Walk-through for Pricing and Rate Cards

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This article gives a hands-on lesson to help you understand how to work with line item code pricing and rate card structures. It walks you through a simple line item code setup and shows you how the pricing appears in an order.

You can create records in your aACE system for each step of the walk-through. Each step adds a layer of complexity to the pricing structure, then summarizes how the change affects the order pricing that the end user sees.

1. Create a line item code called TESTLIC:
   1. Rate Type - Fixed Price
   2. Rate Value - 100
   3. Make sure it has no custom pricing
2. Create an order and add TESTLIC. The price will be $100.
3. Edit the TESTLIC line item code and set up a volume discount :
   1. Qty Range - 2+
   2. Discount Amt - $10
4. Create a second order and add TESTLIC with a quantity of 2. The price will be $90.
5. Create a rate card called TESTRC:
   1. Rate Type - Discount %
   2. Rate Value - 50%
   3. Linked line items - none
6. Create a third order, assign the TESTRC rate card, and add TESTLIC with a quantity of 1. The price will still be $100, since TESTLIC does not belong to the rate card yet.
7. Edit the TESTRC rate card:
   1. Qty Range - 2+
   2. Discount Amount - $20
8. Create a fourth order, assign the rate card TESTRC, and add TESTLIC with a quantity of 2. The price is again $90, since TESTLIC does not belong to the rate card yet; the calculation is only applying the $10 discount from the line item code volume discount.
9. Edit the TESTLIC line item code and add the TESTRC rate card to the Custom Prices list. Do not change the default checkboxes.
10. Create a fifth order, assign the rate card TESTRC, and add TESTLIC with a quantity

of 1. The price will be $50, since it's now applying the rate card's 50% discount.
11. Edit this fifth order, changing the quantity to 2. The price becomes $30, since it's now applying the rate card's 50% discount and the $20 volume discount.
12. Edit the TESTLIC line item code:
    1. Uncheck the default logic for custom pricing
    2. Rate Type - Fixed Price.
    3. Rate Value - $25
    4. No volume discounting
13. Create a sixth order, assign the rate card TESTRC, and add TESTLIC with a quantity of 1. The price will be $25, since it's now also applying the related rate card item.
14. Edit the TESTLIC line item code and add custom discount pricing:
    1. Qty Range - 2+
    2. Discount Range - 50%
15. Create a seventh order, assign the rate card TESTRC, and add TESTLIC with a quantity of 2. The price will be $12.50, since it's now also applying line item code's custom discount of 50%.
16. Edit the TESTRC rate card:
    1. Select the default for the pricing logic for the TESTLIC line item code.
    2. Discount amount - 75%
17. Create an eighth order, assign rate card TESTRC, and add TESTLIC with a quantity of 1. The price will be $25, since it's applying the 75% discount from the rate card. This is helpful because users can have a straight discount % rate card without having to worry about price changes.

Pricing Details to Remember

- Rate cards can have many line item codes and line item codes can be included on many rate cards.
- "Rate Card Items" in rate cards and "Custom Pricing" in line item codes are looking at the same data table, just from different perspectives.
- If a rate card is selected at the order level and the line item code of the line item is on that rate card, the rate card (i.e. custom pricing) logic takes precedence. Note: This can either be "Default" or overridden with custom logic.
- If a rate card is selected in the order, and the line item code of the line item is *not* on the selected rate card, the line item code logic takes precedence.
- Pricing logic does *not* cross levels. For example, the rate at the order will *not* both pull a rate from the rate card item and also try to apply the volume discount logic stored at the line item code.

- Client discounts are taken into consideration *after* all the above have been considered. For example, an order can have a rate card discount, a volume discount, and a client discount all at the same time.

If you need additional help to create a pricing structure not covered in this walkthrough, contact aACE Support at the number listed on [Getting Started with aACE Support](.).