Assigning Customer Discounts

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This guide explains how to set discounts on various records. It is intended for general users.

You can use several methods to organize discounts for your customers' orders, including:

- Rate cards
- Standing discounts
- Order adjustments
- Line item adjustments
- Billing and payment terms

If multiple discounts are applicable, aACE <u>applies them in a hierarchical sequence</u> (https://aace5.knowledgeowl.com/help/assigning-customer-discounts#AssigningMultipleDiscounts). On an order that has discounts applied, team members may be able to modify them (see below for details).

Company-Level Discounts

Rate cards and standing discounts can be applied at the company record.

Rate Card Discounts

Rate cards can offer ongoing discounts for various line item codes (LICs), you can <u>create a</u> <u>rate card (http://aace5.knowledgeowl.com/help/create-a-rate-card)</u> and assign it to various company records. You can structure customer rate cards to allow for pricing locks and overrides on the LICs.

To assign a rate card to a company:

- 1. Navigate from Main Menu > CRM & Sales > Companies and select the desired company record.
- 2. Click the Customer Details view, then click Edit.
- 3. In the Billing Setup section, click the Rate Card field and select the desired rate card.

Company:	Westbury	Catholic I	High Schoo	l (50136)					ACTIVE
Company Detail	s Sales & Ma	rketing	ustomer Details	Vendor Details	Restricted Access		2 Notice	es 🕛 🛛 Ema	ils 🗹 🛛 Docs (
Billing Address ♀	s	Sync with Office 🗴	Billing Setup	Payment	Approved 🗙 🖈	Tax Setup			Tax Exempt
Billing Salutation (Compar	ıy Name)		A/P Contact >		Deliver Invoice Via	Tax Profile >		Tax ID	
Westbury Catholic Hig	h School				Q Email		Q,		
Address			Email		Last Order Date	Exempt Use Code	Exempt No	Cert	Exp Date
9068 Fremont Drive					8/6/2021			0	
			Billing Terms Net 30	Rate Card >	Niscount %	Shipping Setu	р		2
City	State / Prov	Postal Code	A/R Balance	CntrHS	Center Ille High Sch			Account #	
Westbury	NY	11590	5,125.83	HBAEX	Highbridge Academy E Homeschool	xpansion			
Country	Postal Format	Currency	Ship Rate Type	HSCT	High School Classroo			FOB	
Sales History	American Orders Invoice	s Receipts	Require Customer	LOYAL NSACS PO TBLTV Tech-10 WTS2020	Loyal Customer Disco New Start Academy Ch Tablet Volume Discou Tech Discount Spring Tablet Sale	arter School			
Line Item Code				/endor	Last Or	der	Date		Unit Price
> HP-200-T HP 200	Series Toner Cartridge	:	>	Hewlett Packard (HP)	> 50320	Westbury Catholic	06/18/2	1	28.00
> HP-250 HP 250 Pri	inter		>	Hewlett Packard (HP)	> 50320	Westbury Catholic	06/18/2	1	262.86
> HP-290 HP 290 Pri	inter		>	Hewlett Packard (HP)	> 50320	Westbury Catholic	06/18/2	1	285.71
> HP-300 HP 300 Pr	inter		>	Hewlett Packard (HP)	> 50320	Westbury Catholic	06/18/2	1	571.43
> HP-300-T HP 300	Series Toner Cartridge	:	>	Hewlett Packard (HP)	> 50320	Westbury Catholic	06/18/2	1	35.00
> HP-PPS HP Printer	Pack Special				> 50268	Westbury Catholic	04/16/2	1	2,499.00
> NTBK-011 Lab Not	ebooks / Journals		>	McGullicuddy McGuire-	Hall (50009) > 50340	Westbury Catholic	08/06/2	1	10.00
> SHID Shinning			>	EndEy (50028)	> 50132	Westhuny Catholic	11/12/2	n	0.00

When an order for that company is created, aACE applies the default rate card to the order. The user may be able to change this (see below).

Standing Discounts

A standing discount applies to a single customer, affecting all orders that include *applicable* LICs (see below for details).

To assign a rate card to a company:

- Navigate from Main Menu > CRM & Sales > Companies and select the desired company record.
- 2. Click the **Customer Details** view, then click **Edit**.
- 3. In the Billing Setup section, enter the amount in the **Discount %** field.

Record: 2 of 2 Company: V	Vesthurv	Catholic I	High Schoo	L (501)	36)		New •	🛛 Edit 🥒 🛛	Delete 🗶 🛛 P		
Company Details	Sales & M		ustomer Details	Vendor De	-	Restricted Access		2 Notices	0 -	ACT1	Docs @
Company Details	Sales of M	arkeung	ustomer Details	Vendor De	ctans	Resulcted Access		2 NOUCES	S 😈 Lille		DOCS
Billing Address ♀		Sync with Office 🗙	Billing Setup	Payment		Approved 🗙 🖈	Tax Setup			Tax Ex	kempt [
Billing Salutation (Company	Name)		A/P Contact >			Deliver Invoice Via	Tax Profile >		Tax ID		
Westbury Catholic High	School				Q, E	Email		Q,			
Address			Email		L	ast Order Date	Exempt Use Code	Exempt No	Cer	t Exp Date	
9068 Fremont Drive					8	3/6/2021			0		
			Billing Terms	Rate Card >	(Discount %					
			Net 30			٩	Shipping Setup				,
City	State / Prov	Postal Code	A/R Balance	Credit Limit	Credit Balanc	e Phonce Charge	Courier Service		Account #		
Westbury	NY	11590	5,125.83								
Country	Postal Format	Currency	Ship Rate Type	Rate Value	Ref Comm Typ	e Ref Comm %	Shipping Terms		FOB		
	American	USD									
			Require Customer	POX	Credit Hold						
Sales History 0	rders Invoice	es Receipts					•				
Line Item Code				Vendor		Last C	rder	Date		Unit	Price
> HP-200-T HP 200 Se	ries Toner Cartridg	e	>	Hewlett Packar	d (HP)	> 5032	0 Westbury Catholic	06/18/21		2	8.00
> HP-250 HP 250 Print	er		>	Hewlett Packar	d (HP)	> 5032	0 Westbury Catholic	06/18/21		26	2.86
> HP-290 HP 290 Print	er		>	Hewlett Packar	d (HP)	> 5032	0 Westbury Catholic	06/18/21		28	5.71
> HP-300 HP 300 Print	er		>	Hewlett Packar	d (HP)	> 5032	0 Westbury Catholic	06/18/21		57	1.43
> HP-300-T HP 300 Se	ries Toner Cartridg	e	>	Hewlett Packar	d (HP)	> 5032	0 Westbury Catholic	06/18/21		3	5.00
> HP-PPS HP Printer P	ack Special					> 5026	8 Westbury Catholic	04/16/21		2,49	9.00
> NTBK-011 Lab Note	oooks / Journals		>	McGullicuddy M	IcGuire-Hall	(50009) > 5034	0 Westbury Catholic	08/06/21		1	0.00
> CHID Shinning			>	FodEv (50028)		> 5013	Westhuny Catholic	11/12/20			0.00 ~

When an order for that company is created, aACE applies the discount.

Order-Level Discounts

Order adjustments, LIC adjustments, and billing terms can be applied to an order record.

Order Adjustments

You can discount the *total* amount of an order using the Adjustment field in the payment area.

- 1. Navigate from Main Menu > Order Management > Orders and select the desired order record.
- 2. Click Edit, then enter a negative percentage or lump sum in the Adjustment field.

Record: 3 of 3					te 🗶 Print 📇 Actions 🖈
Order: 50381	Westbur	y Catholic High	School - discount	ts 11/03/21	PENDING
Sales Order Man	agement Job Costs & Ap	provals		Notices 🔒	Emails M Docs @
Bill To	=" *	The school is t Ship To	trying to be more eco-friendly, so please lin 146 Ridgewood St. =="		ients
Customer (Bill To) >	Contact >	Ship To Company > Use Bil	II To x Ship To Contact >		
The Haughton School		The Haughton School	Megan Lloyd		
A/R Balance > Credit Availabl	e Rate Card >	Delivery Type	Courier Service		
0.00	Q	Ship Together			
Sales Rep > Customer PO #	Billing Terms Disc %	Courier Account #	Shipping Terms FOB		
MH Q	Net 30				
Order Items Build item	s from Template:	Invtry Alts Upgs	Quantity BO DS SO Unit Price	Unit Adj Extended Price	Total Tax Profile 🗱
1 > Technology TBLT-7	Student Tablet, 7" Screen	163 2 7 🖈	1 450.00	0.00 450.00	450.00 OUT 🛪 ^
Sales	۹	Fulfillment		Subtotal Adjustment	450.00 C -40.00
Lead > Acct Manager >	Referral Company >	Ffmt Priority Start Date	End (Delivery) Job >	Total	410.00
_	King's Rock School District	Normal 11/03/21	11/05/21	Q Tax OUT	0.00 Exempt
9				Grand Total	426.50
Campaign > Type	Route Source				

Note: You can also use Adjustment field to charge a premium (i.e. increasing an order's total cost by entering a *positive* number or percentage).

Line Item Code Adjustments

You can discount the amount of a single LIC using the Unit Adj field for that order item.

- 1. Navigate from Main Menu > Order Management > Orders, select the desired order, then click Edit.
- 2. In the Order Items list, at the **Unit Adj** field, enter the discount as a *negative* percentage or lump sum.

Record: 3 of 3	lana a				Print 📇 Actions 🖈
Order: 50382	Westbury	Catholic High S	School - discounts	s 11/04/21	PENDING 😑
Sales Order Mana	gement Job Costs & App	rovals		Notices 🔒	Emails 🎽 🛛 Docs 🖉
Bill To	= *	Ship To	9068 Fremont Drive	Activities & Comments	
Customer (Bill To) >	Contact >	Ship To Company > Use Bill	To 🗙 Ship To Contact >		
Westbury Catholic High 🛛 🔍	Selah Murphy Q	Westbury Catholic High	Selah Murphy		
A/R Balance > Credit Available	Rate Card >	Delivery Type	Courier Service		
5,125.83	High School Classroom	Ship Together			
Sales Rep > Customer PO #	Billing Terms Disc %	Courier Account #	Shipping Terms FOB		
MH Q	Net 30				
C Type Line Item Co			uantity BO DS SO Unit Price		otal Tax Profile 💥
1 > Technology TBLT-7	Student Tablet, 7" Screen	163 2 7 🖈	1 427.50	-5.00% 406.12 406	.12 NYS 🖈 ^
					.12 🖸
	*	Fulfillment	*		.12
Sales	7				
Lead > Acct Manager >	Referral Company >	Ffmt Priority Start Date	End (Delivery) Job >	Shipping 15.00 16	
Lead > Acct Manager >	Referral Company >	Ffmt Priority Start Date Normal 11/04/21	End (Delivery) Job > 11/08/21	. Tax NYS 29	.59 Exempt
Lead > Acct Manager >	Referral Company >			A Tax NYS 29 Grand Total 452	.59 Exempt

Note: The Adjustment field can also be used to charge clients a premium. To increase a line item's cost, enter the number or percentage as a *positive* value.

Billing Term Discounts

Using <u>billing terms</u> (http://aace5.knowledgeowl.com/help/billing-payment-terms-preferences), you can offer early-payment discounts to customers.

If you create an order and assign a billing term that includes an early payment discount (e.g. Net 10 2%), that possible discount will also be noted on the invoice record. It displays as a suggested discount below the Grand Total. The note is displayed until the Discount Period is passed.

When you enter the receipt for that invoice, aACE compares the Receipt date to the Invoice date. If the Receipt date is before the Discount Period has passed, aACE automatically applies the Suggested Discount as an <u>adjustment on the receipt (http://aace5.knowledgeowl.com/help/using-the-adjustment-field-in-receipts</u>). In the General Ledger, aACE applies the early payment discount adjustment to the GL Account specified in your <u>Adjustment Codes preferences</u>

(http://aace5.knowledgeowl.com/help/adjustment-codes-preferences).

Note: If the customer sent a payment *within* the Discount Period, but it arrived after that timeframe, you can edit the receipt, backdate it, and apply the billing terms discount.

Assigning Multiple Discounts

You can assign multiple, overlapping discounts for an order. aACE calculates the final total by applying discounts in this hierarchy:

- 1. Special rate card adjustments
- 2. Standing discounts for the customer
- 3. Line item adjustments on the order
- 4. Order adjustments

Note: aACE applies any billing terms discounts when you enter the receipt.

Modifying Discounts on an Order

Team members may be able to change the discounts on an order. This is controlled by their <u>User Group (http://aace5.knowledgeowl.com/help/controlling-access-to-aace-modules-with-user-groups)</u> privileges, as well as by the current order status.

- Rate card discounts Can be changed while the order is in Pending status. Edited in Open status.
- Standing discounts Cannot be changed at the order.
- Order adjustments Can be changed while the order is in Pending status. Edited in Open status.
- Line item adjustments Can be changed while the order is in Pending status. Edited in Open status.
- Billing and payment terms Can be changed while the order is in Pending status. Edited in Open status.

On a Pending or Open order, most team members can modify order adjustments, line item adjustments, and billing terms. Other team members can modify the rate card applied (if any) to the order.

You *cannot* modify a customer's standing discount at the order record. You can only edit it at the company record. However, you can *prevent* an LIC from receiving any standing discounts — at the LIC record, mark the flag to 'Exclude customer discount'.

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