

DISCOUNT MATRIX

Introduction

The Helper Script provides a Discount Matrix (DM) that operates for clients on Price Level A of Product. The steps are

1. Products are assigned to product groups using the category1 field of the product
2. You create dummy products to contain the discount data for that group. The dummy product has a code that is a tilde (~) followed by the code of the product group.
3. You assign discounts rates in the comment field of the dummy record
4. You assign discount groups to each customer.

Installing the Script file in Moneyworks Custom Plug-ins

Click the link below for the instructions on installing the script:

```
http://moneyworks.sussol.net/index.php?s=file\_download&id=40
```

The Helper Script provides a Discount Matrix (DM) that operates for clients on Price Level A of Product.

Assign a product group to each product

- The Discount applies to various Groups of Products. These groups are Identified by the code in the Category1 field of the Product record.
- e.g. AQP. In the example below.
- If a product should not be in a discount group, then leave the Category1 for that product blank.

Product

Product Code: 2215-10-12S+H Name: JIC F/M ADAPTOR Class: Product

Categories: **Disc Matrix** AQP Prod Type: 1 Prod Group: 15 Discountabl: H Colour: None

Details Buying Info Selling Info Inventory History Costing

☒ We Buy This ☒ We Sell It ☒ We Stock It

Control Accounts

Cost-of-Goods Expense Acct: 3100 Product Cost ☒ Append Dept

Income Account when Selling: 1100 Sales ☒ Append Dept

Asset Account for Stock: 6230 Stock on Hand

Comment: AeroQuip NZ Update 21/04/99

Setting up dummy product records to hold the group discounts

- The level of discount is set in a Resource (in the Product File) that has a Product code that starts with “~” plus the code for that discount group. (e.g “~AQP”). This resource should set so that the Buy, Sell and Stock boxes are not ticked. The only data in the Product Record is the level of discount which is in the Comment field. The data in the comment field is the discount rate % for each of the product Groups. The rate for each group is separated by a “/”

In the example below:

10 = Level 1
 15 = Level 2
 20 = Level 3 and so on..

Product

Product Code: ~AQP Name: Discount Product Group AQP Class: Resource

Disc Matrix Prod Type Prod Group Discountabl

Categories: Colour: None

Details Buying Info Selling Info Inventory History Costing

☐ We Buy This ☐ We Sell It ☐ We Stock It

Control Accounts

Expense Account when buying: ☐ Append Dept

Income Account when Selling: ☐ Append Dept

Asset Account for Stock:

Comment: 10/15/20/50/10/15/20/20/20/25/30/30/30/40/40/45

Barcode:

To Delete Rees Code Bin Locn

Custom:

Previous Next Cancel OK

Set up debtors/customers to apply a certain discount

In the Name record for clients that are entitled to the discount scheme, Category4 should contain the appropriate level of Discount. If you want to use 10% discount for the customer when you sell them products in group "AQP" then you have to enter "1" to get the appropriate discount rate as in the example below:

Name

☐ Supplier
 ☒ Customer
 ☐ Creditor
 ☒ Debtor
 ☐ Other
 ☐ Template

Code:

Name: Colour:

Details | Pricing & Terms | Bank | Balances | Contacts | Autocode

Mailing

 State: Post Code:
 Country:

Delivery

 State: Post Code:
 Country:

Phone: Fax: Co.Reg#

Web URL: Their Ref:

Comment:

Categories: P/O Regd P/Slip P/Priced **Disc Matrix**

Rees Code
 Custom:

The results

- The DM currently operates on Debtor Invoices and Jobsheet Items. It inserts the appropriate level of Discount into the discount column on the MoneyWorks (MW) Debtor Invoice input screen.
- . In Jobsheet Item, the appropriate level of pricing is charged to clients and shown in the Charge field. This should be Price Level A multiplied by the discount rate for these Customers.

Debtor Invoice

Debtor Invoice Reverse Info Views Hold Make Recurring Setup *Transaction is posted*

Debtor: Invoice #: 200589 Period: Dec:2009/10 ends 31/12/2009
 Order #: GMWS 19736 Date: 31/12/2009 Price Code: A
 Due Date: 20/01/2010
☐ Mail: ☐ Deliver To: Deliver to...
 Description: MAKE UP 3 NEW HOSES FPS Reference JS 12599 Dept V_JS
 Entered By KO FPS Contact JS Work Order
 Amount: 411.40 Colour: None Flag: 1

Service Product

Qty	Product	Description	Unit Price	Disc. %	Extension	TC	GST	Job
1	*DESC		0.00	0	0.00	G	0.00	
1.7	GH781-6R2...		29.10	15	42.05	G	5.26	
2	1AA6FJ6+G		22.00	15	37.40	G	4.68	
0.5	GH781-4R25...		24.20	15	10.28	G	1.28	
2	1A4BF4+G		14.80	15	25.16	G	3.14	
2	1A4BF84+G		27.00	15	45.90	G	5.74	
1	4008-2+G		6.90	15	5.86	G	0.73	
3	135-2-4+G		6.90	15	17.60	G	2.20	
1	4813-4-2+G		6.40	15	5.44	G	0.68	
10	MILEAGE		1.50	0	15.00	G	1.88	
6	SWJ1		7.50	0	45.00	G	5.62	
2	LJS		58.00	0	116.00	G	14.50	
Total Cost of Goods:					Subtot:	365.69		
Total Margin:					GST:	45.71		
					Total:	411.40		

Prev Next Cancel OK

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<http://docs.sussol.net/> - Sussol Docs

Permanent link:

http://docs.sussol.net/doku.php/moneyworks:discount_matrix

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