Creating Rate Cards

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This guide explains how to create and link a rate card. It is intended for general users.

Rate Cards are a powerful tool in managing pricing logic in aACE, including adding adjustments and discounts to orders. For more details, read the overview of rate cards (https://aace6.knowledgeowl.com/help/overview-of-rate-cards).

Set Up a Rate Card

1. Navigate from **Main Menu** > **Order Setup** > **Rate Cards**.
2. Click **New.**
3. Enter the required information, including Name, Abbr, Rate Type, and Rate Value.

4. Click **Save** and **Activate**.

After you set up pricing logic on a rate card, you must link it to other records:
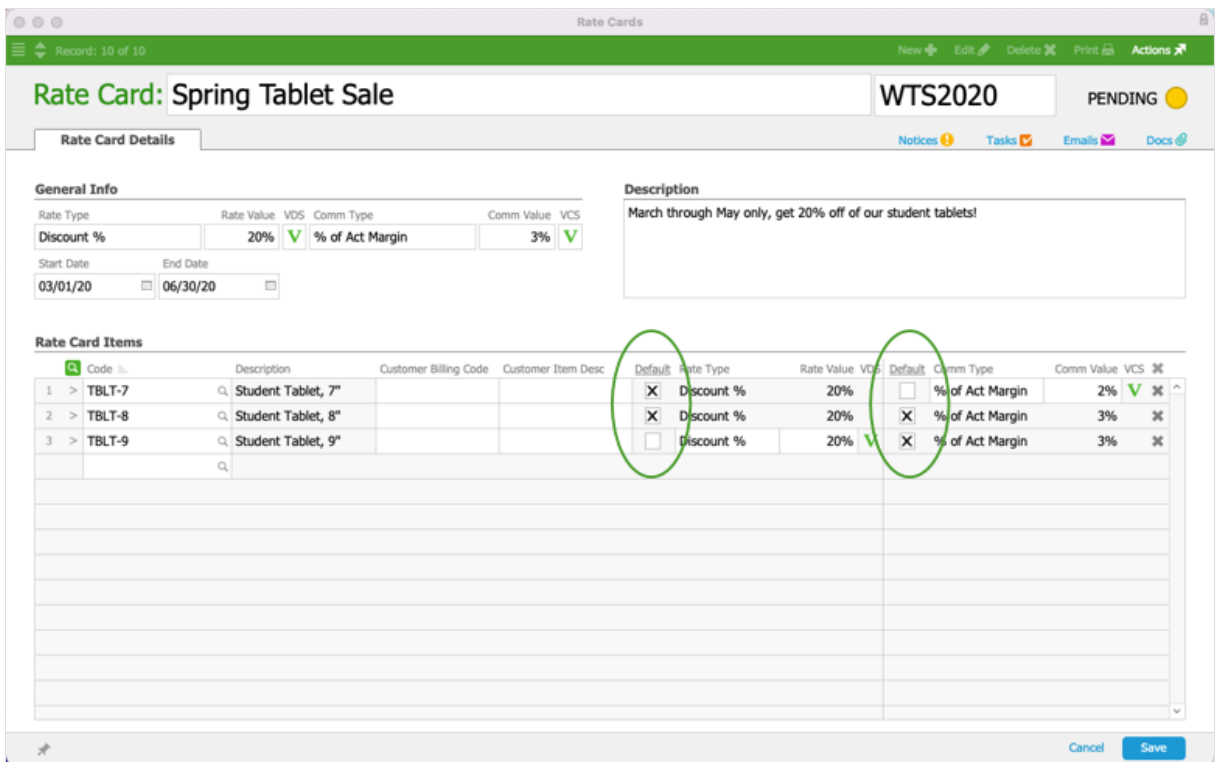
- Line Item Codes (LICs)
- Companies
- Orders

Link a Rate Card to a Line Item Code

You can link a rate card to a LIC in two ways:
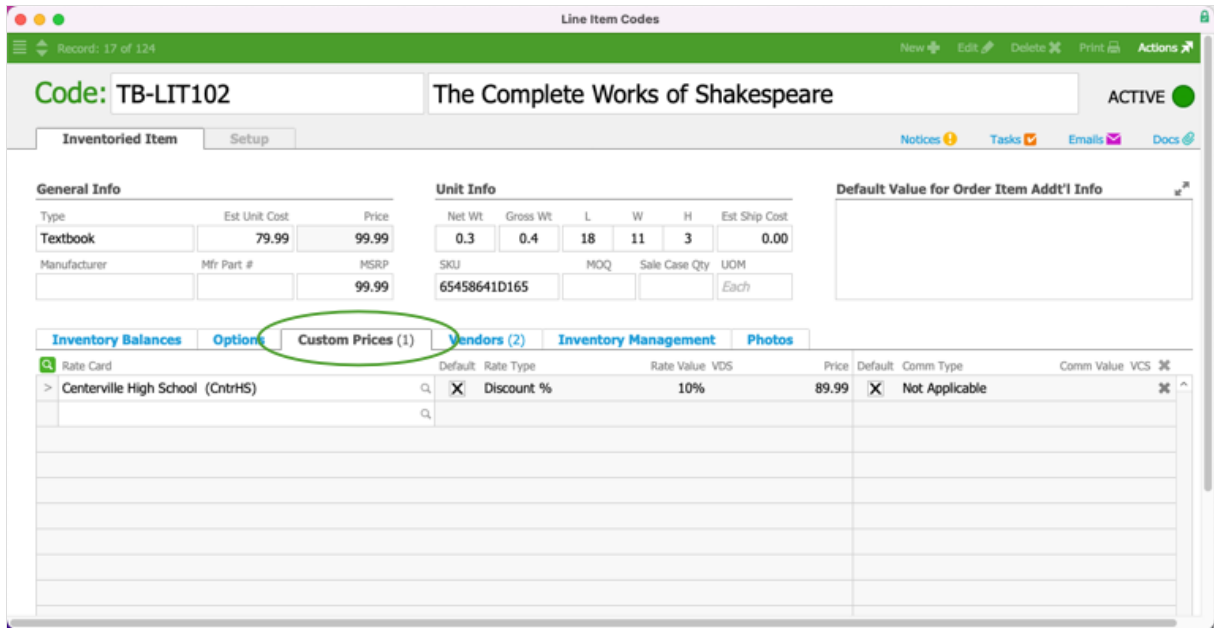
Link from the Rate Card Record

1. Navigate from **Main Menu** > **Order Setup** > **Rate Cards**, then locate the desired rate card.
2. At the rate card detail view, you can link a single LIC or a batch of LICs.
   - Link a single LIC by clicking the Search (🔍) icon, by selecting from the Code field dropdown menu, or by typing a code abbreviation.
   - Link multiple LICs — Click the list-level **Search** (🔍) icon and select the needed LICs.
3. If needed, configure the rate or commission details (https://aace6.knowledgeowl.com/help/overview-of-rate-cards#CommissionsAndDefaults) for the LIC(s) by clearing the **Default** flag and updating the **Rate Type** and **Rate Value**.

4. Click **Save**.

Link from the LIC Record

1. Navigate from **Main Menu** > **Order Setup** > **Line Item Codes**.
2. Locate the desired LIC.
3. Click the **Custom Prices** tab and click **Edit**.

4. Specify the desired rate card by clicking the Search (🔍) icon, by selecting from the Rate Card field dropdown menu, or by typing a rate card abbreviation.
   Note: You can also select multiple rate cards clicking the list-level **Search** (🔍) icon.
5. Click **Save**.

Link a Rate Card to a Company

When you specify a rate card on a company record, it is typically to set up an ongoing customer discount (https://aace6.knowledgeowl.com/help/assigning-customer-discounts). Then, when a team member creates an order for the company, aACE applies the rate card pricing logic to LICs that are both on the rate card and on the order.

Note: Team members with the necessary user group privileges can change a default rate card (https://aace6.knowledgeowl.com/help/assigning-customer-discounts#ChangeOrderDiscounts).

Apply a Rate Card to an Order

You can also apply a rate card on a specific order (https://aace6.knowledgeowl.com/help/assigning-rate-cards-to-orders). This will apply the pricing logic on the rate card to any LICs that are both linked to the rate card and present on the order.