

Selling Quantity Breaks Transcript

You can set up quantity break pricing so that each time you sell a certain amount of an item, you can give the customer a discounted price. We'll show you how by adding a Product Specific Quantity Break and then a System break. Then we'll assign the discounts to products and set the associated Selling Price Rule option. Finally, we'll look at adding products with quantity price breaks to sales orders.

From the Products view, find and open the Properties for a product, and then open the Selling tab. Beside the Quantity Break dialog box, click the New icon. The system adds a Code and Name automatically. This Quantity Break will be for this product and the Default Branch only.

Now determine the quantities and pricing for each break level. For the first one, set the Qty From value to 12 and the Qty To to 23. Then select the Value Type from the drop-down list. This may be a specific price, application of a Discount, or include a price band. For this example, we'll choose % Discount and enter a Value of 5. Press Enter to complete the line.

BisTrack shows the details and you may continue with the next break level. You can use the Copy option to add additional levels. Set the Qty To to a large value that is unlikely to be sold. When finished, click OK.

The dialog box indicates that a Product Specific Quantity Break and the Properties and Delete icons are now available. Save and close the product.

You can add a System Quantity Break and then assign it to multiple products. Start by opening the Pricing view in System Manager, and then select the Pricing Taskpad option. Choose Selling Quantity Breaks. From the pop-up window displayed, select the Add button.

Enter a Code and Name. The Name should be a short description as it will be visible when you assign it to a product. Here, when a customer buys 100 or more, they get 5 percent off. Enable the Aggregate check box so the pricing applies to the total of products on order. If you want to base the Quantity Break on the

Sales Amount instead of Quantity, enable the Value based check box. We'll leave this unchecked.

Enter a number for Multiples of, or choose an option from the drop-down list. We'll enter a multiple of 1. When you have products that are stocked in one UOM, but sold in another, you can choose the UOM applicable to the Quantity Break. Now, enter the quantity and break values. When finished, click OK to save and close the window. BisTrack shows the new Selling Quantity Break. Close the window.

Once created, you can assign the system Quantity Break to all applicable products. From the Products view, find and open the Properties for a product, and then select the Selling tab. Enter the Name in the dialog box or click the Quantity Break button to search for it.

Press Enter or click Go to display all available Selling Quantity Breaks, and then select one to assign to this product. The system shows the Name in the dialog box. Save and Close the window. Continue to assign the Quantity Break to all the products where it applies.

You need to set the option to use Quantity Breaks on any applicable price rules. For the drywall products that we assigned a Quantity Break, we need to check for any rules associated with those products. Open the Selling Price Rules browser window. Set the filter to Find rules where Product Group Contains Drywall.

There are a few rules that match. The first one is for customers assigned the Drywall Contractor Price Profile and items in the Drywall Product Group. Open the rule Properties. Then, open the Adjustments tab. Enable the check box to Use product quantity breaks. Click OK to save the change and close the rule.

Note that you need to enable this check box for any Selling Price Rule where you want to allow Quantity Breaks. To ensure that you apply Quantity Breaks even when no other rule applies, a Best Practice is to have a catchall Price Rule with the option set to use Quantity Breaks. Here we added a Price Group Rule type using the Default Price Group. The Calculation uses the Standard Selling Price and no

Discounts entered. On the Adjustments tab, we enable the Use product quantity breaks check box.

With the set-up complete, let's enter a sales order using the products with Quantity Breaks. Here we have a new order with a drywall product chosen. The system displays the price automatically. When you add the line to the order, the system reprices it.

To see how it is calculated, double-click the line. Open the Price Calculation tab. We see that the system used a Price Profile and Product Group rule, including the Quantity Break discount. Click Ok to close the line.

Now, we'll add the item that has a product-specific Quantity Break. Note the Price here, before the line is completed. When you add the line, the system adjusts the price automatically. Double-click the line to open it. A Quantity Break button appears on the Price Negotiation tab for any product assigned one. Clicking it opens a window with the Quantity Break details.

We see that the system based the price for this line on a Qty of 24 to 95. The system can use this information to advise the customer of the next level and discount available. When finished, Close the window.

Selling Quantity Breaks are another pricing strategy that you can use to increase sales. You should be able to complete the steps necessary to set up quantity break pricing including adding a Quantity Break, assigning it to a product, and allowing Price Rules to make use of them.

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