

Knowledge Base



Introduction to Pricing Schemes

Pricing schemes in Gojee allow you to set up discounts for your repeat customers and link them to one or more of the items you sell.

Pricing schemes are easy to set up and allocate to your customers. Once you've set up your pricing schemes, when you create new jobs for that customer the pricing will automatically be applied to make sure you're always charging your customers the right price.

Create Pricing Schemes

To get started, navigate to the [Resources>Pricing Schemes](#) page. You will be presented with the following screen:

Name	Type	Rules	In Use?	Created Date	Updated By
Tier 1 - 5% Discount	Flat rate discount	5% Off	Yes	05 Oct 2023, 17:41	Jack Testing
Tier 2 - 10% Discount	Flat rate discount	10% Off	Yes	05 Oct 2023, 17:41	Jack Testing
Tier 3 - 20% Discount	Flat rate discount	20% Off	Yes	05 Oct 2023, 17:41	Jack Testing

- *Note that this page will be empty if you haven't already created a pricing scheme.*

To create a new pricing scheme, click on the green Add button and you'll be presented with the following screen:

Create a new pricing scheme

Name

Type

Disc. %

Create

Cancel

- Enter the name and discount amount

Pricing Scheme - Tier 1 - 5% Discount

Name

Type

Disc. %

Save

Terminate

Cancel

- Click Save and you'll be sent back to the Pricing Scheme page.

You can create as many pricing schemes as you like in Gojee. Each pricing scheme requires a unique name as its identifier, and this cannot overlap with archived pricing schemes.

View and Edit Pricing Schemes

To view all your pricing schemes, navigate to the [Resources>Pricing Schemes](#) page. You will be presented with the following screen:

Resources > Pricing Schemes						Feedback
Pricing Schemes						
<div>Active Terminated</div>						
<div>Search</div>						
Name	Type	Rules	In Use?	Created Date	Updated By	
Tier 1 - 5% Discount	Flat rate discount	5% Off	Yes	05 Oct 2023, 17:43	Jack Testing	
Tier 2 - 10% Discount	Flat rate discount	10% Off	Yes	05 Oct 2023, 17:43	Jack Testing	
Tier 3 - 20% Discount	Flat rate discount	20% Off	Yes	05 Oct 2023, 17:43	Jack Testing	
Records to display on page: 20						

To edit the pricing scheme, simply click on the row, make any changes required to the name or the % and save.

Note: Changes to pricing schemes will only be applied to new jobs created after the change. Existing jobs will not reflect any changes made, they will maintain the pricing scheme(s) applied when the job items were added onto the BOM.

Note: You can terminate a pricing scheme from the edit page. Simply click on the Terminate button.

Pricing Scheme - Tier 2 - 10%

Name

Tier 2 - 10%

Type

Flat rate discount

Disc. %

10

Save Terminate Cancel

Warning: When a pricing scheme is terminated, it will be removed from all customers to which it was applied. Jobs which have already had the pricing scheme applied will not be changed and they will maintain the discounts already applied regardless if the pricing scheme is terminated. Terminated pricing schemes can be reactivated, but they will not be re-applied to the previously associated customers or SKUs.

Apply a Default Pricing Scheme to Customer

Pricing scheme application is performed from the page for the relevant customer.

- Navigate to the [contact list page](#)
- Set the filter to “Customer” or type to search for the correct contact
- Click on the name of the customer that you’d like to apply the pricing scheme to.

Once you’re on the customer’s page, click on the Pricing Scheme tab as selected in the image below:

Resources > Customers > Edit Customer - 132 Collins Feedback

Edit Customer Contact - 132 Collins

General **Pricing Schemes** Prepayments

Default Pricing Scheme

Select Pricing Scheme

SKU Pricing Schemes

Name	SKU

Update Cancel

For each customer, there are two sections where pricing schemes can be applied. The first is the default scheme as highlighted below:

Resources > Customers > Edit Customer - 132 Collins Feedback

Edit Customer Contact - 132 Collins

General **Pricing Schemes** Prepayments

Default Pricing Scheme

Select Pricing Scheme

SKU Pricing Schemes

Name	SKU

Update Cancel

The default option allows you to select one pricing scheme and apply it to all items added to a job for the selected customer.

- You will need to have first created a pricing scheme as per the section above.
- Select the desired scheme and click update to apply the pricing scheme as per the image below:

Resources > Customers > Edit Customer - ABC Furniture Feedback

Edit Customer Contact - ABC Furniture

General **Pricing Schemes** Prepayments

Default Pricing Scheme ⓘ

Tier 1 - 5% ✕ ▼

SKU Pricing Schemes ⓘ Add

Name ▼	SKUs

Update Cancel

- Once complete, if you create a new job, select this customer first, and then add any item onto the job BOM page, this discount will be applied.

Apply Item Specific Pricing for Customers

The second section of the Pricing Scheme tab on a customer's page is for SKU pricing, or item-specific pricing. This allows for specific discounts to be applied per item that will also override any default pricing scheme applied for the customer.

Resources > Customers > Edit Customer - ABC Furniture Feedback

Edit Customer Contact - ABC Furniture

General **Pricing Schemes** Prepayments

Default Pricing Scheme ⓘ

Tier 1 - 5% ✕ ▼

SKU Pricing Schemes ⓘ Add

Name ^	SKUs

Update Cancel

You can choose to add multiple schemes here that apply to one or more SKUs.

Note: In this context, an "SKU" is any item you sell in your system, and can include inventory, assets, professions and templates.

To set up your SKU Pricing Schemes:

- Click the green Add button to add a new pricing scheme row
- Select the pricing scheme in the left hand column
- Select one or more SKUs in the right hand column

Repeat the process to add more pricing scheme rows as per the image below.

Resources > Customers > Edit Customer - 132 Collins Feedback

Edit Customer Contact - 132 Collins

General **Pricing Schemes** Prepayments

Default Pricing Scheme ⓘ

Tier 1 - 5% Discount ✕ ▼

SKU Pricing Schemes ⓘ Add

Name ^	SKUs
Tier 3 - 20% Discount ▼	4 Pack Downlights ✕ Reverse Cycle Split System Air Conditioner ✕
Tier 2 - 10% Discount ▼	Ceiling Fan ✕ Electrician ✕

Update Cancel

Note: a SKU can only have one pricing scheme applied at a given time, meaning that any SKU can only exist in one row in this table.

Once complete, if you create a new job, select this customer first, and then add any item onto the job BOM page, the discount(s) will be applied automatically.

Any SKU specific pricing scheme will be applied first on the Job BOM page. The default pricing scheme will be applied for SKU's that do not have a specific pricing scheme if one exists.

Using Pricing Schemes in Jobs

Once you've completed the steps above to set up the pricing schemes and you've applied them to customers, the system will automatically apply these pricing schemes to any item added onto a job's BOM as per the image below:

The screenshot shows the 'Create new Customer Job' interface. At the top, there's a summary box with the following information:

- Total Job Price: \$5,137.57
- Includes a discount of: \$423.80
- Total Job Cost: \$5,137.57
- Net Markup %: -9.23

Below this, there's a tabbed interface with 'Job Settings', 'Customer', 'Job Details', 'BOM of Materials', and 'Comments'. The 'BOM of Materials' tab is active. It shows a table of items with the following columns: Item code, Name, Type, Unit, Unit cost, Markup %, Unit price, Disc. %, Qty, Qty (in stock) available, Qty reserved, Qty consumed, Qty on order, Total cost, Disc. total, and Total price. A green circle highlights the 'Disc. %' column.

Item code	Name	Type	Unit	Unit cost	Markup %	Unit price	Disc. %	Qty	Qty (in stock) available	Qty reserved	Qty consumed	Qty on order	Total cost	Disc. total	Total price
	Work Van		hour	\$21,000	700	208,000		5	65.00	-	-	-	\$25.00	\$5.00	190.00
IS002	Reverse Cycle Split S...		each	\$180,000	2.54	1,845,703		20	1	0	-	-	\$1,800.00	369.24	1,476.56
	Office Equipment		hour	\$11,000	180	90,000		5	65.00	-	-	-	\$15.00	1.50	28.50
	Electrician		hour	\$80,000	50	1,20,000		10	65.00	-	-	-	\$80.00	12.00	108.00
	Computer Equipment		hour	\$11,000	180	90,000		5	65.00	-	-	-	\$15.00	1.50	28.50
IS001	Ceiling Fan		each	\$113,000	-4.42	108,000		10	1	0	-	-	\$113.00	10.80	97.20
IS004	Call Out Fee		each	\$0.000		188,000		5	1	-	-	-	\$0.00	5.00	95.00
IS002	Airlec V8 Tri Colour D...		each	\$6,7143	50.07	10,0754		5	1	0	-	-	\$6.71	0.50	9.57
	Air Cond. Technician		hour	\$16,000	20	67,200		5	65.00	-	-	-	\$16.00	3.36	63.84
	4 Pack Downlights		each	\$26,9511	67.54	40,9000		20	1	-	-	-	\$26.96	9.00	36.00

To get started:

- Create a new job (refer to [Create a Job](#) for more information).
- Choose the customer on the Customer tab.
- Add the items onto the BOM page
- Any applicable discount will be applied automatically.
- You can modify discount %, and also add discounts as usual on the BOM page for items with no pricing scheme.

Note: if you change the customer for the job after the items have been added to the job, the discounts will not be updated. Be sure to choose the correct customer first. Also note that adding items to the BOM prior to selecting a customer price will result in those items not having the pricing scheme applied.

Next: [Supplier Catalogues](#).