

SALES

COMMERCIALS – ADD COMMERCIAL

A **commercial** is an agreement as to how much you will sell your products / parts and services, to a customer. It is a list of **parts** and **labour** with **pricing details**.

The pricing details specified in a commercial are the ones that will default when you are creating sales documents e.g. a sales invoice for a customer linked to the commercial.

There are two types of commercials in **BPO**:

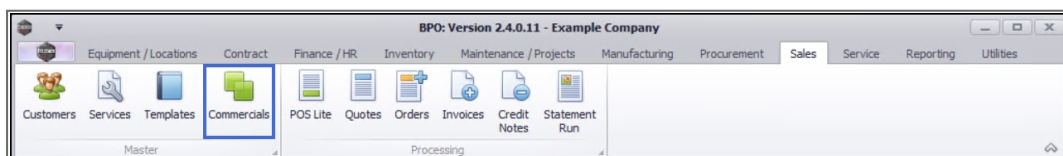
- Pricing by Item
- Pricing by Type / Class

For the commercial type - **Pricing by Item** , you can only specify the **discount** and / or **selling price** per Craft, individual Parts or individual Service item.

For the commercial type - **Pricing by Type / Class** , you can only specify **markups** and / or **selling price** per Craft, per Part Category or per Service Item Type.

Customers are linked to Commercials and any updates to commercials will affect the associated customers.

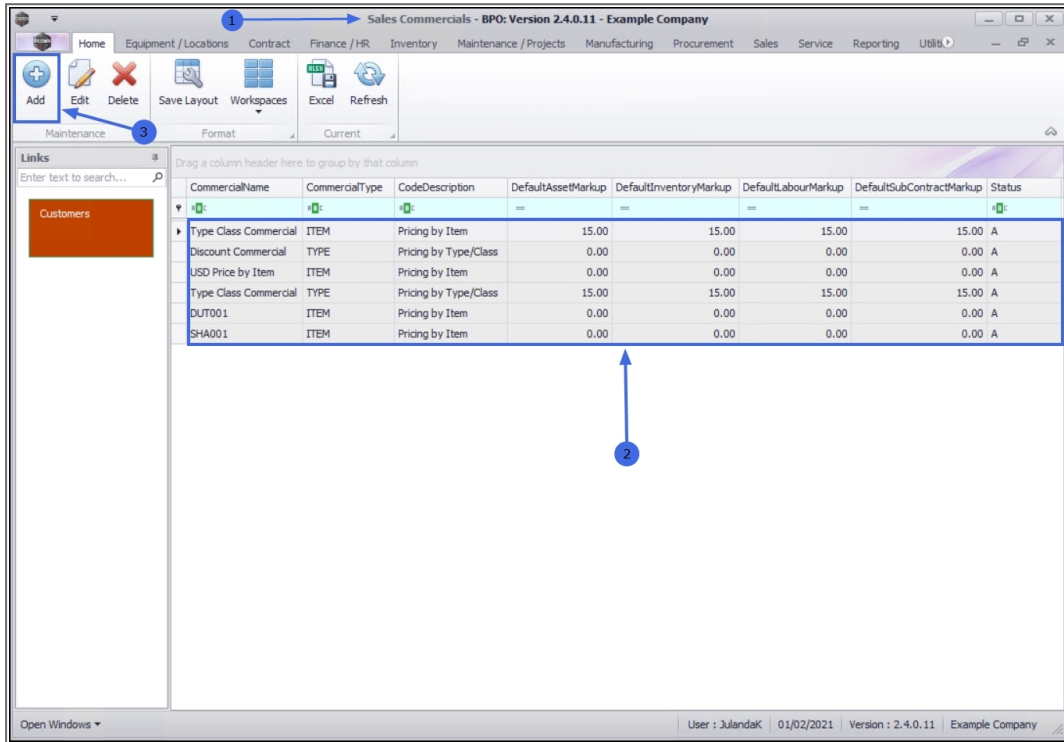
Ribbon Access: *Sales > Commercials*



1. The **Sales Commercials** screen will be displayed.
2. From here you can view a list of all your sales commercials with the default mark ups that have already been created.
3. Click on **Add** to create a new sales commercial.



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



4. The **Commercial Maintain** screen will display.

COMMERCIAL DETAILS

5. **Commercial Name:** Type in the name for the commercial you are creating.
6. **Commercial Type:** Click on the **search** button to display the Commercial Type drop-down menu.

Pricing by Type/Class

7. Click on **TYPE - Pricing by Type/Class**.
8. The data grid will list all Markups and / or Selling Price (Fixed Cost) based on a group - such as Part Category or Labour Type for example.

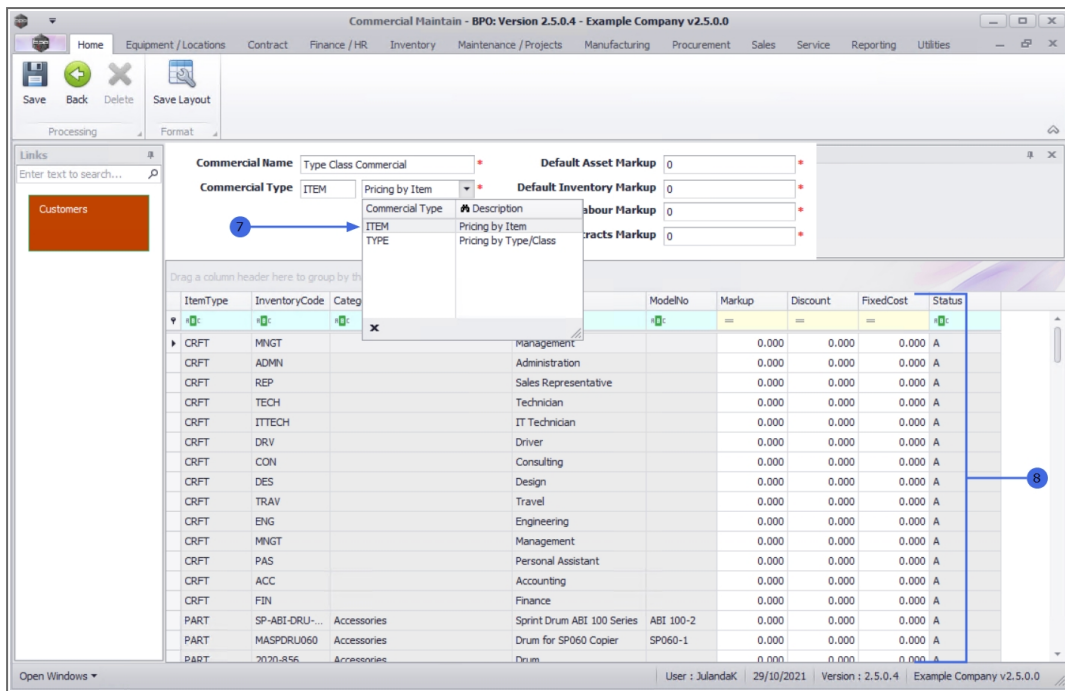


Note that you can only specify a markup and / or selling price based on a group - such as Part Category / Labour Type.

The screenshot shows the 'Commercial Maintain' window for 'Example Company v2.5.0.0'. The 'Commercial Name' is 'Type Class Commercial'. The 'Commercial Type' dropdown is set to 'TYPE', and its menu is open, showing options: 'TYPE', 'ITEM', and 'TYPE'. The 'Default Asset Markup' is 0. The 'Default Inventory Markup' is 0. The 'Labour Markup' is 0. The 'Contracts Markup' is 0. The data grid below has columns for 'Item Type', 'Category Desc', 'FixedCost', and 'Status'. The grid lists various categories like 'Accounting', 'Administration', 'Consulting', etc., with 'FixedCost' values of 0.000 and 'Status' values of 'A'. Blue arrows and numbers (4, 5, 6, 7, 8) highlight specific UI elements and the data grid.

Pricing by Item

7. Click on **ITEM - Pricing by Item**.
8. The data grid will list the specific discount and or selling price (fixed cost) for each individual item.



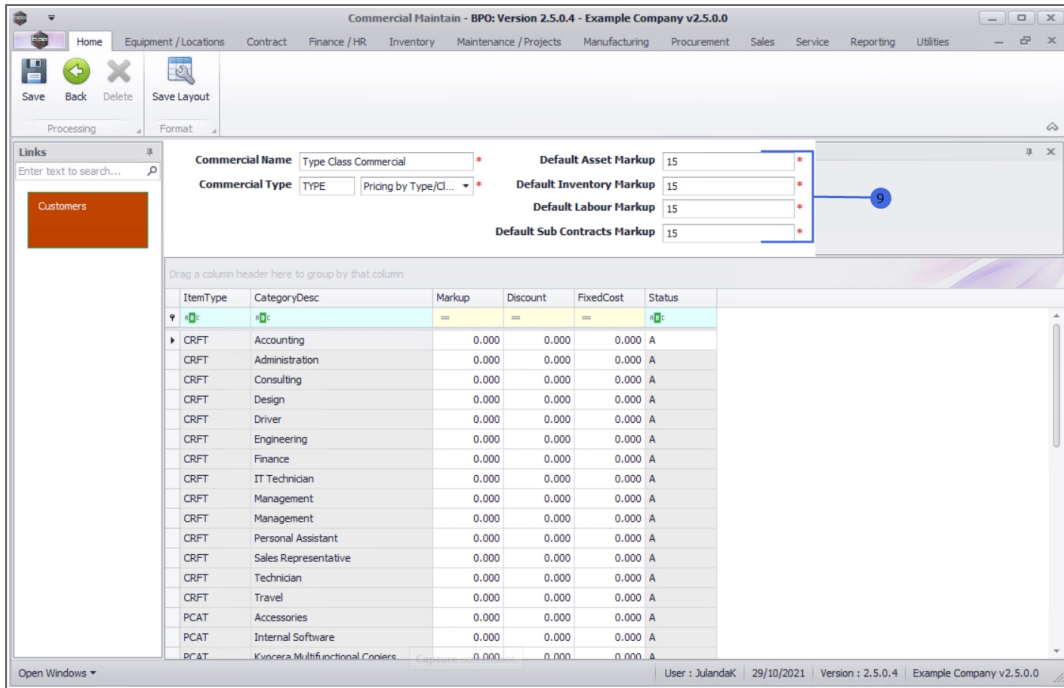
DEFAULT MARKUP

9. Specify the Default Markup for the Customer

- **Default Asset Markup:** Type in the default markup for a *serialised part sale*, if applicable.
- **Default Inventory Markup:** Type in the default markup for a *non-serialised part sale*, if applicable.
- **Default Labour Markup:** Type in the default markup for a *labour sale*, if applicable.
- **Default Sub Contracts Markup:** Type in the default markup for a *third-party subcontract sale*, if applicable.



Note: If the mark up has not been set up on a specific item, then the default mark up will apply.



COMMERCIAL SPECIFICS

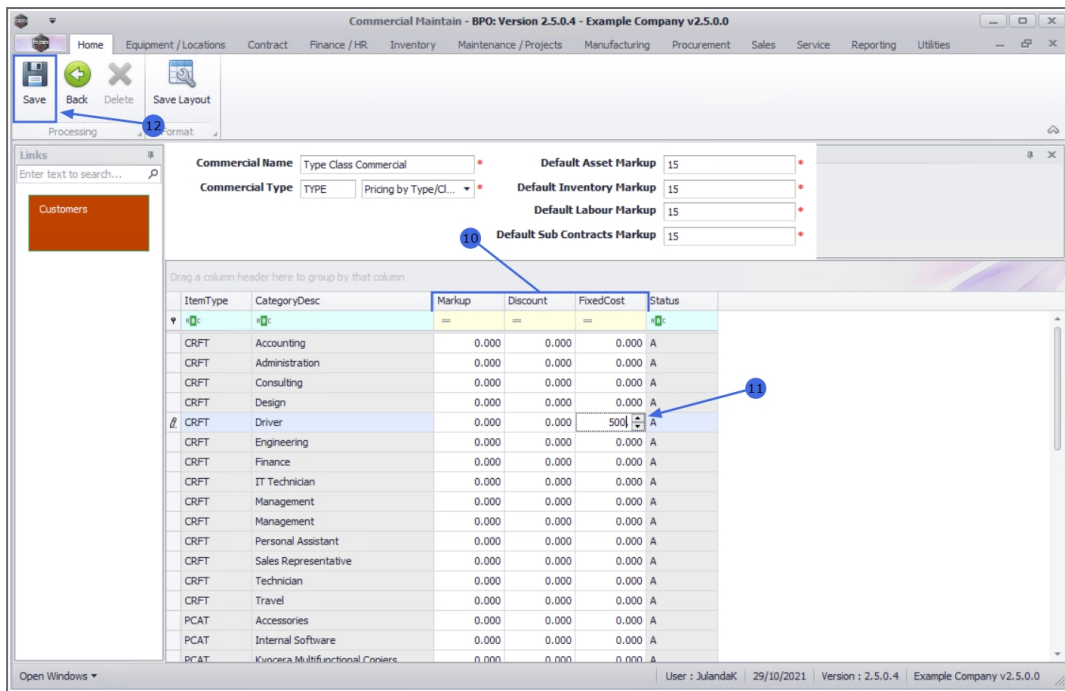
The commercial specifics grid displays the Markup, Discount and FixedCost for specific items, e.g. discount on a certain labour type, or a consumable item, etc.

- Click in the **MarkUp**, **Discount** or **FixedCost** column to set the amount for a specific item, e.g discount on a certain type of labour.

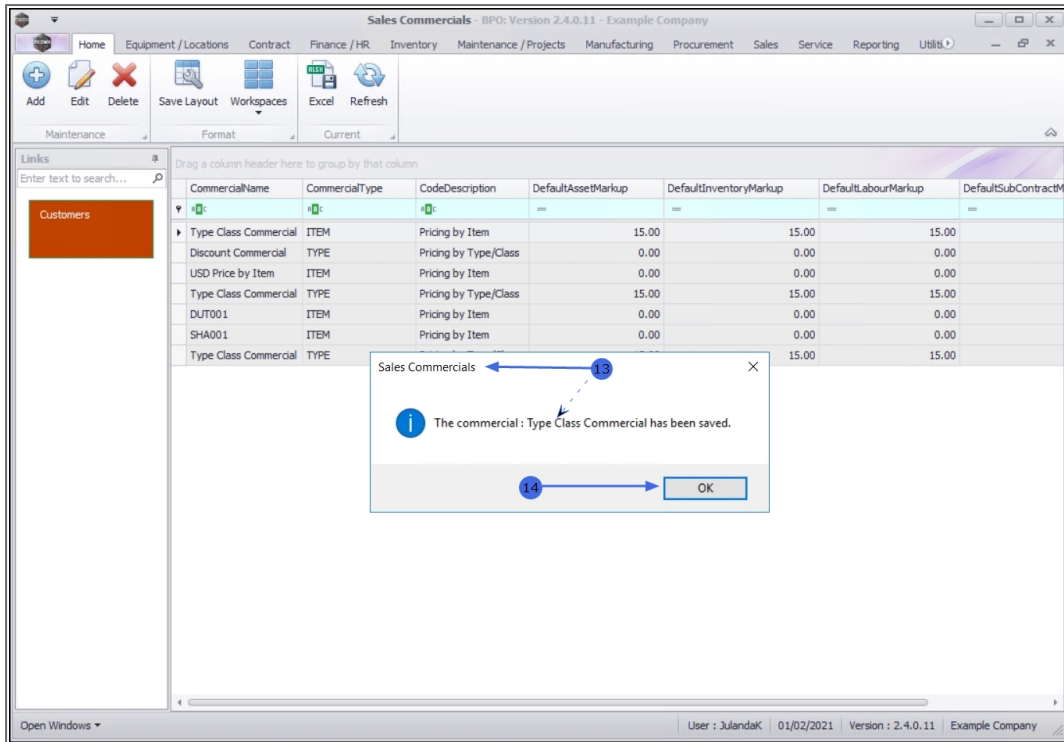


Note: The pricing details you specify will be the default price that will be reflected on the sales documents when it is created.

- Type in or use the **directional arrows** to add the amount.
- When all the Items have been updated, click on **Save**.



13. When you receive the **Sales Commercials** message to confirm;
 - **The Commercials : Type Class Commercial has been saved.**
14. Click on **OK**.



15. The **Sales Commercials** listing screen will be updated with the new commercial **Type/Class** created.
16. Click on the screen **Close** button to return to the **Sales Commercials** listing screen.
17. You can now continue to link a Customer to the Commercial . [For a detailed handling of this topic refer to Commercials - Link Customer to Commercial](#)

Windows Title: Sales Commercials - BPO: Version 2.4.0.11 - Example Company

Navigation: Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, Utiliti

Tools: Add, Edit, Delete, Save Layout, Workspaces, Excel, Refresh

Links: Customers

| CommercialName | CommercialType | CodeDescription | DefaultAssetMarkup | DefaultInventoryMarkup | DefaultLabourMarkup | DefaultSubContractM |
|-----------------------|----------------|-----------------------|--------------------|------------------------|---------------------|---------------------|
| Type Class Commercial | ITEM | Pricing by Item | 15.00 | 15.00 | 15.00 | |
| Discount Commercial | TYPE | Pricing by Type/Class | 0.00 | 0.00 | 0.00 | |
| USD Price by Item | ITEM | Pricing by Item | 0.00 | 0.00 | 0.00 | |
| Type Class Commercial | TYPE | Pricing by Type/Class | 15.00 | 15.00 | 15.00 | |
| DUT001 | ITEM | Pricing by Item | 0.00 | 0.00 | 0.00 | |
| SHA001 | ITEM | Pricing by Item | 0.00 | 0.00 | 0.00 | |
| Type Class Commercial | TYPE | Pricing by Type/Class | 15.00 | 15.00 | 15.00 | |

Footer: Open Windows | User : JulandaK | 01/02/2021 | Version : 2.4.0.11 | Example Company

MNU.067.001