

Setup Price Factor Tables

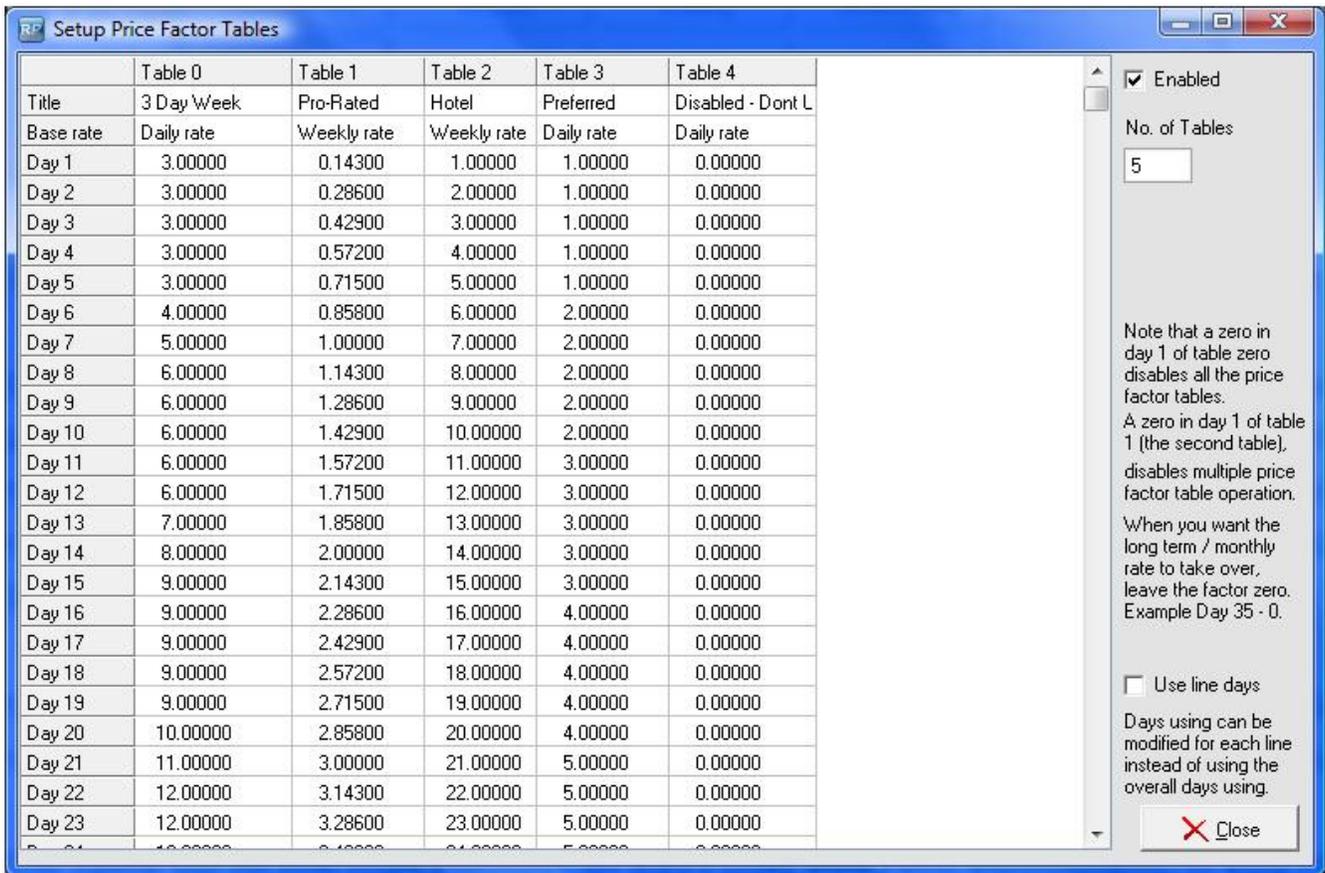
On the main menu click Setup and select the Parameters option. Once the Parameter window displays select Pricing Setup. Open #2 – Price Factor Tables. By default the window will only display 5 tables. You can enable more tables by changing the number of tables in the top right corner of the window.

1. Start by giving your price factor table a name. Click in the top row under Table 0, Table 1 etc and enter a meaningful name.
2. Next, select which rate you want to use as your base rate. The pricing for the table will be based on the rate selected.
3. Now you need to enter the price factor for each day. Along the left side of the window you will see Day 1, Day 2, Day 3 etc. These days indicate the number of days that the equipment will be on site with the client. The factors that you enter will determine how many days the client will be charged for the equipment. For example, a client wants equipment from 9am Monday to 5pm Saturday, so the equipment will be on site for 6 days. However you only want to charge the client for 3 days. Enter 3 in Day 6 of the table.
4. Once you have completed all the factors for all tables, be sure to click the 'Enabled' box in the top right corner.

To ensure your pricing is consistent you need to enter a price factor in each day. If a price factor is 0.00000 the price factor structure will no longer be used, a default pricing structure of weekly and monthly will take over.

You only need to fill the table up to the max number of days that you rent equipment. If you rent for a max period of 20 days, then you only need to fill the table to Day 20. If you rent for up to 150 days, you need to fill the table to Day 150.

If you don't want to use a certain price factor table, enter a 0 in Day 1.



Setup Price Sets

Once you have setup your Price Factor Tables, you need to setup your Price Sets. Price Sets allow you to charge different rates for the same equipment.

Open Pricing Setup #4 – Price Set Tables. A default 'Standard Price' set is displayed. To enable more price sets increase the number using the up and down arrows in the 'number of Price Set Tables' box and click Apply.

1. Start by giving your price set a name that will be unique and identifiable and therefore easier for users to select the correct price set. Click in the Price Set Name and enter a name.

2. Next, select which price factor table your price set is based on. Selecting '0 – Uses Product Group' will force the system to use the price factor table that is specified in the group properties that the product belongs to.

3. If you are using multi currency, select the currency that this price set will use.

Set #	Price set name	Uses price factor table #	Uses currency
1	Use Group Pricing	0 - Uses product group	Domestic currency
2	3 Day Week	1 - 3 Day Week	Domestic currency
3	Long Term Billable	2 - Pro-Rated	Domestic currency
4	Hotel	3 - Hotel	Domestic currency
5	Preferred Client	4 - Preferred	Domestic currency

Number of price set tables: 5

Product price table setup

There can be multiple price sets for each rental product. (most companies will have only one) this means that different customers will pay different prices for the same equipment, an example of different prices :-

Set 1 - Standard price	Use Product Group	Domestic currency
Set 2 - National price list	Use Product Group	Domestic currency
Set 3 - Canadian price list	Use Product Group	CAD\$ Canadian dollar

You can also set a price set up to use a selected price factor table.

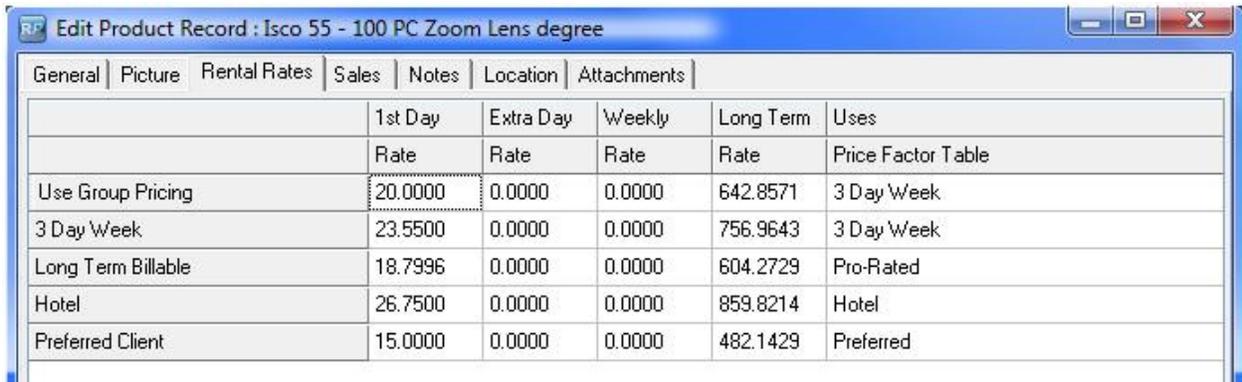
Currency - a price set may be in a different currency, simply select the currency, this currency will then be selected whenever the price set is assigned to a customer record, all amounts will be invoiced in this currency. The currencies must first be set up on the "set up" menu under currencies.

Using Price Sets

Price sets are used in 3 main areas throughout the system; a product, a customer and a booking.

Equipment Rates

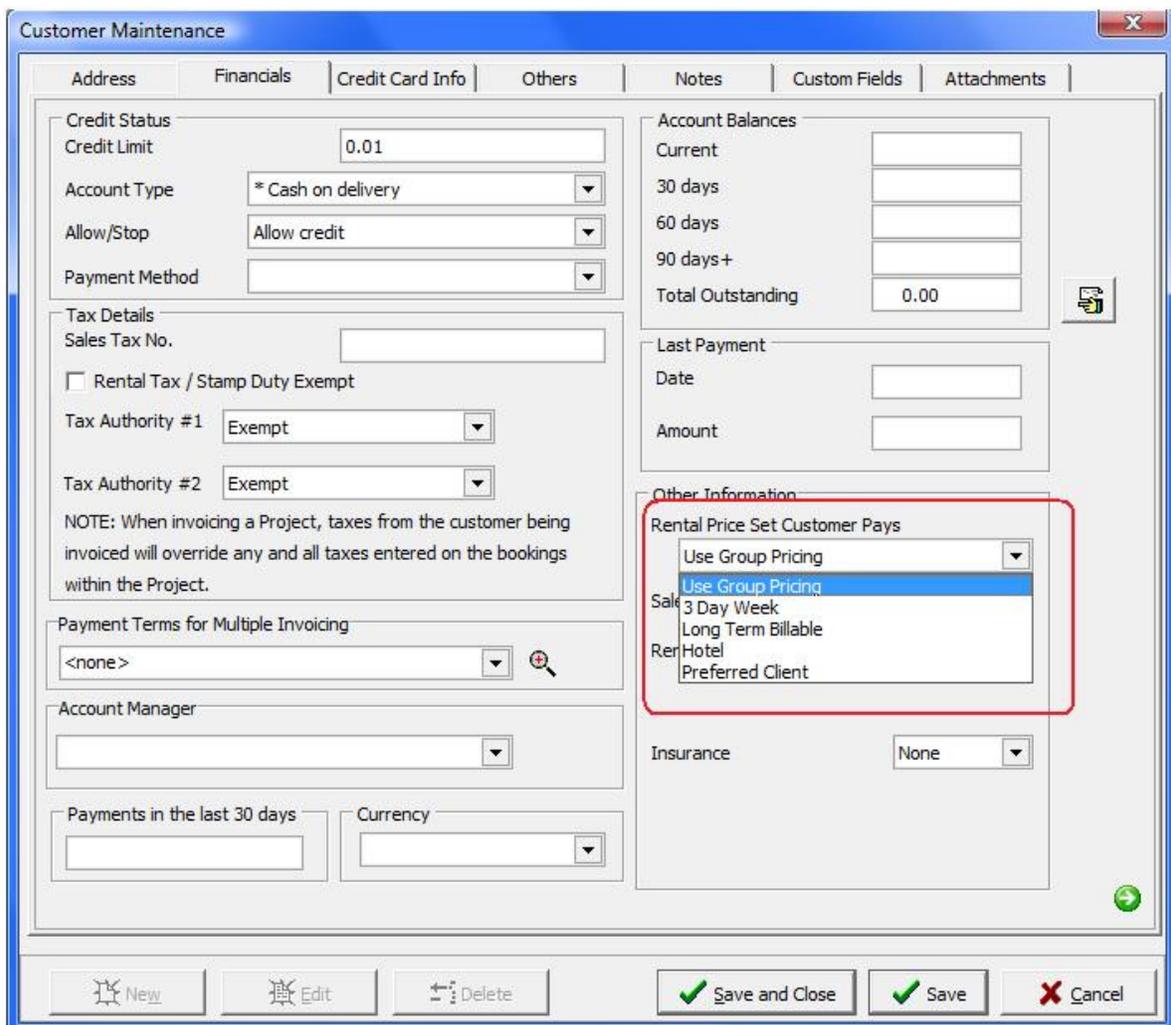
Open a product and click the Rental Rates tab. Enter the pricing for your product. Each of the Price Sets you setup earlier will now be listed here, thereby allowing you to determine different base rates for a product for each price set.



	1st Day	Extra Day	Weekly	Long Term	Uses
	Rate	Rate	Rate	Rate	Price Factor Table
Use Group Pricing	20.0000	0.0000	0.0000	642.8571	3 Day Week
3 Day Week	23.5500	0.0000	0.0000	756.9643	3 Day Week
Long Term Billable	18.7996	0.0000	0.0000	604.2729	Pro-Rated
Hotel	26.7500	0.0000	0.0000	859.8214	Hotel
Preferred Client	15.0000	0.0000	0.0000	482.1429	Preferred

Default Customer Price Set

Open the customer record and click the Financials tab, select the default price set from the drop down list. When creating a booking, the system will use the price set you selected.



Customer Maintenance

Address | Financials | Credit Card Info | Others | Notes | Custom Fields | Attachments

Credit Status
Credit Limit: 0.01

Account Type: *Cash on delivery

Allow/Stop: Allow credit

Payment Method:

Tax Details
Sales Tax No.:
 Rental Tax / Stamp Duty Exempt
Tax Authority #1: Exempt
Tax Authority #2: Exempt

NOTE: When invoicing a Project, taxes from the customer being invoiced will override any and all taxes entered on the bookings within the Project.

Payment Terms for Multiple Invoicing: <none>

Account Manager:

Payments in the last 30 days: Currency:

Account Balances
Current:
30 days:
60 days:
90 days+:
Total Outstanding: 0.00

Last Payment
Date:
Amount:

Other Information
Rental Price Set Customer Pays:
Use Group Pricing (selected)
3 Day Week
Long Term Billable
Hotel
Preferred Client

Insurance: None

Buttons: New, Edit, Delete, Save and Close, Save, Cancel

Price Set in a Booking

You can change the price set that a booking uses by selecting another price set from the drop down list.

The screenshot shows a software window titled "Inquiry" with a blue header. The window contains a form for customer and booking information. At the top, there are fields for "Out 08/24/10 0900", "In 08/25/10 1800", and "00001", along with a "Location" dropdown set to "0 - Main Office". Below this is a navigation bar with tabs: "Customer", "Calendar", "Equipment", "Crew", "Venue", "Notes", "Payments", "Attachments", "Other Details", and "Status".

The main form is divided into several sections:

- Invoice To:** Includes a "New Customer" checkbox, a "Customer Code" field with "Find" and "Search" buttons, and a "Company" dropdown.
- Bill To:** Includes a "Same" checkbox and a field for the bill-to name.
- Street Address:** Fields for "Street", "Area", "City", "Province", "Country", and "Post Code".
- Phone/Fax:** Fields for "Phone 1", "Phone 2", and "Fax", each with "Country Code", "Area Code", "Number", and "Extension" sub-fields. There is also a "Fax Options" section with a "Dial Area Code" checkbox and a "Local" dropdown.
- Customer Contact:** A field for the customer's contact name.
- Website Address:** A field for the website URL.
- Email Address:** A field for the email address.
- Notes:** A section for adding notes, currently empty.

On the right side of the window, there are additional details:

- Booking Type:** A dropdown menu set to "Rental".
- Account Details:** Fields for "Payments", "Current", "30 days", "60 days", "90 days+", and "Total Due".
- Credit Limit:** A field set to "0.01".
- Currency:** A dropdown menu set to "Canadian\$".
- Rental Price Set Customer Pays:** A dropdown menu with a red border, currently showing "Preferred Client". Other options include "Use Group Pricing", "3 Day Week", "Long Term Billable", and "Hotel".
- Rental discount rate %:** A field set to "0.0000".