

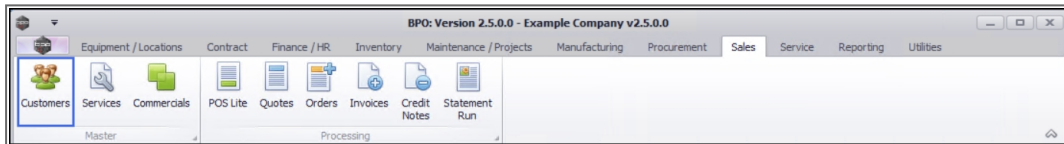
We are currently updating our site; thank you for your patience.

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.

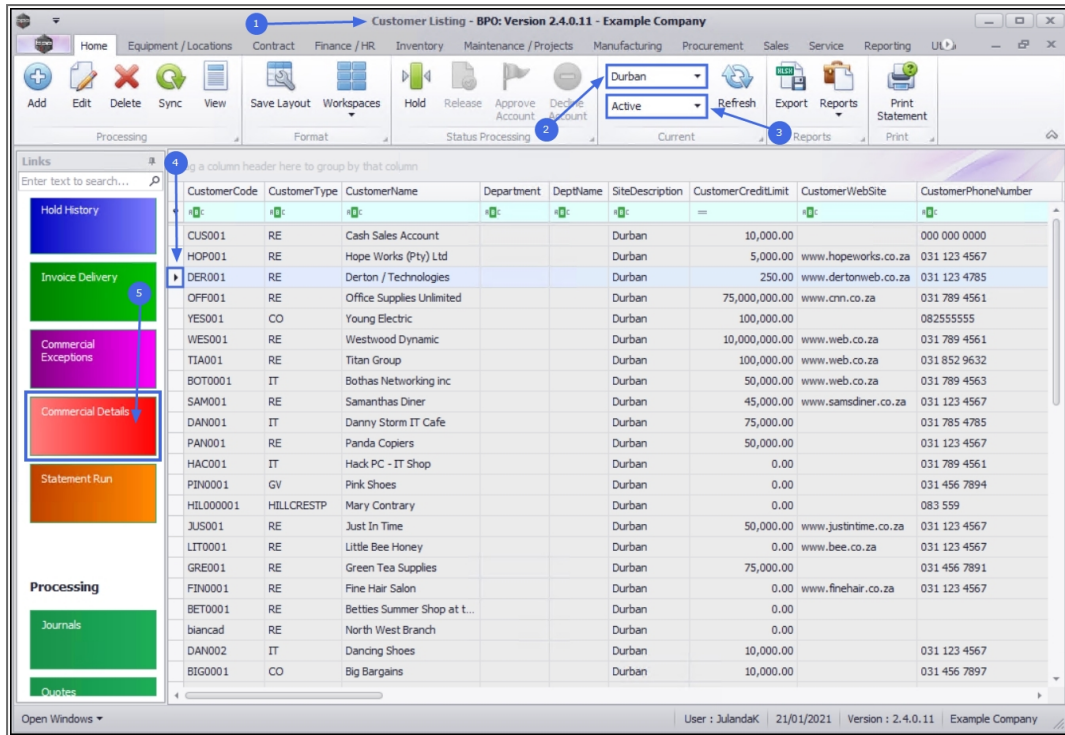
Ribbon Access: Sales > Customers



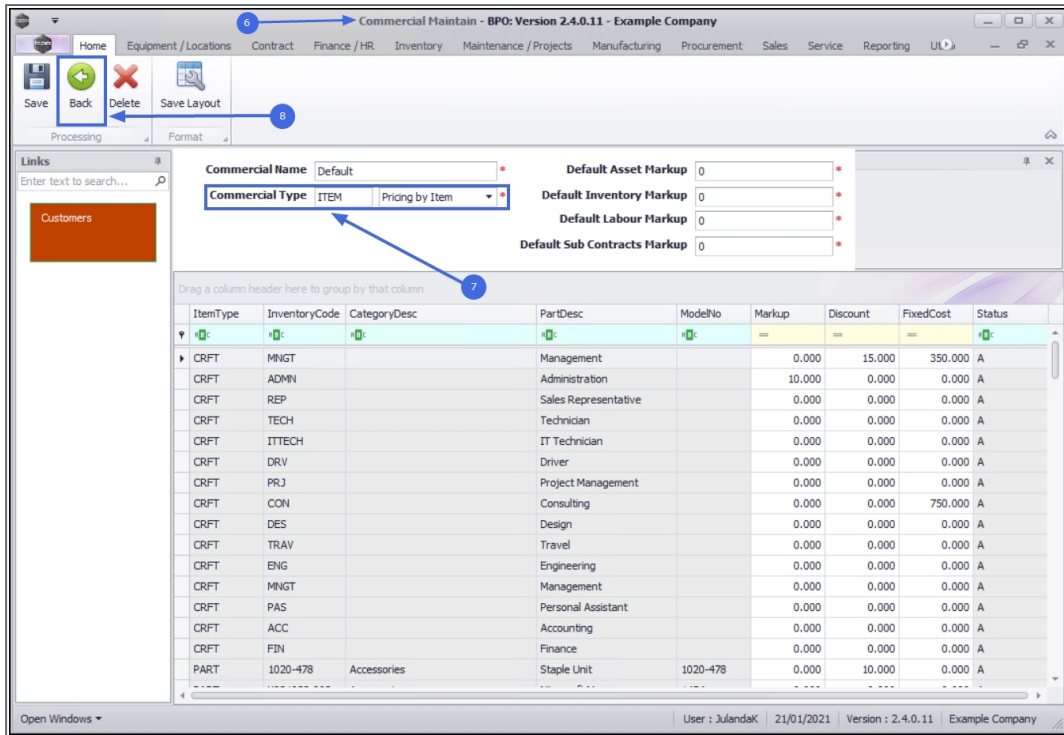
1. The **Customer Listing** screen will be displayed.
2. Select the **Site** where the customer can be located.
 - The example has **Durban** selected.
3. Select the **Status** of the customer you wish to view.
 - The example has **Active** selected.

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.

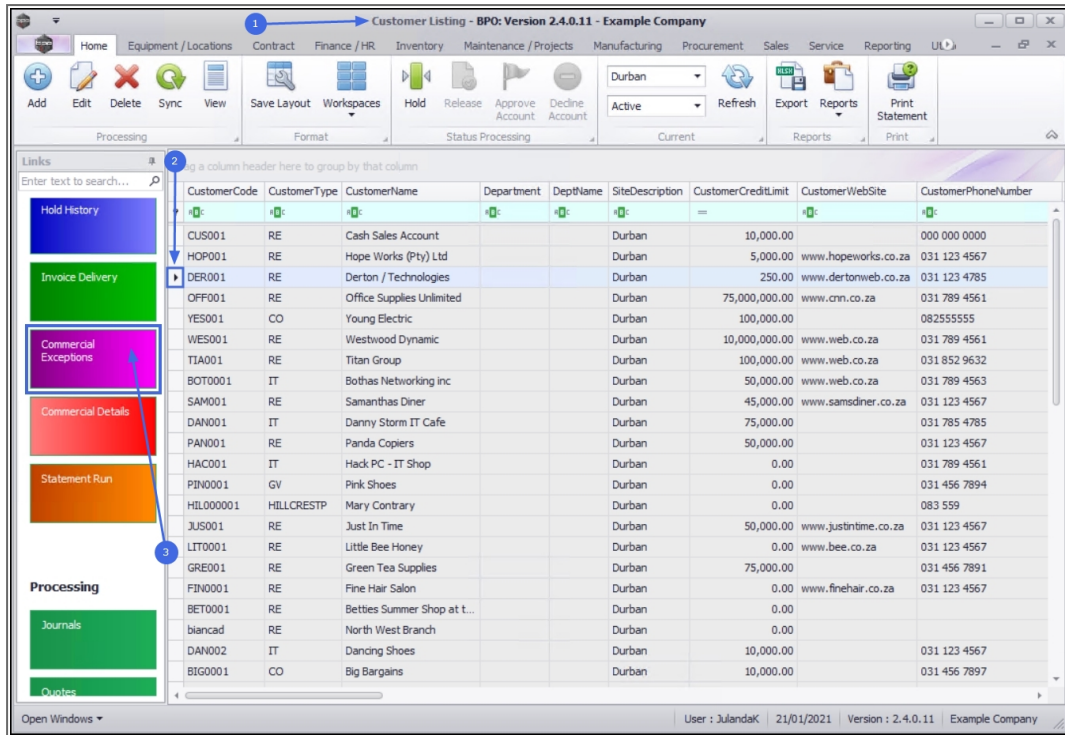


6. The **Commercial Maintain** screen will display.
7. From this screen you can view which **Commercial Type** the selected customer is linked to.
 - The example has the selected customer linked to an **Item - Pricing by Item** commercial type.
8. Click on **Back** to return to the Customer Listing screen.



COMMERCIAL 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.



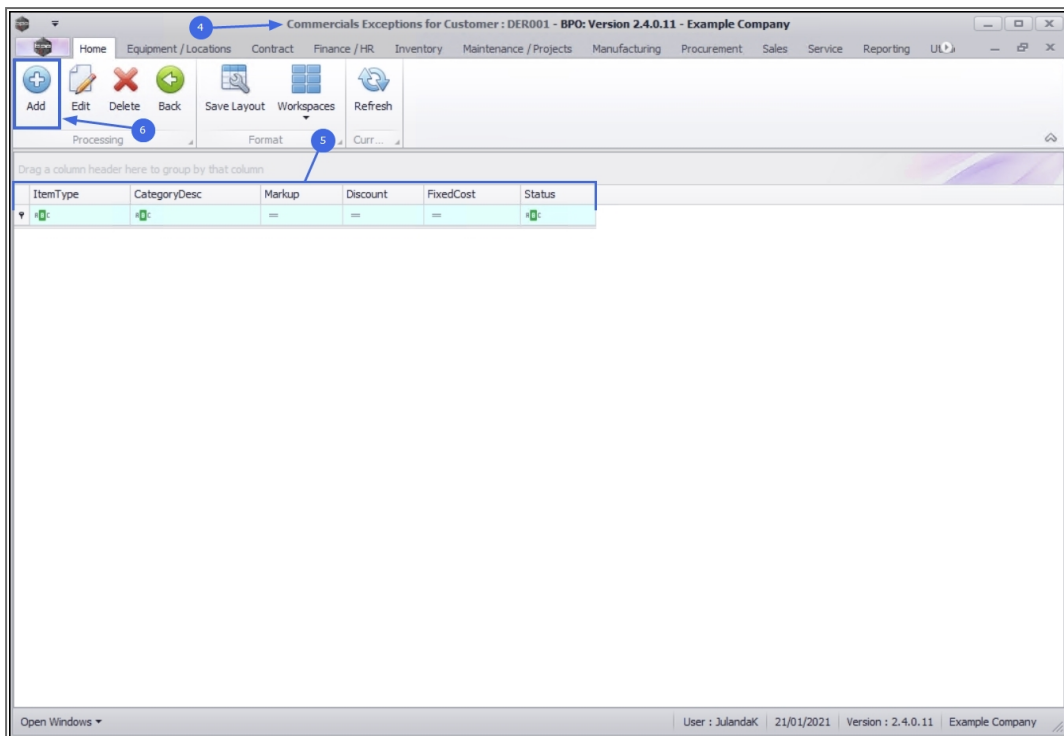
- The **Commercial Exceptions for Customer: [customer code]** screen will display.
- Exceptions already linked to this commercial, will be listed in this screen.

ADD EXCEPTION

- Click on **Add**.



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



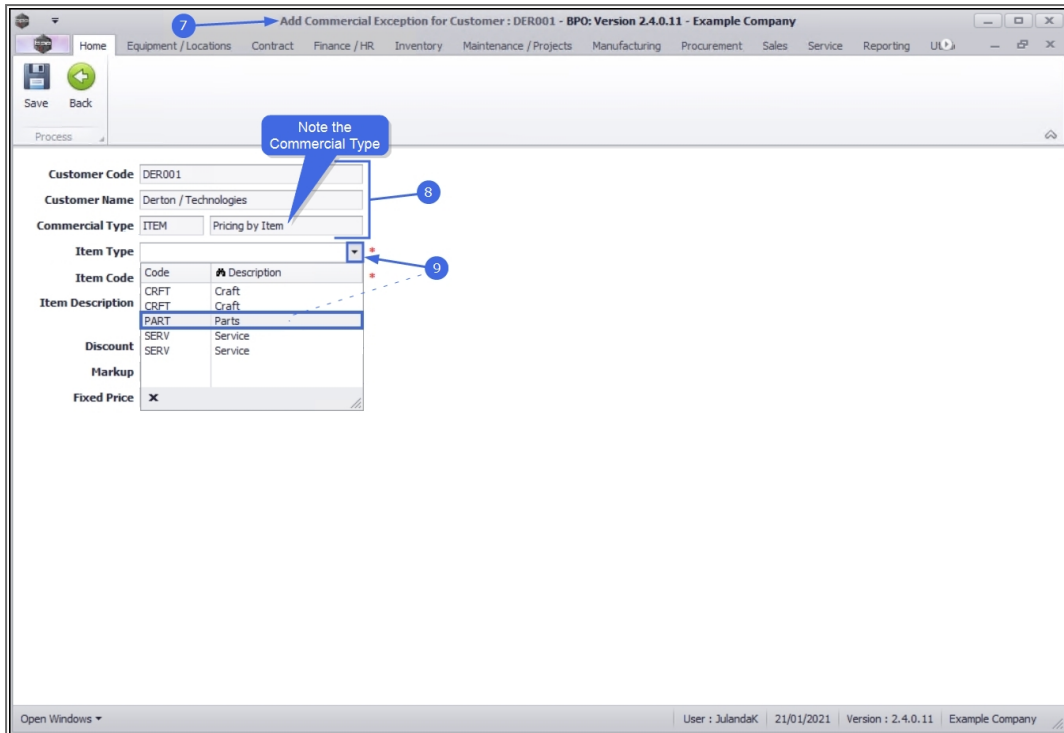
Exception Details

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.



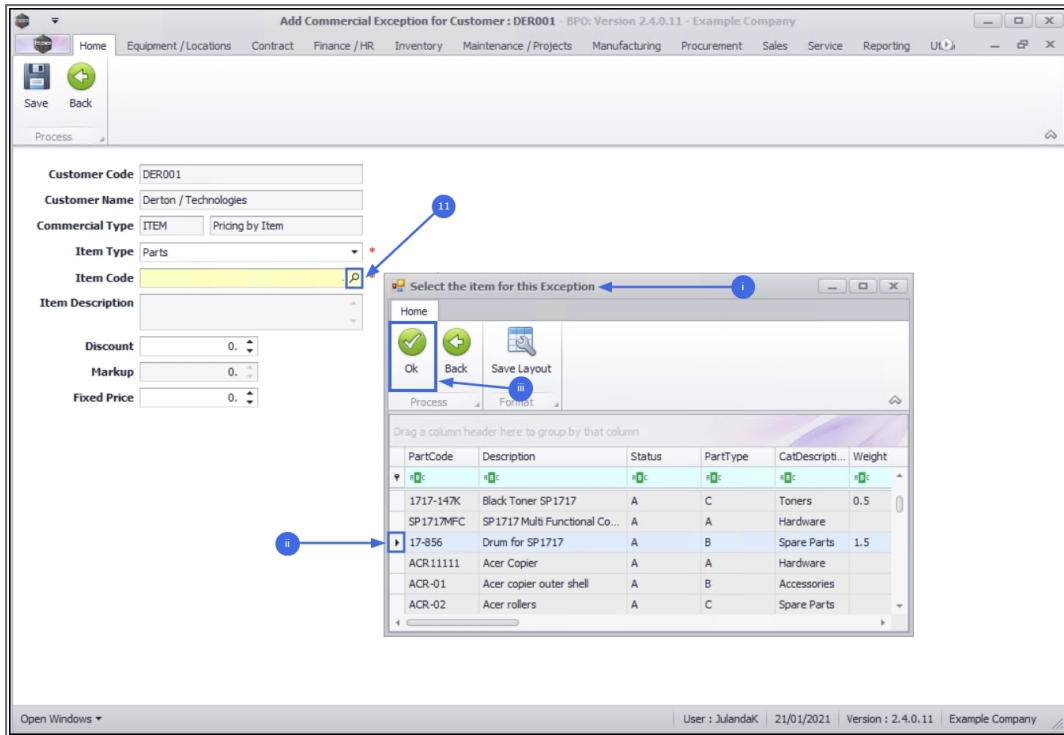
Note that the Commercial Type is **ITEM - Pricing By Item**.

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**.



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 Price**¹ 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.

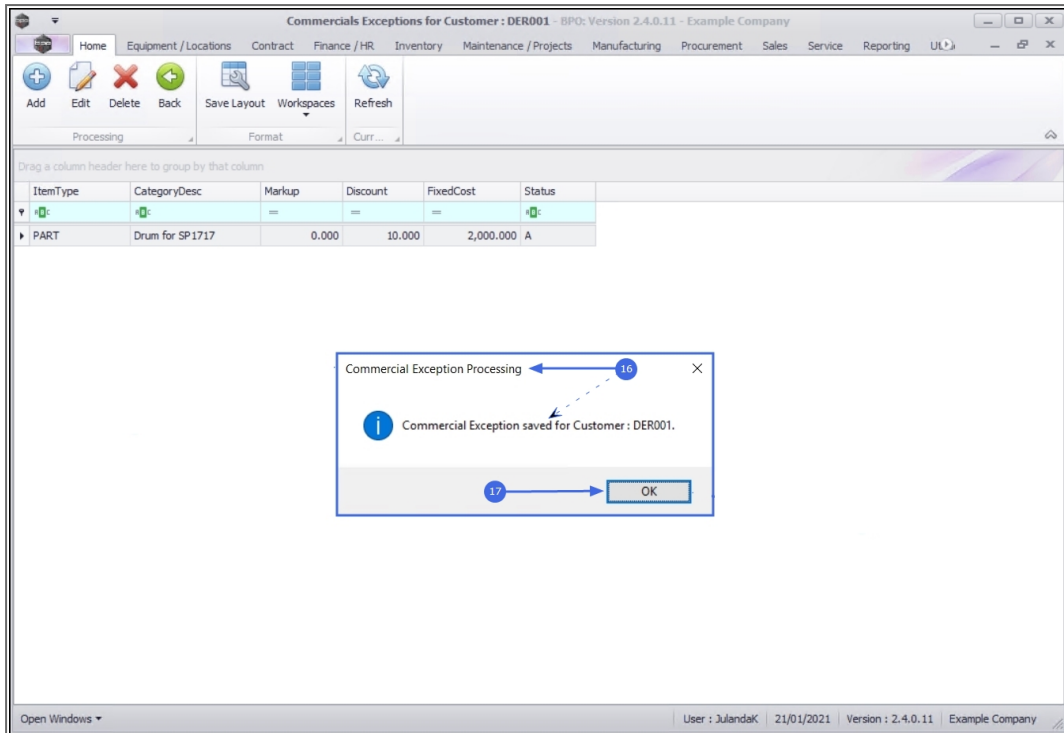
SAVE EXCEPTION

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

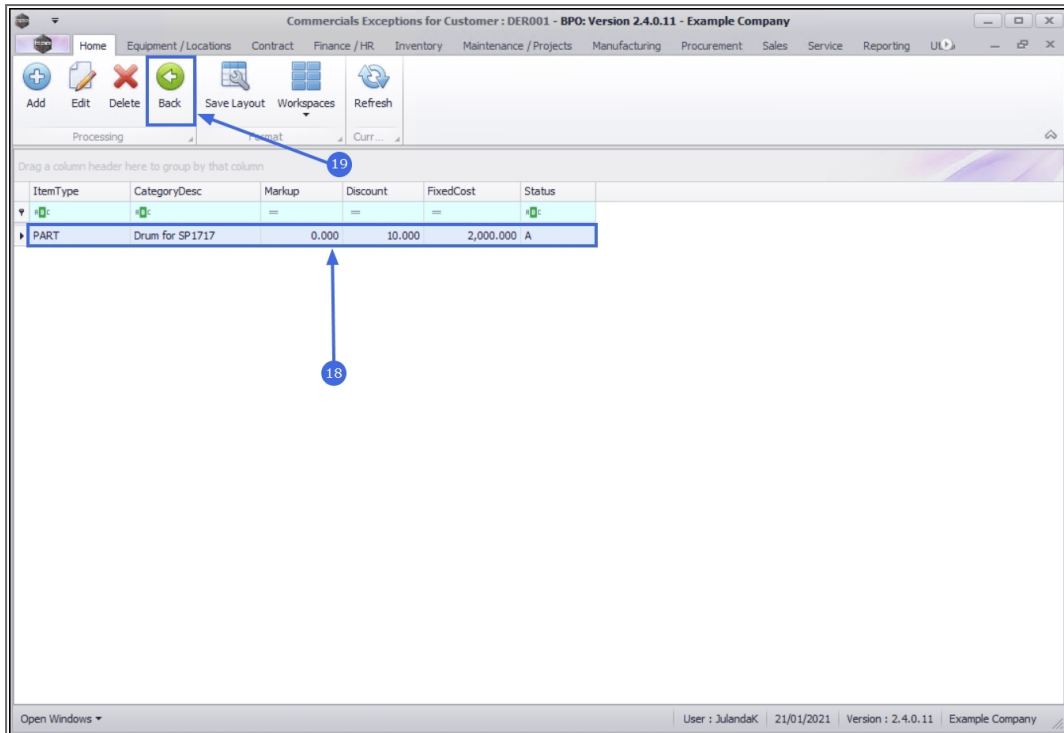
16. When you receive the **Customer Exceptions Processing** screen to confirm;

- **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

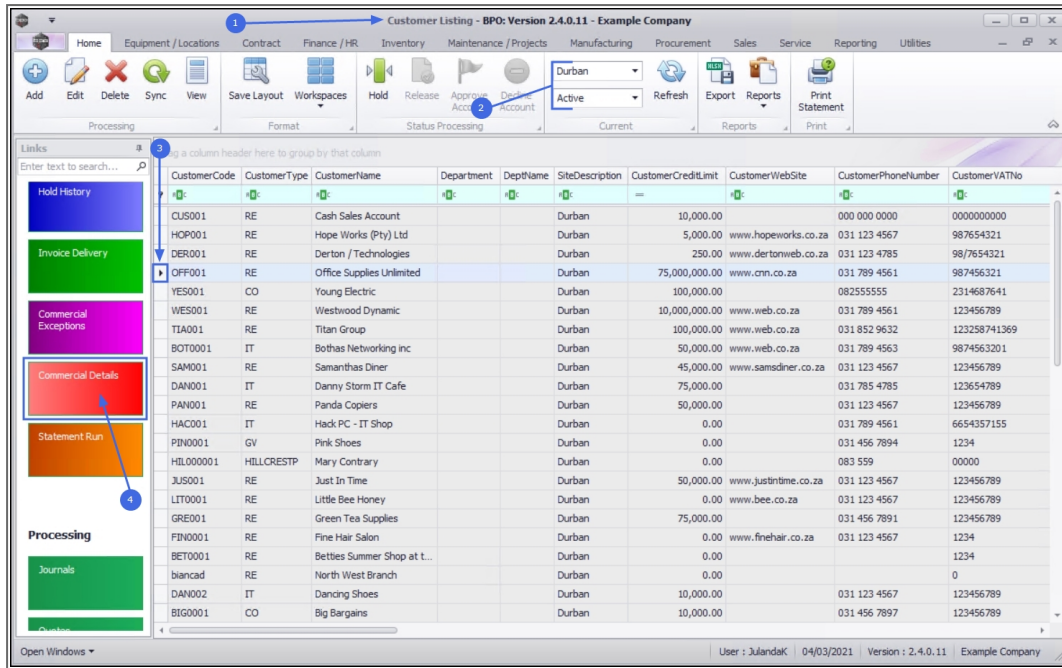


Note that this selection is category specific.

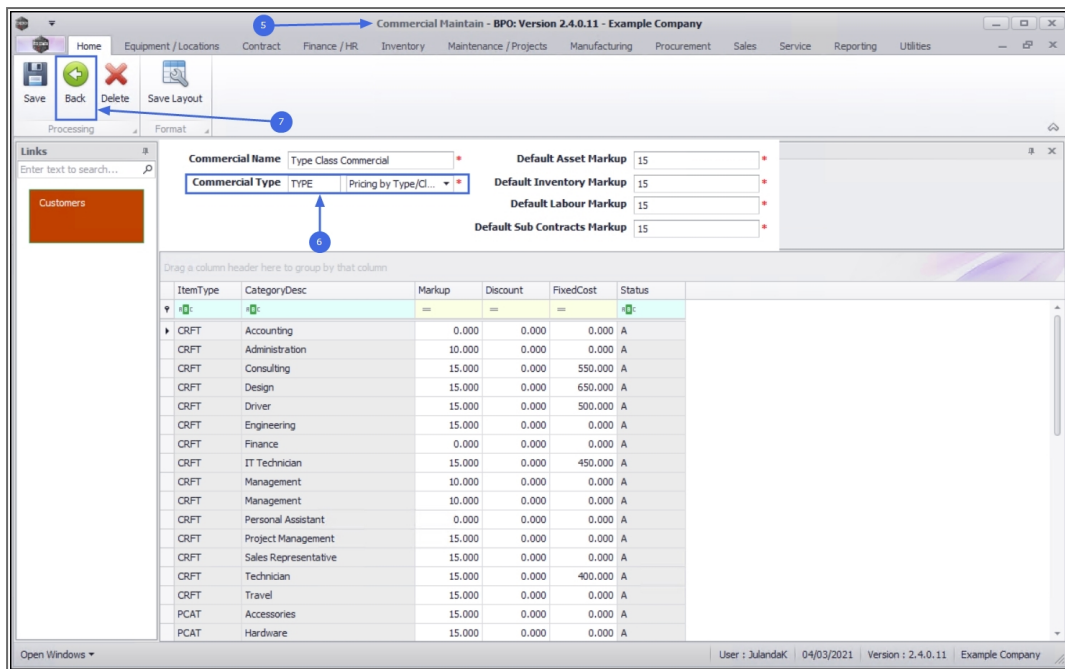
1. From the **Customer Listing** screen,
2. Select the correct **Site** and **Status** to narrow your customer filter parameters.

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.

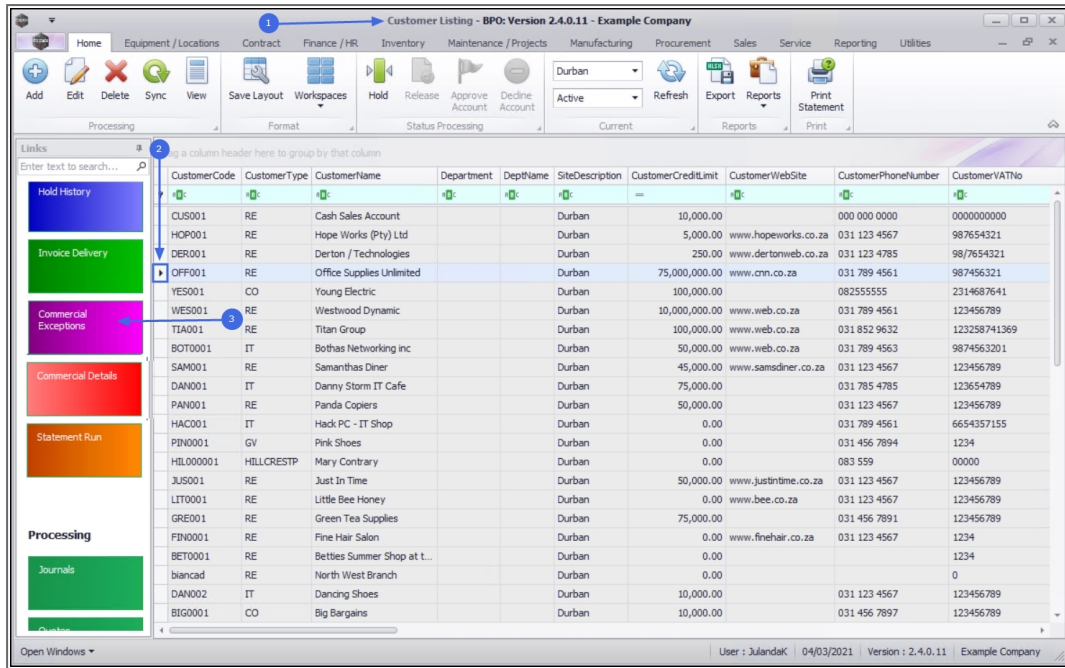


5. The **Commercial Maintain** screen will be displayed.
6. From this screen you can view which **Commercial Type** the selected customer is linked to.
 - The example has the selected customer linked to the **Type - Pricing by Type/Class** commercial type.
7. Click on **Back** to return to the **Customer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



ADD EXCEPTION

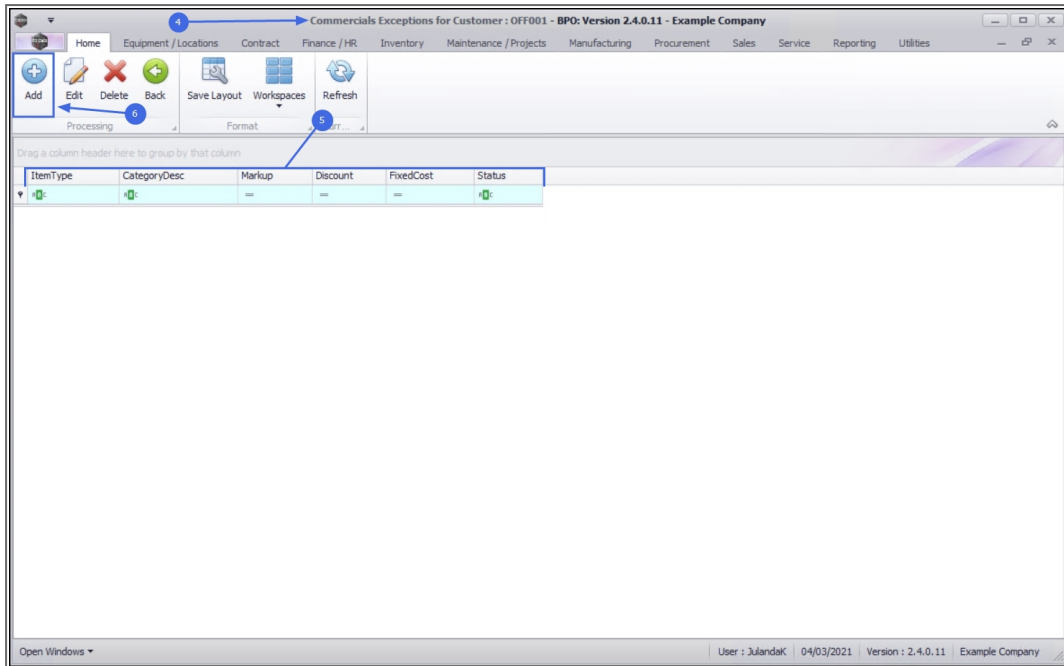
1. From the **Customer Listing** screen,
2. Ensure that the **same customer** is still selected.
3. Click on the **Commercial Exceptions** tile.



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



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



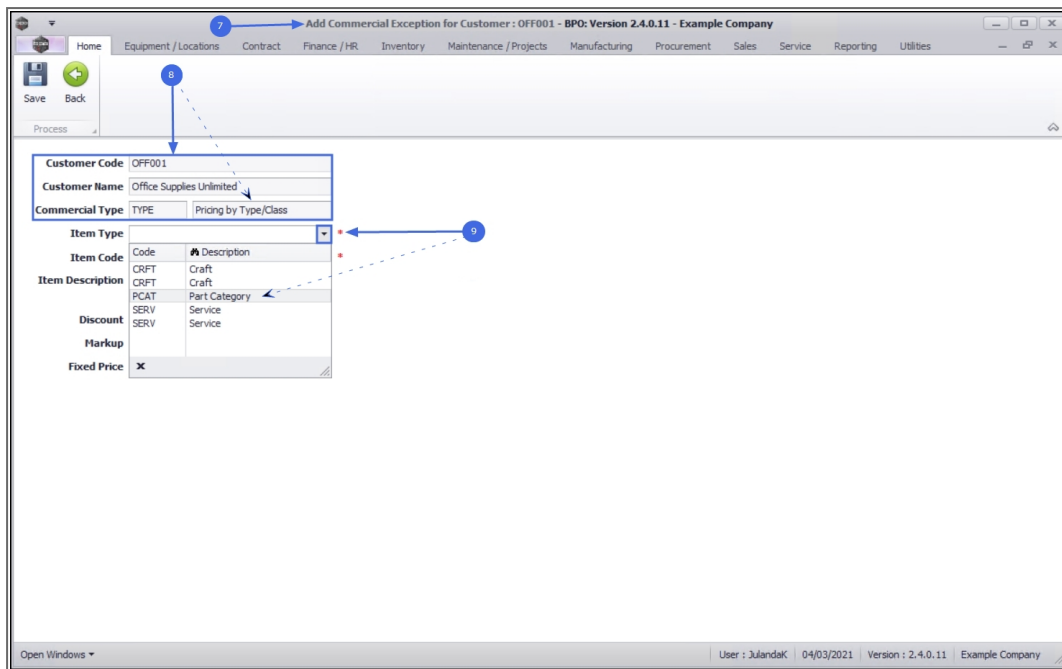
Exception Details

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



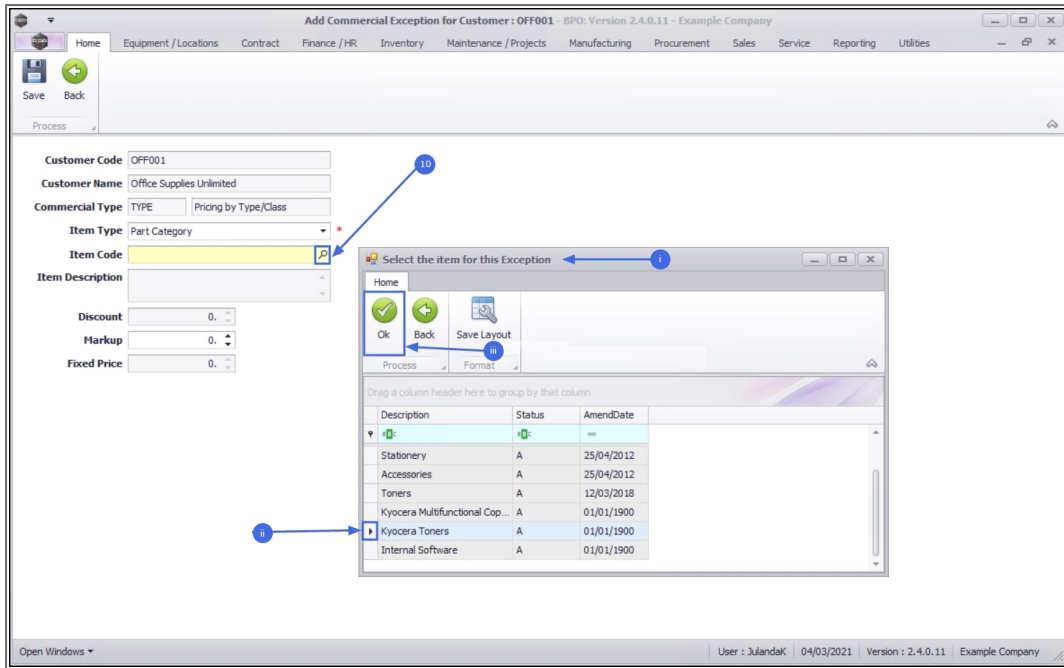
You will note that the Commercial Type is Pricing by Type/Class.

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.



Exception Item

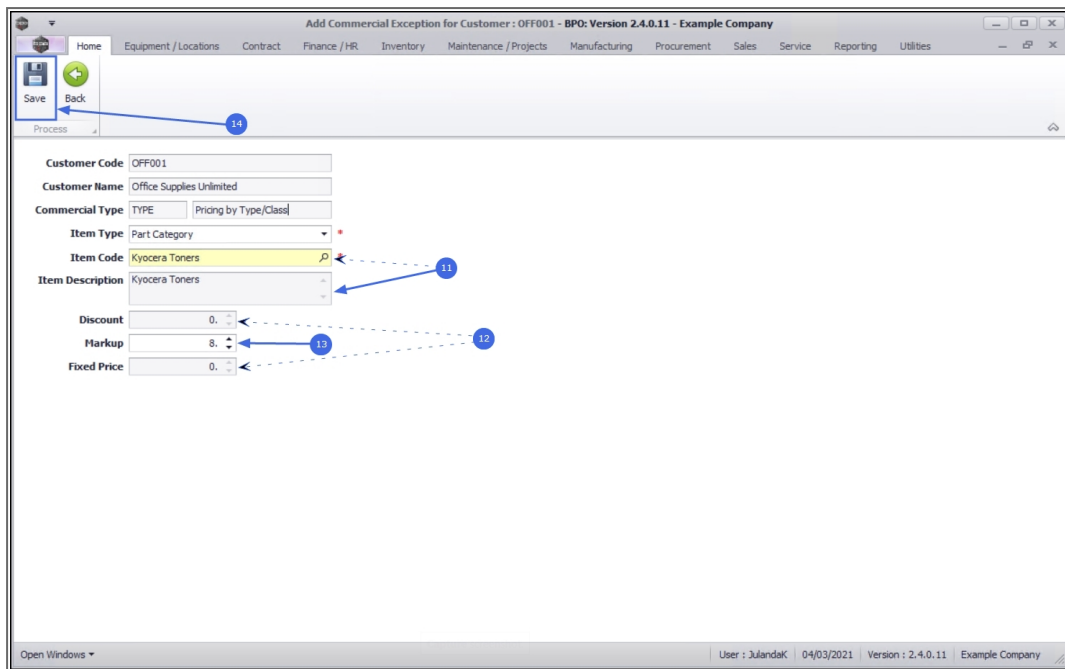
10. **Item Code:** To select the item code, click on the **search** button.
 - i. The **Select the item for this Exception** screen will be displayed.
 - ii. Click in the **row** of the **item** you wish to create the exception for.
 - iii. Click on **OK**.



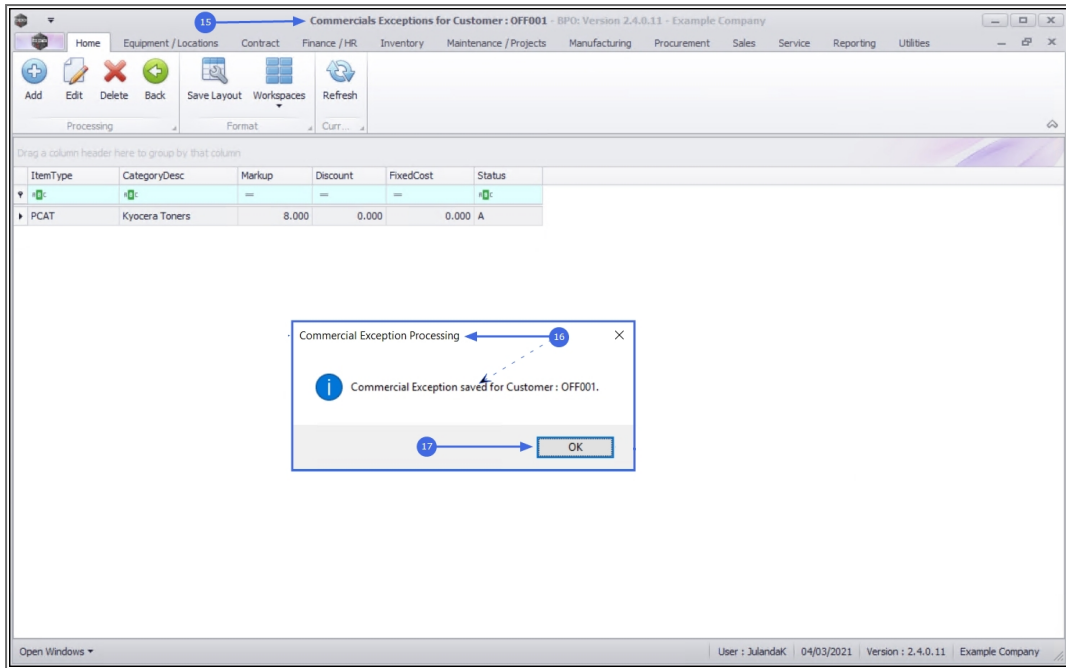
11. **Item Description:** The item description will auto populate with the description of the Item Code selected.
12. The **Discount** and **Fixed Price** fields cannot be edited as this process is linked to a customer with **Pricing By Type/Class** commercial.
13. **Markup:** Type in or use the **arrow**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

SAVE THE EXCEPTION

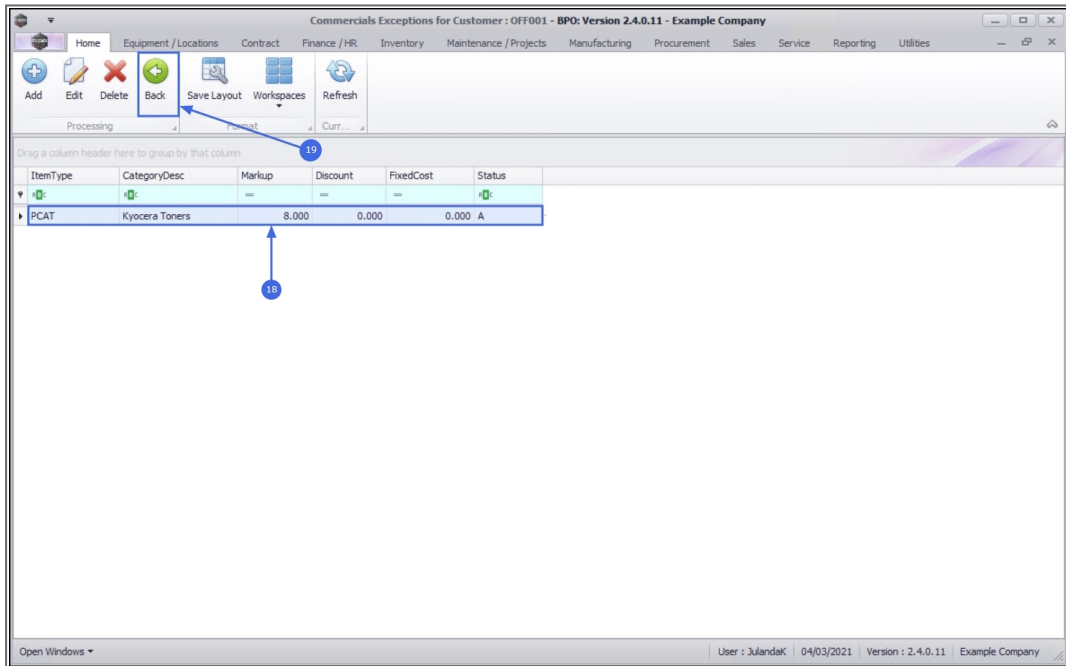
14. When you have finished adding details to this screen, click on **Save**.



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**.



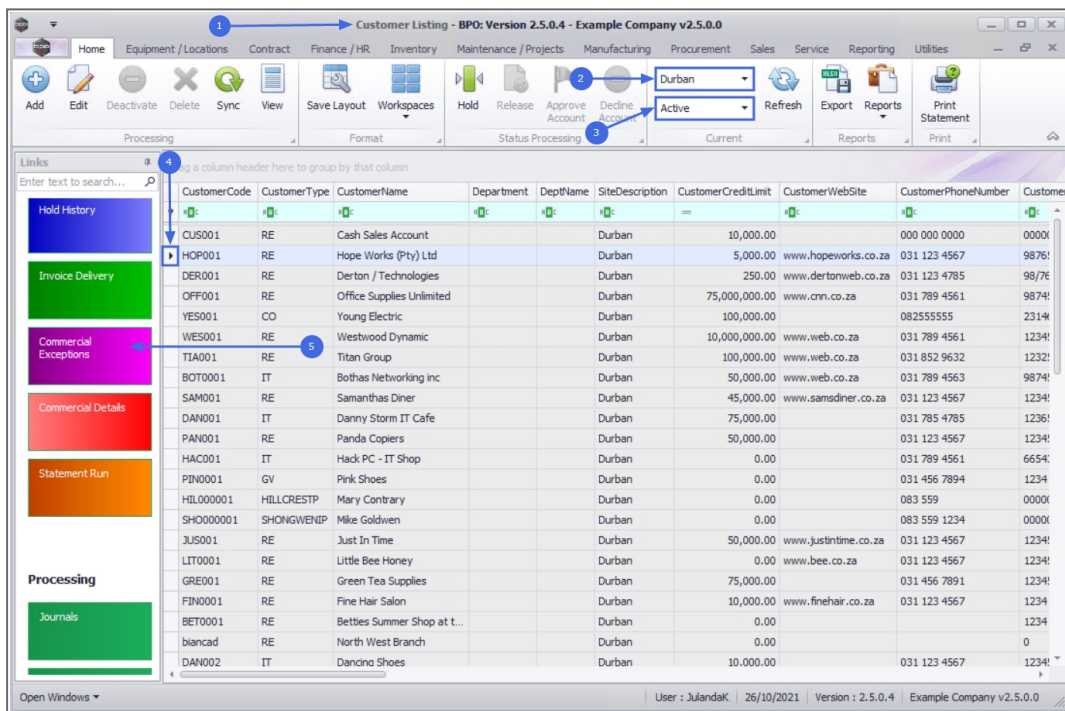
- 18. The **Commercials Exceptions for Customer** screen has been updated with the exception you have linked for the customer.
- 19. Click on **Back** to return to the Customer Listing screen.



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.

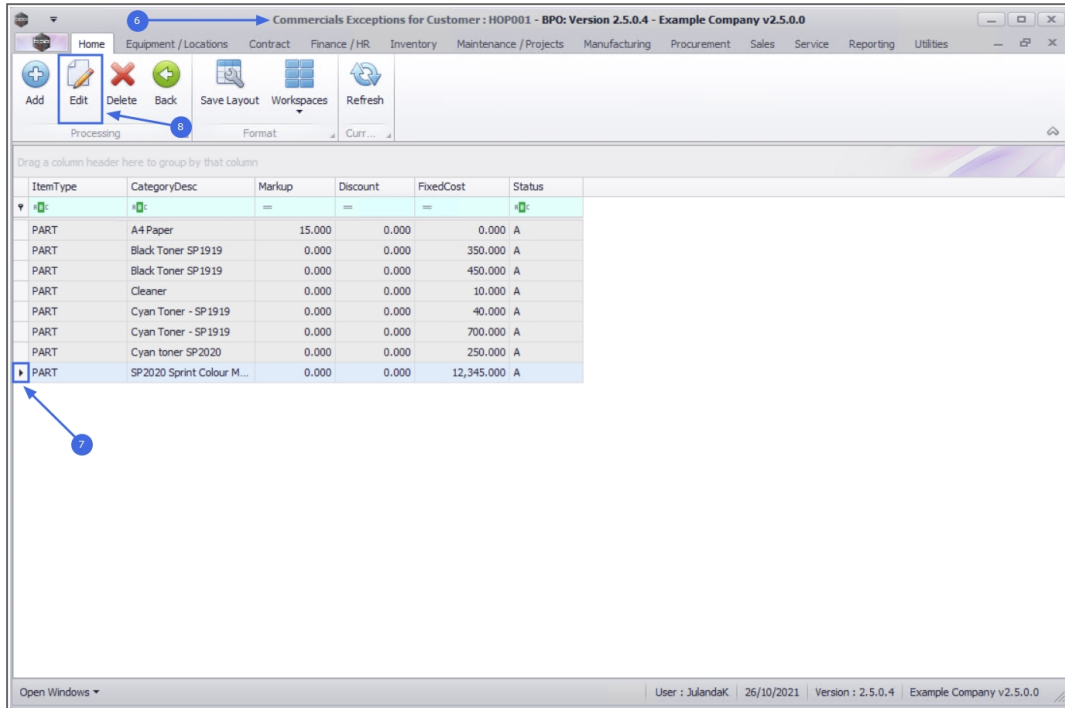


6. The **Commercials Exceptions for Customer :[customer code]** screen will display.

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



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

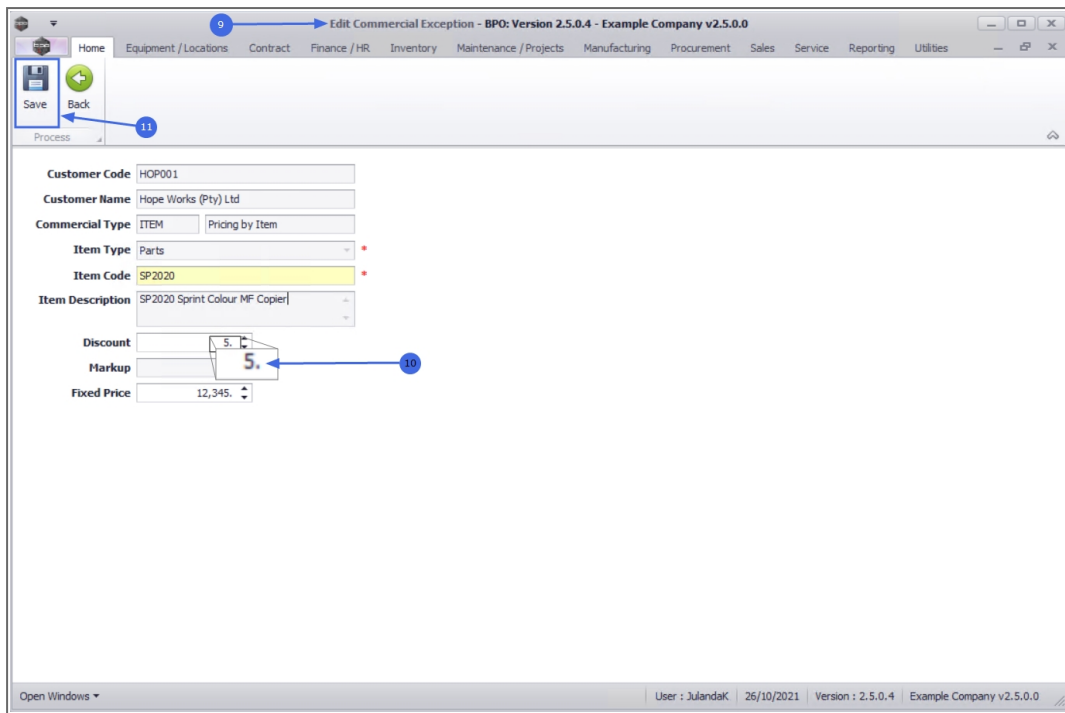


- The Edit Commercial Exception screen will display.



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.

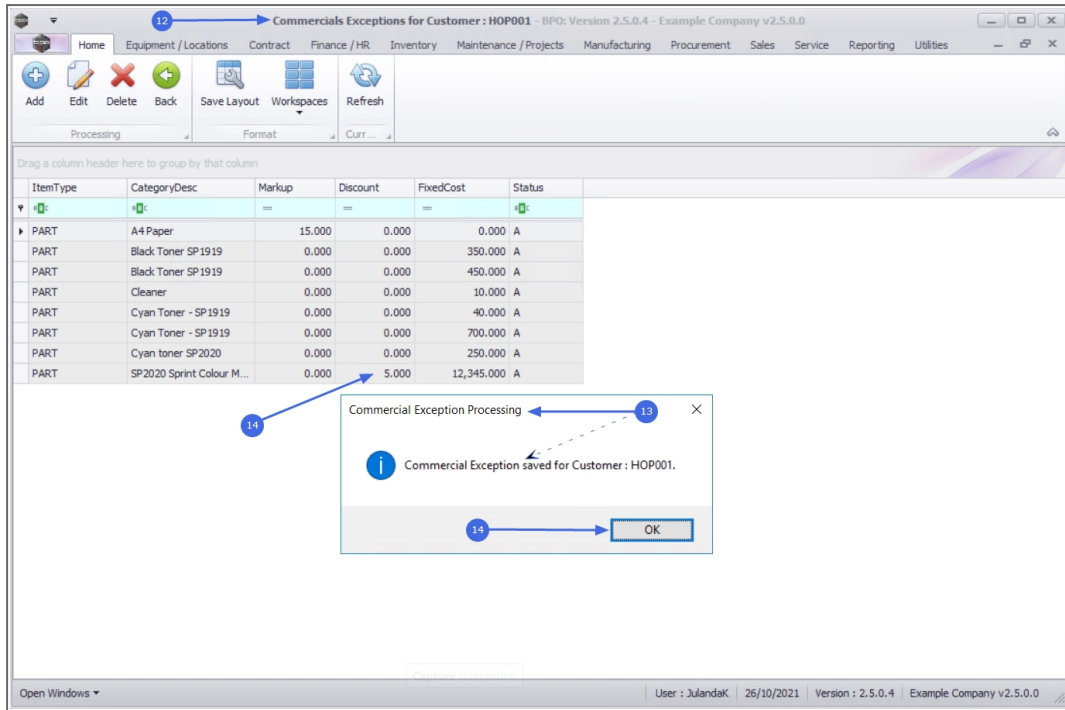
- The example has updated the **Discount** to **5%** for the selected item.
- Click on **Save** when you have made the necessary changes.



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**.



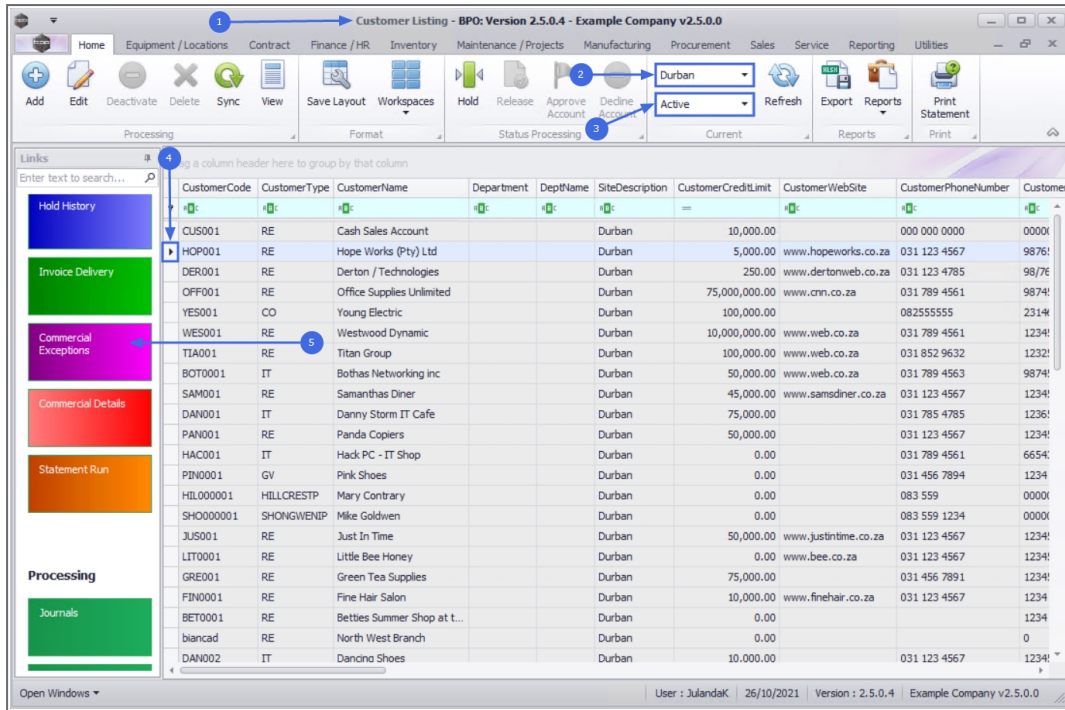
Note that the discounted amount has been updated with the percentage adjustment made.



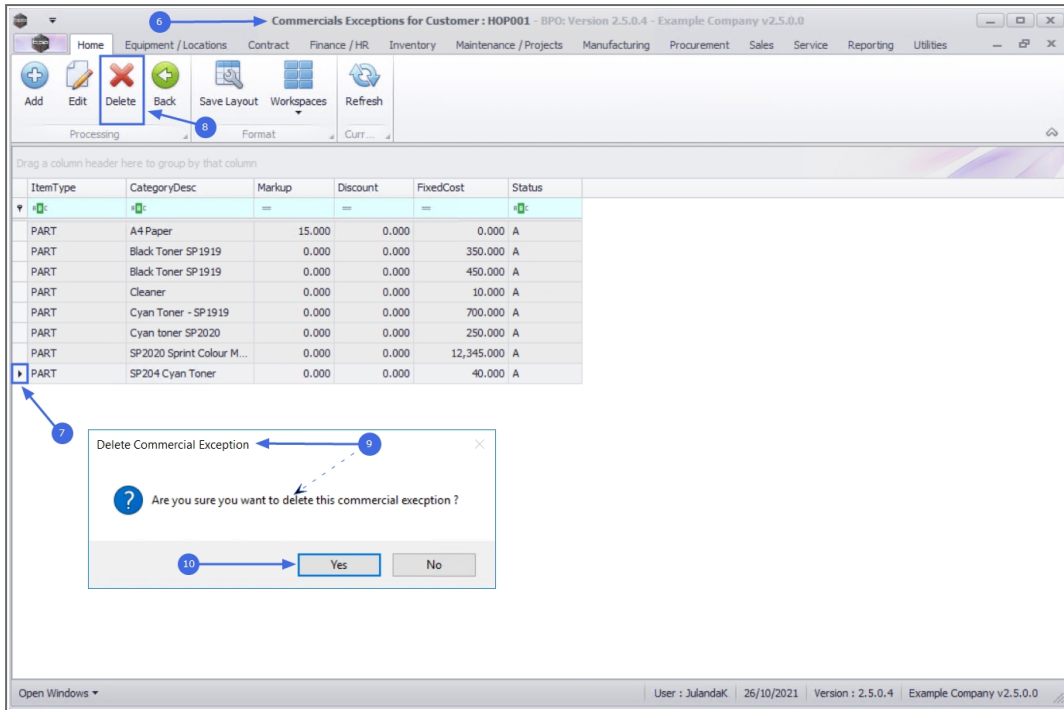
DELETE COMMERCIAL EXCEPTION

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.

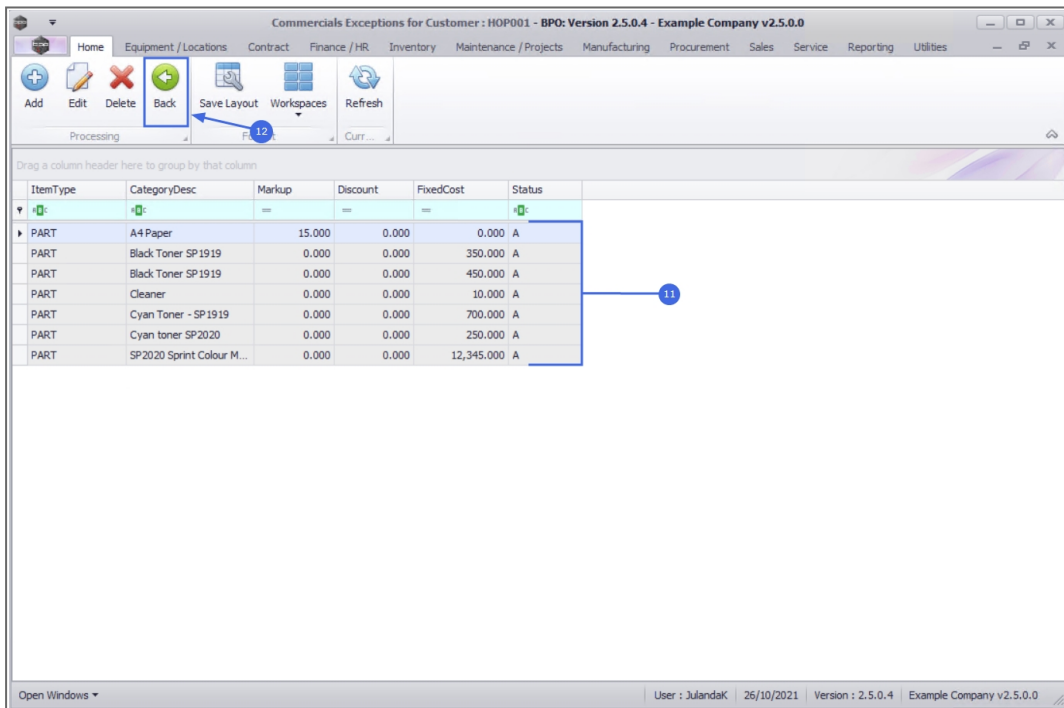


6. The **Commercials Exceptions for Customer** : [customer code] screen will display.
7. Select the **row** of the commercial exception you wish to remove.
8. Click on **Delete**.
9. When you receive the **Delete Commercial Exception** message to confirm;
 - **Are you sure you want to delete this commercial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