Click the **Save** button.

4. Integrated Workflow & Business Process

- **Price List Management**: The price types created here become the basis for creating price lists. The company can create several different price lists for each product, one for each different price type (e.g., one product has a price for `Retail` and another for `Wholesale`).

- **Sales Transactions**: When creating a Sales Order, the sales team can select a customer. The system can then automatically apply the appropriate price type for that customer (e.g., customer A is a distributor, so the "Distributor Price" is used automatically).

- **Promotional Flexibility**: Facilitates the creation of promotional prices or special prices for specific events by creating temporary price types, such as "Year-End Discount Price."

- **Profitability Analysis**: Allows management to analyze profitability based on customer segments or sales channels that use different price types.

5. Tips & Important Notes

- Use a clear and consistent naming and categorization scheme to avoid confusion.

- This module is an important foundation for the company's pricing strategy. Discuss with the sales and finance teams to determine what price types are needed.

- This module is often tightly integrated with customer master data, where each customer can be assigned a default price type.

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