Fube

GUIDE

How to set different prices for each customer with price lists and custom prices



> The installer who buys spare parts from you every week gets a special price; the private individual who walks into the shop pays the usual one. If your catalogue only has one price per product, you end up typing the other one into every line, and the day you forget, you overcharge your best customer.

In Fube this is handled with two pieces. **Price lists** are named lists of prices for a group of customers: ‘Installers’, ‘Wholesalers’, ‘Hospitality’. **Custom prices** are the price of a product for a specific customer. This guide explains how to set up both and which price then appears in each document and in the customer portal.

Before you start

- **It’s on every plan**, including the free one. It comes with the catalogue, with no separate module.
- **Your products, in the catalogue.** A price list gives a different price to products that already exist; it doesn’t create them. If you haven’t set it up yet, start with **creating your catalogue of products and services**.
- **All prices are excluding tax**: both price list prices and custom prices, just like the catalogue price. The tax is still the product’s.

The rule, first of all

When Fube looks up the price of a product for a customer, it checks in this order and uses the first one it finds:

1. **The custom price** for that customer for that product.
2. **The one in their price list**, if they have one and the product is on it.
3. **The catalogue price**, which is the one everyone gets.

A product that isn’t on the price list is charged at its catalogue price, so the price list only needs to include what changes.

Step 1 · Create the price list

Go to **Inventory › Price lists** and click **New price list**, or press N.

1. Give it a **Name**, which is required, and if you like a **Description**: who it applies to or how you calculated it.
2. Under **Prices**, use **Add product** for each product whose price changes. The new row starts with the catalogue price, which remains visible below the name ('Catalogue: …'), and you change it to the price list price.
3. Save. Fube confirms it with 'Price list created'.

Each product appears only once in each price list: if you add it again, Fube warns you with 'This product is already on the price list.'. To remove it, use the bin on its row.

For example, an air-conditioning company might have an **Installers** price list with its spare parts and accessories — an air filter for a split unit, a thermostat, a universal remote — 12% below the shop price. You work out the percentage yourself: the price list stores an amount per product, not a discount.

Step 2 · Assign the price list to its customers

There are two ways, and they do the same thing:

- **From the price list.** Open it from the list. Below the prices is **Customers with this price list**: with **Add customer** you choose one and the price list is assigned straight away, without clicking 'Save'. The cross on their row removes it, and from then on they go back to the catalogue price.
- **From the customer.** When editing their record, under **Sales details**, the **Price list** field. When empty it says 'No price list: catalogue price'.

A customer has **only one price list**. If you change it, the previous one no longer applies to them; Fube says so when you add them from the price list: 'They now have this price list; if they had another, they no longer have it.'. What the customer record looks like is covered in creating a customer.

Step 3 · Give a customer a custom price

There are customers for whom you keep a price that nobody else gets. You don't need a single-customer price list for that: open their record and look in the sidebar for **Custom prices**.

At the top it tells you which price list they're sold at — 'Price list: Installers', or 'No price list: catalogue price.' — and below are the products they have at their own price, each with the catalogue price alongside. The add button in that section opens **Add custom price**:

- **Product**: the one with the special price.
- **Their price**: what you charge them. Below it, Fube reminds you what they would pay without it, 'In the catalogue: … In their price list (Installers): … Excluding tax.'.

Each customer has at most one custom price per product. The pencil on the row changes the price and the bin removes it; to move the price to a different product, delete this one and add the other.

Step 4 · Create the document: the line takes the customer's price

Once everything is set up, creating the invoice is the same as always, with one detail about order:

1. **Choose the customer first.** The price comes from whichever customer the document has at that moment.
2. Click **Add from catalogue**, choose the products and their quantities, and add them.
3. Each line comes in with that customer's price: the custom price, their price list price or the catalogue price. If any line isn't at the catalogue price, Fube tells you with a notice: 'With the prices from the customer's "Installers" price list.', 'With the customer's custom price.' or both at once.

The line price can be changed, as always: the price list suggests, it doesn't impose. And **discounts** are separate: a discount on the line is applied to whichever price it has taken.

It works the same way in invoices, simplified invoices, quotes, pro forma invoices, delivery notes, orders and recurring invoice templates: in any sales document with the **Add from catalogue** button.

What happens next

- **You change a price in the price list.** It applies to the lines you add from then on. The documents you already had do not change, neither drafts nor issued ones.
- **You raise the catalogue price.** The price list price does not move: it is a fixed amount, not a percentage of the catalogue price. If you want it to go up too, change it in the price list.
- **Recurring invoices** go out with the price on the template line. Changing the price list or the custom price does not change what they generate; if you want the new price, edit the template. How to set it up is in **automating recurring invoices**.
- **You delete a price list.** Its customers are left without a price list and go back to the catalogue price. Their custom prices, however, stay where they were.

In the customer portal

If the customer logs in to their portal and has the catalogue switched on, **they see and pay their prices**: the catalogue, each product's page, the basket and the order you receive show the same price the line would take —the custom price, their price list's or the catalogue's—. There is no need to set up separate catalogues for each price list. How to open the catalogue to orders is in **the catalogue and orders in the portal**.

Edge cases and common mistakes

- **The line comes in at the catalogue price and the customer has a price list.** The most common cause: you added the product before choosing the customer. Changing the customer afterwards does not recalculate the lines already there; remove the line and add it again from the catalogue. If that is not it, check that the product is in their price list.
- **You type the description by hand instead of choosing it from the catalogue.** A line that does not come from a product has nowhere to take another price from: it is whatever you type.
- **You want a volume price**, cheaper from ten units upwards. A price list stores one price per product, without tiers. That is what the line discount is for.

- **A customer on two price lists.** It is not possible: they have one. If you need to combine them, create a price list that merges both, or set custom prices for what differs.
- **You cannot see Price lists in the menu, or Custom prices does not appear on the customer record.** It comes down to your role: you need the price list permissions, which are granted separately from the catalogue ones.

Frequently asked questions

Do price lists change invoices I have already issued?

No. An issued invoice keeps the price it went out with. The price list only decides the price the line suggests when you add a product.

Does my customer see their price list prices in their portal?

Yes. The catalogue in their portal shows them their price —custom, from the price list or from the catalogue— and that is the one that goes on the order they place with you.

Are price lists included in the free plan?

Yes, on all plans. They come with the **product catalogue**.

Can I enter the price list price including taxes?

No. Like the catalogue price, it excludes taxes, and the tax is set by the product.

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