

Customer Sales Discounts

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Overview

The purpose of this feature is to explain the use of the applying of Customer Discounts in Palladium Enterprise. The discounts are in the Form of Item Line Discounts and Customer Trade Discounts (Document Discounts).

Item Discounts

There are 2 settings relating item discounts as follows:

Item Discount Matrix

The item Discount Matrix is a Discount Matrix that is Applied to a Customer Category vs an Item Category.

Setup

To set this up go to **Inventory / Maintenance / Price Discount Matrix**. In the screen below you will see that we have 3 customer categories with 5 Inventory Item Categories, each with their own default item discount value.

	DISTRIBUTOR	RETAIL	WHOLESALE
ACCESSORIES	12.00	5.00	9.00
BRACELETS	6.00	3.00	4.50
NECKLACES	6.00	3.00	4.50
RINGS	10.00	5.00	8.00
WATCHES	17.00	7.00	12.00

Processing

When processing a sale for a Customer assigned to the Wholesale Category, the Discounts relating to the respective inventory Category will be applied as seen below.

The screenshot shows a 'Sales Invoice' window with a menu bar (File, Edit, View, Navigate, Sales, Report) and a toolbar. The main area is titled 'SALES INVOICE' and contains customer information, account balances, and a table of items. The 'TISSOT-MENS' item is highlighted, and its 'Discount %' of 12.00 is circled in red. A summary table at the bottom right shows totals for Margin, Weight, Delivery Method, Volumetric, and Tax.

Number	Location	Description	Qty	Unit	Price	Discount %	Margin %	Tax Code	Tax	Amount
GOLDRING	DEFAULT	12ct Gold Ring	1	EA	1 600.00	8.00	34.10	01	206.08	1 472.00
TISSOT-MENS	DEFAULT	Tissot Mens Gold Watch	1	EA	4 600.00	12.00	40.71	01	566.72	4 048.00

Total Margin %:	38.95	Subtotal:	5 520.00
Weight:	0.000	Discount %:	0.00
Delivery Method:		Delivery Cost:	0.00
Volumetric:	0.000	Tax:	772.80
Total:			6 292.80

Item Contract Pricing

This function allows you to set an Overriding Discount per Item Category per Individual Customer or for a Group of Customers based on the value of the Item Sale for that specific item Category.

Item Contract Pricing Setup

To set this up go to **Inventory / Maintenance / Contract Pricing**. Then select the Validity Date Range for this Special Pricing, then set the price value breaks and overriding discount value for the Inventory Categories. You are not obliged to set the Value Breaks and could have the additional discount apply from the first cent.

In the screen below you will see that we have set an additional discount for Ring Sales between \$2000 and \$9,999.99 and another from \$10,000.

Contract Pricing

Name: DISTRIBUTOR-1
 Description: Distributor Group 1

Apply Contract Pricing To:
 Value Based Tax Inclusive Tax Exclusive

Save Cancel

Start: Monday, 01 Februar Finish: Monday, 29 Februar Inactive

Matrix	Inclusions	Exclusions	
Category	Value From	Value To	Discount %
RINGS	2 000.00	9 999.99	10.00
RINGS	10 000.00	999 999 999.00	12.00
ACCESSORIES	5 000.00	999 999 999.00	10.00

Using the Inclusion / Exclusion function you can include only specific items for the overriding discount, meaning that you could have the special discount relate only to specific items without having to change the Inventory Category as seen below.

Contract Pricing

Name: DISTRIBUTOR-1
 Description: Distributor Group 1

Apply Contract Pricing To:
 Value Based Tax Inclusive Tax Exclusive

Save Cancel

Start: Monday, 01 Februar Finish: Monday, 29 Februar Inactive

Matrix Inclusions Exclusions

Filter: Category Exclude

1 * Category	Type	Select	Number	Description	Inactive
Total RINGS					
RINGS	INVENTORY	<input type="checkbox"/>	GOLDRING	12ct Gold Ring	<input type="checkbox"/>
Total ACCESSORIE					
ACCESSORIES	INVENTORY	<input type="checkbox"/>	250mlPlasticBtle	250 ml Plastic Bottle	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	250mlSauce	250ml Tomato Sauce	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	2lEmptybottle	2L Bottle Empty bottle	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	2lTomatoSauce	2L bottle Tomato Sauce	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	InvItem	Inventory Item	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	plastic	plastic bottles	<input type="checkbox"/>
ACCESSORIES	INVENTORY	<input type="checkbox"/>	premix	Premix	<input type="checkbox"/>
ACCESSORIES	SERVICES	<input type="checkbox"/>	S1020	Drafting	<input type="checkbox"/>
ACCESSORIES	SERVICES	<input type="checkbox"/>	S1040	Engineering Consulting	<input type="checkbox"/>
ACCESSORIES	SERVICES	<input type="checkbox"/>	S1060	Estimating Consulting	<input type="checkbox"/>
ACCESSORIES	SERVICES	<input type="checkbox"/>	S1080	Surveying	<input type="checkbox"/>
ACCESSORIES	SERVICES	<input type="checkbox"/>	S2015	Service Call	<input type="checkbox"/>

Inactive

OK Cancel

The date ranges allows you to set Multiple Pricing Ranges and Variations within the same Discount Matrix Type as seen below. This is the same as the new date-base Customer Pricing in Palladium as seen below as well as on the Trade Discount Matrix below.

Assign Contract Price to Customers

Once we have setup the contract pricing we need to assign the Pricing to a Customer. To do this simply go to **Customers / Maintenance / Settings Tab** and navigate to the Contract Pricing section as seen below.

Processing

When we process a sales document with the value for rings over \$10,000 you will see that the discount has increased to 12% for this Customer.

Number	Location	Description	Qty	Unit	Price	Discount %	Margin %	Tax Code	Tax	Amount
GOLDRING	DEFAULT	12ct Gold Ring	1	EA	11 000.00	12.00	89.98	01	1 355.20	9 680.00

Customer Trade Discounts

These discounts are applied on a per Customer basis and applied as an overall Document Discount. We have 2 Types of Trade Discounts in the form of General Customer Trade Discounts and a Trade Discount Matrix.

General Customer Trade Discounts

Setup

To set this up, simply go to **Accounts Receivable / Maintenance / Customers / Settings Tab** and navigate to the Trade Discount section as seen below and enter the discount value.

The screenshot shows the 'Customer' settings window for 'Ashburton Reinforcing' (Number: TST001). The 'Trade Discount' section is highlighted with a red box, showing 'Fixed' selected with a value of 5.00% and 'Matrix Type' unselected. Other settings include 'Credit Control' (Limit: 100 000.00), 'Payment Terms' (30 Days From Invoice), 'Currency' (South African Rand), and 'Contract Pricing' (DISTRIBUTOR-1).

Processing

Once Set, the discounts will appear on all sub-total of the sales document (net of item discounts above) as seen below.

The screenshot shows a 'Sales Invoice' for 'Ashburton Reinforcing'. The invoice includes a table of items and a summary table at the bottom right. The 'Discount %' is set to 5.00, and the 'Discount' amount is -484.00.

Number	Location	Description	Qty	Unit	Price	Discount %	Margin %	Tax Code	Tax	Amount
GOLDRING	DEFAULT	12ct Gold Ring	1	EA	11 000.00	12.00	89.98	01	1 355.20	9 680.00

Total Margin %:	89.98	Subtotal:	9 680.00
Weight:	0.000	Discount %:	5.00
Delivery Method:		Discount:	-484.00
Volumetric:	0.000	Delivery Cost:	0.00
		Tax:	1 287.44
		Total:	10 483.44

Trade Discount Matrix

This function is similar to that of the Item Trade Discount Matrix in that it allows for a variable Trade (Document) Discount with the ability to Include and Exclude specific items.

Setup

To setup the various Trade Discount Matrix Types, go to **Accounts Receivable / Maintenance / Trade Discount Matrix Types**. Like we had previously you can set the selected items in which you would like included in the additional "overall" discount structure as seen below.

Assign to Customers

To assign this Matrix to your Customer(s), simply go to **Accounts Receivable / Maintenance / Customers /Settings Tab** and navigate to the Trade Discount section as seen in an earlier screen assigning the relevant Matrix type.

Processing

Once we have setup all we do is to process an invoice with the respective value and the Trade discount will adjust Dynamically as seen below,

