

[illegible]

Customer File Master Maintenance									
								Change Account Mode	
Basic Information									
Account #				8	A/R Method:				
2	Name:				9	Phone Number:			
3	Bill To:				12	Fax Number:			
					16	Contact:			
					17	Salesman:			
6	Province	7	Postal Code		19	Territory:			
21	Start Date:			24	GST Lic. #:		Charge	26	PST Lic. #:
28	Remarks:								
Operating Controls and Pricing Parameters									
29	Default Shipper:				44	Account Control Flags:			
30	Delivery Type				52	Overdue Control Flag:			
34	Standing PO Number:				53	Sales Summary Number:			
35	Start			38	End			54	Allow Contract Pricing?:
41	Industry Reporting Group:				55	Discount Group:			
42	Default Payment Terms:				43	Default Br#:			
					56	Core Billing?	57	Days Allow	
Financial Control Settings									
58	Credit Limit in \$'s				63	Require Statement?:			
59	Rating:				64	Service Charges?:	(Y/N/M)	65	S/C Rate
60	Allow Prompt Pay Discount?:				66	ME Invoice Copies:			
61	Max. Number of Days:			62	Discount:			67	Redirect To:
									Summary Account #
								F1	F2

Specials Maintenance

At least one of the main options must be chosen when setting up a new special, Customer, Category, Discount Level, Discount Group, Class or Sub Class or a combination of these can be selected.

Change Specials				Special Pricing Maintenance	
1	Customer			Space = All	At least one of these must have an entry
3	Category			Space = All	
5	Part Number			Space = All	
7	Discount Level	8	Only if Blank?	(Y/N)	
9	Discount Group			Space = All	
9	Class			Space = All	
12	Sub-Class			Space = All	
14	Only at Net				
15	Start Date				
18	End Date				
21	Net Price				
22	Price Level				
23	Percentage				
24	Price Break				
25	Inc. Non Stocked?			(Y/N)	
26	To Be Sold			(0 = No Limit)	
27	Sold			(Updated By System)	
28	Flyer			(Promotion Number)	

Customer

If left blank the special will apply to all customers and if you wish to use a specific customer they will need to be setup to “Allow Contract Pricing = Y” in the Customer Maintenance screen. Depending on the Billing Parameter setting “Contract Only” found on screen 3 a Contract setup for a specific customer will always sell at the Contract price if set to Y and will sell at the lowest available price based on Discounts and Specials for the product if set to N.

The Billing Parameter Maintenance is found under **Utilities > System Setup > Sales Desk > Parts Billing Parameters.**

Screen 3 : User Choices

Line	Description	Value	Position	Message	Value	Value	Value
1	Lost Sale - Quantity Or Occ.	Q		Invoice Message			
2	Cancels To Lost Sale	Y	C	THANK-YOU FOR YOUR ORDER			
3	Last Sale Date?	S	C	ANS CONTINUING TO SUPPORT LOCAL			
4	Update History On 'W'	Y	C				
5	Update " On L/Sale	N	C				
6	Use Detail Sales	Y		Cash Tape Message			
7	Use Invoice History	Y	C				
8	Use Rentals	N					
9	Use Core Detail File	Y					
10	Stock Replenish Daily?	N					
11	Stock Replenish on S0?	N		Payment Text			
12	Detailed Invoice Reg.	Y		Received On Account			
13	Salesman Summary?	Y	38	GP Minimum %	30.0	47	Show Non-Purchased
14	Discount Summary	Y	39	GP Maximum %	300.0	48	Default Chaining
15	Overrides?	L	40	Monthly Overdue %		49	Order Below Minimum
16	S/T Auto Confirm?	N	41	Annual Overdue %		50	D% On Screen YNDS
17	Corporate Messages	N	42	Replenish Committed?		51	Contract Only?
18	Kit Detail Display	N	43	Replenish Unsold?		52	Alternate List Price
19	Ask Kit Question?	N	44	Replenish Use Available		53	Whse Buying Group?
20	Levy Within Kit?	N	45	Invoice Description	S	56	Force Clerk Order to Inv
54	Default Email	ar		@amscomp.com		57	Core Values inc. in GP%
Any change?	1.		46	Show On Hand Only?	N	58	Use Dispatch?

Category – Part Number

A Special/Contract can be setup for a specific Category/Part Number or an entire Category by just entering the Category and leaving the Part Number blank. If setup for an entire Category then the pricing will be entered as a Price Level and Discount (+/-).

Discount Level

The use of Discount Level for a Special or Contract requires that the Special/Contract be setup for an entire Category or All Categories. When adding a Special/Contract for an entire Category it also requires that you identify if the Special/Contract is to only affect parts with a blank Discount Level or if it is to be all parts. If a specific Discount Level is assigned to the Special/Contract the Only if Blank will be automatically filled in.

Discount Group

Specials setup for a Discount Group will apply to all customers assigned to that discount group regardless of the “Allow Contract Pricing” setting on the customer.

Class/Subclass

The Special/Contract will apply to all part numbers contained in the Class or Class and Subclass. The pricing will be by Price Level and Discount (+/-).

Only at Net

When this is set to “N” [Net Only] the Special will apply to All Customers as the net price. This will override the customers regular discounts but if the Billing Parameters are set for “Contract Only” = Y then an existing Contract price will take precedence.

Start – End Dates

This is the time frame the Special/Contract will run for, inclusive of the start and end dates. If a To Be Sold quantity is used then the Special/Contract will be in effect until the available quantity is sold or the end date is reached, whichever occurs first.

Price

If the Special/Contract is for a specific part number then a Unit Price can be entered otherwise the price will be based on a Price Level and Discount (+/-)

Price Break

The Quantity Price Breaks option has been updated to allow Quantity Breaks for individual customers or discount groups as well as all customers. The dates may be used to limit the time this price break is offered. The net price is left blank and “0” (zero) is used for the price level with a blank percentage value when adding a Price Break Special. The Price Break code is entered into the special, the Tab key can be used to search the codes setup in the system. Only S type Price Break codes can be used in the Specials.

Within the Billing Parameters the system must be set to not show line discounts in order to take advantage of Quantity Price Breaks. This setting, **D% on screen YNDS** is found on screen 3 of the Billing Parameter Maintenance and must be an **N** as shown in the parameter screen above.

Include Non-Stocked

Specials/Contracts setup for an entire category or discount level can be applied to Non-Stocked parts included in the price book.

To Be Sold

This will limit the Special/Contract to the number of units entered. When the quantity sold exceeds the “To be Sold” value the price will revert back to the normal price.

Quantity Sold

This value is updated automatically as sales take place

Flyer

This is a reference description used for reporting.

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