

# Prices and price lists

Manage prices

Version 8.0



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# Manage prices

PRODUCTS: SALES ENTERPRISE SALES COMMERCE

**Note.** The feature is only available for Creatio Sales, enterprise edition and Creatio Sales, commerce edition.

Use price lists to manage prices for different customer categories. You can include a product in multiple price lists. When issuing orders, use either the universal “base” price list or a price list that is specific for the customer or affiliate.


Personal price lists are specified in the customer’s account profile.

**Note.** For more information on using personal price lists in affiliate orders, see the “[Special conditions of partner cooperation](#)” article.

When issuing an order, Creatio pulls the price from the customer’s personal price list, if the corresponding price list is available. If the product price is not found in the customer’s personal price lists, Creatio pulls the price from the base price list (specified in the “Base price list” system, setting). If the base price list is not set, Creatio pulls the product price from the product page.

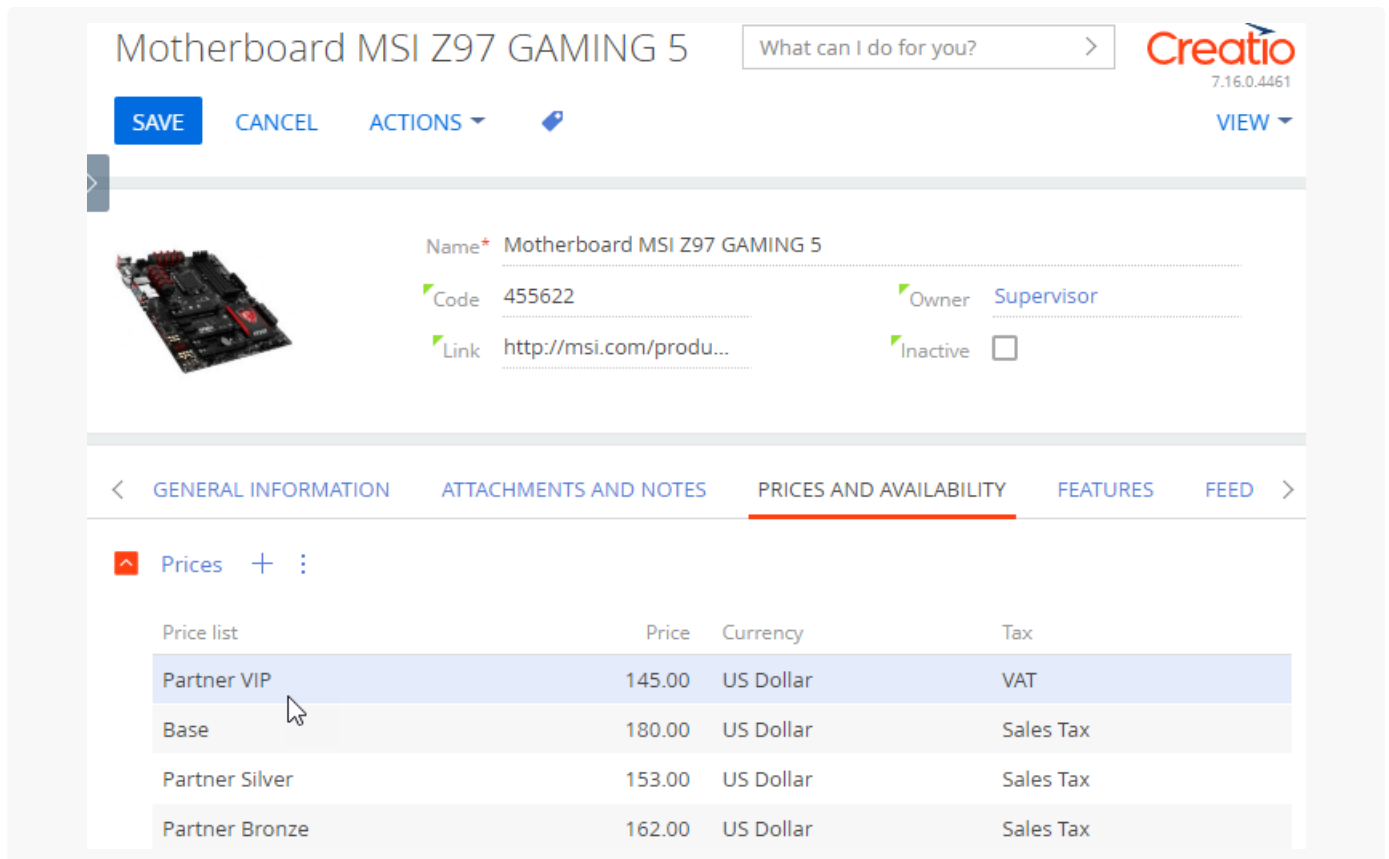
## Create a personal price list

Use the [ *Price lists* ] lookup to manage your price lists. The prices for different price lists are specified in the [ *Prices* ] detail of the [ *Prices and availability* ] tab on the product page.


1. Click  in the main Creatio application. The System Designer will open.
2. Click the [ *Lookups* ] link in the [ *System setup* ] block.
3. Open the [ *Price lists* ] lookup → click [ *Add* ]. Enter the price list name, e.g., “VIP Affiliates.”
4. Open the [ *Products* ] section. Open a product page.
5. Go to the [ *Prices and availability* ] tab → [ *Prices* ] → + . The [ *Product price* ] page opens.
6. Select the price list in the [ *Price list* ] field.
7. Specify the product price for the selected price list in the [ *Price* ] field.
8. Click [ *Save* ].


As a result, the name of the new price list will be added to the [ *Prices* ] detail ([Fig. 1](#)).

Fig. 1 Price list displayed on a product page



Motherboard MSI Z97 GAMING 5 What can I do for you? > **Creatio**  
7.16.0.4461 VIEW ▾


**SAVE** **CANCEL** **ACTIONS ▾** 

 Name\* Motherboard MSI Z97 GAMING 5

Code 455622 Owner Supervisor

Link <http://msi.com/produ...> Inactive

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 **Prices** + ⋮

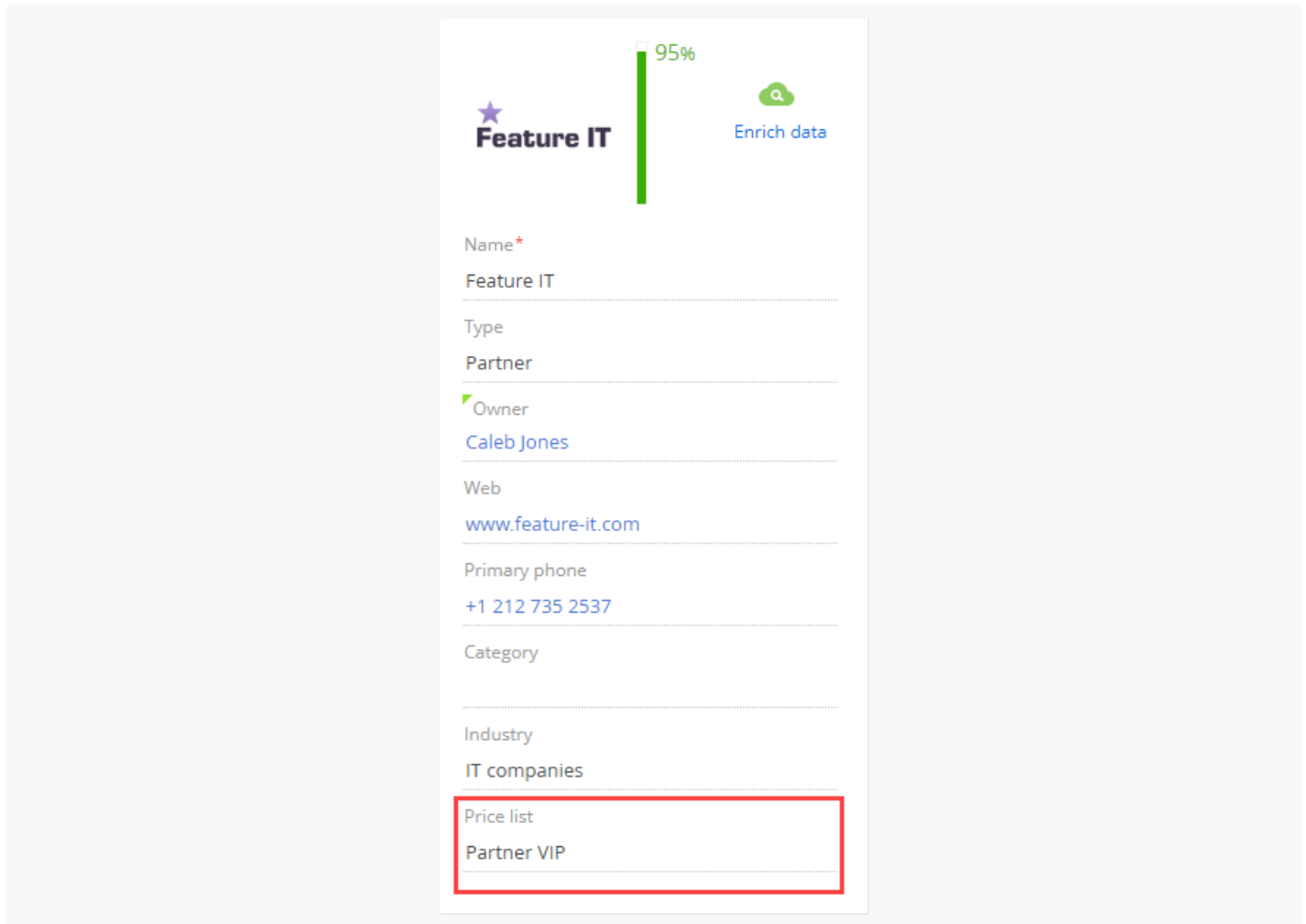
Price list	Price	Currency	Tax
Partner VIP	145.00	US Dollar	VAT
Base	180.00	US Dollar	Sales Tax
Partner Silver	153.00	US Dollar	Sales Tax
Partner Bronze	162.00	US Dollar	Sales Tax

## Add the [Price list] field to the account page

By default, the [ *Price list* ] field is hidden on the account page. You can add this field via the Section Wizard, for example, to the record profile ([Fig. 1](#)).

See the “[Set up page fields](#)” article for more about adding fields to pages, based on existing section columns.

Fig. 1 The [ *Price list* ] field displayed on the account page



The screenshot shows a user interface for managing an account. At the top, there is a profile card for 'Feature IT' with a 95% data enrichment progress bar and an 'Enrich data' button. Below this, the account details are listed in a form-like structure:

- Name\*: Feature IT
- Type: Partner
- Owner: Caleb Jones
- Web: www.feature-it.com
- Primary phone: +1 212 735 2537
- Category:
- Industry: IT companies
- Price list: Partner VIP (highlighted with a red box)

## Select a personal price list on the account page

1. Open the [ *Accounts* ] section.
2. Select an account and open the account page.
3. Populate the [ *Price list* ] field by selecting the new personal price list and click [ *Save* ].

**Note.** By default, the [ *Price list* ] field is hidden on the account page. Use the Section Wizard to add the field to the record page of the [ *Accounts* ] section.

As a result, every time the account orders a product from the personal price list, Creatio will pull the product price from that price list.