Walk-Through for Pricing and Rate Cards

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This guide explains how to work with pricing and rate cards. It is intended for beginning users.

aACE allows you to work with line item code (LIC) pricing and rate card structures. Simple LIC setup will show you how pricing appears on an order, which you can then test and manage. Pricing structure can increase in complexity as you customize various parts of an LIC. This guide demonstrates several aACE settings and summarizes how the changes affect the order pricing that the end user sees.

Standard Pricing Set Up

The typical process for setting pricing includes four steps:

- 1. Set up pricing on your LIC record
- 2. <u>Set up rate card</u>
- 3. <u>Set up volume discounts</u>
- 4. Link LIC to rate card

Note: You can create new records in your aACE system at each step in this process.

1. Set Up Pricing for an LIC

- 1. Navigate from Main Menu > Inventory > Line Item Codes.
- 2. Click New > Item.
- 3. Enter the required initial information (e.g. Code, Description, and Type).
- 4. Click Save.
- 5. At the prompt to activate the LIC, click Not Yet.
- 6. Click the LIC record's **Setup** tab, then click **Edit**.
- 7. Enter the pricing information, including **Rate Type** and **Rate Value**.

• •	Line Item Codes					
Record: 2 of 2			5	New 🖶	Edit 🖋 Delet	e 🕱 Print 🗟 Actions 🛪
Code: T4PC Test for Pricing Calc	ulations			1 Notice	🔒 🛛 Tasks 💟	ACTIVE
Accounting Setup	Commissions and Rate Setup Excitison Commissions		Unit Info			
Revenue Account > Cost Account >	Rate Type Rate Value VDS Price	-	Proc Case Qty	UOM	UPC	HTS
4001 Uncategorized Q 5001 Uncategorized Q	Fixed Price 100.00 V 100.00					
Inventory Account > Department >	Commission Type Comm Value VCS Commission		Sale Case Qty	UOM	GTIN	ECCN
٩	Not Applicable					
Print by default. Enforce rate card billing. Exclude customer discount.	Update the estimated cost rate to average of recent purchases on purchasing activity within this last number of days: 0 Record Access					
Exclude customer discount. Enable tax automation. Tax code:						
Shipping and Fulfillment	Accessible to all offices. Accessible to selected offices only. (No Offices Selected)					
 Enable outgoing shipments in Orders. 	The sume section)					
Drop ship by default.	Oversight Notifications					
Special order by default.	Send notice when an order or PO is opened.					
Do not create a sub-assembly job.	Send notice if sold with margin less than:					
Time & Expenses	Barcode Scanning					
	Barcode input: T4PC					

- 8. Click Save.
- 9. At the prompt to activate the LIC, this time click Activate.

Verify the LIC Pricing on a Test Order

- 1. Navigate from Main Menu > Order Management > Orders.
- 2. Click **New > Sales**.
- 3. Leave the Customer field blank to prevent any customer-specific pricing from affecting the test order. In the Order Items section, enter the code for your LIC.

Record: 9 of 9			New 🖶 Edit 🖋 Delete 🕱 Print 🗟 Actions 🛪
Order: 60038	Title		02/08/23 PENDING
Sales Order M	ianagement Job Costs & Ap	SALES-INVENTORY Ship To End Customer *	Notices 🕂 Tasks 💟 Emails 🏹 Docs 🖉
41 To >	Customer PO # Rate Card > Disc % Billing Terms	Ship To >	
escription	× ^a	Additional Info	Next Step Next Step Date
rder Items			\frown
Code 1 > T4PC	Cescription	Inventory Bin Invtry Aits Upgs Opts Quentity BO DS S 0 0 + Ξ ≠ 1 □	SO Unit Price Total Margin 7 100.00 100% 7 ^

- 4. Confirm that the correct Unit Price displays.
- 5. Cancel the test order.

2. Set Up a Rate Card

Setting pricing at the rate card General Info section allows you to set a flat discount percentage without having to worry about price updates on individual LICs.

- 1. Navigate from Main Menu > Order Setup > Rate Cards.
- 2. <u>Create a new rate card (http://aace6.knowledgeowl.com/help/create-a-rate-card</u>), but leave the Line Item Code Types and Rate Card Items empty for now.

•••		Rate Cards			8
				New 🗣 Edit 🖋 Dele	ite 💥 🛛 Print 🖶 🛛 Actions 🖈
Rate Card: T4PC_	RateCard01			T4PC-01	
Rate Card Details				Notices 😣 🛛 Tasks 🔽	👔 Emails 🎽 🛛 Docs 🖉
General Info				Description	
Rate Type Rate Discount %	Value IDS Commission Type 50% Not Applicable	Commission Value VCS Start Date	End Date		
Line Item Code Types				E	Enable rate card automation 🗌 💡
Туре	Notes		Default Rate Type	Rate Value VDS Default Comm Type	Comm Value VCS 🛪
					¥
Rate Card Items Filter by Code Type	e:				
Code 🖾 Desc	ription Type II.	Customer Bill Code Item Description	Default Rate Type	Rate Value VDS Default Comm Type	Comm Value VCS 🕱
					v
*					Cancel Save

3. Click **Save** and **Activate**.

Verify the Rate Card on a Test Order

Create another test sales order. Assign your new rate card and add your LIC with a quantity of 1. The LIC price should *remain* as specified on the LIC record because it is *not linked* to the rate card yet.

Record: 9 of 9							New 🖶	Edit 🖋 🛛 Delet	te 🗶 🛛 Print	🖶 Actio	ns 🛪
Order: 60003		Title					02/0	9/23	P	ENDING	•
Sales Order M	anagement	Job Costs & Appr	rovals				Notices 😣	Tasks 🗹	Emails		xes 6
				SALES-INVENTOR	Y						
Bill To		*	Ship To	End Customer		*	Comm	nents and Ne	ext Steps		
Bill To >	📋 ♀ Customer I	%O #	Ship To >		🗅 ♀ Ship Type	Ship Date					
		_			Complete	02/13/23 🗆					
	Rate Card				Inventory Bin						
	T4PC-01	۹ 0%				Q					
	Billing Ten	15			Shipping Terr	ms					
escription			Additional I	nfo			Next Step		1	Next Step Da	rbe
Description		ĸ	Additional I	nfo		ĸ×	Next Step			Next Step Da	
·	Q. Test for F		Additional I		Upgs Opts 0 + = *	R ^{PR} Quantity BO DS	SO Unit	Price 10.00	Total 100.00	Margin xi 100% xi	
Order Items	् Test for F			Invtry Alts		Quantity BO DS	SO Unit		Total	Margin 🖈	-
Order Items	् Test for F			Invtry Alts		Quantity BO DS	SO Unit		Total 100.00	Margin X 100% X	-
Code 1 > T4PC	Q Test for F	ricing Calculations		Invtry Alts		Quantity BO DS	so Unit		Total 100.00	Margin 3 100% 3	
Code 1 > T4PC	Q Test for F	ricing Calculations		Invtry Alts		Quantity BO DS	SO Unit		Total 100.00	Margin 3 100% 3	
Code 1 > T4PC	Q Test for F	ricing Calculations		Invtry Alts 0	k ⊑ + 0	Quantity BO DS	SO Unit Unit Subtotal Adjustment Total Shipping	0.00	Total 100.00 0.00 0.00	Margin 3 100% 3 2 0% 0%	

After confirming that the correct unit price displays, cancel the test order.

3. Set Up a Volume Discount

- 1. Navigate back to your LIC record.
- 2. Click the **Setup** tab, then click **Edit**.
- 3. Click the VDS (\mathbf{V}) icon next to the Rate Value field.
- 4. Mark the flag to activate the volume discount.

This activates the fields where you can specify quantity ranges and discount amounts.

5. <u>Specify a volume discount setup (http://aace6.knowledgeowl.com/help/working-with-volume-discount-pricing)</u> (VDS).

000	Volu	ıme Discour	nt Setup		۵
Setup Quantity Range 2+	Discount Amount 20	sold, up to th tier (e.g. 1-10 quantity spec Sample Qua "Less than 5", ">31", "sub 1	e maximum (usually) @ 5%, 11-20 @ 6' trum is represented ntity Ranges: , "6-10", "11 to 20", 000", "above 1000", count Amounts:	"21 thru 25", "2630", "3	hat can be per discount the entire
		Quantity 2	Base Price	Unit Discount 20.00	Unit Price 80.00
				Cancel	Save

6. Click **Save** and **Save**.

Note: The VDS (${\bf V}$) icon is now highlighted green.

Verify the VDS Pricing on a Test Order

Create another order and add your LIC with a quantity that will trigger your volume discount settings. aACE automatically applies the volume discount and adjusts the unit price:

•				Orders						
Record: 9 of 9							New 💠 🛛 Edit 👌	P Delete 🔀	Print 🖶	Actions 🛪
Order: 600)37	Title					02/08/	23	PEN	
Sales Order	Management	Job Costs & App	rovals				Notices 😣	Tasks 🗹	Emails 🔛	Docs @
				SALES-INVENTO	RY					
ill To		*	Ship To	End Customer		*	 Comments 	and Next S	Steps	
il To >	📋 ♀ Custo	mer PO #	Ship To >		📋 ♀ Ship Type	Ship Date				
					Complete	02/10/23				
	Rate 0	Card > Disc %			Inventory Bir	n 🗌 Blind				
		୍ 0%				Q				
	Billing	Terms			Shipping Ter	ms				
rectintion			Additional I	afo.			Next Class		Need	t Chen Dala
		× ⁸	Additional I	info		×	Next Step		Next	t Step Date
rder Items	Descri Q. Test	ption	Inventory Bin		s Upgs Opts 0 + = x	\frown	S SO Unit Price		Total M	⊟ targin औ
rder Items Code Code Code Code			Inventory Bin	Invtry Alt		Quantity B0 D	S SO Unit Price		Total M	
rder Items	् Test	ption	Inventory Bin	Invtry Alt		Quantity B0 D	S SO Unit Price 80.00	16	Total M 0.00 1	⊟ targin औ
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rder Items	a Test	ption	Inventory Bin	Invtry Alt		Quantity B0 D	S SO Unit Price 80.00 Subtotal Adjustment Total	16	Total M 0.00 1 0.00 2	targin 7 ³⁷
rder Items Code 1 > T4PC	a Test	ption for Pricing Calculations	Inventory Bin	Invtry Alt	k ⊑ + 0	Quantity B0 D	S SO Unit Price 80.00 Subtotal Adjustment Total	00	Total M 0.00 1/	تعتيد المعتاد ا المعتاد المعتاد ا

After confirming that the correct Unit Price displays, cancel the test order.

4. Link the Rate Card to the LIC

Navigate back to your LIC and edit it. Display the Custom Prices tab

(https://aace6.knowledgeowl.com/help/creating-rate-cards#LinkRCtoLICRecord), then link the Rate Card you created, leaving the Default checkbox marked. The discount you specified on the rate card displays:

												1	Line Ite	em Code	5				New	ф Бо	dit 🖋	Delete	×	Print #	à 🗛	ctions 🬶
General Info Unit Info Type Est Unit Cost Price Net Wt Gross Wt L W H Est Ship Misc 0.00 100.00 Net Wt Gross Wt L W H Est Ship Manufacturer Mfr Part # MSRP SkU MOQ Sale Case Qty UOM Options Custom Prices (1) Vendors Offices (6) Photos Card Default Rate Type Rate Value VDS YaPC_RateCard01 (T4PC-01) Q. Discount % 50%		:	:						Tes	st f	or Pr	ricir	ng C	alcu	latior	าร								Å	CTI	VE 🔵
Type Est Unit Cost Price Net Wt Gross Wt L W H Est Ship Misc 0.00 100.00 SRU MOQ Sale Case Qty UOM Manufacturer Mfr Part # MSRP SRU MOQ Sale Case Qty UOM Options Custom Prices (1) Vendors Offices (6) Photos Card Default Rate Card Default Rate Value VDS 14PC_RateCard01 (T4PC-01) Q. Ø Discount % 50%		up	up																1 Not	ice 🔒	т	asks 🔽	E	mails		Docs (
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Rate Card Default Rate Type Rate Value VDS > T4PC_RateCard01 (T4PC-01) Q Image: Comparison of the second se							0.0	.00								Each										

Be sure to save your changes.

Note: After you link a rate card to an LIC, aACE will automatically transfer updates of pricing details on the rate card to the LIC record's Custom Prices tab.

Verify the Rate Card Pricing on a Test Order

Create a fourth test order. Again assign your rate card and LIC with a quantity of one. The price is now adjusted by the discount specified on the rate card.

			Orders											_
Record: 9 of 9								New 🖶	Edit 🖋	Delete	X Prin	t 🖶 🛛	Actions	7
Order: 60004	Title							02/	09/2	23		PENDI	NG 🤇	
Sales Order Mar	nagement Job Costs & Appro	ovals						Notices 6	Та	asks 🔽	Email	s 🗠	Docs	.6
			SALES-INVENTOR	Y										
Sill To	*	Ship To	End Customer				*	Com	ments a	nd Nex	t Steps			
Bill To >	📋 ♀ Customer PO #	Ship To >		🗅 오 s	Ship Type	Ship Date								
				C	Complete	02/13/23								
	Rate Card > Disc %			I	Inventory Bin	8								
	T4PC-01 0%						Q,							
	Driing Tenns			5	Shipping Terr	ns								
escription		Additional In	ifo					Next Step	>			Next Str	p Date	
														_
order Items	28						ĸ							
Code 1 > T4PC	Description Q Test for Pricing Calculations	Inventory Bin	Invtry Alts 0)pts + ⊒ ≯	Quantity E	O DS SO	-	it Price 50.00	>	Total 50.00		n x ^m	
Code	Description	Inventory Bin					O DS SO	-		>			n x ^a	
Code	Description Q Test for Pricing Calculations	Inventory Bin					O DS SO	-					n x ^a	
Code	Description Q Test for Pricing Calculations	Inventory Bin					0 DS 50	-				1009	n x™ 6 x™	
Code	Description Q Test for Pricing Calculations	Inventory Bin					O DS SO	btotal	50.00		0.00 0.00	1009	n 7 ¹¹ 6	^
Code 1 > T4PC	Description Q Test for Pricing Calculations	Inventory Bin					O DS SO	btotal ljustment tal	50.00		50.00 0.00 0.00 0.00	1009 C 09	n 7 ¹¹ 6	
C Code 1 > T4PC Sales Billing Fulf	Description C Test for Pricing Calculations C		0		+ = *		Su Su Su Su Su	btotal ljustment tal ipping	50.00		0.00 0.00 0.00 0.00	1009 C 09 09	n 7 ¹¹ 6	
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Change the Quantity on the test order to 2. The unit price remains the same. This is because the rate card discount precludes the volume discount.

After confirming that the correct unit price displays, cancel the test order.

Additional Custom Pricing Features

You can have LICs that are linked to a rate card, but which use pricing details different from that rate card. At the LIC's tab for Custom Prices, edit the rate card line and clear the Default flag:

Code: CLT-B	oiseC-VS-Ivl2	2650	Cross	-lamina	ated	IIm	ber -	Boise C	ascac				- ^		E
Item Setu	qt										Notices 🔒	Tasks 💟	Emails 🔛	D	Docs
General Info			Unit Info	,					De	fault V	alue for Ord	ier Item /	Addt'l Info		
Type	Est Unit Cost	Price	Net Wt	Gross Wt	L	W	н	Est Ship Cost							×,
Framing Supplies	100.00	100.00			8	5.5	1.5	0.00							
Manufacturer	Mfr Part #	MSRP	SKU		MOQ	2 Sak	e Case Qty								
Boise Cascade		0.00						Each							
Rate Card	m Prices (1) Ven	dors Office	Default P	ate Type ixed Price		R	ate Value 20.00		Price 20.00	Default	Comm Type Not Applicat	yle	Comm Value		
Rate Card		dors Office	Default P			R						le	Comm Value		*
Rate Card		dors Office	Default P			R						9 <mark>le</mark>	Comm Value		
Rate Card		dors Office	Default P			R						ole	Comm Value		
Rate Card		dors Office	Default P			R						sie	Comm Value		

After you clear the Default flag, you can configure new pricing details on the LIC. aACE automatically transfers any changes here to the rate card as well.

The following sections show some of the most common pricing configurations.

LIC-Specific Fixed Price

With the Rate Type set to Fixed Price, the LIC will apply the Rate Value you specify here when you add both the rate card and the LIC on an order.

Record: 1 of 1							_				en de la co	it 🖈 Delete	X Print 🖶	Actions
Code: T4P	с		Test f	or Pric	ing C	alcul	latio	ns						
Item Se	etup									1	Notice 😣	Tasks 🗹	Emails 🔛	Docs (
eneral Info			Unit Info	D					Defau	ult Valu	e for Orde	r Item Add	'l Info	
ype	Est Unit Cost	Price	Net Wt	Gross Wt	L	W	н	Est Ship Cost						×
lisc	0.00	100.00						0.00						
anufacturer	Mfr Part #	MSRP	SKU		MOQ	Sale	Case Qty	UOM						
		0.00						Each						
	tom Prices (1) Vend	fors Office		Rate Type Fixed Price	2		Rate Valu 25.0	ve VDS x0 V	Price 25.00		Comm Type Iot Applica	ble	Comm Value	
		(Default	Rate Type	2							ble	Comm Value	
		(Default	Rate Type	2							ble	Comm Value	
		(Default	Rate Type	2							ble	Comm Value	
		(Default	Rate Type	2							ble	Comm Value	
		(Default	Rate Type	2							ble	Comm Value	
Rate Card		(Default	Rate Type	2							ble	Comm Value	VCS #

LIC-Specific Percentage Discount

With the Rate Type set to Discount / Markup / Margin % and a Rate Value specifying the percentage, aACE will calculate the price accordingly when you add both the rate card and the LIC on an order.

Code: CLT-Bo		650	Croco	Inmin	atad	Tim	hor	Boise Ca	condo					Print 🖶	
		050	Cross		ateu		ber -	boise Ca	scaue						
Item Setup											Notices 😣	Tasks	E E	mails 🗹	Docs
General Info			Unit Info	o					Defa	ılt Valu	e for Orde	er Item A	ddt'l In	fo	
Туре	Est Unit Cost	Price	Net Wt	Gross Wt	L	W	н	Est Ship Cost							×.
Framing Supplies	100.00	100.00			8	5.5	1.5	0.00							
Manufacturer	Mfr Part #	MSRP	SKU		MOQ	2 Sale	Case Qty								
Boise Cascade		0.00						Each							
Options Custom Rate Card Rate Card for VDS+ 1	Prices (1) Vend	lors Office		Rate Type Discount %	6		Rate Valu 209	We VDS	Price 80.00		Comm Type Not Applica	ble	Cor	mm Value N	× 1
Rate Card		iors Office	Default	Rate Type	6							ble	Cor	mm Value 1	
Rate Card		lors Office	Default	Rate Type	6							ble	Con	mm Value N	
Rate Card		lors Office	Default	Rate Type	6							ble	Cor	mm Value N	
Rate Card		lors Office	Default	Rate Type	6							ble	Cor	mm Value 1	

LIC-Specific Volume Discount

With the VDS button on the LIC record, you can open the VDS popup and specify volume discounts for this LIC (as described above). The VDS settings you specify apply when you add both the rate card and the LIC on an order.

Item Setup Notices Tasks Emails December Seneral Info Unit Info Unit Info Default Value for Order Item Addt'l Info Type Est Unit Cost Price Net Wt. Gross Wt. L. W. H. Est Ship Cost Default Value for Order Item Addt'l Info Nurdacturer Mr Part # MSRP SKU MQ Sale Case QV. UDM M Boise Cascade 0.00 SKU MQ Sale Case QV. UDM Each M Options Custom Prices (1) Vendors Offices Photos Price Default Comm Type Comm Value VCS X	Item Setup Notices Tasks ™ Emails Docs eneral Info Unit Info Default Value for Order Item Addt'l Info ype Est Unit Cost Price Net Wt Gross Wt L W H Est Ship Cost Default Value for Order Item Addt'l Info windracture Mfr Part # MSRP SkU MQQ Sale Case Qiv UOM # obje Cascade 0.000 SkU MQQ Sale Case Qiv UOM #		Est Unit Cost				ated	Timt	ber -	Boise Ca	scade Versa-				
General Info Unit Info Default Value for Order Item Addt'i Info Type Est Unit Cost Price Net Wt Gross Wt L W H Est Ship Cost Manufacturer Mfr Part # MSRP SkU MOQ Sale Case Qty UOM Image: Cost of the state of t	eneral Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Unit Info Default Value for Order Item Addt'l Info Unit Info Default Value for Order Item Addt'l Info Unit Info Price Default Value for Order Item Addt'l Info Unit Info Price Default Value for Order Item Addt'l Info Price Info Price Default Value for Order Item Addt'l Info Price Info Price Default Value for Order Item Addt'l Info Price Info Price Default Value for Order Item Addt'l Info Price Info Price Default Value for Order Item Addt'l Info Price Info Pric	General Info Type Framing Supplies Manufacturer	Est Unit Cost	Price	Unit Info							Notices 🔒	Tasks 🔽	Emails M	Docs
Type Est Unit Cost Price Framing Supplies 100.00 100.00 Manufacturer Mfr Part # MSRP SkU MOQ Sale Case Qty UOM Boise Cascade 0.00 SkU MOQ Sale Case Qty UOM Options Custom Prices (1) Vendors Offices Photos State Card Default Rate Type Rate Value VOS Price Default Comm Value VCS % > Rate Card for VDS+ Test (RC-VDS-TST) Q Fixed Price 20.00 20.00 Not Applicable %	Net Wt Gross Wt L W H Est Ship Cost raming Supplies 100.00 100.00 8 5.5 1.5 0.00 lanufacturer Mfr Part # MSRP SkU MOQ Sale Case Qty UOM objec Cascade 0.00 SkU MOQ Sale Case Qty UOM Options Custom Prices (1) Vendors Offices Photos 3 Rate Card Default Rate Type Rate Vilue VDS 2 Rate Card Default Rate Type Price 2 Rate Card for VDS+ Test (RC-VDS-TST) Q Fixed Price 20.00 20.00 Not Applicable %	Type Framing Supplies Manufacturer	100.00	Price	Unit Info										
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		> Rate Card for VDS+	Test (RC-VDS-TST)		Q	Fixe	d Price			20.00 V	20.00 🗸	Not Applicab	le		× ^
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Pricing Details to Remember

- Rate cards can have many LICs and an LIC can be included on many rate cards.
- On a rate card record, the Rate Card Items section looks at the same data table as the LIC's record Custom Pricing section. The data is identical; just framed from different perspectives.
- If a rate card is specified on an order and an LIC on the order is linked to that rate card, the rate card pricing logic takes precedence (i.e. custom pricing).
 Note: This can either be "Default" or overridden with custom logic.
- If a rate card is specified on an order and an LIC on the order is *not* linked to that rate card, the LIC pricing logic takes precedence.
- 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.
- Pricing logic does not 'cross levels'. For example, the rate at the order will not both apply a rate from the rate card item and also apply a volume discount set on the LIC. Note: To see how aACE applies multiple discounts, read our guide on <u>assigning</u> <u>customer discounts (https://aace6.knowledgeowl.com/help/assigning-customer-discounts)</u>.

If you need additional help to create a pricing structure not covered in this walkthrough, contact aACE Support at the number listed on <u>Getting Started with aACE Support</u>

(http://aace6.knowledgeowl.com/help/getting-started-with-aace-support).