

Sage Line 500 - Extended Discounts

This module provides alternative and more powerful chained discounting functionality for orders entered in the Sales Order Entry module.

Records Kept

Customer Hierarchies

- Define multiple customer hierarchies, for instance to represent customer branch or delivery point structures.
- Link customers to the appropriate point in a hierarchy structure, using a hierarchy code held on the Accounts Receivable customer file.

Product Hierarchies

- Define multiple product hierarchies, for instance to represent brands or product types.
- Link products to the appropriate point in a hierarchy structure, using one of the product group codes held on the Inventory Control product file.

Discounts

- Set up multiple user-defined discounts, each with different calculation and application rules.
- For each discount, define how it will be calculated by recording the following parameters:
 - Line-based or order-based.
 - Automatic or manual.
 - Value discount or free of charge product.
 - Priority, to determine the sequence in which the discounts will be applied.
 - Whether to calculate based on quantity, list price, nett price so far or price after a specified discount.
 - For order discounts, whether to split the discount back across the qualifying lines of the order.
- For each discount, set up multiple rules to define which products and customers it will apply to.

Rules are based on one or more of:

- Customer or customer hierarchy code. Where a discount is defined for a hierarchy node it is given to all customers at or below this point in the hierarchy.
- Product, warehouse or product hierarchy code. Where a discount is defined for a hierarchy node it is given for all products at or below this point in the hierarchy.
- Price list.
- Quantity or value rules, for instance minimum quantity of a single product or group of products.
- If quantity based, whether unit of sale dependent, for instance full pallets only.
- Date range.

Sales history

- For each order line, the discounts given are recorded for use in sales analysis reporting.

Tasks Supported

Enquire on discounts

- Respond immediately to ad-hoc pricing and discounting queries for customer, product and quantity combinations.

Enter orders

- During order entry, automatically calculate and display multiple discounts per order line, based on the rules defined.
- Manually insert additional discounts at any point in the line discount chain.
- Automatically calculate and display multiple discounts at the end of the order, including the addition of free of charge product lines.
- Manually insert additional discounts at any point in the order discount chain.

Print invoices

- Print details of discounts given on your invoices, displaying them in a columnar format, or listing them on separate lines.
- Optionally, print discount code and description, as well as the value.

Reporting

- Discounts given report, showing discounts by customer, order, discount code, etc., for orders at different statuses, including invoiced orders.
- Define your own sales and margin analysis reports based on the detailed history information recorded.

Housekeeping

- Discount history information is removed when the associated invoiced product lines are cleared from the sales history file.

Integration with other modules

Sales Order Processing

- Discounts may be calculated for all orders entered in the Sales Order Processing module.

Accounts Receivable

- Base discounts on the customer hierarchy defined in the Accounts Receivable module.

General Ledger

- Post each discount to a different General Ledger code, to allow detailed margin analysis directly from the ledger.

Inventory Control

- Base discounts on the product hierarchy defined in the Inventory Control module.

EDI

- Discounts may be calculated for all orders entered via the EDI module.

Features for international use

- This functionality fully supports the multi-currency facilities provided for processing sales orders.

