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Price Rules for Invoicing

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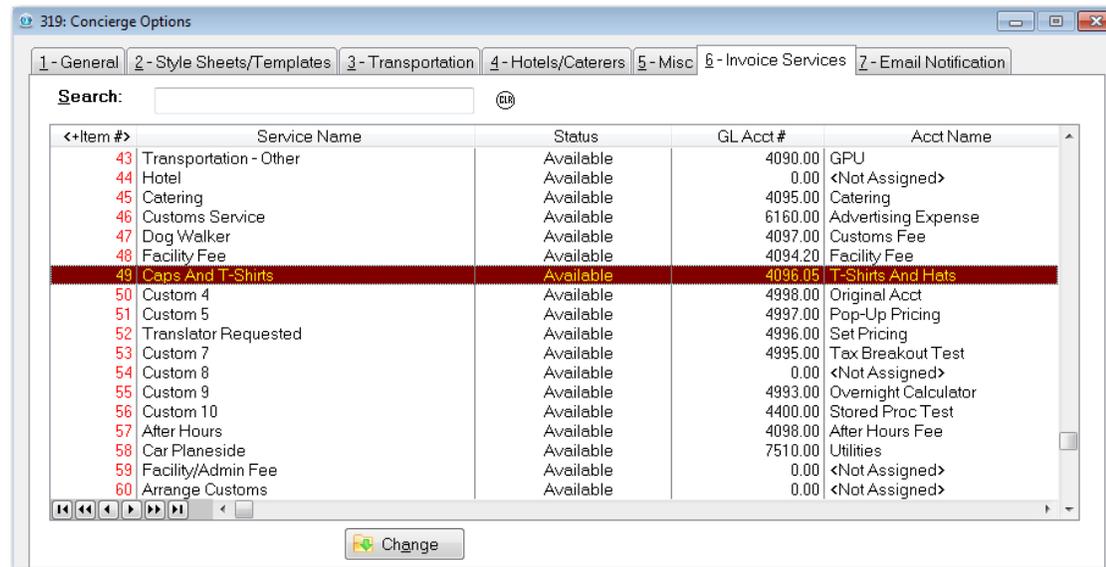
Price Rules

- To be used when setting up a special promotion
- Applying a discount if an invoice meets some preset criteria
- Rules can easily be created that set up certain parameters which allow customers to receive a special promotional service

Price Rules Set-Up

Operations > Concierge > Options > Tab 6 Invoice Services.

- Any service, if that service has also been setup properly in the Concierge Super Screen Invoicing Options.
- Qualifying items are linked to concierge services, not to GL accounts directly.



The screenshot shows a software window titled "319: Concierge Options" with several tabs: "1 - General", "2 - Style Sheets/Templates", "3 - Transportation", "4 - Hotels/Caterers", "5 - Misc", "6 - Invoice Services", and "7 - Email Notification". The "6 - Invoice Services" tab is active. Below the tabs is a search field and a table with the following columns: "<+Item #>", "Service Name", "Status", "GL Acct #", and "Acct Name". The table contains 17 rows of data, with the row for "49 Caps And T-Shirts" highlighted in red. A "Change" button is located at the bottom of the window.

<+Item #>	Service Name	Status	GL Acct #	Acct Name
43	Transportation - Other	Available	4090.00	GPU
44	Hotel	Available	0.00	<Not Assigned>
45	Catering	Available	4095.00	Catering
46	Customs Service	Available	6160.00	Advertising Expense
47	Dog Walker	Available	4097.00	Customs Fee
48	Facility Fee	Available	4094.20	Facility Fee
49	Caps And T-Shirts	Available	4096.05	T-Shirts And Hats
50	Custom 4	Available	4998.00	Original Acct
51	Custom 5	Available	4997.00	Pop-Up Pricing
52	Translator Requested	Available	4996.00	Set Pricing
53	Custom 7	Available	4995.00	Tax Breakout Test
54	Custom 8	Available	0.00	<Not Assigned>
55	Custom 9	Available	4993.00	Overnight Calculator
56	Custom 10	Available	4400.00	Stored Proc Test
57	After Hours	Available	4098.00	After Hours Fee
58	Car Planeside	Available	7510.00	Utilities
59	Facility/Admin Fee	Available	0.00	<Not Assigned>
60	Arrange Customs	Available	0.00	<Not Assigned>

Price Rules Set-Up

Price Rules are created by going to Accounting > Invoicing > Options and Settings > Update Price Rules.

364: Update Price Rules

Rule:

Effective: Expires:

Tail Number:

Customer:

Selection Codes:

Test Rule

Buy Some - Get Some

How many qualifiers needed to apply rule:

Qualifier Items

<+Name>	Req'd
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Promotional Items

<+Promotional Name>	Quantity	Unit Price	Disc%
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OK Cancel Help

Price Rules Set-Up

Effective and Expiration Dates - These dates are used if a rule is to be run for a promotional event that is only valid for a limited time. If no dates are entered, the price rule will ALWAYS be in effect.



364: Update Price Rules

Rule:

Effective: Expires:

Tail Number:

Customer:

Selection Codes:

Test Rule

Buy Some - Get Some

How many qualifiers needed to apply rule:

Qualifier Items

<+Name>	Req'd
---------	-------

Promotional Items

<+Promotional Name>	Quantity	Unit Price	Disc%
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OK Cancel Help

Price Rules Set-Up

Tail Number – The price rule created will only be effective for invoices with that tail number associated with it.

Customer – The price rule will be available for any invoice created for that customer. If both a tail number AND customer account are entered, then both **MUST** be on the invoice for the price rule to be applied.

Selection Codes – Up to five (5) Selection Codes can be placed into this field. If a customer has one or more of the selection codes on their customer record, the rule will be applied to that invoice.

364: Update Price Rules

Rule:

Effective: Expires:

Tail Number:

Customer:

Selection Codes:

Test Rule

Buy Some - Get Some

How many qualifiers needed to apply rule: 0

Qualifier Items

<+Name>	Req'd
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Promotional Items

<+Promotional Name>	Quantity	Unit Price	Disc%
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OK Cancel Help

Price Rules Set-Up

Buy Some - Get Some - These are the main parameter settings to begin creating any price rule. All price rules are based on IF/THEN statements. If some criteria are met, then a promotional item is awarded. The first drop down box is the IF qualifier part of the rule.

If I Buy At Least - This is how many of an inventory item or service is required to qualify for the promotion. For fuel it would be a minimum number of gallons to qualify for a discount. For a service line, it may be how many of the services were purchased.

I Get This - This is what is received at a discount, or free, if the qualifying items are met. This can be a discount on the service line previously purchased, or it may be a service that is awarded if the qualifying criteria are met.

Buy Some - Get Some

If I buy at least: I get this:

How many qualifiers needed to apply rule:

<<+Name>	Req'd
Jet A	<input checked="" type="checkbox"/>
User-Defined Service #2	<input type="checkbox"/>

<<+Promotional Name>	Quantity	Unit Price	Disc%
User-Defined Service #2	1	0.00	0.00

Price Rules Set-Up

IF I BUY AT LEAST

Qualifier 1 JET A is a **required** qualifier and at least 200 gallons must be on the invoice as a single line item.

Qualifier 2 is a required qualifier and linked to the Concierge service for 1 Facility Fee.

Qualifier 3 can be any of the additional services listed.

I GET this

Promo service item is linked to the Concierge service for a Facility Fee Discount Percentage of 50%.

I get 1 Facility Fee at a 50% reduced rate.

364: Update Price Rules

Rule: Jet A Waive Facility Fee

Effective: [] Expires: []

Tail Number: []

Customer: []

Selection Codes: []

Test Rule

Buy Some - Get Some

If I buy at least [] I get this []

How many qualifiers needed to apply rule: 3

Qualifier Items

<-Name>	Req'd
Jet A	[]
Lavatory Cleaning	[]
Nitrogen	[]
Oxygen	[]
Power Cart	[]
Ramp Parking-Hangar	[]
User-Defined Service #2	[]

Promotional Items

<<Promotional Name>	Quantity	Unit Price	Disc%
User-Defined Service #2	1	0.00	0.00

Insert Change Delete

OK Cancel Help

364: Update Promo Service Item

Service: User-Defined Service #2

Quantity: 1

Discount Percentage

Unit Price: 0.000000

Discount: 50

OK Cancel Help

Price Rules Set-Up

IF I BUY AT LEAST

Qualifier 1 JET A is a **required** qualifier and at least 200 gallons must be on the invoice as a single line item.

Qualifier 2 can be any of the additional services listed.

Qualifier 3 can be any of the additional services listed.

I GET this

Promo service item is linked to the Concierge service for a Caps and T-Shirts
A New Service Line will be added to the Invoice.

I get a Free Cap or T-Shirt! Sweet, **I love this FBO!**

48	Facility Fee	Available	4094.20	Facility Fee
49	Caps And T-Shirts	Available	4096.05	T-Shirts And Hats
50	Custom 4	Available	4998.00	Original Acct

Buy Some - Get Some

If I buy at least I get this

How many qualifiers needed to apply rule:

Qualifier Items

<<Name>	Req'd
Jet A	<input checked="" type="checkbox"/>
Lavatory Cleaning	<input type="checkbox"/>
Nitrogen	<input type="checkbox"/>
Oxygen	<input type="checkbox"/>
Power Cart	<input type="checkbox"/>
Ramp Parking-Hangar	<input type="checkbox"/>

Insert Change Delete

Promotional Items

<<Promotional Name>	Quantity	Unit Price	Disc%
User-Defined Service #3	1	0.00	0.00

364: Update Promo Service Item

Service:

Quantity:

Fixed Price

Unit Price:

Discount:

OK Cancel Help



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Thank You