Pricing Templates

Sales Catalog · https://mountainstream.co/docs/pricing-templates-in-streamline/

This guide explains how to create and manage pricing templates, apply them to items, and assign them to customers within Streamline's sales catalog features.

Items › Prices › All items › Price Lists

[Screenshot of a software interface for creating Pricing Templates, featuring a pop-up box labeled New Price List Template, a field to enter a name, and Save and Cancel buttons.]

1. Select “Price List Templates”.
2. Select “Add New Price List”, give the pricelist a name, and save.
3. Go to **Items › Prices › Batch Edit › Filter › General Wholesale.**
   - Blank fields in the General Wholesale column mean to charge the default price.
   - You can copy a column, paste it into Excel, work with the numbers in Excel, and then copy and paste back into Batch Edit and save.
   - Be careful not to delete or add rows, or sort data in Excel as it will throw the alignment of your data out.
4. Go to **Batch Edit › Customer Settings › Filter › Price**

[A software interface shows a Batch Edit Customers screen. The Price List dropdown is expanded, highlighting General Wholesale. The Pivot Mode settings menu is open in the top right corner, providing quick access to Pricing Templates.]

5. When setting up a new customer, you can attach a pricelist to them from customer settings.

[A screenshot of a Customer Settings page for PARAOA BREWING. The Edit option under SETTINGS is highlighted, as well as the Price List dropdown, which is set to General Wholesale using Pricing Templates.]

Get Started