

Understanding Rate Cards

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This guide explains where rate cards can be assigned and how a rate is calculated. It is intended for general users.

The most complex pricing models and commission structures your company uses can be constructed in aACE's powerful infrastructure. This ensures that your pricing controls are used correctly and your payout schedules are accurate. For an example of how this feature can help your team, read our [feature highlight](https://www.aacesoft.com/resources/reward-loyal-customers-and-entice-new-prospects-with-aace-rate-cards) (<https://www.aacesoft.com/resources/reward-loyal-customers-and-entice-new-prospects-with-aace-rate-cards>).

While standard pricing and commission logic is set with [line item codes](https://aace6.knowledgeowl.com/help/overview-of-line-item-codes) (LICs), you can create special pricing schemes using rate cards. After you [set up a rate card](https://aace6.knowledgeowl.com/help/creating-rate-cards), you can gradually fine-tune which LICs should apply that pricing.

Rate Types and Their Rate Values

The Rate Cards module and Line Item Codes module use the same logic. The Rate Type and Rate Value fields are used to determine the LIC pricing for an order. For details about Fixed Price, Fixed Markup, Markup %, and Margin % fields, please see the [overview for line item code rates](https://aace6.knowledgeowl.com/help/overview-of-line-item-code-rates) (<https://aace6.knowledgeowl.com/help/overview-of-line-item-code-rates>).

Rate cards provide two additional rate types:

- Fixed Discount — Sets a fixed dollar discount to all LICs in the list
- Discount % — Sets a fixed percentage discount to all LICs in the list

Note: If a rate card is applied to an order, but an LIC on the order is *not* represented on that rate card, then the pricing and commissions for that LIC will pull from its default values.

Commission Types and Their Values

[Commission structures](https://aace6.knowledgeowl.com/help/understanding-commission-structures) on rate cards work the same as at the LIC level.

Overriding Line Item Code Info Using the Default Checkbox

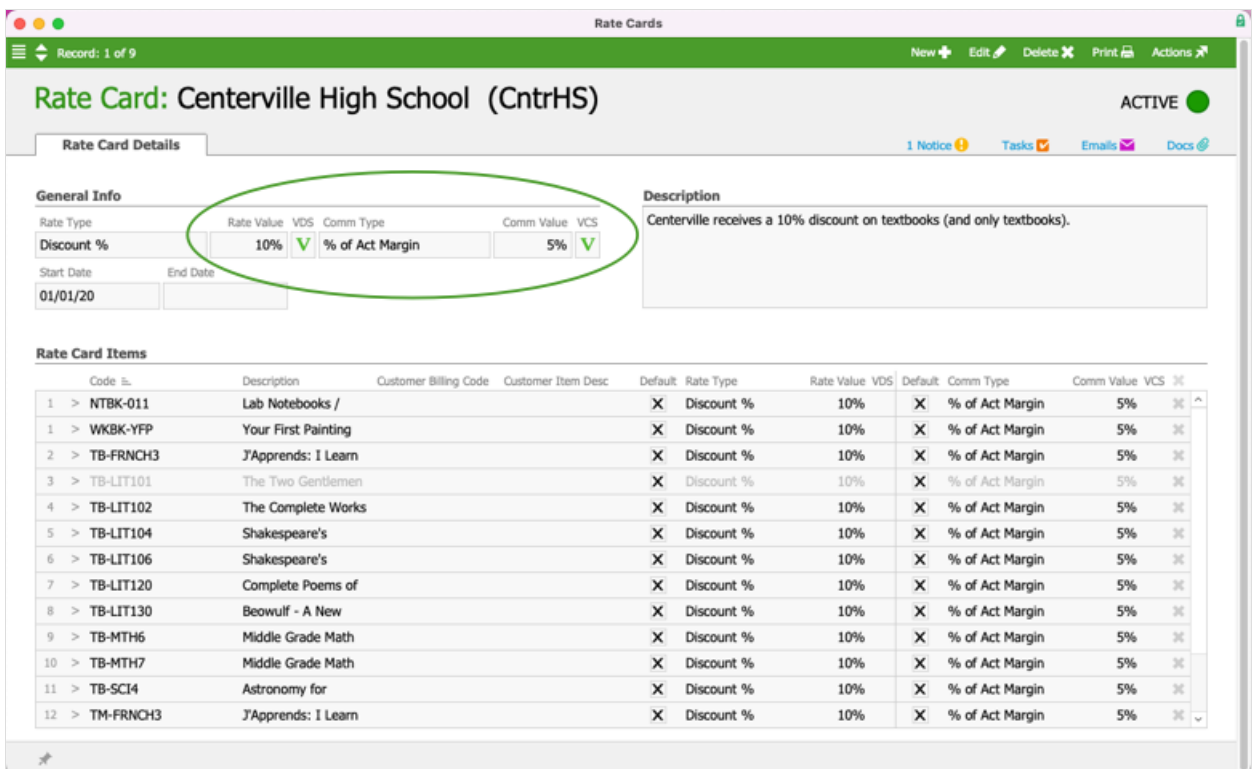
To force an LIC to use the discount logic designated in the header of the record, mark the Default flag. If this flag is cleared, then aACE will apply the discount / commission logic specified in the line itself.

Rate Cards for Companies and Orders

You can link rate cards to specific customers / companies or to individual orders.

Rate Cards Linked to Companies

You can assign special pricing and commission payouts to every order made by a specific customer or group. When a rate card is linked to a [customer record](https://aace6.knowledgeowl.com/help/creating-rate-cards#LinkRCtoCompany) (<https://aace6.knowledgeowl.com/help/creating-rate-cards#LinkRCtoCompany>), that customer's orders automatically pull pricing and commission payouts from that rate card.



Rate Cards Linked to Orders

This feature gives you the flexibility to use special structured pricing and commission payouts [for an individual order](https://aace6.knowledgeowl.com/help/creating-rate-cards#LinkRCtoOrder) (<https://aace6.knowledgeowl.com/help/creating-rate-cards#LinkRCtoOrder>). If there is a

rate card linked to the customer company who is placing the order, the order will initially inherit that info. Depending on their access privileges, users may be able to manually change the rate card on an order.

The screenshot displays the 'Rate Cards' application window. At the top, it shows 'Record: 3 of 9' and navigation options like 'New', 'Edit', 'Delete', 'Print', and 'Actions'. The main title is 'Rate Card: Spring Tablet Sale (WTS2020)' with an 'ACTIVE' status indicator. Below the title, there are tabs for 'Rate Card Details', '1 Notice', 'Tasks', 'Emails', and 'Docs'. The 'Rate Card Details' tab is active, showing a 'General Info' section with fields for 'Rate Type' (Discount %), 'Rate Value' (20%), 'VDS' (% of Act Margin), 'Comm Type' (3.00%), and 'VCS'. There are also fields for 'Start Date' (03/01/20) and 'End Date'. A 'Description' section contains the text: 'March through May only, get 20% off of our student tablets!'. Below this is a 'Rate Card Items' table with columns for Code, Description, Customer Billing Code, Customer Item Desc, Default, Rate Type, Rate Value, VDS, Default, Comm Type, Comm Value, and VCS. The table lists three items: TBLT-7 (7-inch Student Tablet), TBLT-8 (8-inch Student Tablet), and TBLT-9 (9-inch Student Tablet), each with a 20% discount and a 3% commission value.

Code	Description	Customer Billing Code	Customer Item Desc	Default	Rate Type	Rate Value	VDS	Default	Comm Type	Comm Value	VCS
1 > TBLT-7	Student Tablet, 7"	7TABST	7-inch Student Tablet	<input checked="" type="checkbox"/>	Discount %	20%	<input type="checkbox"/>	<input type="checkbox"/>	% of Act Margin	2%	<input checked="" type="checkbox"/>
2 > TBLT-8	Student Tablet, 8"			<input checked="" type="checkbox"/>	Discount %	20%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	% of Act Margin	3.00%	<input checked="" type="checkbox"/>
3 > TBLT-9	Student Tablet, 9"			<input type="checkbox"/>	Discount %	20%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	% of Act Margin	3%	<input checked="" type="checkbox"/>