

Solution-IV™ Accounting Contract Maintenance



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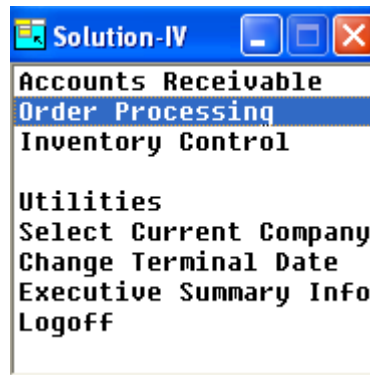
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Contract Maintenance (Special Pricing)

For help with any option or field please refer to the Accounts Receivable Manual or press **F6** on your keyboard.

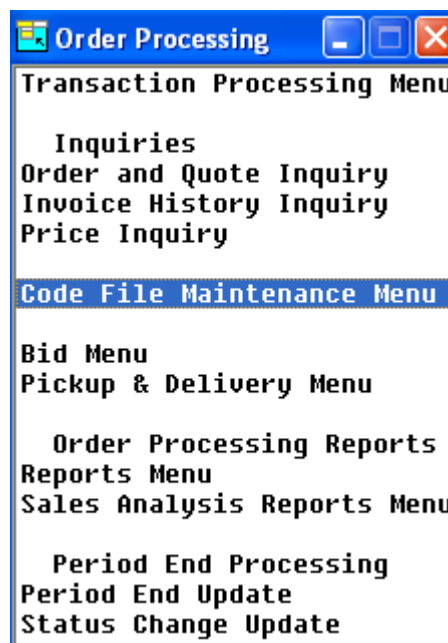
Both steps begin from the Solution-IV Main Menu where you select **Order Processing**.



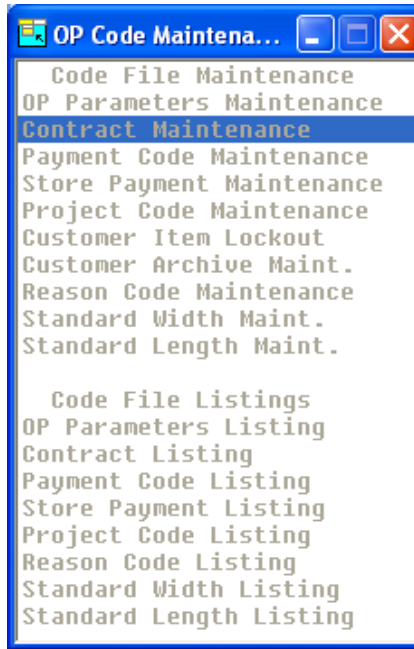
Contract Maintenance

The Cash Receipts program is used to record payments against customer balances. Prepayments are also entered here along with matching credit memos and debit memos to outstanding invoices.

From the Order Processing Main Menu, select **Code File Maintenance Menu**.



From Code File Maintenance Menu, select **Contract Maintenance**.



	Month to Date	Year to Date	Last Year
Sales	194,336.0000	194,336.0000	0.0000
Cost of Sales	31,390.8000	31,390.8000	0.0000
Number of Invoices	342	342	0

Customer

Press **F2** to lookup by Customer or existing Contracts.

Contract

Enter up to 6 alphanumeric characters, use "000001".

Description

Enter up to 35 alphanumeric characters to describe the customer contract.

Contract Date

Enter the contract date or the date on which this contract was made with this customer. If unknown just leave blank.

Start Date

Enter the date on which this contract takes effect.

Expiration Date

Enter the date on which this contract expires.

Closed Date

Enter the date on which this contract has been closed.

Priority

Enter the priority of this customer contract as it relates to special sales promotions from the following list:

- C** Customer contract price takes priority.
- L** The lesser of the contract price and special promotion takes priority.
- S** Special sales promotion price takes priority.

Dollar limit

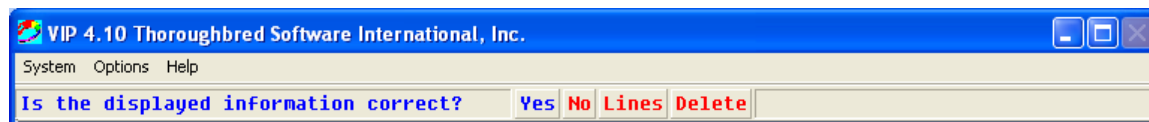
You have the option of limiting the amount of sales associated with this contract. Select from the following:

- 0** Enter zero for no limit
- \$** Enter the dollar amount for this contract

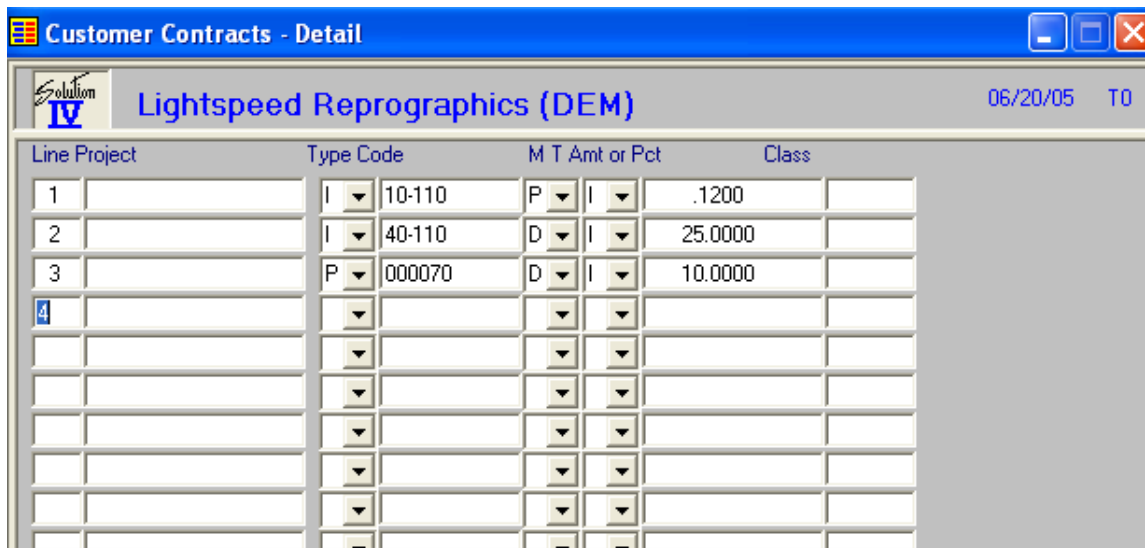
Lifetime Sales

This field contains the total sales dollars applied to this contract.

The system displays:



Select **Yes**.



Line

If the line exists, pressing **Enter** allows you to modify it.

If the line is blank, pressing **Enter** will add a line.

Project

The project code is a file verified code that may be used in order entry.

Type

Enter the type of code that the line of the contract will be compared to.

- I** Item code
- P** Product code
- C** Item Price Class
- N** No code compare
- S** Special Item Class Code 4

Code

Enter the item code, product code or item price class depending on the code type that you have selected. If this field is left blank, all codes of the selected type will be considered a match.

M – Contract Method

Enter the method of calculating the price for this contract from the following list:

- A** Discount amount off regular price
- C** Markup percentage over cost
- D** Discount percentage off regular price
- M** Markup amount over cost
- O** Override item price class
- P** Actual Price
- Y** YTD Sales using override item price class

T – Contract Type

If Method is set to discount base price on the following:

- I Price is off item list price.
- Q Price is off quantity price break.

Amt or Pct

Based on the contract method for this contract, enter either the actual price, the discount amount, cost markup amount, discount percentage, or cost markup percentage.

Class

Enter the item price class which applies to this contract if the contract method is 'O'.

From the lines Screen, press **F7** for other data, the Contract Detail Summary screen will display:

Contracted quantity		Closed Date		
Contracted quantity	0	Closed Date		
Quantity used	.0000	Ship Date		
Minimum quantity	.0000	Dollar limit	.00	
Exceed limit?	<input type="checkbox"/>	Sales	.00	
Line Summary		Month to Date	Year to Date	Last Year
Sales	0.0000	0.0000	0.0000	
Cost of Sales	0.0000	0.0000	0.0000	
Number of Invoices	0	0	0	

Contracted quantity

Enter the number of units to which this contract applies. If there is no limit to the quantity the customer can buy at this price, press **Enter** or enter **0**.

Quantity used

This field contains the number of units which have been sold against this contract so far. When used equals contract quantity, this contract will be fulfilled and will no longer be used for pricing.

Minimum Quantity

This field contains the minimum quantity to be ordered at any one time for this contract to be used for printing.

Exceed limit?

The contract may be flagged to allow pricing to be done for the entire order quantity against this line even though the order quantity is more than the contract line's limit.

- Y** Will calculate a price for the entire order quantity when this line is used, even though the quantity is greater than the contract line's quantity limit.
- N** Will not calculate a price for the order quantity that is in excess of the contract line's limit. The rest of the quantity will be matched against other lines of this contract or another contract altogether.

Closed Date

Enter the date on which this line of the contract has been closed. If a contract line is closed it will no longer be available for pricing.

Ship Date

Enter the date on which this line of the contract is expected to be shipped to the customer.

Dollar limit

You have the option of limiting the amount of sales associated with this contract line.

- 0** Enter zero for no limit
- \$** Enter the dollar limit amount for this contract line.

Sales

This field contains the total sales dollars applied to this contract line.

Month-to-date, Year-to-date, Last-year Sales

The sales month-to-date, year-to-date and last-year fields represent the sales on which this contract code has applied. The fields are automatically updated by the system during the Order Processing Sales Journal Update.

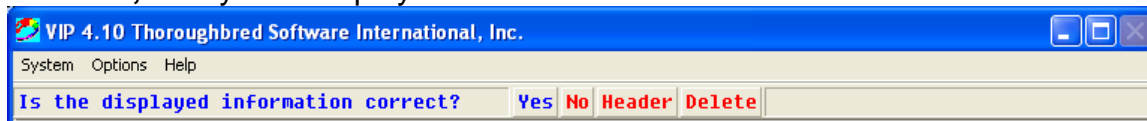
Cost of Sales

The cost of sales month-to-date, year-to-date and last-year fields represent the cost of sales on which this contract code has applied. The fields are automatically updated by the system during the Order Processing Sales Journal Update.

Number of invoices

The number of invoices, month-to-date, year-to-date and last-year fields represent the number of invoices on which this contract code has applied. The fields are automatically updated by the system during the Order Processing Sales Journal Update.

Press **F4**, the system displays:



Select **Yes**.