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PRICE LIST

Sidebar contain '**Price List**' tab, if we click on '**Price List**' it redirects to the list out page, which contain list of price lists and their details. If we click on to the '+' then it opens to a create price list page, where we can create a new price list.

[Show all pricelist created in the customer price list dropdown in customer creation.](#)

PRICE LISTS LIST OUT:

'All Price List' page displays all Active and Inactive items. In this page,

- **Import** new price list details from other sources and **export** price lists details to Excel
- A **search box** to filter the price lists details while typing any price list related details, like item name, HSN, or status.
- **Sort** - Sort out the price lists details in ascending order based on price lists name and Type.
 - **All**
 - **Name**
 - **Type**
- **Filter** – Filter out the price lists based on the status.
 - **All**
 - **Active**
 - **Inactive**
- **NEW** – New button to open create page to add new price list.
- Below that have a table to list out the details of all price lists. The table contain,

- **Date** – Price list Date
- **Name** – Price list name
- **Description** – Show message icon, and hide message. If we hover on it show the message.
- **Type**
- **Rounding** – If created as percentage show selected rounding, but if we created as each item the show rounding as 'Never Mind'
- **Status** – Show whether the item is **Active** or **Inactive**
- **Details**

CREATE PRICE LIST:

We can create price list in three different pages in Zoho. From the sidebar by clicking '+', from the 'All Price Lists' page by clicking '**NEW**' or from the overview price list page has a button '**NEW**' to create new price list.

In '**New Price List**' page

- **Name** – Price List Name field.
- **Type**- Select whether it is **Sales** or **Purchase**.
- **Tax Preference** – Choose whether it is, '**Markup or Markdown the item rate by percentage**' or '**Enter the rate individually for each item**'.
- **Description** – Notes for Price list.
- If selected '**Markup or Markdown the item rate by percentage**' then show below fields,
 - **Percentage** – Here there is dropdown to choose,
 - Markup
 - Markdown

And an input field to enter the percentage value.

- **Round off** – To enter rounding with options are,
 - Never Mind
 - Nearest Whole Number
 - 0.99
 - 0.50
 - 0.49

If we selected '**Enter the rate individually for each item**' then,

- **Currency** – Currency type, with option **Indian Rupee**

- **Customize Item Rates in Bulk** - This section is a table with all items listed under. The table contains,
 - **Item Details** – Item name
 - **Standard Rate(INR)** – If we selected sales as type above show sales rate of each item. If we selected purchase as type above show purchase rate of each item.
 - **Custom Rate(INR)** – Here we can change the price list value.
- **Save** – Button to save item to the database and redirects to price lists list out page
- **Cancel** – Cancel and reload the price list create page.

PRICELIST OVERVIEW PAGE:

If click on any of the price list it redirects to the overview page.

Show all content given in create price list page should be displayed in overview page. In this page there is two sections. Left section shows all price lists and right section shows details of each selected price list from left listing.

Left Section '**All Price Lists**' includes,

- A **search box** to filter the price lists details while typing any pricelist name.
- **Sort** - Sort out the price list details in ascending order based on price list name and Type.
 - **All**
 - **Item Name**
 - **Type**
- **Filter** – Filter out the price lists based on the status.
 - **All**
 - **Active**
 - **Inactive**
- **NEW** – New button to open create page to add new price list.
- Below this contain price list details,
 - **All Price lists Name**

Right Section includes,

- Show selected **Price List Name** on top.
- **Overview** page to show details of the selected price list given in the price list database table.
 - **Type**
 - **Description**
 - **Details**
 - **Rounding**
 - **Currency**
- **Edit** – By clicking Edit it redirects to the edit price list page, where we can edit price list details we added to the database.
- **Share** – Share the transaction through **WhatsApp** and **Email**
- **Print** – Print transaction
- **PDF** – Can take transaction PDF
- **Comment** – We can add and **view comment** for price list
- **Attach** – Dropdown with '**Attach File**' option, where we can attach document here. If we attached any document show option '**Download File**' to download the document in attached.
- **Delete** – We can delete price list
- **Active** or **Inactive** button to change price list status. If price list is created status will be saved as Active at first and it show Active on the button as well. If we click on the button status will change to Inactive and button also displayed as Inactive.

If we add or edit price list, the created or altered date and name of created or altered person should be displayed in the transaction history.