

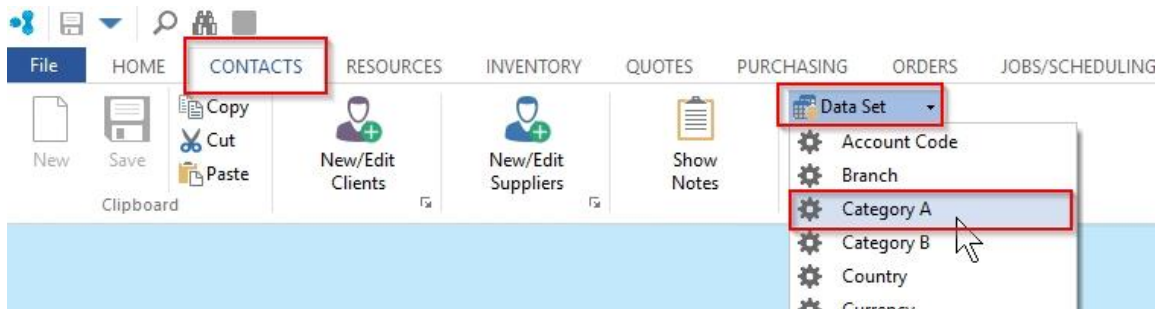
Discounts / Pricing

Note: A USER MUST be logged on as the USER - admin to set system parameters unless they have been granted permissions for their USER number.

Quote	Client Order	Production Order	Type	Variable	Parameter	Part	Materials
√	√	X	1. Category Sell Price Discount	Sell Price	√	√	√
√	√	X	2. Client Dependant Discount/Factor	Discount		√	√
√	√		3. Category Sell Price Fixing	Sell Price	√	√	√
√	√		4. Quantity/Client Sell Price Fixing	Sell Price	√	√	x

Category Sell Price Discount

From the OPTO ribbon, select the 'Contacts' tab and then **click** on the 'Data Set' drop menu, select the 'Category A' option from the list. The 'Categories for Clients/Suppliers/Workcenters/Quotes' window opens.



This is the **Cat A** field in the 'Client Details' window, the USER can apply a discount for this field. Enter a code for the discount in the **Code** field and **press <TAB>** to advance to the **Category Description** field and type in the description for the discount. **Click** on the 'Sub Category' drop menu and select 'CLIENT' from the list, **click** in the **Discount** field and enter the appropriate amount in percent, **press <F9>** to save.

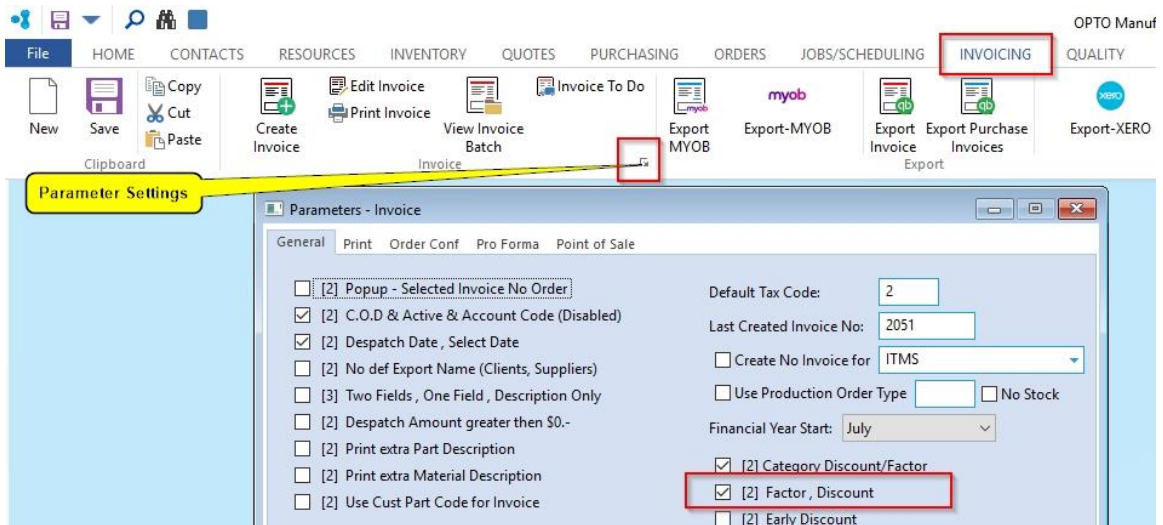
Qty = <	Disc %
1	10.00
2	12.50
3	15.00
4	
5	

Group	Description	Disc %
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Parameter Setup

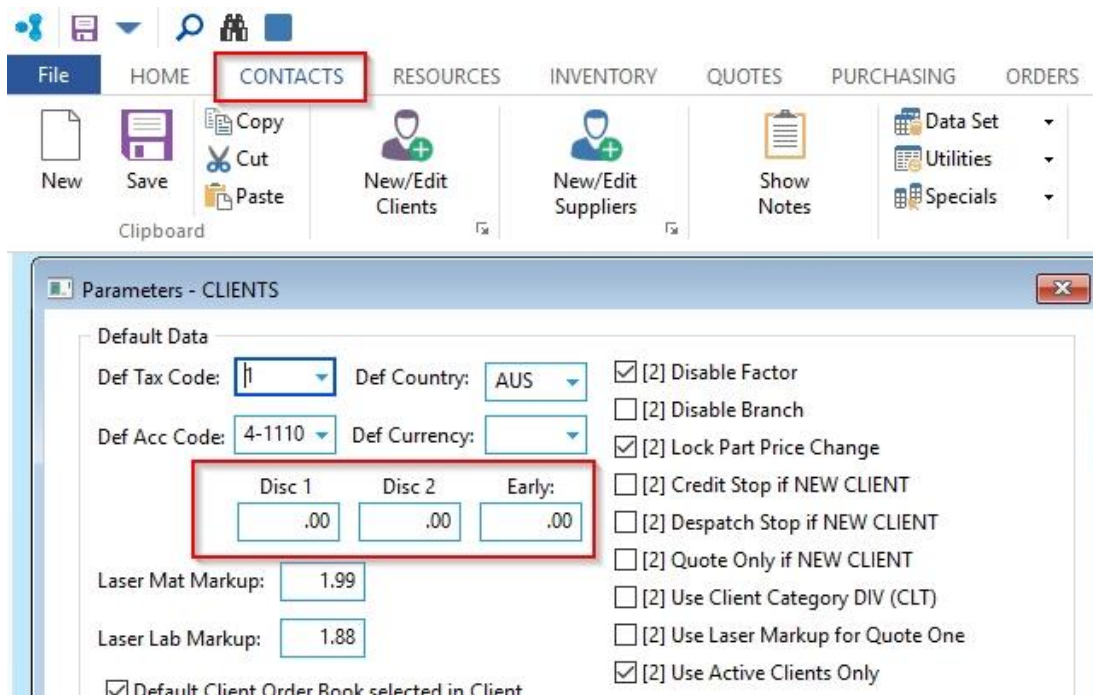
From the OPTO ribbon, select the 'Invoicing' tab then **click** the 'Systems Parameters' drop down arrow to view the 'Parameters – Invoice' window. **Click** in the [2] **Factor, Discount** box to tick, **press <F9>** to save.

Note: This is a 2-stage tick box, no tick = Factor, ticked = Discount.

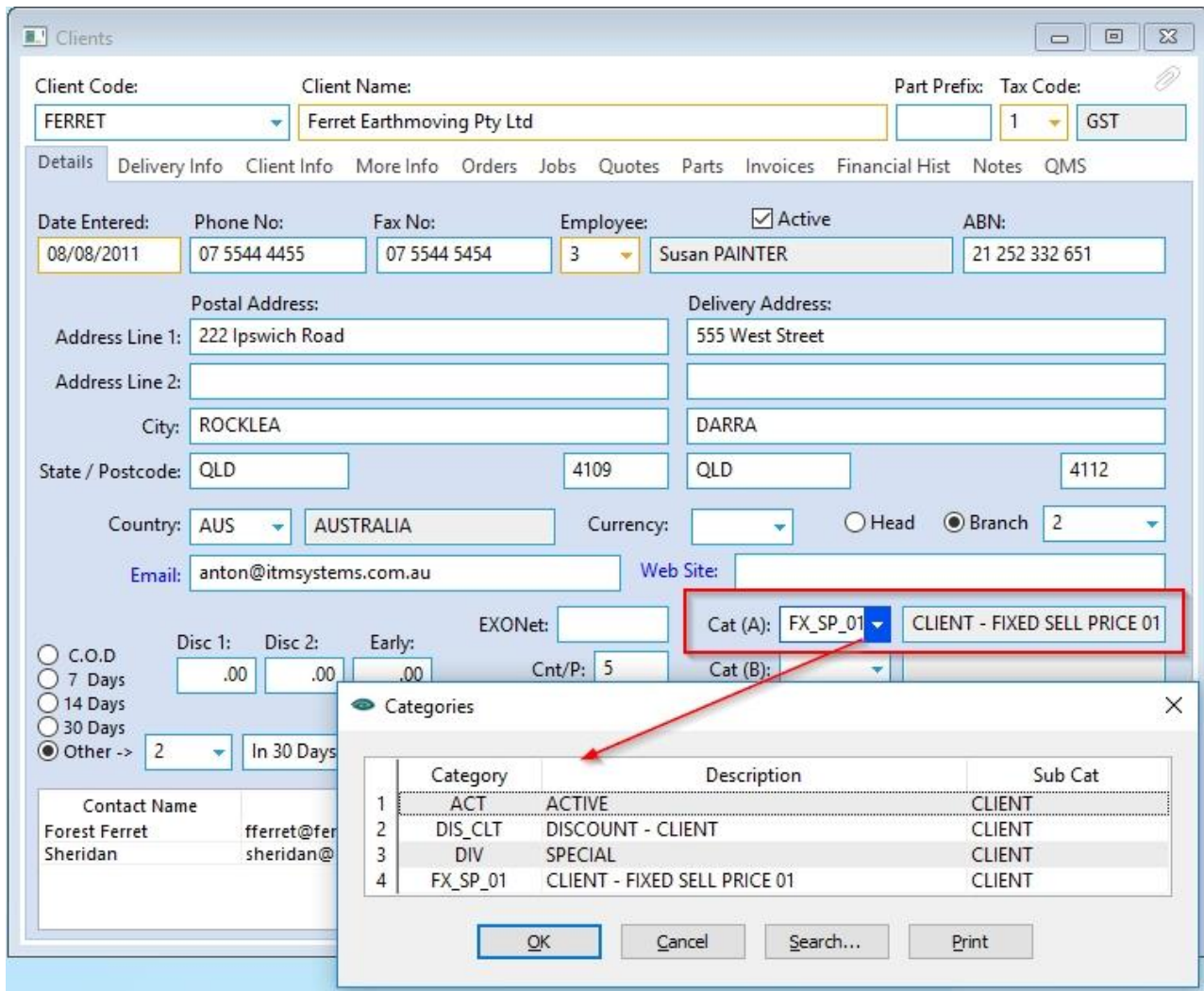


From the OPTO ribbon, select the 'Contacts' tab then **click** on the 'System Parameters' drop down arrow to open the 'Parameters – Clients' window. For the Client Category A Sell Price Discount to come into effect the Default discount amount must be zero, **press <F9>** to save any changes.

Note: The USER MUST have permission to set the parameter settings.

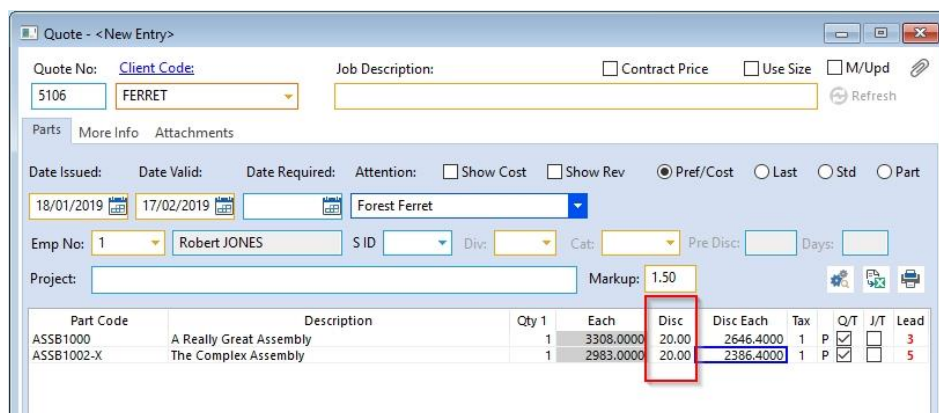


Return to the 'Contacts' tab and **click** on the 'New/Edit Clients' icon to open the 'Client Details' window. In the 'Client Details' window type in the client code or **press <F2>** and select the client from the pop-up list, **click** on **OK** and **press <TAB>** to generate the window. **Click** in the **Cat (A)** field and **press <F2>** to display the 'Categories' pop-up list. **Click** on the appropriate category to highlight and **click** on **OK**. **Press <TAB>** to generate the category description and **press <F9>** to save.



Create a Quote and/or Sales Order

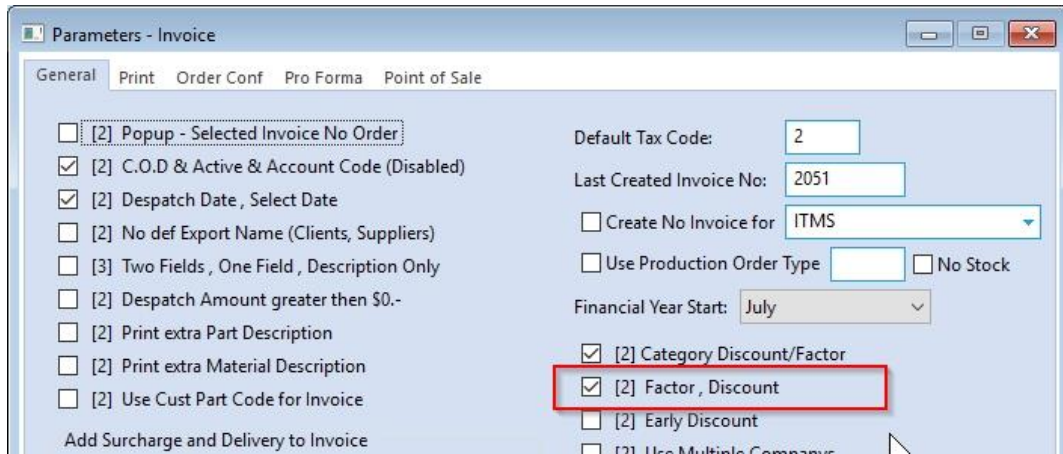
Create a New Quote/Sales Order as normal, enter parts and/or materials, discount is applied automatically to all parts and materials. **Press <F9>** to save.



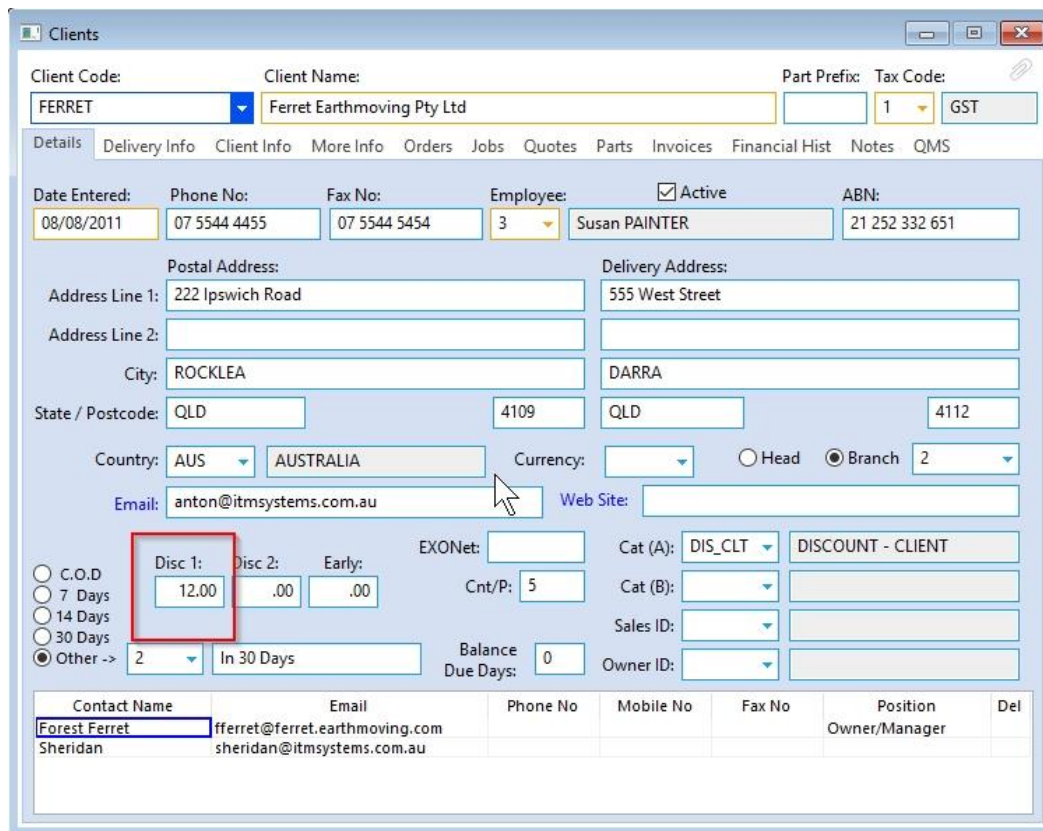
Client Dependant Discount Factor

From the OPTO ribbon, select the 'Invoicing' tab then **click** on the 'Systems Parameters' drop menu to view the 'Parameters – Invoice' window. **Click** in the [2] **Factor, Discount** box to tick, **press <F9>** to save.

Note: this is a 2-stage tick box, no tick = Factor, ticked = Discount.



From the OPTO ribbon select the 'Contacts' tab and **click** on 'New/Edit Clients', **press <F2>** and select the client from the pop-up list. **Click** on **OK** and **press <TAB>** to generate the window. **Click** in the **Disc 1** field and type in the discount amount, **press <F9>** to save.



Contact Name	Email	Phone No	Mobile No	Fax No	Position	Del
Forest Ferret	fferret@ferret.earthmoving.com				Owner/Manager	
Sheridan	sheridan@itmsystems.com.au					

Create a Quote and/or Sales Order

Create a New Quote/Client Order as normal, enter parts and/or materials, discount is applied automatically to all parts and materials. Press <F9> to save.

Order No: 50153 Client Code: FERRET Client Name: FERRET EARTHMOVING PTY LTD

Date Entered: 18/01/2019 ABN: 21 252 332 651 Emp No: 1 Robert JONES

Client Order No: 1545f222 Div: 1 Sales ID: Cat(A): Job Type: Ferret Industries

Job Info: 26 Main Street

Job Desc: The Fantastic Assembly CLEVELAND QLD 4163

T	Part Code	Part Description	Qty	Each	Disc	Total	Due Date	Tax	Avail	F	Uo...
P	ASSB1002	The Fantastic Assembly	1	360.0000	12.00	316.80	02/02/19	1	114		EACH

Credit Limit: \$30,000.00 Balance: \$-180,857.73

Line: 1 Items: 1 Excl TAX: \$316.80 TAX: \$31.68 Incl TAX: \$348.48

Category Sell Price Fixing

From the OPTO ribbon, select the 'Contacts' tab then **click** on the 'Data Set' drop menu and select the 'Category A' option. The 'Categories for Clients/Suppliers/Workcenters/Quotes' window opens. Enter a code for the fixed sell price in the **Code** field and **press <TAB>** to advance to the **Category Description** field and type in the description for the fixed price. **Click** on the 'Sub Category' drop menu and select "CLIENT" from the list, **Press <F9>** to save.

Code: DIS_CLT Category Description: DISCOUNT - CLIENT Sub Category: CLIENT

Discount (%): 10.00 Premium (Factor): Division: 1

Qty = <	Disc %
1	10.00
2	12.50
3	15.00
4	
5	

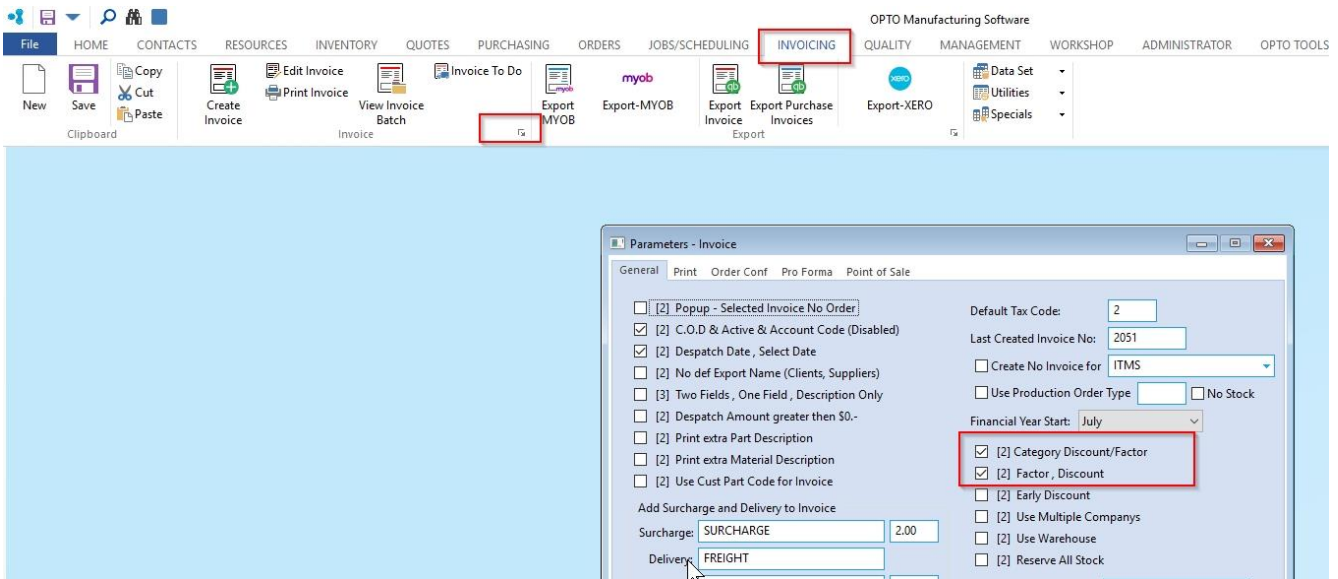
Group	Description	Disc %
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Use two decimal in each Price calculation (Discount)

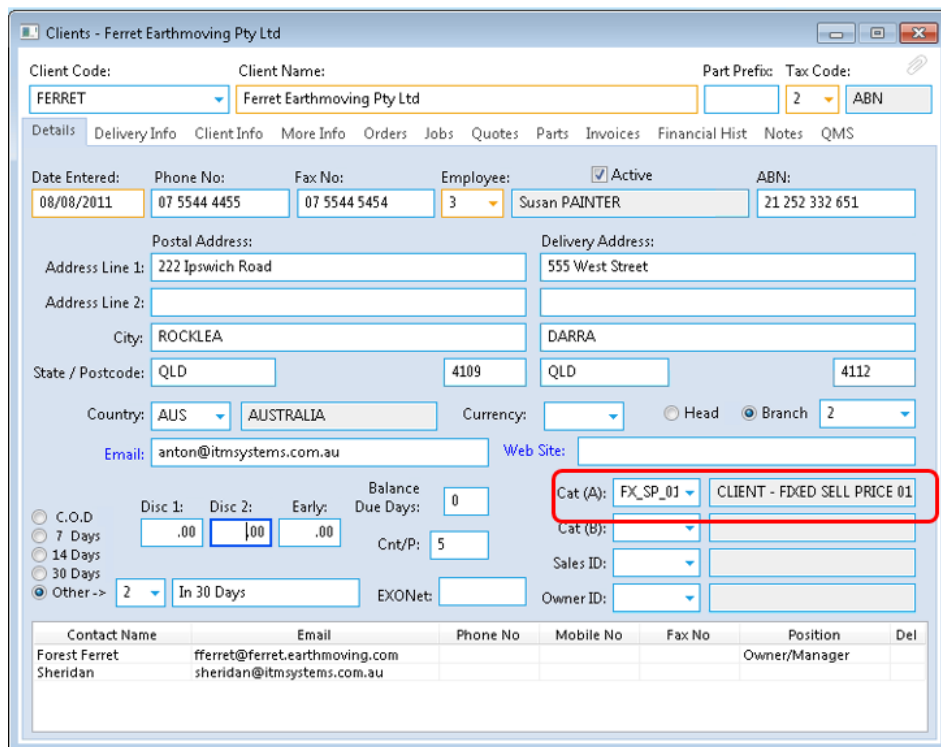
Use Cost Price in combination with Premium (Factor) ON-HOLD (Client Order)

Terms Attachment:

From the OPTO ribbon, select the 'Invoicing' tab then **click** on the 'Systems Parameters' drop down arrow to view the 'Parameters – Invoice' window.



Return to the 'Contacts' tab and **click** on the 'New/Edit Clients' icon to open the 'Client Details' window. In the 'Client Details' window type in the client code or **press <F2>** and select the client from the pop-up list, **click on <OK>** and **press <TAB>** to generate the window. **Click** in the **Cat (A)** field and **press <F2>** to display the 'Categories' pop-up list. **Click** on the appropriate category to highlight and **click** on OK. **Press <TAB>** to generate the field and **press <F9>** to save.



From the OPTO ribbon, select the 'Inventory' tab then **click** the 'New/Edit Parts' icon and either create a new part or use an existing part. If using an existing part, **press <F2>** and select the appropriate part from the pop-up list and **click OK**. In the **Category** field, **press <F2>** and select the 'Client Fixed Price' category from the pop-up list and **click OK**. **Press <TAB>** to advance to the **Price** field and enter the price for that category, **press <F9>** to save.

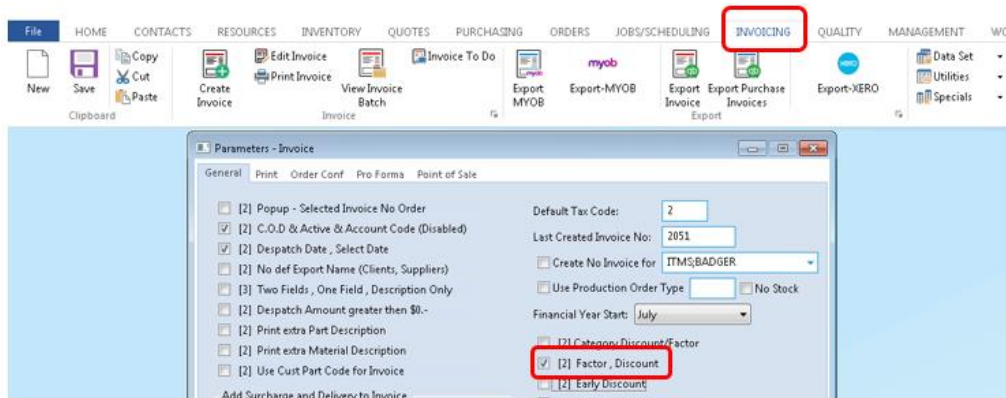
Create a Quote and/or Sales Order

Create a New Quote/Sales Order as normal, enter parts and/or materials, fixed price for the client is applied automatically to the part, **Press <F9>** to save.

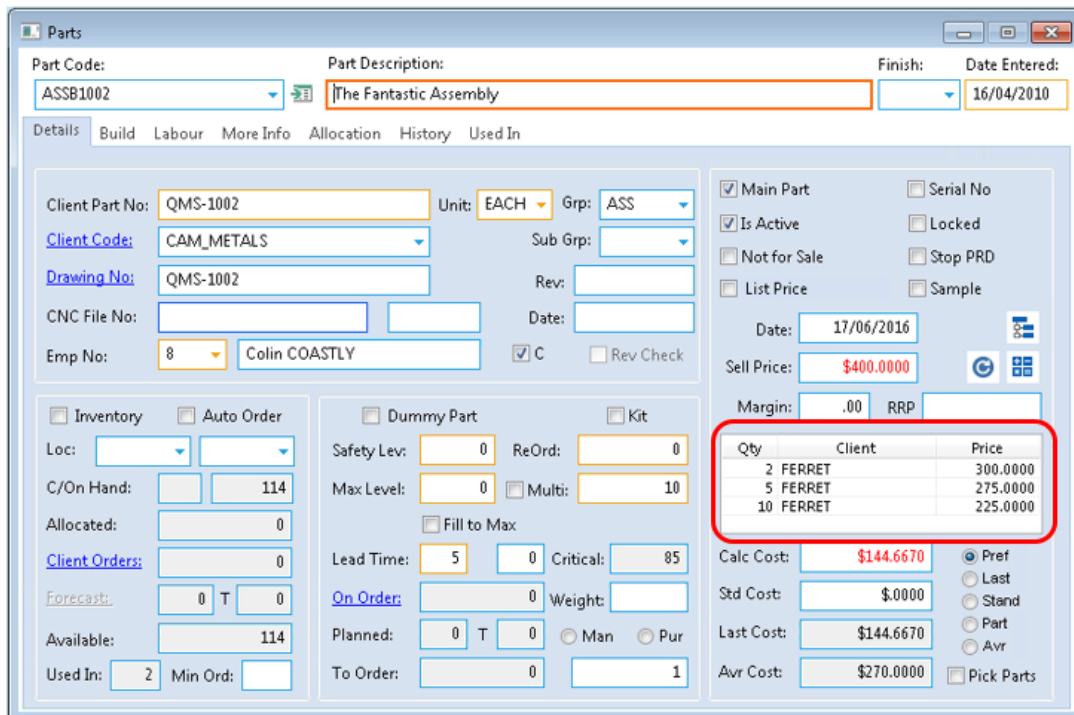
T	Part Code	Part Description	Qty	Each	Disc	Total	Due Date	Tax	Avail	F	Uo...
P	ASSB1002	The Fantastic Assembly	1	350.0000	.00	350.00	28/03/18	2	114		EACH

Quantity/Client Sell Price Fixing (Parts Only)

From the OPTO ribbon, select the 'Invoicing' tab then **click** the 'Systems Parameters' drop down arrow to view the 'Parameters – Invoice' window. **Click** in the **[2] Factor Discount** tick box and **press <F9>** to save.



From the OPTO ribbon, select the 'Inventory' tab and **click** on the 'New/Edit Parts' icon and either create a new part or use an existing part. If using an existing part, **press <F2>** and select the appropriate part from the pop-up list and **click OK**. In the **Qty** field enter the quantity, **press <TAB>** to advance to the **Client** field. In the client field type in the client code **press <TAB>** to advance to the **Price** field and enter the price for that Client, **press <F9>** to save.



Create a Quote

Create a New Quote as normal, enter parts for the fixed sell price, and **press <TAB>**. The price does not automatically change, the USER must **press <F2>** and select the price from the 'Pick Price' pop-up window and then **click OK**.

Note: This feature is for Parts only.

The screenshot shows the 'Quote - <New Entry>' window with the following details:

- Quote No: 5106, Client Code: FERRET
- Job Description: (empty)
- Contract Price, Use Size, M/Upd: (unchecked)
- Date Issued: 28/03/2018, Date Valid: 27/04/2018
- Emp No: 1, Robert JONES
- Markup: 1.50

The 'Pick Price' dialog box is open, showing a table with the following data:

	Desc	Qty	Client Code	Price
1	Each Price	1	Client Code	400.0000
2	Multi Price 1	2	FERRET	300.0000
3	Multi Price 2	5	FERRET	275.0000
4	Multi Price 3	10	FERRET	225.0000

Create a Client Order

Create a New Quote/Sales Order as normal, enter parts and/or materials for the fixed sell price. The special price is applied automatically to the Quote/Client Order.

The screenshot shows the 'Sales Order - <New Entry>' window with the following details:

- Order No: 50151, Client Name: FERRET EARTHMOVING PTY LTD
- Del Contact, Phone No / Invoice Email: (empty)
- Date Entered: 28/03/2018, ABN: 21 252 332 651, Emp No: 1, Robert JONES
- Order Type: Normal, Confirmed
- Client Order No: (empty), Div: 1, Sales ID: (empty), Cat(A): (empty), Job Type: Ferret Earthmoving Pty Ltd
- Job Desc: The Fantastic Assembly

The 'Multiple Prices' dialog box is open, displaying the message: "This part has multiple prices. Press <F2> to select a price." with an 'OK' button.

The main window table shows the following data:

T	Part Code	Part Description	Qty	Each	Disc	Total	Due Date	Tax	Avail	F	Uo...
P	ASSB1002	The Fantastic Assembly	3	300.0000	.00	900.00		2	114		EACH