

## Can I Do Line Item Discounts On The Fly?

The items are scanned in the working invoice and now you want to mark one item down 15% and two others 20% - How can I do this without a calculator?

**Price Codes.** If this is something that you do often, this tip is the easy way to do it. Set up price codes so that each of the 8 levels is a specific discount – such as:

level 0 = 0%      level 4 = 20%  
 level 1 = 5%      level 5 = 25%  
 level 2 = 10%     level 6 = 30%  
 level 3 = 15%     level 7 = 40%

**Working Invoice.** Simply enter the proper discount level in the “L” column on the working invoice.

				15% OFF		Terms: Net30
		Salesperson: <input type="text"/>		Choose...		
T	Qty	Item ID	Description	L	Price	Extended
1	S 1	YAN-114534	Banana Nut 14.5oz Jer	3	18.25	18.25
2	S 2	YAN-114504	X-Mas Cookie 14.5oz Jer	4	10.35	20.70
3	S 1	YAN-115504	X-Mas Cookie 22oz Jer	4	13.55	13.55
4	S 1	YAN-115130	Patchouli 22oz Jer	0	16.99	16.99
5	S 1	YAN-115560	Fireside 22oz Jer	0	16.99	16.99
6						
7					20% OFF	
8						

**Printed Invoice.** If you elect to show savings from the user controls/preferences then your invoice may look like this to showing the savings.



# INVOICE

Invoice No: WE0251

Date: 05/18/2007  
Cust ID: 1005  
Terms: Net30  
Salesperson:  
Cust PO:

**Bill To:**

Randy Larson  
3445 E 4800 S  
Salt Lake City, UT 84755  
USA

**Ship To:**

Randy Larson  
3445 E 4800 S  
Salt Lake City, UT 84755  
USA

**15%  
Off**

Qty	Item ID	Description	L	Unit Price	Amount
1	YAN-114534	Banana Nut 14.5oz Jar	3	18.25	18.25
		Sugg. Retail = 21.45      Your Savings = 3.20			
2	YAN-114504	X-Mas Cookie 14.5oz Jar	4	10.35	20.70
		Sugg. Retail = 12.95      Your Savings = 5.20			
1	YAN-115504	X-Mas Cookie 22oz Jar	4	13.55	13.55
		Sugg. Retail = 16.99      Your Savings = 3.44			
1	YAN-115130	Patchouli 22oz Jar	0	16.99	16.99
1	YAN-115560	Fireside 22oz Jar	0	16.99	16.99

**20% Off**

**Setting Up Price Codes.** Find the Price Code Card in POS•IM. Leave level zero blank. Level zero is the default level, and when left blank assigns the “Our Retail” price on the invoice. Click on the button for each row to open the formula screen , then complete the discount information for each of the other 7 rows. The example below shows a 10% discount off retail. We have rounded the result up to the nearest dime and then subtracted a penny.

Simple Price Codes

Simple Price Code [Simple Price Code] [View]

Description: Candles

0 [ ] [>>]

1 Our Retail - 5 % Adjustment rounded up to next 0.10 less 0.05 [>>]

2 Our Retail - 10 % Adjustment rounded up to next 0.10 less 0.05 [>>]

3 Our Retail - 15 % Adjust [ ] [>>]

4 Our Retail - 20 % Adjust [ ] [>>]

5 Our Retail - 25 % Adjust [ ] [>>]

6 Our Retail - 30 % Adjust [ ] [>>]

7 Our Retail - 35 % Adjust [ ] [>>]

**Edit Simple Pricing Formula**

Base Price On:

Last Cost [10.00]

Average Cost [20.00]

Our Retail [30.00]

Sugg. Retail [40.00]

Method:

Adjustment %

Margin %

Add Amt [-10.00]

Fixed Price

Rounding:

Round Down

Round to Nearest [0.10]

Less:

[ ] [0.05]

**Item Card Set Up.** Each item card must have the Simple Price Code ID card that applies typed in the price code section of the item card.

<b>Item ID</b>		Search Multiple ▾	View
YAN-114504		Enter Search Field	
<b>Description:</b> X-Mas Cookie 14.5oz Jar			
<b>Inventory:</b>		<b>Classification:</b>	
On Hand:	<input type="text" value="7"/>	Style:	<input type="text"/>
Available:	<input type="text" value="7"/>	Row:	<input type="text"/>
On Order:	<input type="text" value="0"/>	Col:	<input type="text"/>
<input type="button" value="Adjust"/>		Location:	C22
Max Stock:	<input type="text" value="7"/>	Manufacturer:	Yankee Candle Co.
Reorder Pt:	<input type="text" value="2"/>	Mfr Item No:	114504
		<input type="checkbox"/> Discontinued Item	
<b>Values:</b>		<b>Codes:</b>	
Last Cost:	<input type="text" value="4.95"/>	Comm Code:	<input type="text"/>
Avg Cost:	<input type="text" value="4.95"/>	Tax Code:	3 <input type="button" value="Choose"/>
Sugg Retail:	<input type="text" value="12.95"/>	Price Code:	A <input type="button" value="Choose"/>
Our Retail:	<input type="text" value="12.95"/>	Print Code:	<input type="text"/>
Calc Retail:	<input type="text" value="12.95"/>		
Avg Retail:	<input type="text" value="12.95"/>		
<b>Purchasing:</b>			
Vendor Name:	Yankee Candle Co. <input type="button" value="Choose"/> <input type="button" value="&gt;&gt;"/>		
Vendor Item ID:	<input type="text" value="548010"/>		
Vendor Cost:	<input type="text" value="4.95"/>		
Discount Rate:	<input type="text" value="0"/>		

**Turn It On.** The last step is to turn on the user control/preference. You will find them under the file menu. Find the price code user control/preference and turn it on. You are ready to go.

You may want to review the price code section in the manual.

Note: A Price Code Card that is filed out but the Price Code Id is left blank “”, is an active card, it will link with Item Cards that have a blank in the Price Code Field. That means it is possible to leave all items cards with a blank price code and then create a Price Code card with a blank “” Id to implement Price Codes.