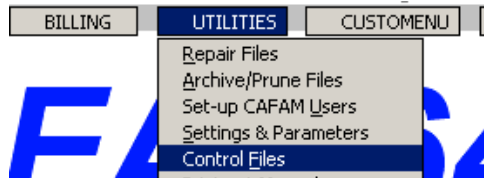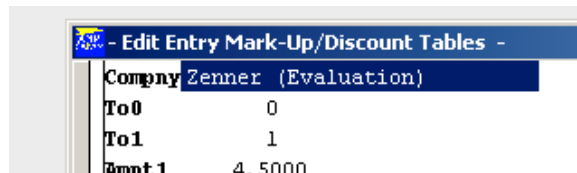## MODIFYING PARTS SELL PRICE TO CUSTOMERS

CAFAM provides for modifying the displayed Inventory Screen Sell Price to suit different pricing policies that might have been agreed with the Customer. To do this you would first define the pricing Discount (or Mark-up) percentages using the Mark-up table. You then apply this Code to the Customer profile in the main Add/Edit screen or directly to Job Number. When CAFAM works it will check for this code and make use of the percentages found to change and modify the Sell Price at point of sale. These notes set out how to do this

MARK-UP TABLE SET-UP First define the Discount (or Mark-up) percentages as follows:
1. Got to the Control Files

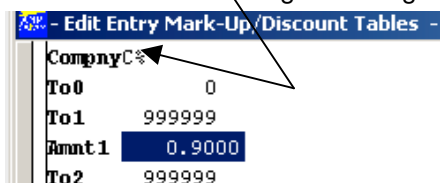2. Press several ESC's (some 26 screens later !) until you see the following screen

3. Create a new Record containing the values you want. You may well find an old example that was set up when the Program was first installed. Use the <Page Dn> or <Page Up> keys to check. Herewith below is an example of letter Code "A%" being used to define a discount

The above translated means that if a Customer is set with Code "A", the parts will be discounted on a sliding scale as follows:

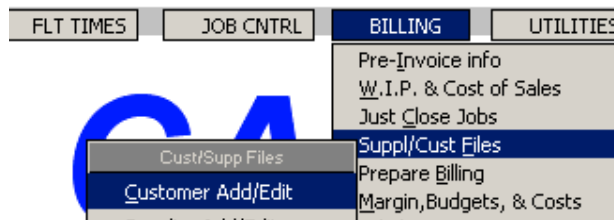| CODE	A%		
0	100	-25.0000	%
100	500	-20.0000	%
500	2000	-15.0000	%
2000	999999	-10.0000	%
999999	999999	0	%

Obviously it does not have to be sliding scale .e.g for a flat 10%, simply set up one band .

Note that the Code must have the "%" symbol alongside, or else it will NOT work !
Further details on the above can also be found in the CAFAM Help Manual under the heading "SET-UP – Markup/Discount Tables"

CUSTOMER ACCOUNT SET-UP Once you have set up your Code(s) and percentage Mark-up or Mark-down, the next step is to apply the code(s) to the Customer

1. Go to the Customer Add/Edit Screen

2. And Enter the Code under the heading "Disc Code" (Note there is no "%" symbol")

Do not put the "%" symbol here or it will NOT work

3. All transactions now to this Customer will have the Sell Price modified at the point of Sales including Quotes, Sales Orders, Requisitions by the percentages defined on the previous page

WORKINGS Here are screen shots showing how above example would work issuing a Part to a Job that has been has been opened to this Customer

1. Part No called up on the Inventory Screen.   Note the Sell Price

2. Select Issue to Job No

3. On selecting the Job with Customer "BANAVIA", the discount code "A" will automatically be applied modifying the price down from 193.91 to 150.13

```
QTY ISSUED          1
  Acft Regn    C-GABC
     Job No    049261/HA
A%    Price       150.13
```

4. Different example, this time using a Customer whose Code has been set to "B" i.e. not a Discount but instead a Mark-Up

```
QTY ISSUED              1
  Acft Regn        N321C

- Searching Job Numbers -
  Date    | Aircraft | Job No    | Cust   | Status
27/12/2015 N321C    | 049253/HA | DAS160 | JOB OPEN
```

5. Now the Sell Price displayed has been uplifted from 193.91 to 232.69

```
QTY ISSUED              1
  Acft Regn        N321C
     Job No        049253/HA
B%    Price           232.69
```

The above logic of "Disc Code" can be used down to single Job Numbers when opening a Job. You may for example want open a Job and set a different Pricing policy for the Job. All you need do is set the "Parts Disc Code" letter under Open/Edit Job Number and the program

```
CAFAM System
Job No   049253/HA    Acft  N321C          Start Date     27/12/2015
Account  DAS160        StatusJOB OPEN       End Date          /  /
EUR Cust Dassault Aviation                  Labour Rates
Cust O/n DAS/123/111/BNACZX                 Fixed Price          0.00
Details  CHECK 4                            Parts Disc Code B
Our Ref                                     Project ID
   P/No                                     Validate Task ? Y
   Desc                                     Est. Hrs Reqd ? N
```

apply the Code as appropriate

This modification in Sell Price will be also applied to the Customer when you do a Quotation from **Quotes, S/Ords, Reqs > Quotes and Inquiries > Create/Add Quote Inq**
And also when doing **Sales Orders** or **Requisitions**

```
CAFAM System
Job No   049253/HA    Acft  N321C          Start Date     27/12/2015
Account  DAS160        StatusJOB OPEN       End Date          /  /
EUR Cust Dassault Aviation                  Labour Rates
Cust O/n DAS/123/111/BNACZX                 Fixed Price          0.00
Details  CHECK 4                            Parts Disc Code B
Our Ref                                     Project ID
   P/No                                     Validate Task ? Y
   Desc                                     Est. Hrs Reqd ? N
```

See Addendum below for recent addition on this subject

<u>ADDENDUM – 27/08/2021</u>

Support was added for a special Customer Code / Job Discount Code. If set to special letter "Z", then internal coding makes the SellPrice to become same as the BuyPrice for the Parts being Issued, Quotes, Requisitions etc.

Note: It needs FMARKUP to also have a Record with COMPNY="Z%" and this can contain its own Mark-up matrix to mark the Buy Price up on a different table. Make sure all values are filled including 1.00 if no Mark-up is required

Thus this option means that the Sell Price for a specific Customer of Job can be different and bypass the default Sell Price where the Buy Price is used as the basis of the Mark-up ....or no Mark-up ie. Sell Price to be the same as Buy

-end-