

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

## 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.

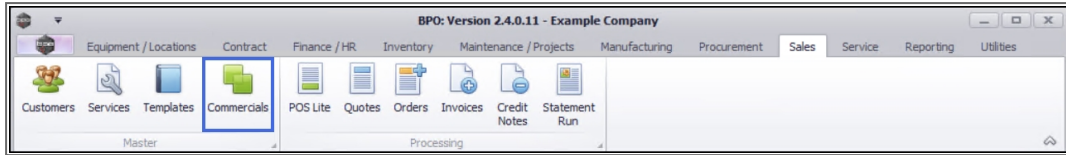
For the commercial type - **Pricing by Type / Class** , you can only specify **markups** and / or **selling price** per Craft, per Part Category or per Service Item Type.

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

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**Ribbon Access:** Sales > Commercials

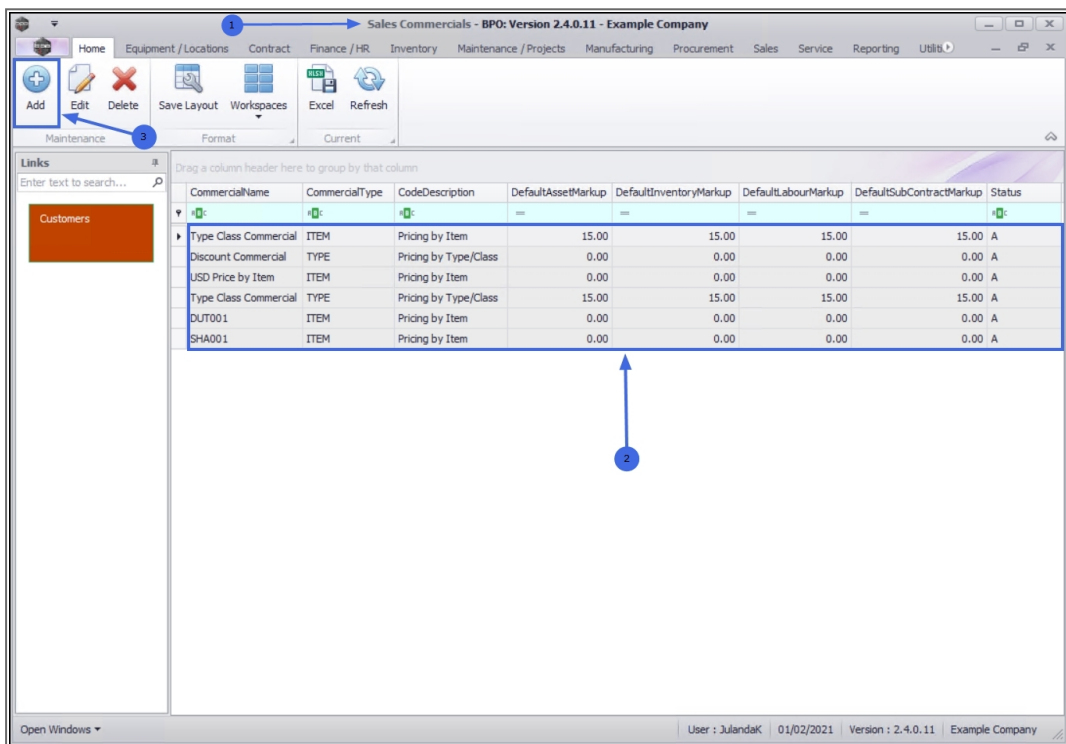
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1. The **Sales Commercials** screen will be displayed.
2. From here you can view a list of all your sales commercials with the default mark ups that have already been created.
3. Click on **Add** to create a new sales commercial.



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.

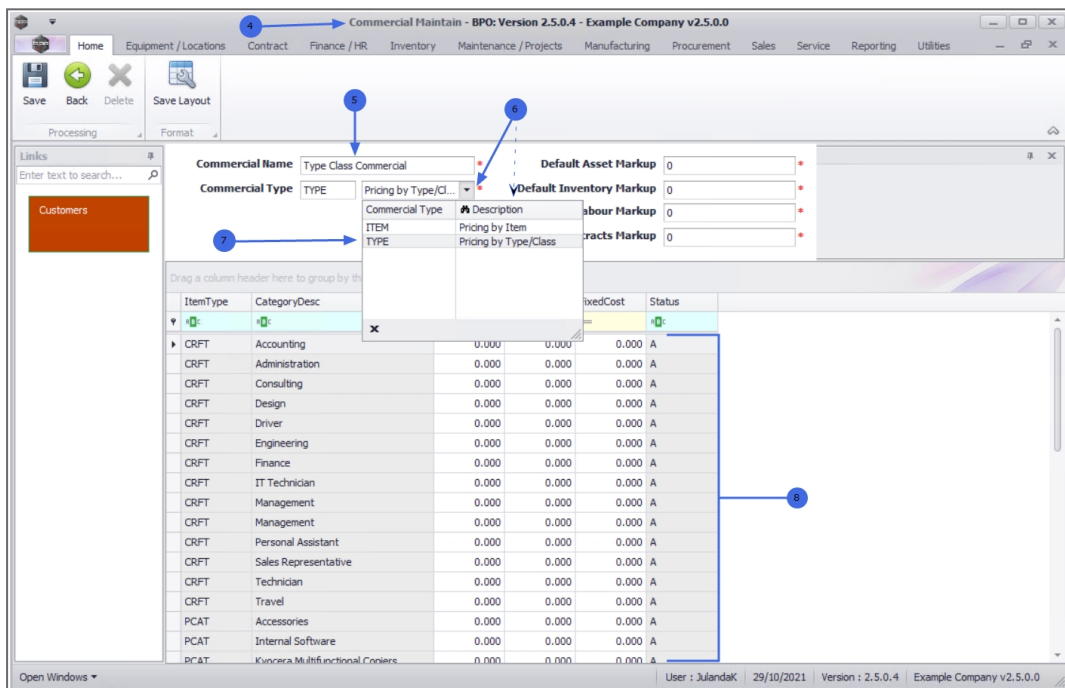
6. **Commercial Type:** Click on the **search** button to display the Commercial Type drop-down menu.

## 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.

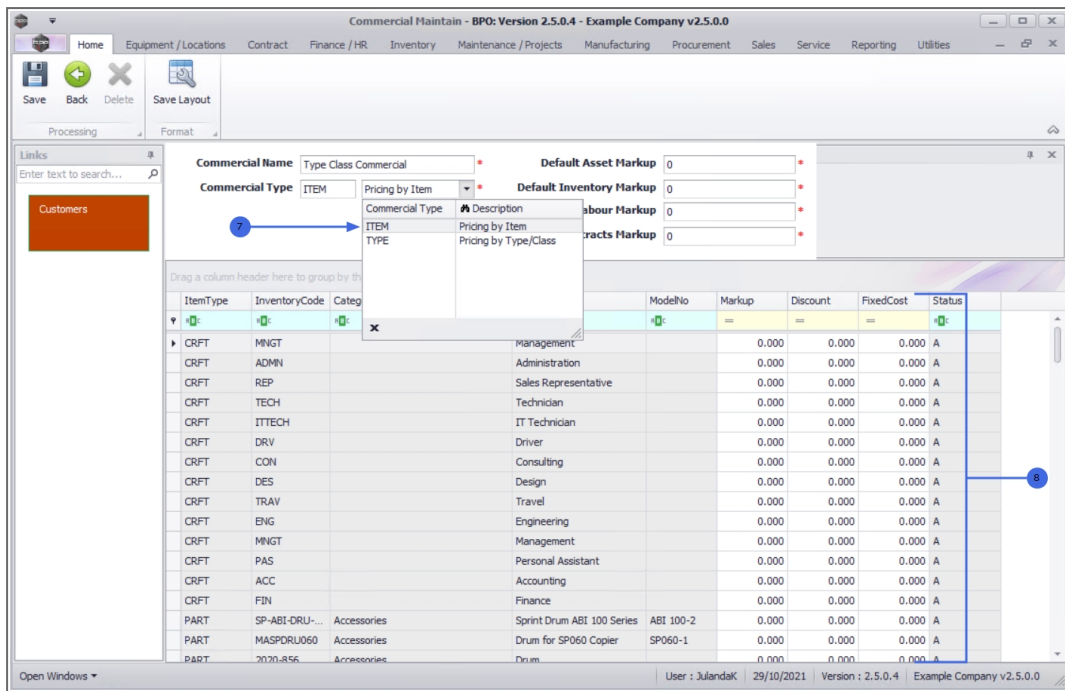


Note that you can only specify a markup and / or selling price based on a group - such as Part Category / Labour Type.



## 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.



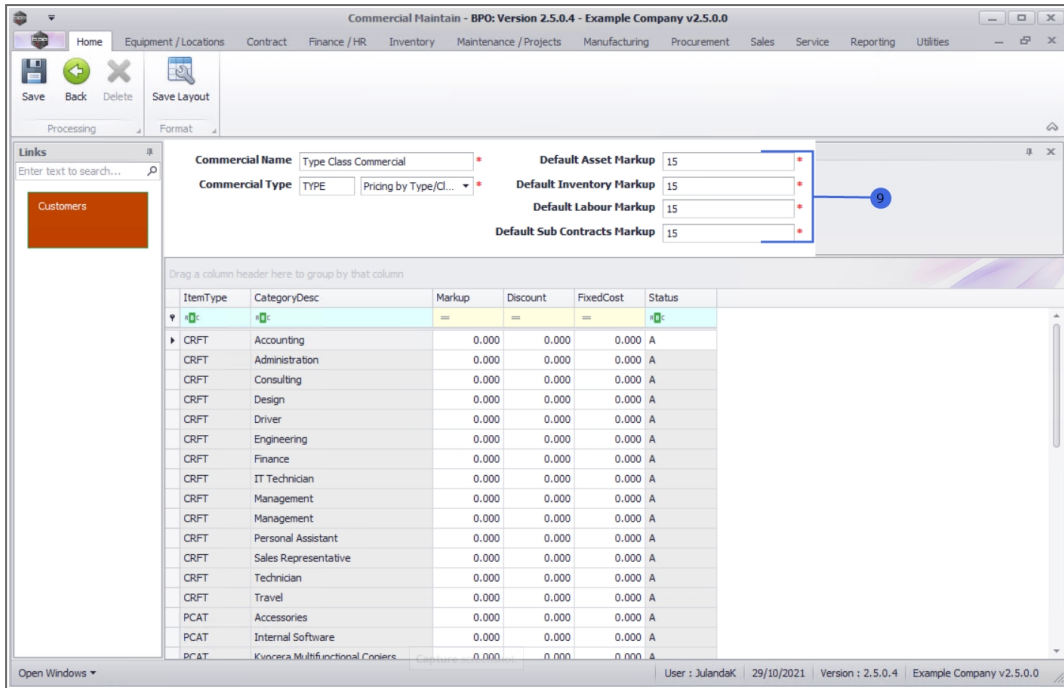
## DEFAULT MARKUP

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

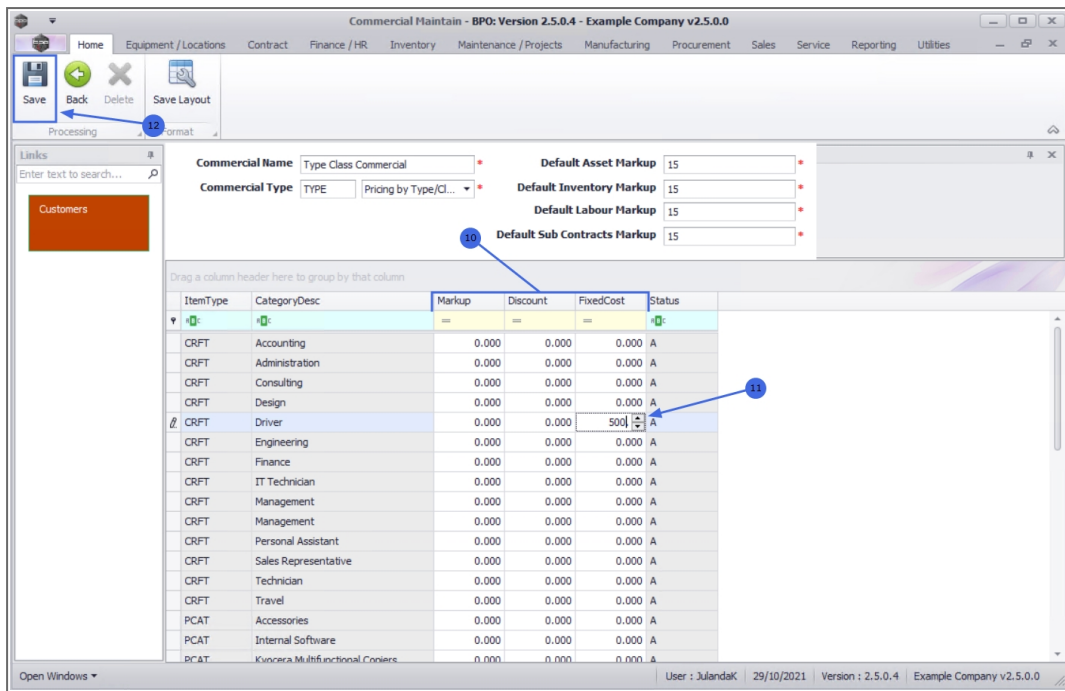
The commercial specifics grid displays the Markup, Discount and FixedCost for specific items, e.g. discount on a certain labour type, or a consumable item, etc.

- 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.

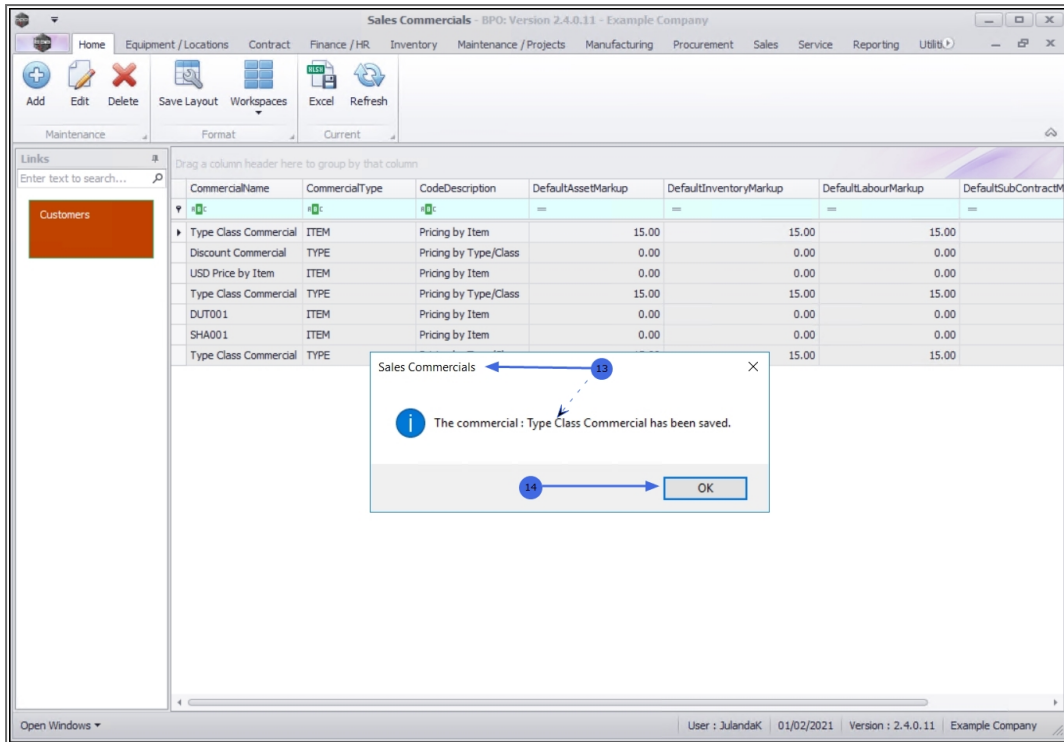


**Note:** The pricing details you specify will be the default price that will be reflected on the sales documents when it is created.

- 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 bar: Sales Commercials - BPO: Version 2.4.0.11 - Example Company

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

Buttons: 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	

Status bar: User : JulandaK | 01/02/2021 | Version : 2.4.0.11 | Example Company

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