

SUPPORT DOCUMENT

Sales Discount Matrix



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Overview

This feature allows you to tailor default customer discounts by a Customer and Inventory Category pricing Matrix table. This gives you the ability to create and manage discount prices for an unlimited number of combinations due to that fact that you can create an unlimited number of Customer and Inventory Categories as well as an unlimited number of Customer Pricelists.

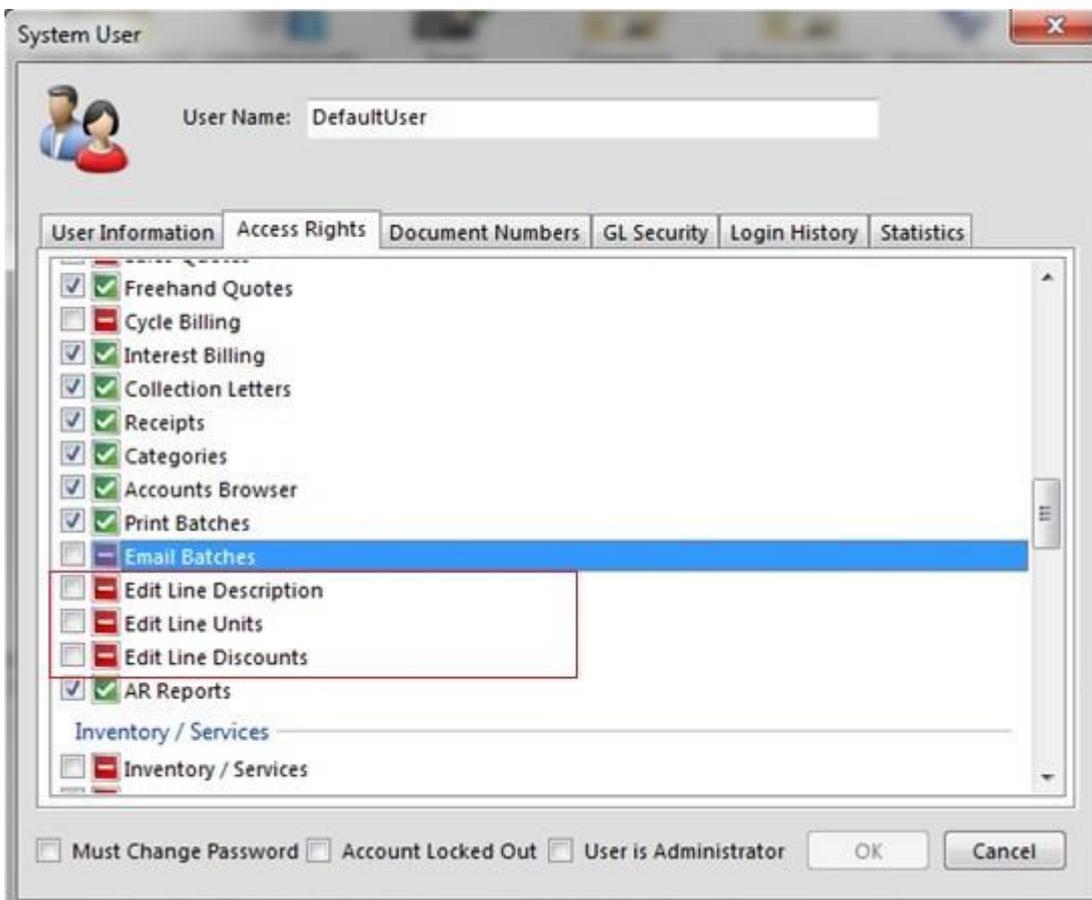
Note: This feature is currently available on the **Palladium Business** and **Palladium Enterprise** versions.

How Does This Feature Help Your Business?

- Eliminates erroneous or unauthorised discount entries.
- Allows you to logically group factors that result in price adjustments.
- Secure, since access to edit discount rates may be granted to specified users only.

Feature Setup

Palladium offers the option to disallow specified users access to the Price Discount Matrix setup function and also allows you to set access rights to amending the Document Line-Item Discounts at a user-level.



Feature Functionality

Firstly, setup the discount matrix rates accordingly. In the example below, a customer who is set as a Distributor will receive a 12,5% discount on handbags and a 15% discount on Shoes as default.

	Consumers	DEFAULT	Distributors	Loyalty	Retail	Wholesalers
Belts-Gents	0.00	1.00	10.00	2.00	3.00	15.00
Belts-ladies	0.00	2.00	10.00	3.00	5.00	15.00
Boots	0.00	3.50	12.50	4.00	6.00	20.00
DEFAULT	0.00	6.00	0.00	6.00	8.00	0.00
Handbags	0.00	5.00	12.50	6.00	7.50	17.50
Shoes	0.00	3.25	15.00	5.00	5.00	20.00

On the Invoice below, the discount is then applied accordingly i.e. the first 2 items are stock items, therefore, a 20% discount is granted. The next item is a service and a 15% discount is then granted.

Number	Location	Description	Qty	Unit	Price	Discount %	Tax Code	Tax	Amount
Handbag-Gucci	DEFAULT	Gucci Style Handbag	57	EA	677.00	12.50	01	4 727.15	33 765.38
Shoes	DEFAULT	Modern Shoes with Buckles	3	EA	245.00	15.00	01	87.46	624.75

Subtotal:		34 390.13
Discount:	5.00	-1 719.51
Tax:		4 573.88
Total:		37 244.50

Feature Related Q & A's

Q: If I do not have a discount setup for certain customer and item categories, am still I able to apply a discount at line level?

A: Palladium is not limited to applying discounts through the Discount Matrix only. You are able to apply a line discount to all Account Receivable and Account Payable documents at the time of processing. This would apply in a scenario where a discount is applied at the time of sale or purchase. In addition to this you have the ability to apply a discount to the total document itself.