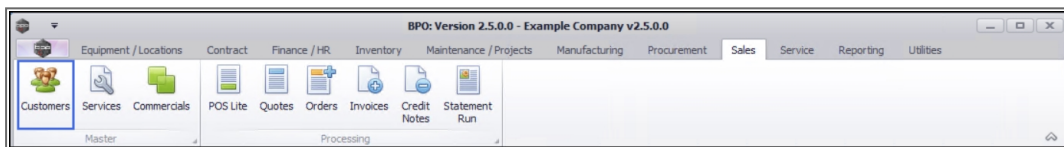


SALES

CUSTOMERS – COMMERCIAL EXCEPTIONS

A **Commercial Exception** can be linked per customer, for instance, Customer **ABC Shoes** is linked to the standard commercial of **15% markup** on all non serialised parts, but only a **5% markup** on toner sales.

Ribbon Access: *Sales > Customers*

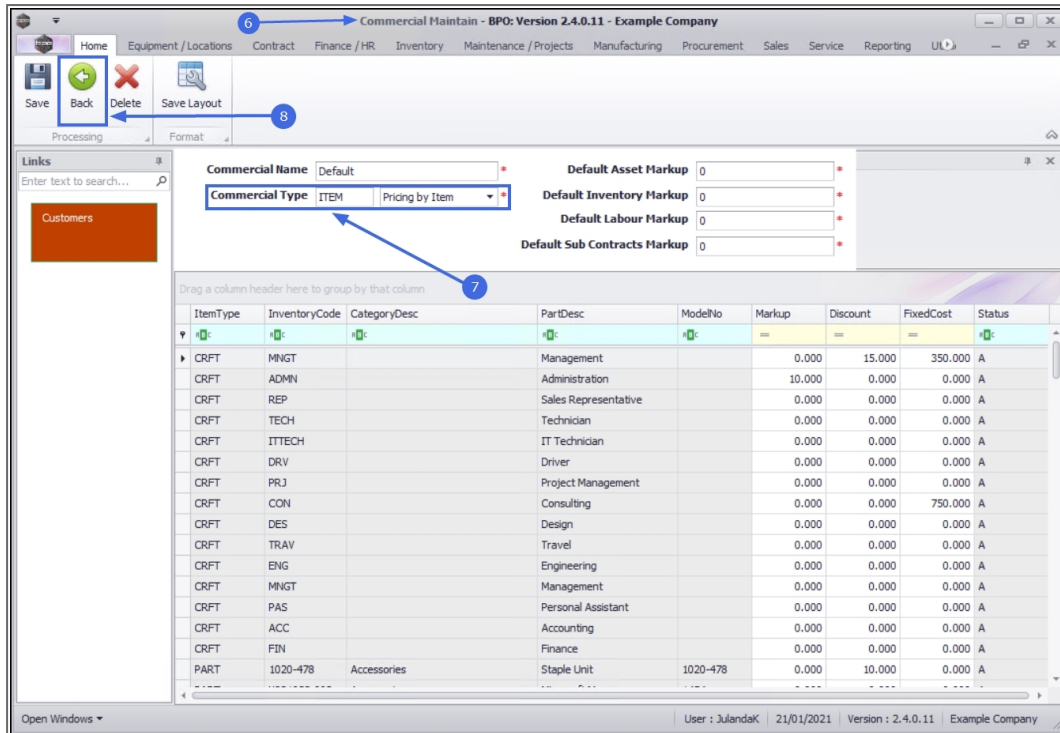


1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** of the customer you wish to view.
 - The example has **Active** selected.

VIEW CUSTOMER COMMERCIAL TYPE

4. Select the **row** of the **customer** you wish to view or link a Commercial Exception to.
5. To check if the customer is set to either a **Pricing by Type/Class** or a **Pricing By Item** commercial detail, click on the **Commercial Details** tile.

6. The **Commercial Maintain** screen will display.
7. From this screen you can view which **Commercial Type** the selected customer is linked to.
 - The example has the selected customer linked to an **Item - Pricing by Item** commercial type.
8. Click on **Back** to return to the Customer Listing screen.



Commercial Name: Default

Commercial Type: ITEM Pricing by Item

Default Asset Markup: 0

Default Inventory Markup: 0

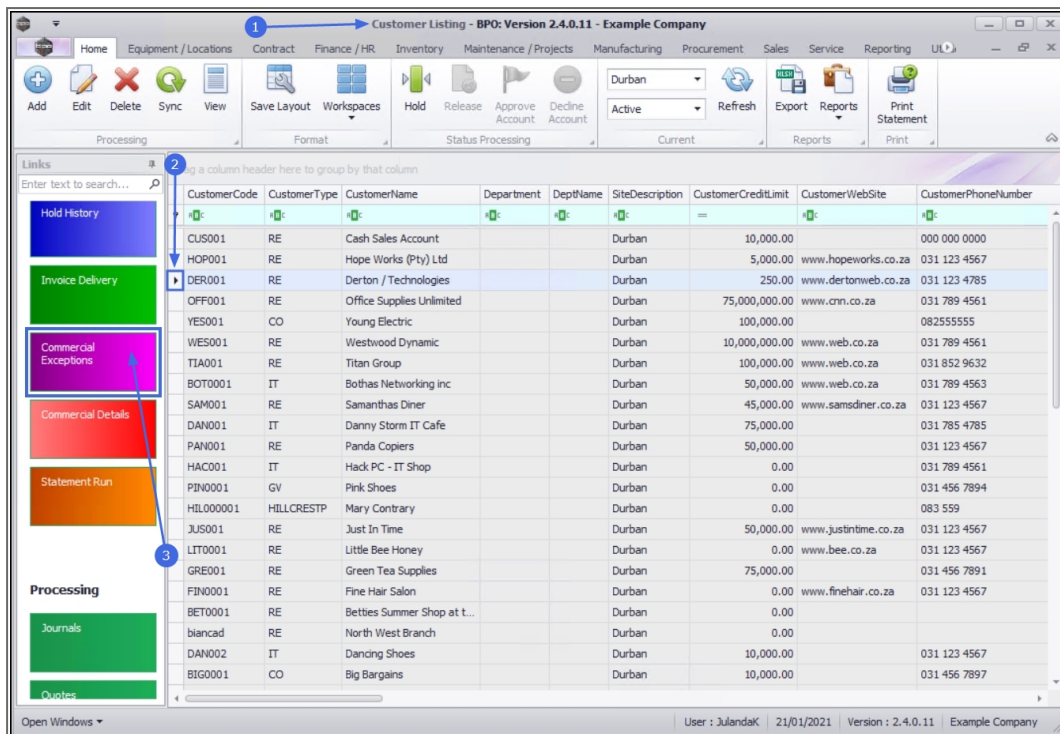
Default Labour Markup: 0

Default Sub Contracts Markup: 0

ItemType	InventoryCode	CategoryDesc	PartDesc	ModelNo	Markup	Discount	FixedCost	Status
CRFT	MNGT		Management		0.000	15.000	350.000	A
CRFT	ADMN		Administration		10.000	0.000	0.000	A
CRFT	REP		Sales Representative		0.000	0.000	0.000	A
CRFT	TECH		Technician		0.000	0.000	0.000	A
CRFT	ITTECH		IT Technician		0.000	0.000	0.000	A
CRFT	DRV		Driver		0.000	0.000	0.000	A
CRFT	PRJ		Project Management		0.000	0.000	0.000	A
CRFT	CON		Consulting		0.000	0.000	750.000	A
CRFT	DES		Design		0.000	0.000	0.000	A
CRFT	TRAV		Travel		0.000	0.000	0.000	A
CRFT	ENG		Engineering		0.000	0.000	0.000	A
CRFT	MNGT		Management		0.000	0.000	0.000	A
CRFT	PAS		Personal Assistant		0.000	0.000	0.000	A
CRFT	ACC		Accounting		0.000	0.000	0.000	A
CRFT	FIN		Finance		0.000	0.000	0.000	A
PART	1020-478	Accessories	Staple Unit	1020-478	0.000	10.000	0.000	A

COMMERCIAL EXCEPTION DISCOUNT PROCESS – PRICE BY ITEM

1. From the **Customer Listing** screen,
2. Ensure that the same customer is still selected.
3. Click on the **Commercial Exceptions** tile.



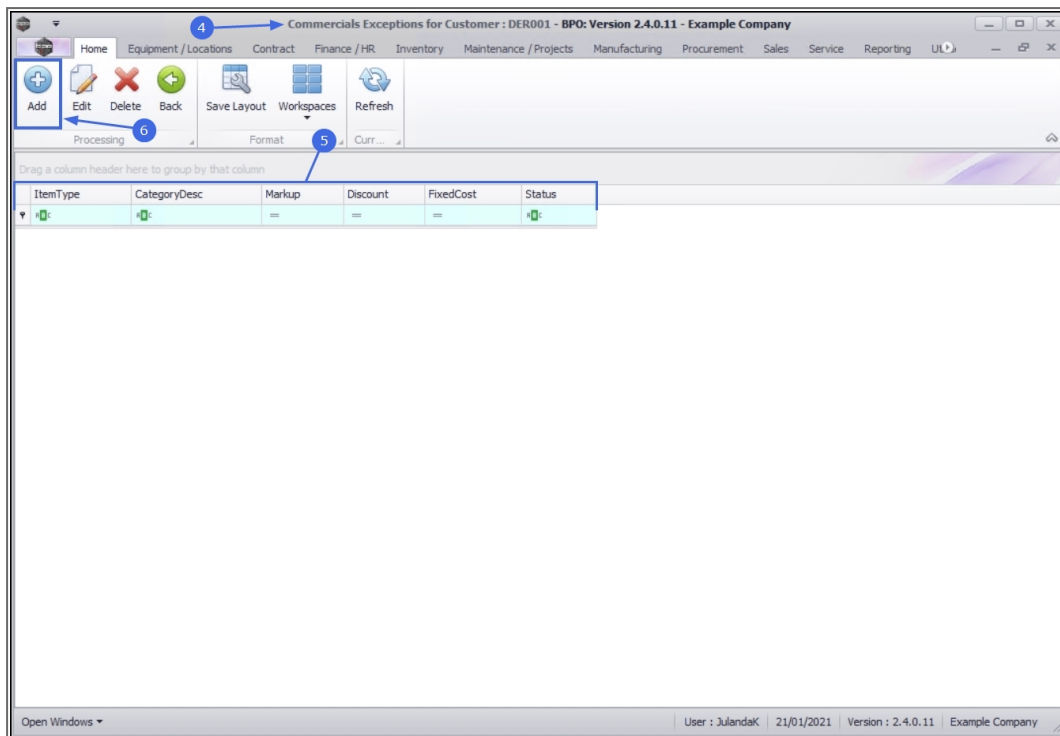
4. The **Commercial Exceptions for Customer: [customer code]** screen will display.
5. Exceptions already linked to this commercial, will be listed in this screen.

ADD EXCEPTION

6. Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



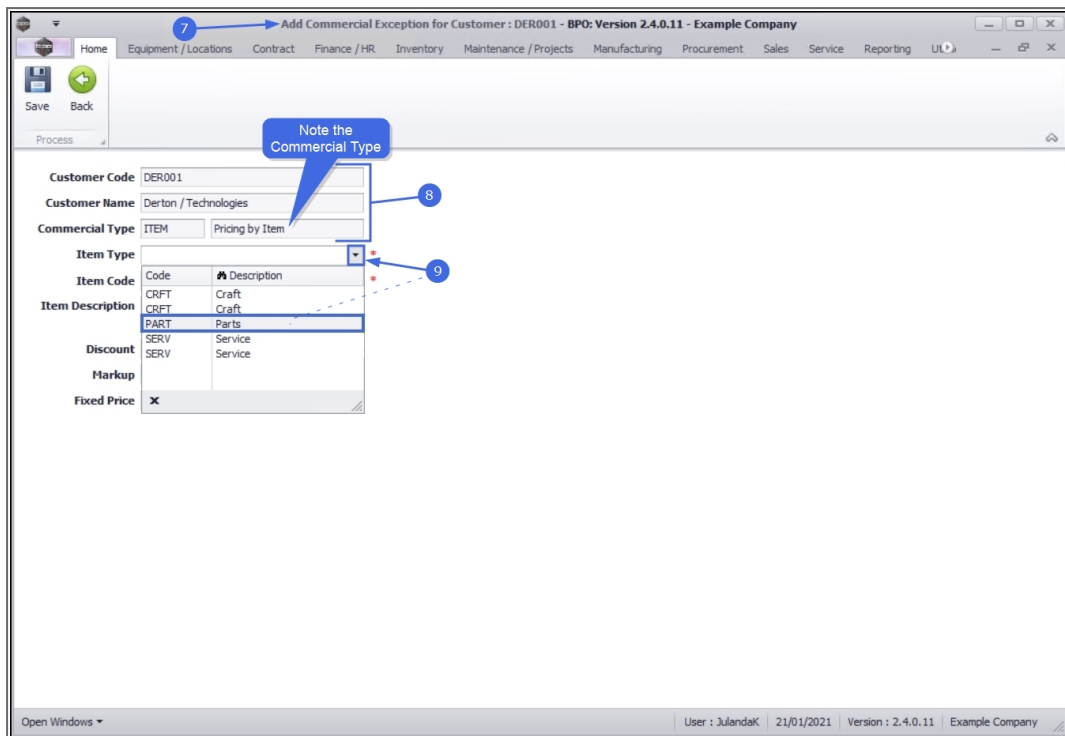
Exception Details

7. The **Add Commercial Exception for Customer: [customer code]** screen will display.
8. **Customer Code**, **Customer Name** and **Commercial Type** will auto populate with the customer originally selected.



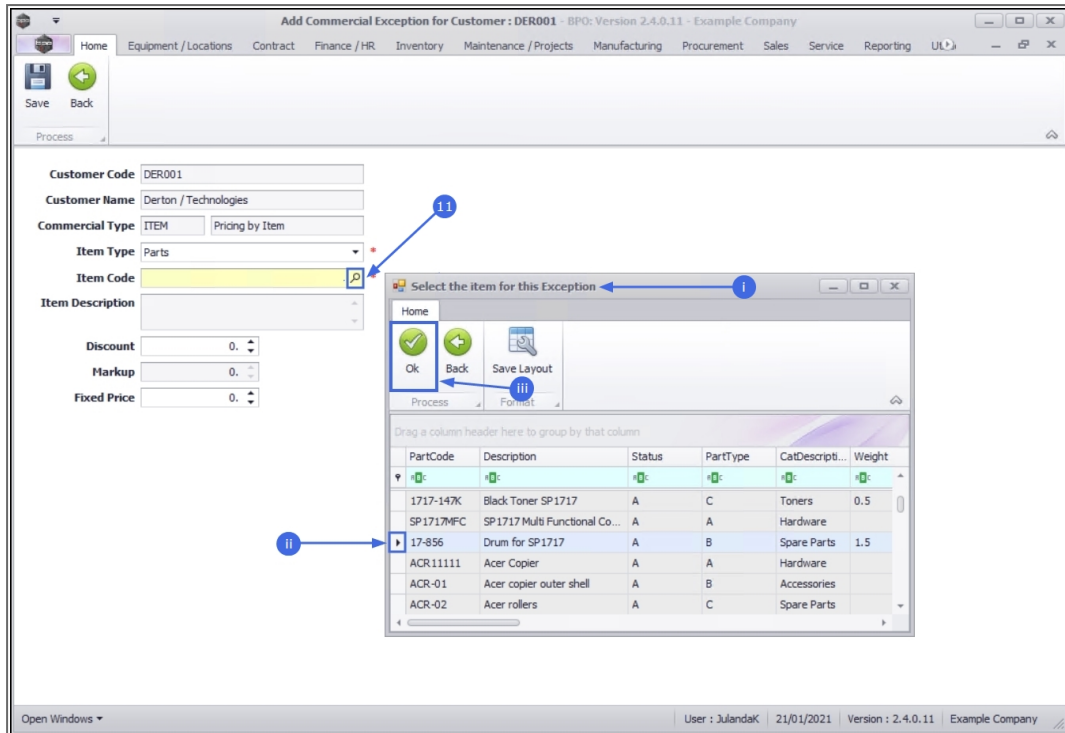
Note that the Commercial Type is **ITEM - Pricing By Item**.

9. **Item Type**: To select the item type, click on the down **arrow** to display the **Item Type** drop-down menu.
 - Click on the **Item Type** you wish to **add** a commercial exception for.
 - The example has **Parts** selected.



Exception Items

11. **Item Code:** To select an item code, click on the **search** button.
 - i. The **Select the item for this Exception** screen will display.
 - ii. Select the **row** of the **item** you wish to create the exception for.
 - iii. Click on **OK**.



Add Commercial Exception for Customer: DER001 - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | UL |

Save Back

Process

Customer Code: DER001

Customer Name: Derton / Technologies

Commercial Type: ITEM Pricing by Item

Item Type: Parts

Item Code: [Select]

Item Description:

Discount: 0.0

Markup: 0.0

Fixed Price: 0.0

Select the item for this Exception

Home | Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

PartCode	Description	Status	PartType	CatDescripti...	Weight
1717-147K	Black Toner SP1717	A	C	Toners	0.5
SP1717MFC	SP1717 Multi Functional Co...	A	A	Hardware	
17-856	Drum for SP1717	A	B	Spare Parts	1.5
ACR11111	Acer Copier	A	A	Hardware	
ACR-01	Acer copier outer shell	A	B	Accessories	
ACR-02	Acer rollers	A	C	Spare Parts	

Open Windows | User: JulandaK | 21/01/2021 | Version: 2.4.0.11 | Example Company

12. **Item Description:** The item description will auto populate with the description of the Item Code selected.

Exception Discount

13. **Discount:** Type in or use the arrow indicators to select the required discount amount.
- The example has **10(%)** selected as the discount percentage.

Exception Fixed Price

14. **Fixed Price:** Type in or use the arrow indicators to select the **Fixed Price¹** amount.

¹The selling price to the customer



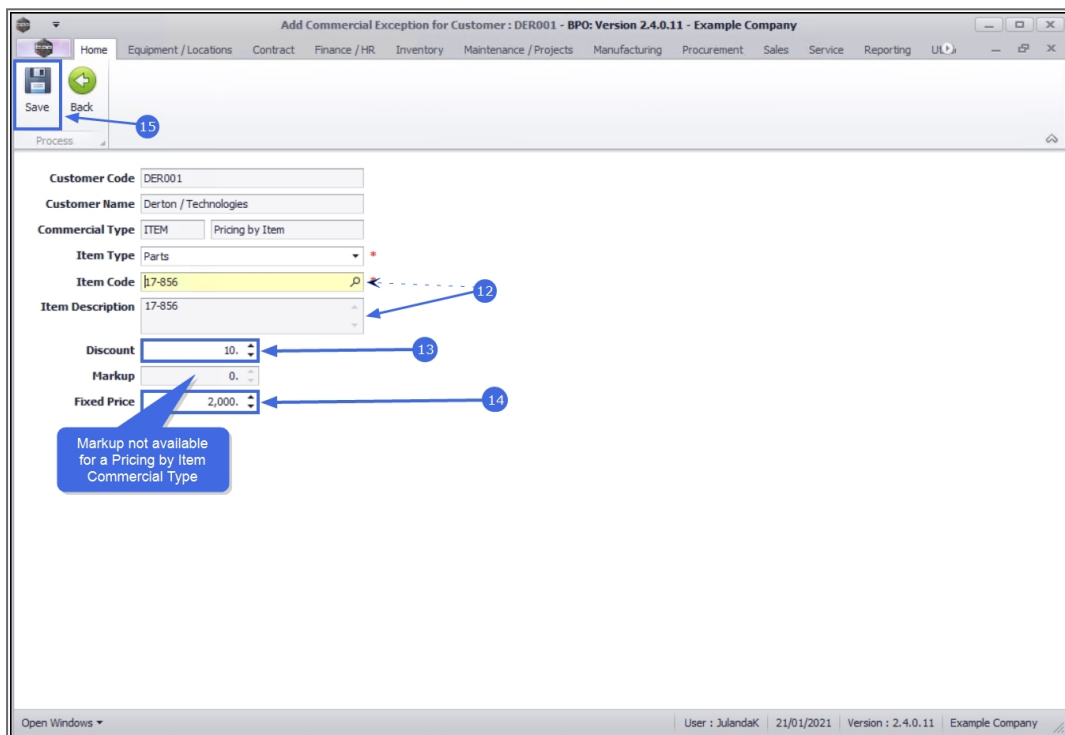
Note 1 You can leave the **Discount** field as 0 and fill in a **Fixed Price** amount only.



Note 2 As this process is linked to a customer with a **Pricing By Item** commercial set up, the **Markup** field will not be editable.

SAVE EXCEPTION

15. When you have finished adding details to this screen, click on **Save**.

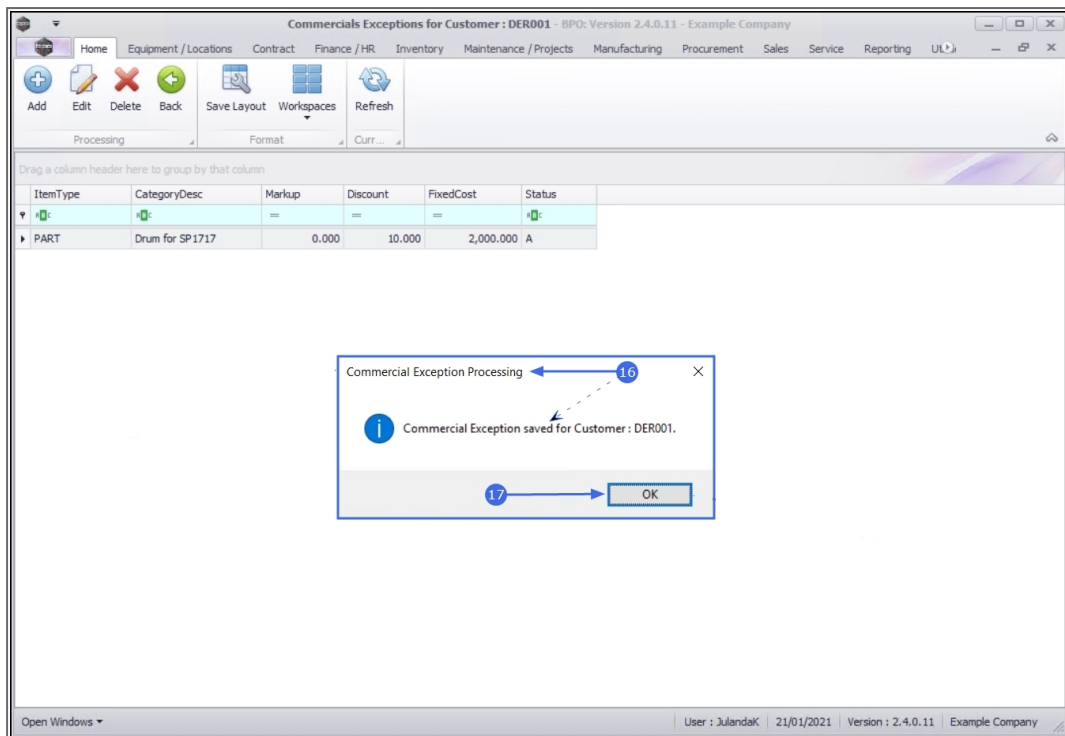


The screenshot shows a software interface for adding a commercial exception. The title bar reads 'Add Commercial Exception for Customer: DER001 - BPO: Version 2.4.0.11 - Example Company'. The interface includes a top navigation bar with tabs like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and UT. Below the navigation bar, there are 'Save' and 'Back' buttons. The main form contains the following fields: 'Customer Code' (DER001), 'Customer Name' (Derton / Technologies), 'Commercial Type' (ITEM), 'Item Type' (Parts), 'Item Code' (17-856), 'Item Description' (17-856), 'Discount' (10), 'Markup' (0), and 'Fixed Price' (2,000). A blue callout box points to the 'Markup' field with the text 'Markup not available for a Pricing by Item Commercial Type'. A blue circle with the number 15 points to the 'Save' button. A blue circle with the number 12 points to the 'Item Code' field. A blue circle with the number 13 points to the 'Discount' field. A blue circle with the number 14 points to the 'Fixed Price' field.

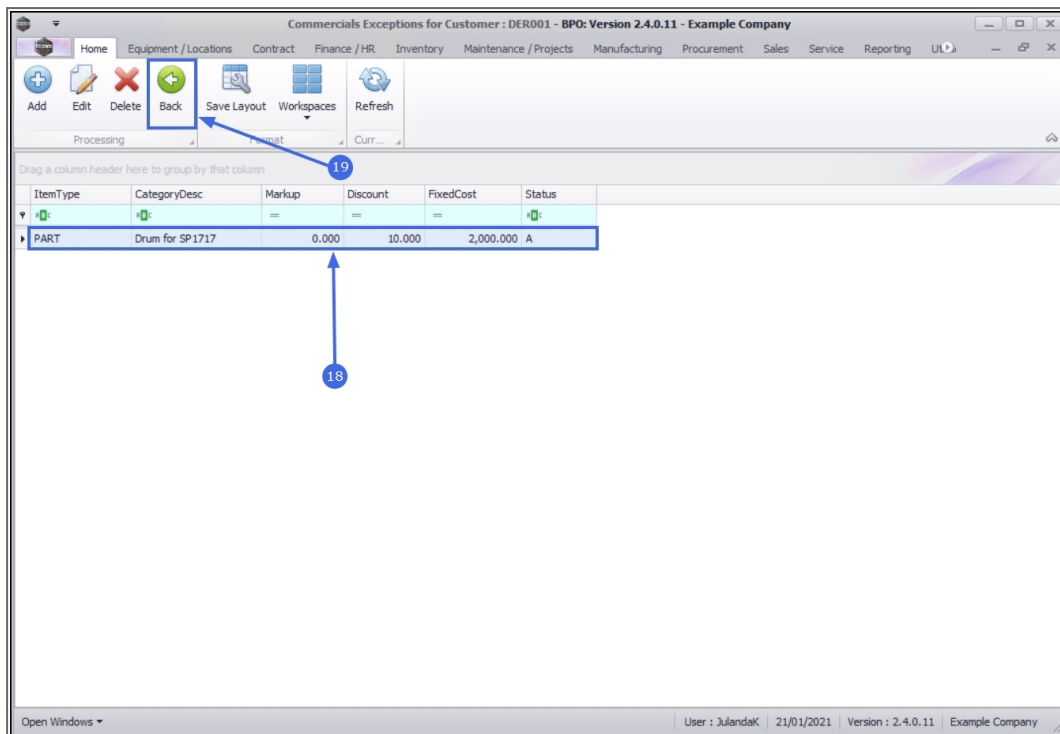
16. When you receive the **Customer Exceptions Processing** screen to confirm;

- **Commercial Exception saved for Customer: [customer code].**

17. Click on **OK**.



18. The **Commercials Exceptions for Customer** screen has been updated with the exception you have linked for the customer.
19. Click on **Back** to return to the Customer Listing screen.



COMMERCIAL EXCEPTION MARKUP PROCESS – PRICE BY TYPE/CLASS

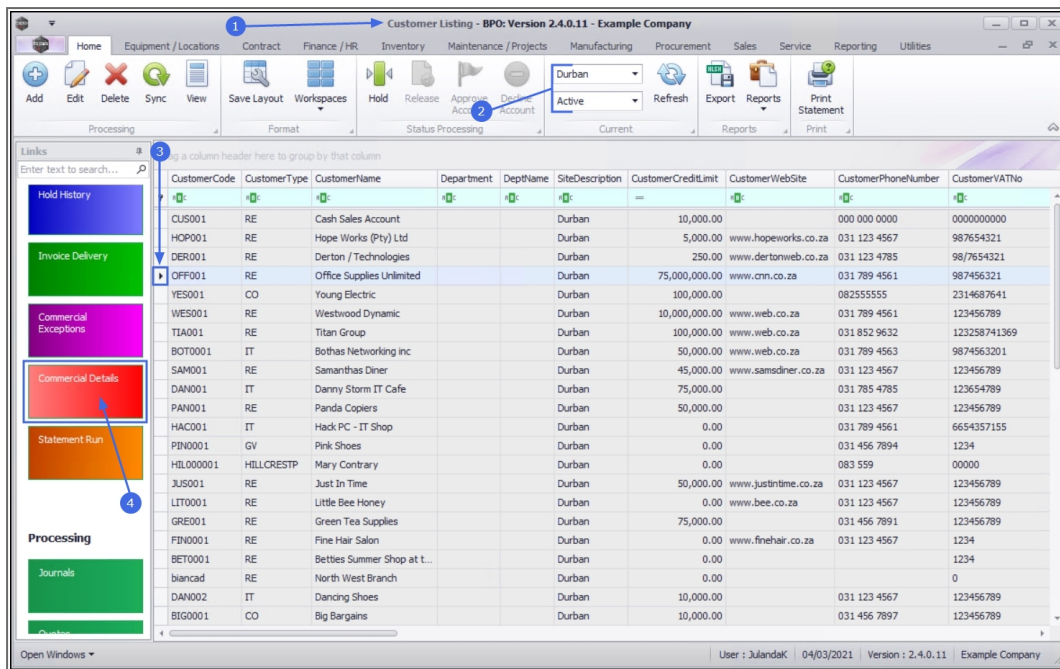


Note that this selection is *category* specific.

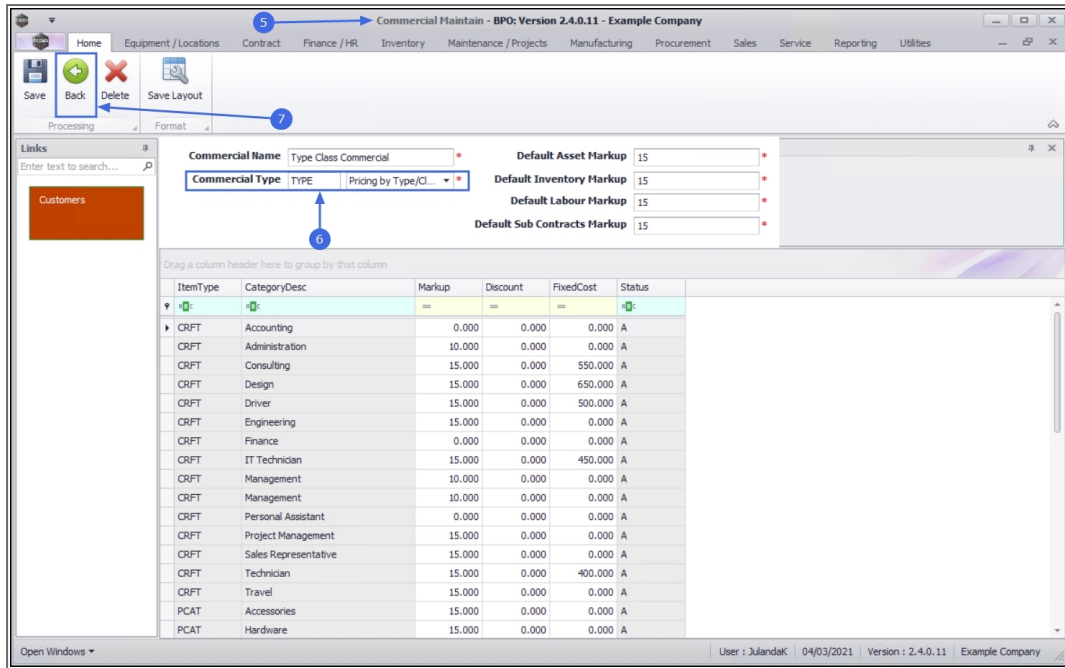
1. From the **Customer Listing** screen,
2. Select the correct **Site** and **Status** to narrow your customer filter parameters.

VIEW CUSTOMER COMMERCIAL TYPE

3. Click on the **row** of the **customer** you wish to link a commercial exception to.
4. To check if the customer is set to either **Pricing by Type/Class** or **Pricing By Item**, click on the **Commercial Details** tile.



5. The **Commercial Maintain** screen will be displayed.
6. From this screen you can view which **Commercial Type** the selected customer is linked to.
 - The example has the selected customer linked to the **Type - Pricing by Type/Class** commercial type.
7. Click on **Back** to return to the **Customer Listing** screen.



Commercial Name: Type Class Commercial

Commercial Type: TYPE

Default Asset Markup: 15

Default Inventory Markup: 15

Default Labour Markup: 15

Default Sub Contracts Markup: 15

ItemType	CategoryDesc	Markup	Discount	FixedCost	Status
CRFT	Accounting	0.000	0.000	0.000	A
CRFT	Administration	10.000	0.000	0.000	A
CRFT	Consulting	15.000	0.000	550.000	A
CRFT	Design	15.000	0.000	650.000	A
CRFT	Driver	15.000	0.000	500.000	A
CRFT	Engineering	15.000	0.000	0.000	A
CRFT	Finance	0.000	0.000	0.000	A
CRFT	IT Technician	15.000	0.000	450.000	A
CRFT	Management	10.000	0.000	0.000	A
CRFT	Management	10.000	0.000	0.000	A
CRFT	Personal Assistant	0.000	0.000	0.000	A
CRFT	Project Management	15.000	0.000	0.000	A
CRFT	Sales Representative	15.000	0.000	0.000	A
CRFT	Technician	15.000	0.000	400.000	A
CRFT	Travel	15.000	0.000	0.000	A
PCAT	Accessories	15.000	0.000	0.000	A
PCAT	Hardware	15.000	0.000	0.000	A

ADD EXCEPTION

1. From the **Customer Listing** screen,
2. Ensure that the **same customer** is still selected.
3. Click on the **Commercial Exceptions** tile.

Customer Listing - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Sync View Save Layout Workspaces Hold Release Approve Account Decline Account

Processing Format Status Processing Current Reports Print

Links

Enter text to search...

Hold History

Invoice Delivery

Commercial Exceptions

Commercial Details

Statement Run

Processing

Journals

Customer

CustomerCode	CustomerType	CustomerName	Department	DepthName	SiteDescription	CustomerCreditLimit	CustomerWebSite	CustomerPhoneNumber	CustomerVATNo
CU5001	RE	Cash Sales Account			Durban	10,000.00		000 000 0000	0000000000
HOP001	RE	Hope Works (Pty) Ltd			Durban	5,000.00	www.hopeworks.co.za	031 123 4567	987654321
DER001	RE	Derton / Technologies			Durban	250.00	www.dertonweb.co.za	031 123 4785	987654321
OFF001	RE	Office Supplies Unlimited			Durban	75,000,000.00	www.cnn.co.za	031 789 4561	987456321
YES001	CO	Young Electric			Durban	100,000.00		0825555555	2314687641
WES001	RE	Westwood Dynamic			Durban	10,000,000.00	www.web.co.za	031 789 4561	123456789
TIA001	RE	Titan Group			Durban	100,000.00	www.web.co.za	031 852 9632	123258741369
BOT0001	IT	Bothas Networking inc			Durban	50,000.00	www.web.co.za	031 789 4563	9874563201
SAM001	RE	Samanthas Diner			Durban	45,000.00	www.samsdiner.co.za	031 123 4567	123456789
DAN001	IT	Danny Storm IT Cafe			Durban	75,000.00		031 785 4785	123654789
PAN001	RE	Panda Copiers			Durban	50,000.00		031 123 4567	123456789
HAC001	IT	Hack PC - IT Shop			Durban	0.00		031 789 4561	6654357155
FIN0001	GV	Pink Shoes			Durban	0.00		031 456 7894	1234
HIL000001	HILLCRESTP	Mary Contrary			Durban	0.00		083 559	00000
JUS001	RE	Just In Time			Durban	50,000.00	www.justintime.co.za	031 123 4567	123456789
LIT0001	RE	Little Bee Honey			Durban	0.00	www.bee.co.za	031 123 4567	123456789
GRE001	RE	Green Tea Supplies			Durban	75,000.00		031 456 7891	123456789
FIN0001	RE	Fine Hair Salon			Durban	0.00	www.finehair.co.za	031 123 4567	1234
BET0001	RE	Betties Summer Shop at t...			Durban	0.00			1234
biancad	RE	North West Branch			Durban	0.00			0
DAN002	IT	Dancing Shoes			Durban	10,000.00		031 123 4567	123456789
BIG0001	CO	Big Bargains			Durban	10,000.00		031 456 7897	123456789

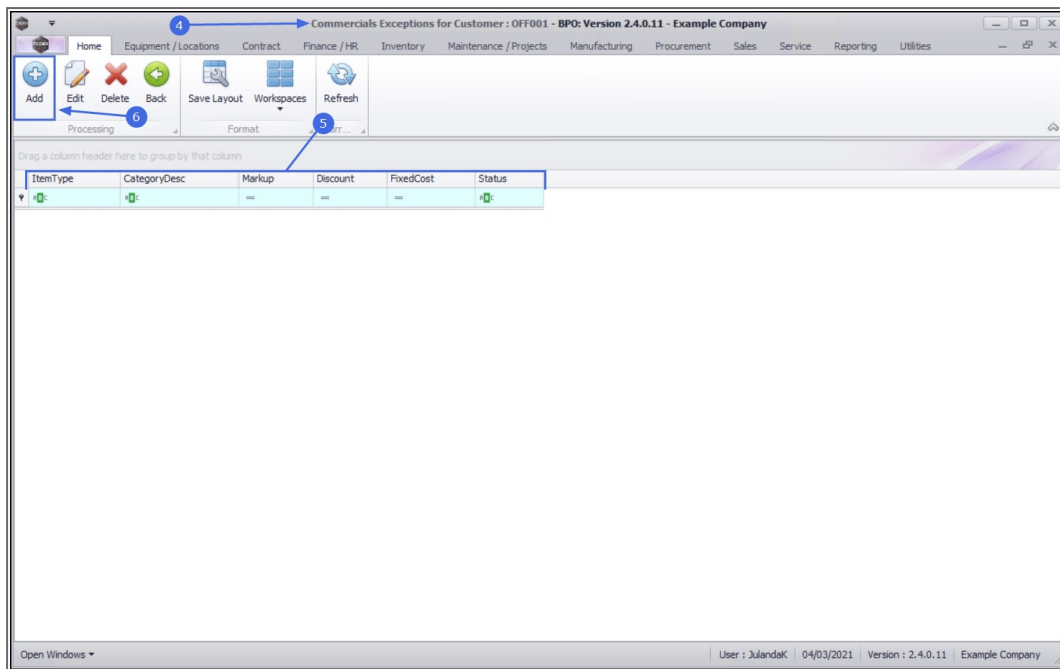
Open Windows

User : JulandK 04/03/2021 Version : 2.4.0.11 Example Company

- The **Commercial Exceptions for Customer: [customer code]** screen will be displayed.
- Exceptions already linked to this commercial, will be listed in this screen.
- Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



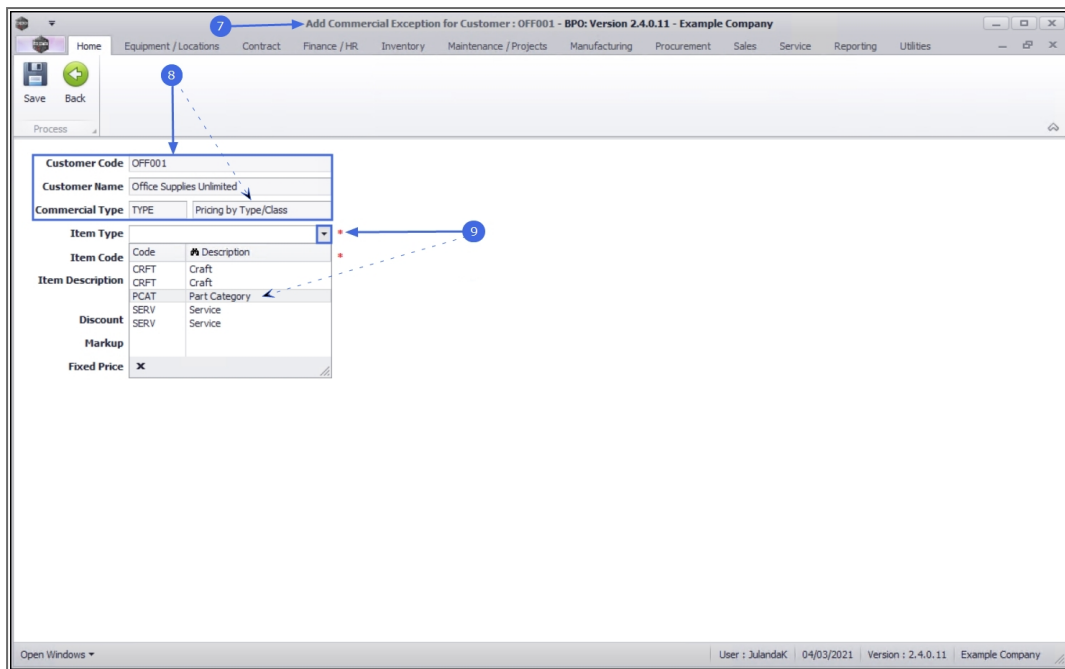
Exception Details

7. The **Add Commercial Exception for Customer: [customer code]** screen will be displayed.
8. The **Customer Code**, **Customer Name** and **Commercial Type** fields will be auto populated according to the customer originally selected.



You will note that the Commercial Type is **Pricing by Type/Class**.

9. **Item Type:** To select the item type, click on the down **arrow** to display the **Item Type** drop-down menu.
 - Click on the **Item Type** that you wish to **add** a commercial exception for.
 - The example has **PCAT - Part Category** has been selected.



7 Add Commercial Exception for Customer : OFF001 - BPO: Version 2.4.0.11 - Example Company

8

9

Customer Code: OFF001

Customer Name: Office Supplies Unlimited

Commercial Type: TYPE Pricing by Type/Class

Item Type: [dropdown]

Item Code:

Code	Description
CRFT	Craft
CRFT	Craft
PCAT	Part Category
SERV	Service
SERV	Service

Item Description:

Code	Description
CRFT	Craft
CRFT	Craft
PCAT	Part Category
SERV	Service
SERV	Service

Discount:

Code	Description
CRFT	Craft
CRFT	Craft
PCAT	Part Category
SERV	Service
SERV	Service

Markup:

Code	Description
CRFT	Craft
CRFT	Craft
PCAT	Part Category
SERV	Service
SERV	Service

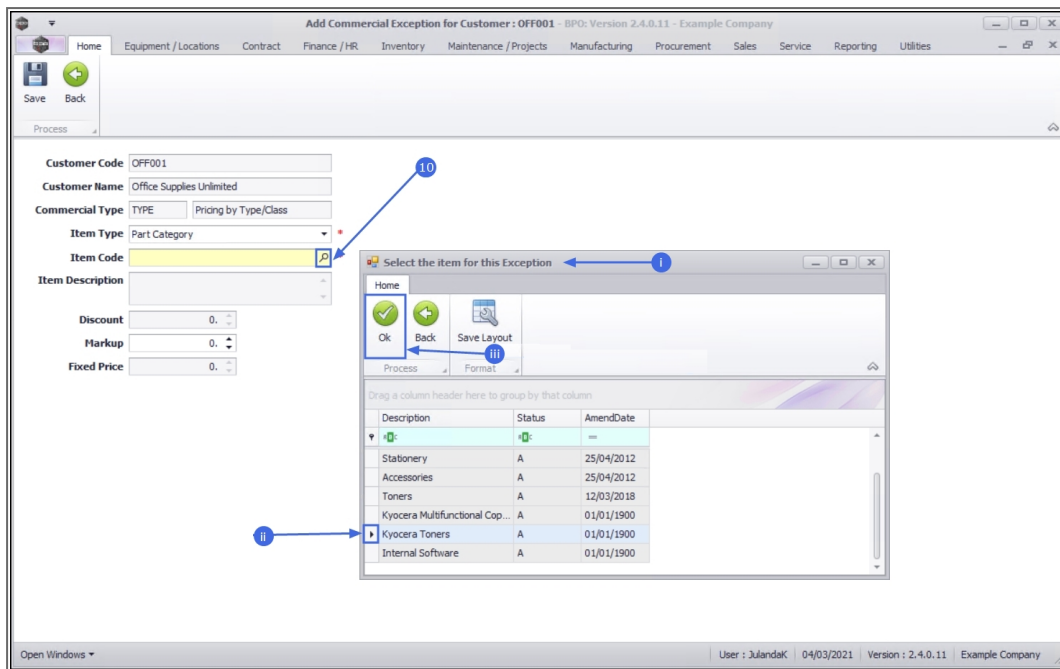
Fixed Price: ☒

Open Windows

User : JulandaK | 04/03/2021 | Version : 2.4.0.11 | Example Company

Exception Item

10. **Item Code:** To select the item code, click on the **search** button.
 - i. The **Select the item for this Exception** screen will be displayed.
 - ii. Click in the **row** of the **item** you wish to create the exception for.
 - iii. Click on **OK**.



Customer Code: OFF001

Customer Name: Office Supplies Unlimited

Commercial Type: TYPE Pricing by Type/Class

Item Type: Part Category

Item Code: [selected]

Item Description: [auto-populated]

Discount: 0.0

Markup: 0.0

Fixed Price: 0.0

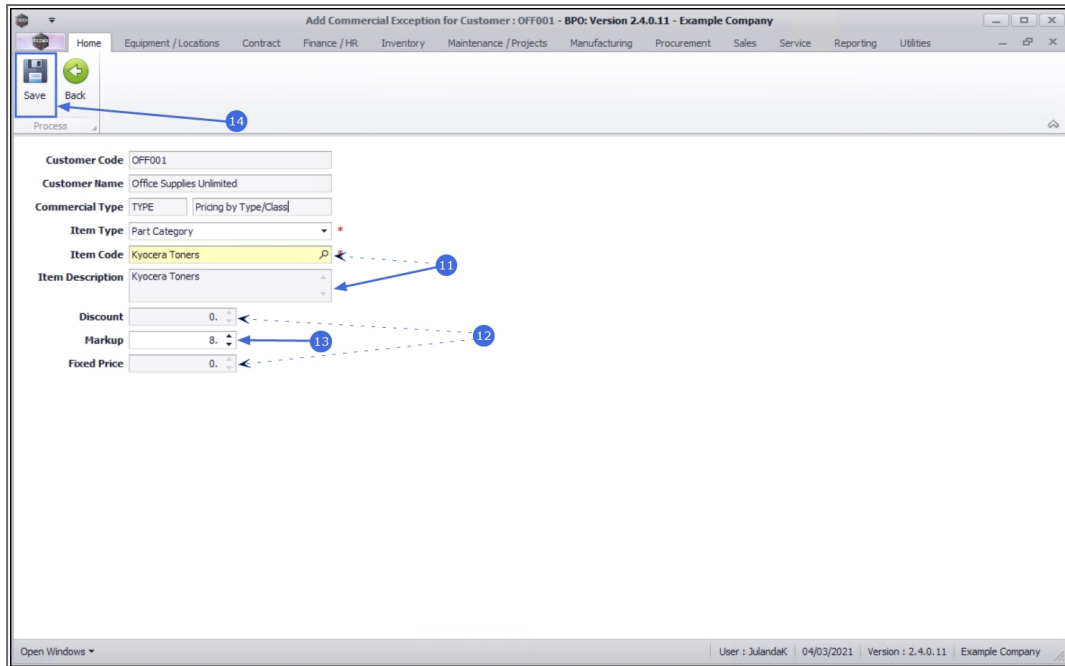
Modal Window: Select the item for this Exception

Description	Status	AmendDate
Stationery	A	25/04/2012
Accessories	A	25/04/2012
Toners	A	12/03/2018
Kyocera Multifunctional Cop...	A	01/01/1900
Kyocera Toners	A	01/01/1900
Internal Software	A	01/01/1900

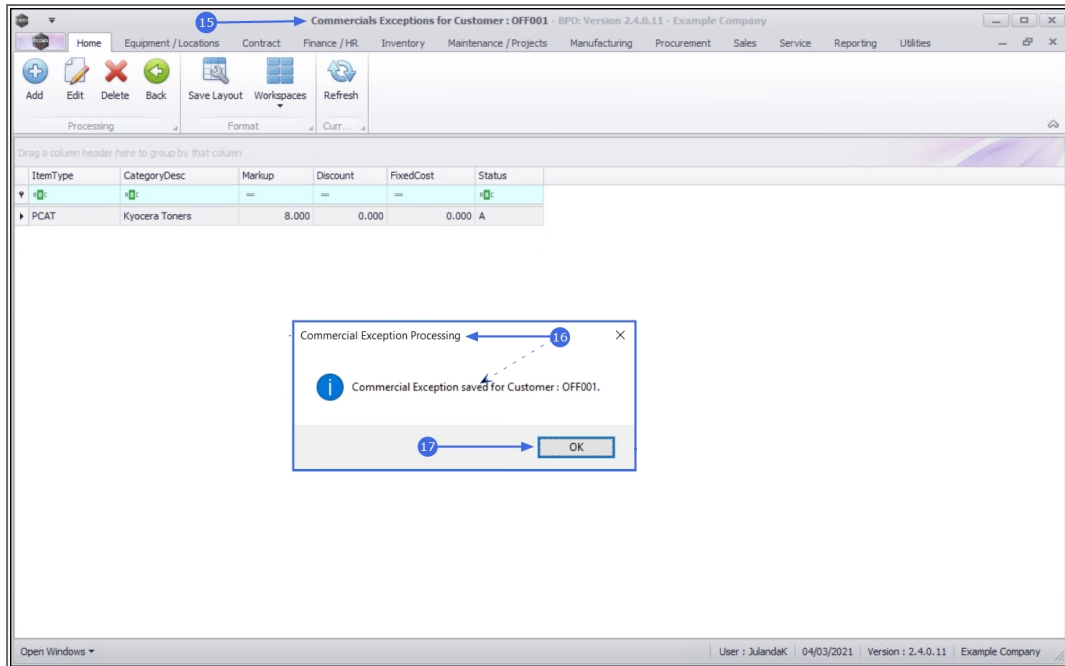
11. **Item Description:** The item description will auto populate with the description of the Item Code selected.
12. The **Discount** and **Fixed Price** fields cannot be edited as this process is linked to a customer with **Pricing By Type/Class** commercial.
13. **Markup:** Type in or use the **arrow** indicators to select the markup percentage.
 - The example has the Markup set to **8** percent.

SAVE THE EXCEPTION

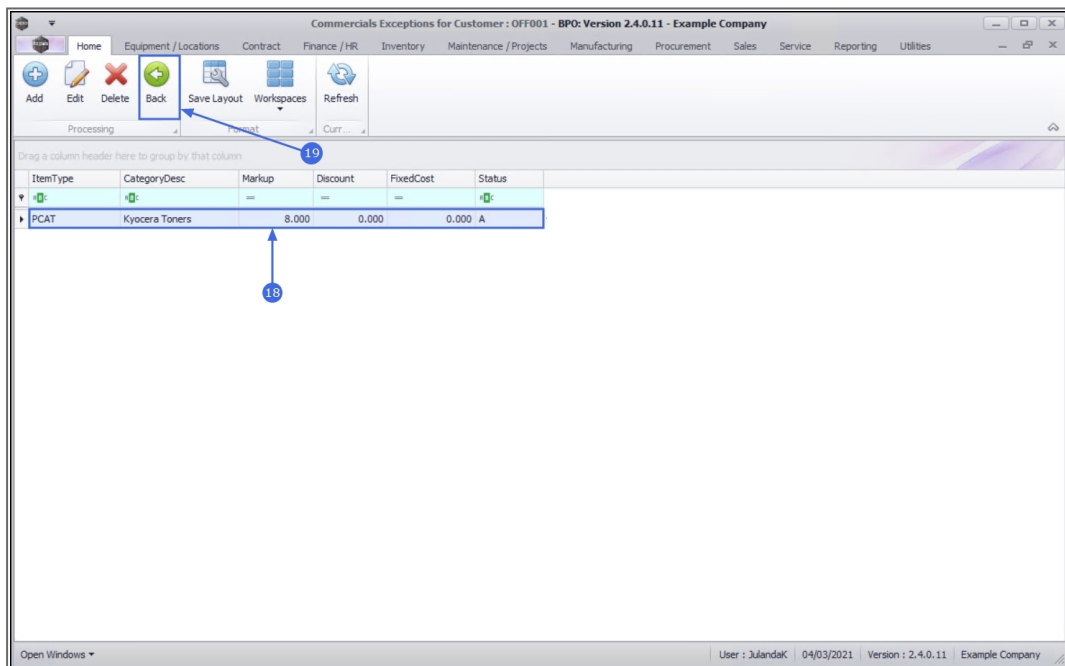
14. When you have finished adding details to this screen, click on **Save**.



15. You will return to the **Customer Exceptions for Customer** screen.
16. When you receive the **Commercial Exception Processing** message to confirm that;
 - **Commercial Exception saved for Customer: [customer code]**
17. Click on **OK**.



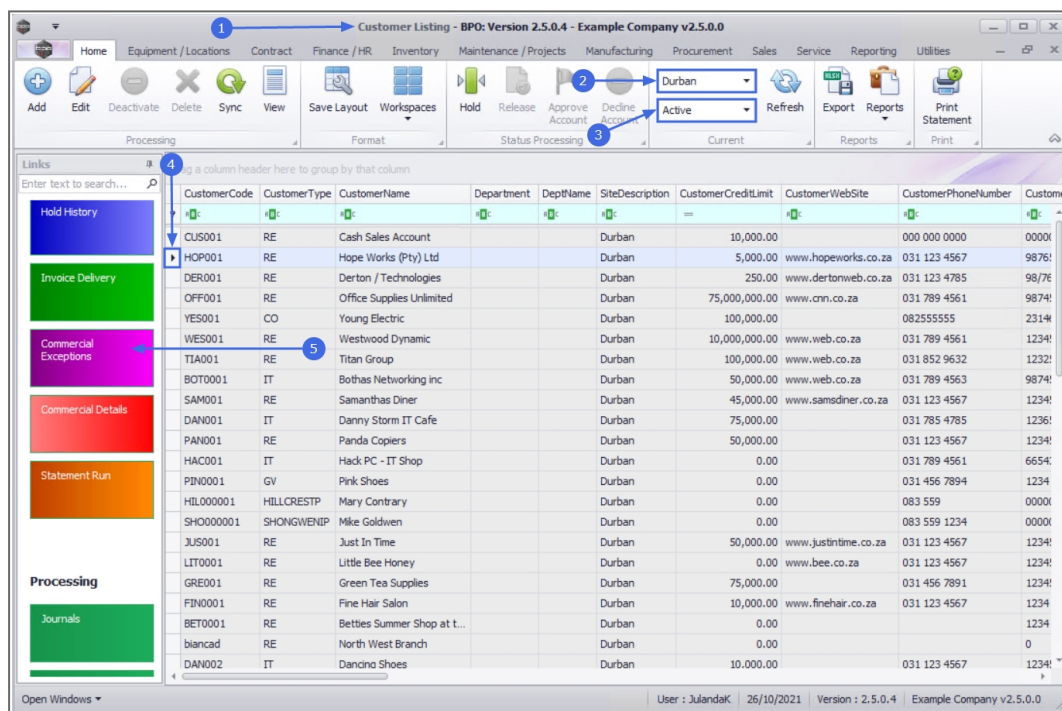
18. The **Commercials Exceptions for Customer** screen has been updated with the exception you have linked for the customer.
19. Click on **Back** to return to the Customer Listing screen.



EDIT COMMERCIAL EXCEPTION

The Edit feature allows you to modify the a Commercial Exception allows you to make changes to the Discounted, Markup or Fixed Price. You may wish to add a discount for a selected customer on a specific commercial item that has a fixed price.

1. From the **Customer Listing** screen,
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Select the **row** of the customer you wish to edit a commercial exception for.
5. Click on the **Commercial Exceptions** tile.

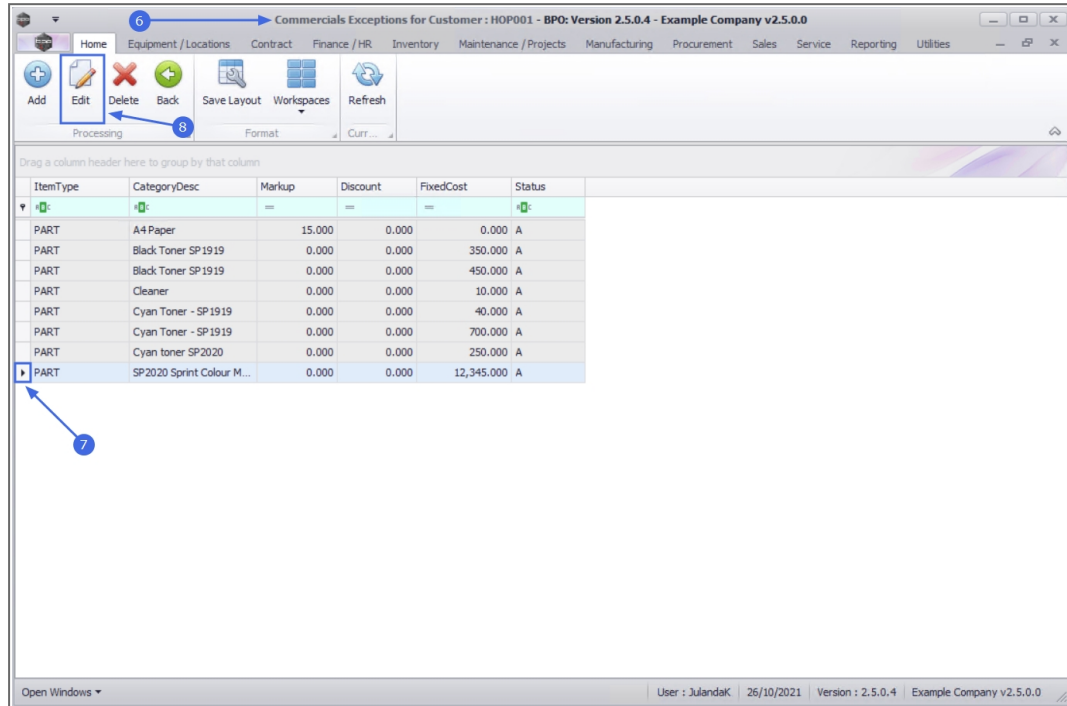


6. The **Commercials Exceptions for Customer :[customer code]** screen will display.

7. Click on the **row** of the commercial exception you wish to updated.
8. Click on **Edit**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.

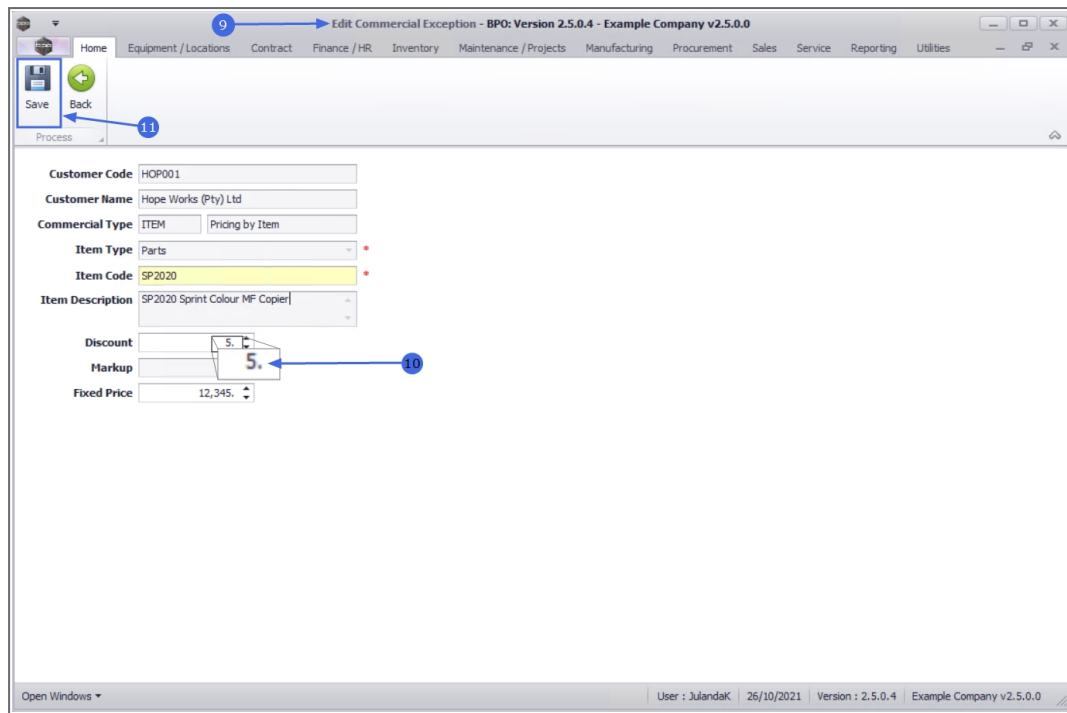


9. The Edit Commercial Exception screen will display.



Note that you will not be able to make changes to any commercial details, except to the **Discount**, **Markup** or **Fixed Price**. The availability of the changes will be dependent on the Commercial Type you have selected.

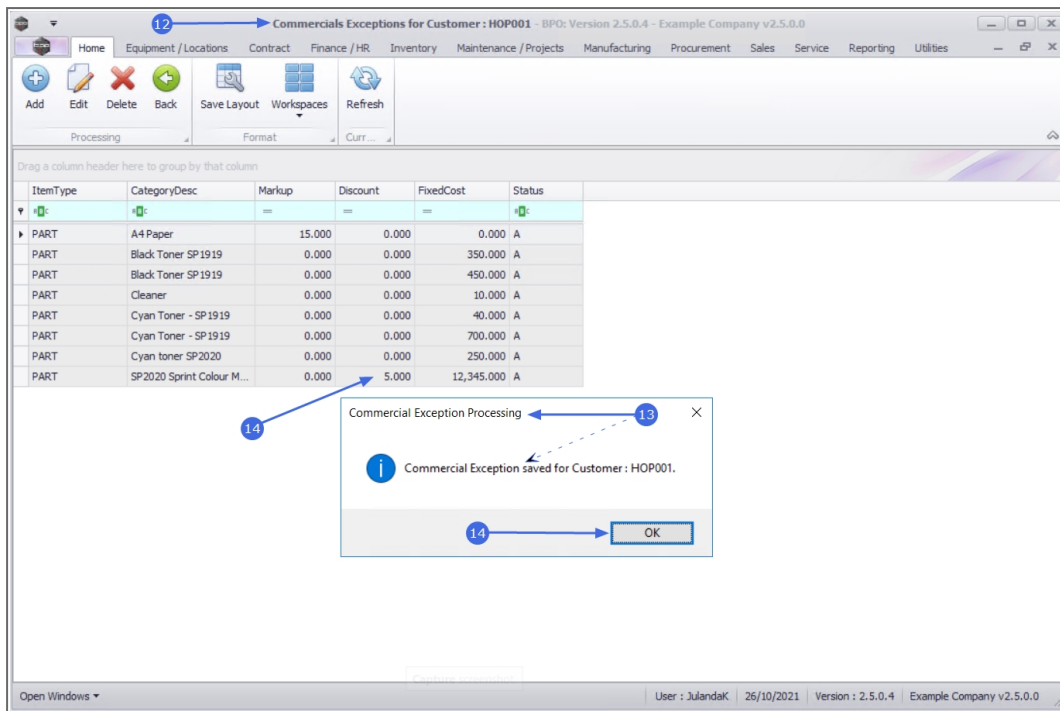
10. The example has updated the **Discount** to **5%** for the selected item.
11. Click on **Save** when you have made the necessary changes.



12. You will return to the **Commercials Exceptions for Customer** screen.
13. When you receive the **Commercial Exception Processing** message to confirm;
 - **Commercial Exception saved for Customer : [customer code]**
14. Click on **OK**.



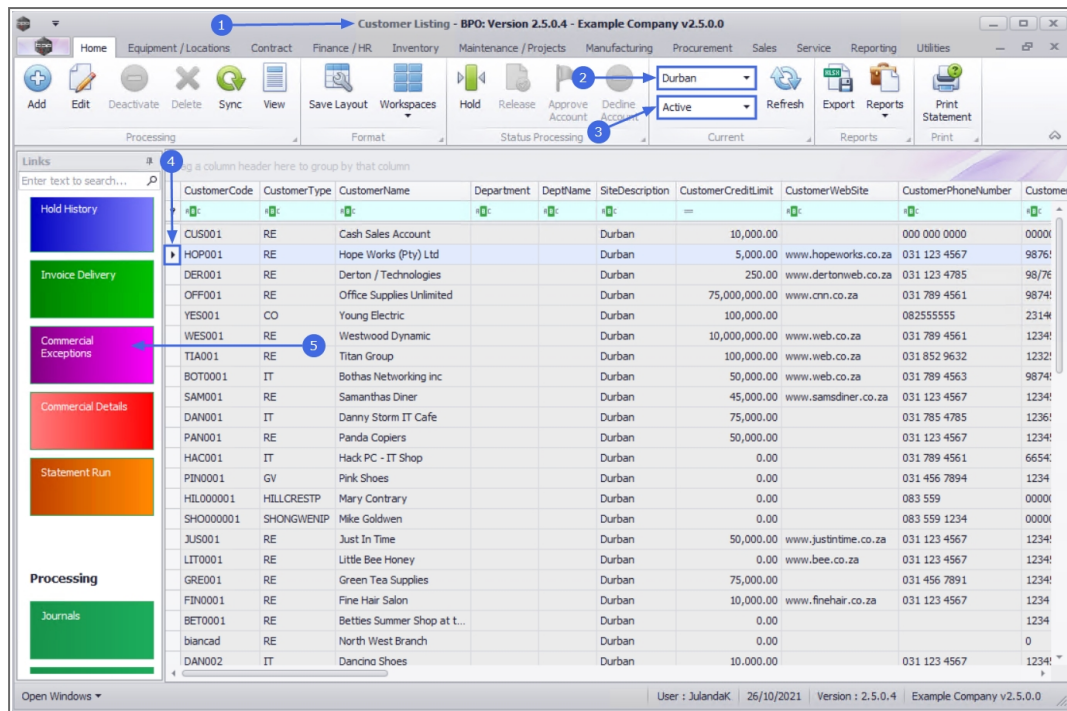
Note that the discounted amount has been updated with the percentage adjustment made.



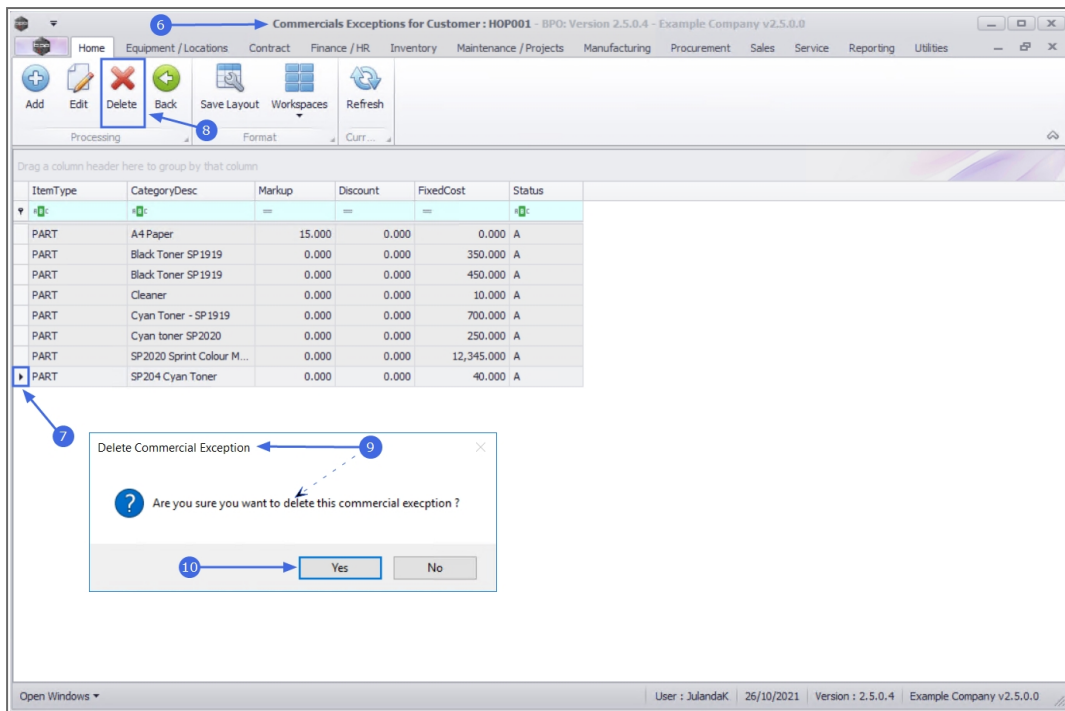
DELETE COMMERCIAL EXCEPTION

You may wish to remove any Commercial Exception items for a customer that has been linked incorrectly or is no longer used, for instance a machine has been upgraded to a newer model.

1. From the **Customer Listing** screen,
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the customer.
 - The example has **Active** selected.
4. Click on the **row** of the customer you wish to remove a commercial exception for.
5. Click on the **Commercial Exceptions** tile.

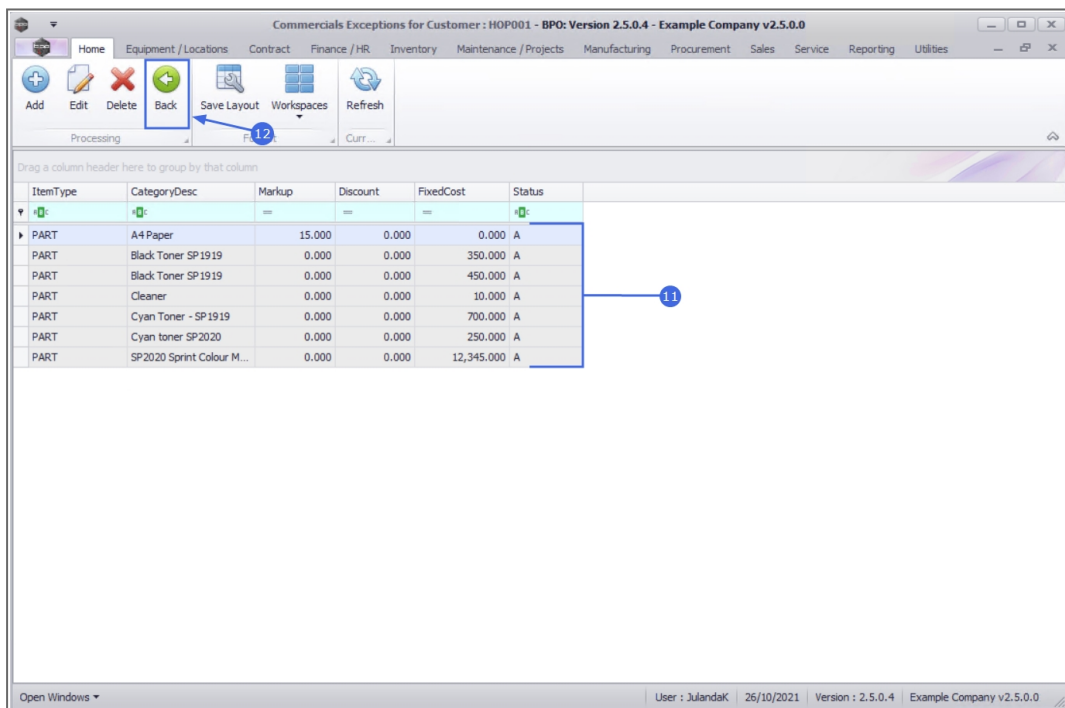


6. The **Commercials Exceptions for Customer : [customer code]** screen will display.
7. Select the **row** of the commercial exception you wish to remove.
8. Click on **Delete**.
9. When you receive the **Delete Commercial Exception** message to confirm;
 - **Are you sure you want to delete this commercial exception?**
10. Click on **Yes** if you are certain about your selection.



11. The commercial exception has been removed from the **Commercials Exceptions for Customer** screen.

12. Click on **Back** to return to the Customer Listing screen.



Related Topics

- [Introduction to Commercials](#)
- [Commercials - Add Commercial](#)
- [Customers - Commercial Details](#)
- [Commercials - View Customers Linked to a Commercial](#)
- [Commercials - Link Customer to Commercial](#)
- [Edit Commercial](#)

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