Steps to add an item to customers pricing based on which items they currently take

If you auto-generate invoices for your drivers DO THIS prior to auto-generating

- 1) Sync items with QuickBooks
- 2) Sync items with the web using the Sync Mobile Devices > Update Item Data button

Next follow these steps

1) Click on "Find Replace or Add an Item to Customer Pricing"



2) Use 2nd Section "Add an Item to Customer Preferred Pricing"

Find and heprace an item in customer Preferre	ed Pricing
Select Item to Replace	•
Replace with this item	•
Run	
Add an Item to Customer Preferred Prici	ing
Add an Item to Customer Preferred Prici elect Item that Customer Takes	ing T
Add an Item to Customer Preferred Prici elect Item that Customer Takes Select Item to Add	ing •

- 3) Select Item that customer currently takes
- 4) Select item to add
- 5) Select how you wish to handle Item Sales Price

6) Click RUN

If the item you are adding already is in customer pricing the add will be skipped for that customer If you are consolidating multiple items into one then run these same steps for each item being replaced.