

Customer Pricing Audit Sheet

Use a sample of real customer-product prices to trace where each price comes from, identify exceptions and decide which rules should remain, be replaced or be removed.

1. Define the sample

Do not audit only easy accounts. Include a mix of customer types, product categories and known exceptions.

Sample factor	What will you include?
Customer mix	☐ high-volume ☐ low-volume ☐ new ☐ long-standing ☐ problem account
Product mix	☐ core lines ☐ slow movers ☐ promoted lines ☐ high-value lines
Price-source mix	☐ customer list ☐ group list ☐ markup ☐ discount ☐ promotion ☐ manual exception

2. Trace ten real prices

For each sampled line, write the price the customer actually sees and the rule that explains it. If nobody can explain it quickly, mark it as an exception to investigate.

#	Customer	Product	Price	Source / rule	Action
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Customer Pricing Audit Sheet - Exceptions

Use this page for the pricing rules that need a decision, not merely a note.

3. Exception log

Exception	Why it exists	Keep / replace / remove	Owner + date

4. Audit summary

Can every sampled price be explained?	☐ Yes ☐ No
Are old exceptions still commercially justified?	☐ Yes ☐ No ☐ Needs review
Are promotions and normal prices being treated separately?	☐ Yes ☐ No
Next audit date	_____

The goal is not to eliminate every exception. It is to make sure each exception is deliberate, explainable and still commercially valid.