


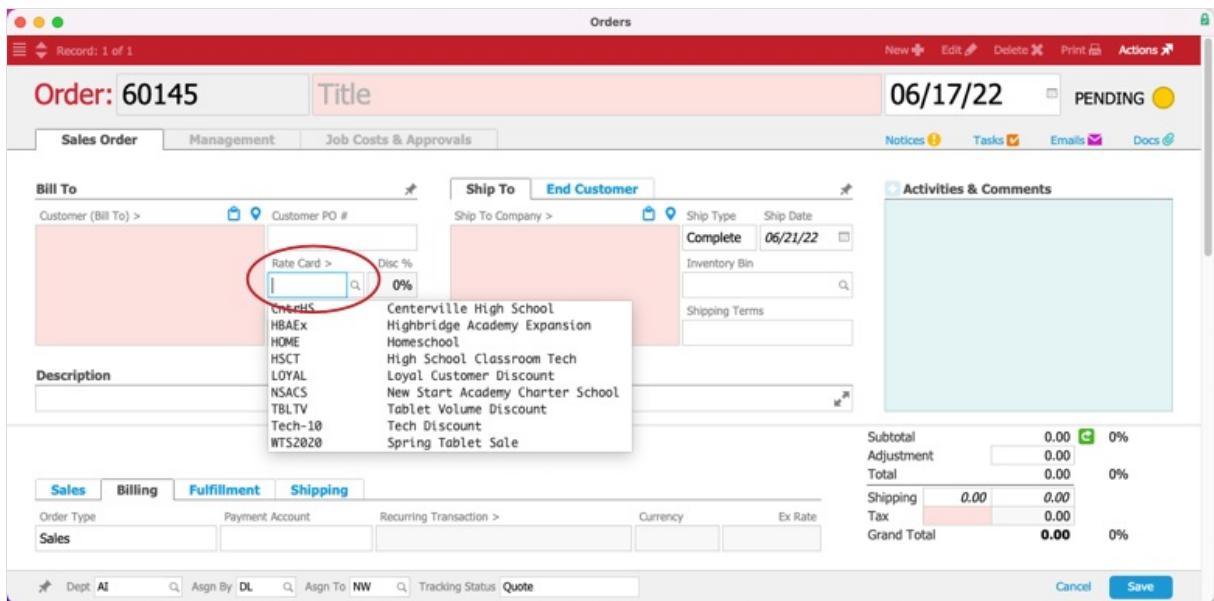
Assigning Rate Cards to Orders

Last Modified on 11/23/2022 12:33 pm EST

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

When entering an order, you can link a rate card to pull in special pricing for your products and services:

1. Navigate from **Main Menu > Order Management > Orders**.
2. In the control bar, click **New > Sales**.
3. In the Bill To section, click the Rate Card field or the selector () icon.



The screenshot displays the 'Orders' form for Order 60145, dated 06/17/22, with a status of 'PENDING'. The 'Bill To' section is active, and the 'Rate Card' field is highlighted with a red circle. A dropdown menu is open, showing a list of rate cards including 'Centerville High School', 'Highbridge Academy Expansion', 'Homeschool', 'High School Classroom Tech', 'Loyal Customer Discount', 'New Start Academy Charter School', 'Tablet Volume Discount', 'Tech Discount', and 'Spring Tablet Sale'. The 'Disc %' field is set to 0%.

Field	Value	Rate
Subtotal	0.00	0%
Adjustment	0.00	
Total	0.00	0%
Shipping	0.00	0%
Tax	0.00	0%
Grand Total	0.00	0%

4. Select the desired rate card.
5. Complete the rest of the order as needed.

After you link a rate card to the order, the line item code (LIC) pricing for that order is managed by the rate card. This includes updating pricing for order items that have already been recorded. However, if a certain LIC is in the order, but is *not* linked to that rate card, then the LIC's general pricing scheme applies.