CC117-Pricing 2 Agenda

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Course Description

This course will cover category discounts and the testing tools associated with discounts.

Business Case

As a … pricing controller

I want to … understand and troubleshoot how to discount my base pricing based on categories

So I can ... configure special pricing for customers or projects.

Key Benefits

- FeneVision offers multiple types of discounts.
- Discount tables allow for reuse of discount logic for multiple customers or projects.
- Upcharges allow for the increase of a price based on a percentage.

Functional Walkthrough

- Order & Item Quantity Schedule Discounts – 'Price Book Setup'
  - Configured by part and option per price book
  - Two schedule types – % Discount and List Price

- Category Discounts
  - Created based on pricing category (similar to price books)
  - Customer Assignments (similar to price books)
  - 10 basic grid types available ('Options' tab also has 'By Value Selection')
  - Parts tab
    - Option check box to use part discount for all options unless defined at option level
  - Options tab
    - Allows for part specific discounts
  - Buildups tab
    - Build configurations that should receive a special price
    - Allows for part or option discounting

- Order Value Schedule Discounts
  - Create discount tables based on monetary values
  - Can exclude parts, but they are excluded from all schedule discounts
  - Assigned in 'Customers Setup' only

- Upcharges
  - **Types –** Long Side, Short Side, Ratio Area, Script
  - **Sum –** Indicates whether multiple surcharges will be added then applied
    - If left unchecked, the percentages will be applied separately

Tips

- Order Quantity Schedule Discounts can be dependent on the 'Include' column in 'Price Book Setup'. This check box means that the ordered quantity for that line item will go towards discounts on other parts.
  - **PART A –** 'Include' not checked – Qty=100 for 10% discount
  - **PART B –** 'Include' checked – Qty=100 for 15% discount
  - If ordering 50 of PART A, the price will not be discounted.
  - If ordering 50 of PART A and 120 of PART B, both prices will be discounted (10 and 15 respectively).

- The ‘Option’ check box in ‘Category Discounts’ is nice, but know that overriding this requires a part-specific override. It is not possible to simply change the discount to 0% in the ‘Options’ tab with {All Parts} selected.



