

Creating and Updating Pricelists

Pricelists have replaced Fee Structure in the Billing Database as the place customer rates are saved for One Source products.

 [Video Guide for Pricelist Management](#)

 [Odoo Pricelist Documentation](#)

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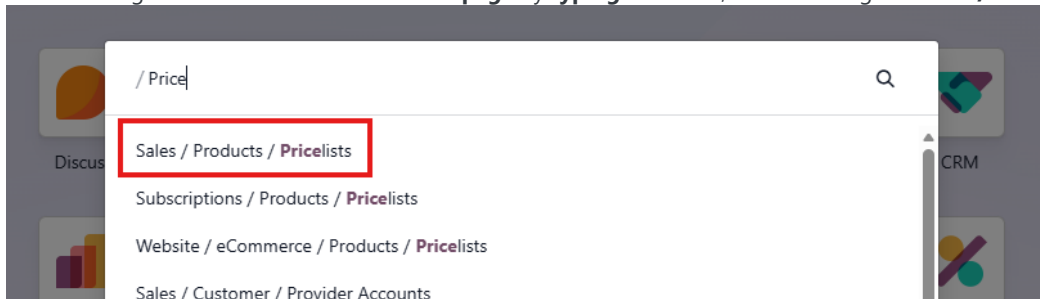
Viewing Pricelists

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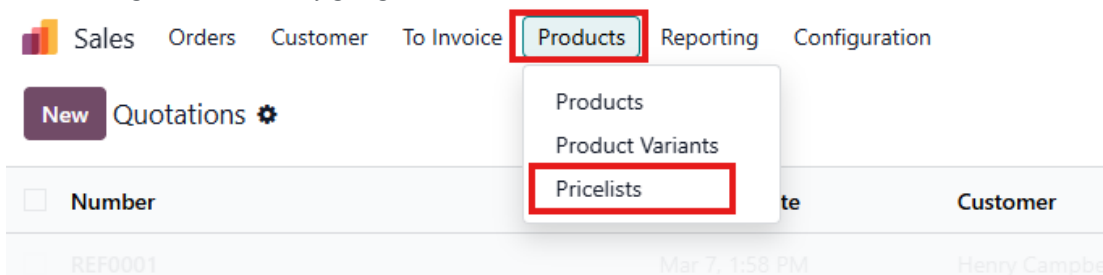
Updating Pricelists

Viewing Pricelists

- You can navigate to Pricelists from the **home page** by **typing Pricelists**, then selecting the **Sales / Products / Pricelists** option.



- You can navigate to Pricelists by going to **Sales > Products > Pricelists**.



- You can navigate to a pricelist from the **Contacts app** by going to **Contacts > Select a contact > Sales & Purchases tab > Pricelist** field.

Person Company

Boddie Noell Enterprises, Inc.

Onboarding Complete

Agreement End Date Feb 13, 2028

Company Company Name...

Address Type Invoice

Address 1021 Noell Ln
Street 2...
Rocky Mount North Carolina (US) 27804
United States

Tax ID ?

Website http://www.bneinc.com

Tags Client X

Vendor Code

Contacts Sales & Purchase Accounting Notes Salesforce

SALES

Billing Schedule ? Monthly

Billing Cycle ? 15

Billing Associate ? Makayla Davis

Billing Rep mdavis

Auto Bill ?

Payment Terms 15 Days

Payment Method

Pricelist ? Boddie Noell Enterprises, Inc. (USD)

Avalara Code ?

PURCHASE

Group RFQ ? On Order

Buyer

Payment Terms

Payment Method

1099 Box ?

Receipt Reminder ?

Supplier Currency ?

Creating a New Pricelists

1. From the Pricelists page, click **New** to create a new pricelist, which reveals a blank pricelist form that can be configured in a number of different ways.
2. Add the **customer's name**.
3. In the **Sales Price** tab, each line creates a new record that will implement special pricing for a product on a quote and sales order. Click **Add a line** to add a new product to the pricelist.

Sales Orders Customer To Invoice Products Reporting Configuration

New Pricelists New (USD)

Print

New Customer's Name

Currency USD

Company One Source

Country Groups

Sales Prices Recurring Prices Rental rules Ecommerce

Apply on	Price	Min. Quantity	Start Date	End Date
Add a line				

4. Keep **Apply To** set to **Product**. Click into the **Product** field and search for the product to which the pricelist will apply. If the product has **variants**, use the **Variant** field to select the variant to which the pricelist will apply.
5. Keep **Price Type** as **Fixed Price**. Reference the [Odoo Pricelist Documentation](#) for information on the other price types.
6. Enter the **management fee** in the **Fixed Price** field. This will always field list "per Unit" even if you've selected a Flat Rate variant.
7. If the customer has **tiered pricing** based on quantity, set the **Min Qty** for the specific price.

Create Pricelist Rules [X]

Apply To ? Product Category

Product ? Communications Lifecycle Management

Variant ? Communications Lifecycle Management (Flat Rate)

Price Type ? Discount Formula Fixed Price

Fixed Price \$ 15,000.00 per Locations

Min Qty ? 0

Validity Period ?

For formula or fixed pricing, the original price isn't shown in sale orders or checkout.

Save & Close Save & New Discard

8. Click **Save & Close**.

9. Once a pricelist has been created, it needs to be set on at the customer contact level. Navigate Contacts > The **specific contact's** form > **Sales & Purchases** tab > **Pricelist** field, then **select the pricelist** you created from the list. Now this pricelist will be used by default on all quotes and sales orders for this customer.

Updating Pricelists

1. From the Pricelist page, select the **pricelist** you wish to update.

2. Click the row that contains the product you wish to update. Then adjust the **Variant** and **Fixed Price** as needed. Click **Save** once complete.

Open: Pricelist Rules [X]

Apply To ? Product Category

Product ? Communications Lifecycle Management

Variant ? Communications Lifecycle Management (Location)

Price Type ? Discount Formula Fixed Price

Fixed Price \$ 82.95 per Locations

Min Qty ? 0

Validity Period ?

For formula or fixed pricing, the original price isn't shown in sale orders or checkout.

Save Discard