

Assigning a Rate Card to an Order

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When entering an order, you can link a rate card to pull in special pricing of your products and services:

1. Navigate to **Order Management > Orders**.
2. Click the **New** button.
3. In the **Bill To** section, click the **Rate Card** field or the selector button.

The screenshot shows the aACE software interface for creating a new order. At the top, the order number is 50006 and the date is 11/02/17. The status is PENDING. The 'Bill To' section is active, and the 'Rate Card' field is highlighted with a blue circle. The 'Rate Card' dropdown menu is open, showing 'CS-pro' and 'PP-01' as options. The 'Charter School' and 'FirstPurchase' fields are also visible. The 'Ship To' section is also visible, with fields for 'Ship To Company', 'Use Bill To', 'Ship To Contact', 'Delivery Type', and 'Courier Service'. The 'Ship Together' section is also visible, with fields for 'Ship Together', 'Account #', 'Shipping Terms', and 'FOB'. The 'Activities & Comments' section is empty.

4. Select the desired rate card.
5. Complete the rest of the order as needed.

After you link a rate card to the order, the line item code pricing for that order is managed by the rate card. This includes updating pricing for order items that have already been recorded. However, if a certain line item code in the order is *not* linked to that rate card, the line item's general pricing scheme applies.