

Default Prices

07/23/2024 3:50 pm EDT

When working with **Prices & Estimates**, Admin users can set default prices and add new pricing segments under **Admin** settings. Admin and Full users can also set default prices for specific customers under the companies' profiles.

Global settings

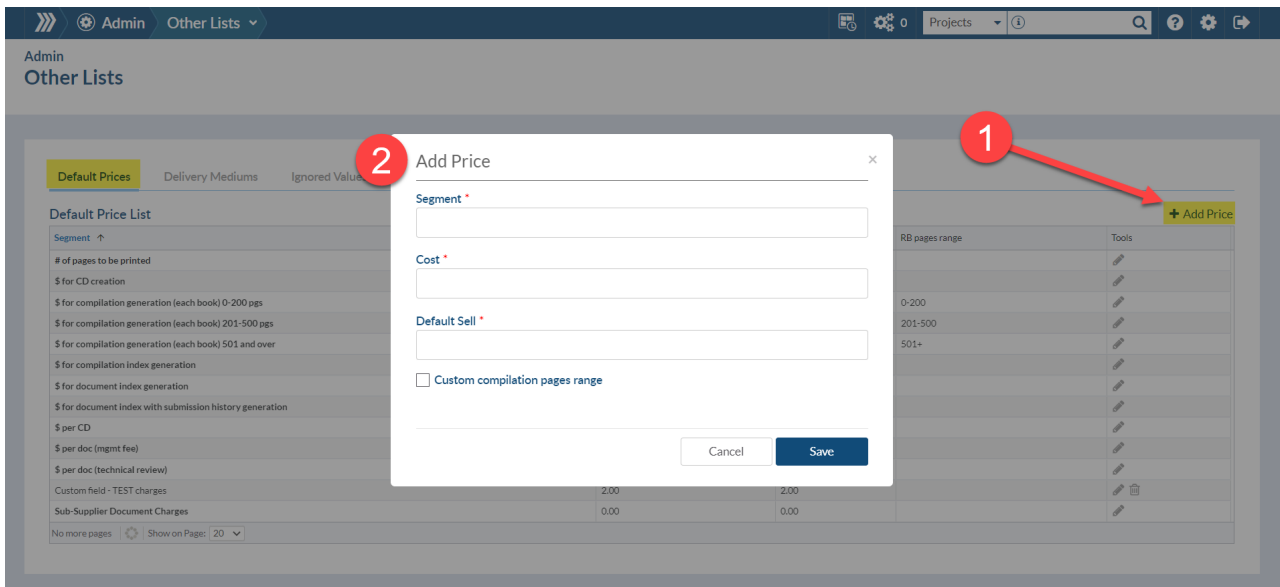
To set default prices or add new segments that will apply to all new projects, select the settings gear, then **Admin > Other Lists**.

The screenshot shows the top navigation bar with a settings gear icon. Below it, the user's name 'Hi, Alina Kleinsasser' and a profile edit link are visible. The main navigation menu is divided into several sections: 'Users' (Manage Users, View Permissions), 'Library' (Manage Library, Library Folders), 'Lists' (Companies, Contacts, Relationships, Jobs), 'Reports' (Project Metrics, Assignment Activity (By User)), and 'Admin' (General, Security Settings, Stage Lists, Distribution Lists, Compil. & Pkg Presets (List), Queries List, Custom Levels, Generation Status, and Other Lists). The 'Other Lists' option is highlighted in yellow, and a red arrow points to it. To the right of the 'Admin' section, there are sub-sections for 'Customization' (Project (Main) Fields, Doc Code/Card Fields, Equipment Fields, Custom Lists (for fields), Project Templates, Labels) and 'Template Mgmt' (Output Templates). At the bottom right, there is a link: 'Allow support to access your account'.

The default screen under **Other Lists** is the **Default Prices** list.

From here, admin users can edit the default pricing for documentation costs across all new projects.

Additional pricing segments can also be added under this area.



To add a new segment, (1) select **Add Price** and (2) complete the information. This will automatically be added to all Prices and Estimates on all new projects. (This will not apply to existing projects.)

Per company

Default prices can also be set per customer on the company's profile.

From the dropdown menu in the company's profile, select **Custom Prices**.

Navigation: Lists > Companies > Charlie's Chemical Com... > Profile

Profile

Profile

- Addresses
- Contacts
- Code/Status/State
- Templates
- Custom Prices

Custom Prices

Save

Save

Company Primary Logo

No Logo present

Company Secondary Logo (if Required)

No Logo present

Company Letterhead Logo

No Logo present

Select the plus sign (+) in the top right corner of the grid to define pricing, per segment, to override the system defaults for this customer. This will apply to new projects only.

Navigation: Lists > Companies > Charlie's Chemical Com... > Custom Prices

Custom Prices

Back to Companies List

Custom Prices

Segment: Sell

Tools

1

Add Price

Segment: \$ per doc (mgmt fee)

Sell

Cancel Save

2