Rates
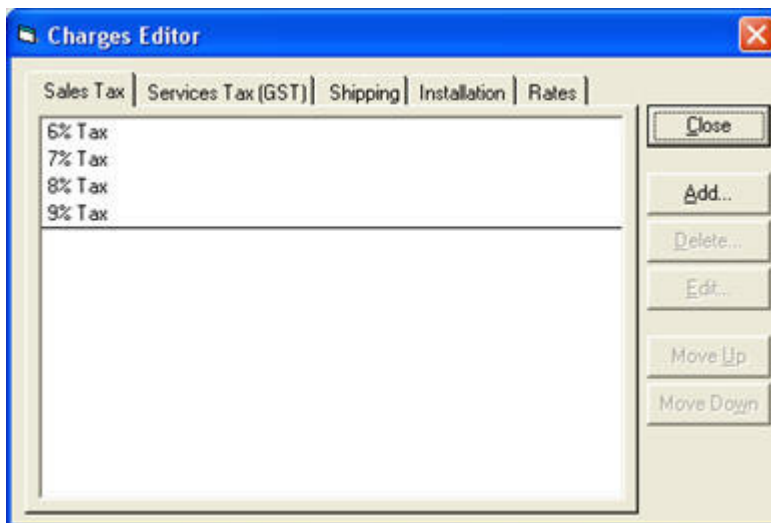
Rate records controls the list, cost and sell pricing by catalog and allows you to produce accurate Cost/Sell reports. You must create one or more rate records per catalog since multipliers vary from one catalog to another.
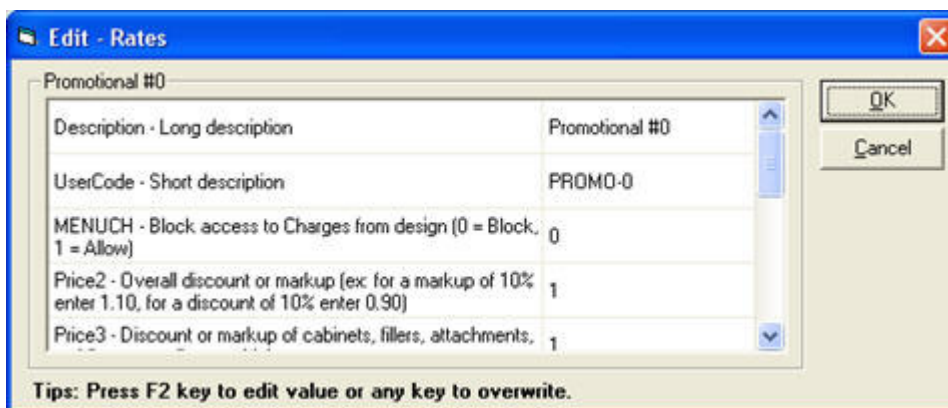
These records:

- hide the surcharges/discounts and display net prices for individual items
- set mandatory discounts or surcharges directly from the database
- create sets of parameters for pricing out designs for different types of customers, i.e. distributors, retailers, consumers and promotional.

Here is an example of a typical rate record that customers create for their Cost/Sell reports.

1. Choose **Tools, Charges Editor**. The **Charges Editor** dialog appears.

2. Click the **Rates** tab.
3. Click the drop-down arrow beside the **Catalog** field and select the catalog to work with.
4. Select the record you to modify, then click **Edit**, or, click **Add**. The **Edit – Rates** dialog appears.

5. Fill the fields as described below or click here for a description of rate record fields.

- Click in the field next to **Description** and type the long name of the rate record. E.g. **42.70- 32.70**. **Note!** *This*

field must not exceed 24 characters.

- Click in the field next to **User Code** and type the short name of the rate record. E.g. **42.70- 32.70**.
- Click in the field next to **MENUCH** and type **0** to prevent or **1** to allow 20-20 users to access the Discounts/Surcharges section of the Catalogs Charges tab in the Styles & Pricing dialog.
- Click in the field next to **Price 2** and type **0.01**.
- Click in the field next to **Price 3** and type your sell multiplier for cabinets, fillers, add-ons, moldings and toe kicks. For example, type **42.70**.
- Click in the field next to **Price 4** and type your sell multiplier for accessories. For example type **42.70**.
- Click in the field next to **Price 5** and type your sell multiplier for appliances. For example type **42.70**.
- Click in the field next to **Price 6** and type your sell multiplier for countertop items. For example type **42.70**.
- Click in the field next to **Price 7** and type **0.01**.
- Click in the field next to **Price 8** and type your cost multiplier for cabinets, fillers, add-ons, moldings and toe kicks. For example type **32.70**.
- Click in the field next to **Price 9** and type your cost multiplier for accessories. For example type **32.70**.
- Click in the field next to **Price 10** and type your cost multiplier for appliances. For example type **32.70**.
- Click in the field next to **Price 11** and type your cost multiplier for countertop items. For example type **32.70**.

6. Click **OK** to confirm the changes and return to the previous dialog.
7. Repeat the procedure for other records as required.
8. When done, click **Close** to exit the **Charges Editor** dialog.

For a description of rate record fields, click here.

To make sure all your designs are charged according to your specifications, you must modify the charges in the catalog.

The charges you apply through the ***Styles & Pricing*** *dialog* in 20-20 Design only affect the current design.

Rate Field Descriptions

Field	Description
Description – Long description	The long form description field. Type in a maximum of 24 characters.
User Code – Short description	Assign a short form description.
MENUCH = Block access to Charges from design (0 = Block, 1 = Allow)	Important field, since you can use it to prevent designers from accessing the Discounts/Surcharges section of the Catalogs Charges tab in the Styles & Pricing dialog. The Styles & Pricing dialog allows you to apply surcharges and/or discounts. Since the Rate records may be used to apply these directly on the items listed in the Reports, type: 0 to prevent the designers from accessing this dialog and from applying other discounts or surcharges. 1 to allow designers to access charges of the Styles and Pricing dialog.
Price 2 = Overall discount or markup (ex. for a markup of 10% enter 1.10 for a discount of 10% enter 0.90)	Use this field only if you want to apply an **overall** discount or a markup. To assign a markup, remember that 10% equals 1.10. To assign a discount, remember that 10% equals 0.90. *Example: Your company offers a 10% discount across the board to a distributor, and then other discounts are added to different types of items. You could use Price 2 on a Rate record to affect each line item by 10%, then use the Discounts/Surcharges section in the Styles & Pricing dialog to reduce the Cabinet total by another 10%, providing that the Rate record selected does not block the Discounts/Surcharges section. In this case, you would assign 0.90 in Price 2.* The Reports module would first reduce or markup the list price of each line item listed above the Cabinet total, before applying the discounts/surcharges, if this Rate record is set in the Styles & Pricing dialog. You should note that if you assign 1.00 or 0.00 in this field, you are not affecting the Reports since it indicates 100%.
Price 3 = Discount or markup of cabinets, fillers, add-ons, moldings as well as toe kicks	Use this field only if you want to apply a discount or a markup to cabinets, fillers, add-ons, moldings as well as toe kicks. To assign a markup, remember that 10%= 1.10. To assign a discount, remember that 10% = 0.90. The Reports module would first reduce or mark up the list price of each line item listed above the Cabinet total, before applying the Charges options, if the Rate record is set in the Styles & Pricing dialog. You should note that if you assign 1.00 or 0.00 in this field, you are not affecting the reports since it indicates 100%.
Price 4 = Discount or mark up accessories	Use this field only if you want to apply a discount or a markup to accessories.

	To assign a markup, remember that 10% = 1.10. To assign a discount, remember that 10% equals 0.90. The Reports module would first reduce or mark up the list price of each line item listed above the Accessories total, before applying the discounts/surcharges, if the Rate record is set in the overall Styles & Pricing dialog. You should note that if you assign 1.00 or 0.00 in this field you are not affecting the reports since it indicates 100%.
Price 5 = Discount or mark up appliances	Use this field only if you want to apply a discount or a markup to appliances. To assign a markup, remember that 10% = 1.10. To assign a discount, remember that 10% = 0.90. The Reports module would first reduce or mark up the list price of each line item listed above the Appliance total, before applying the discounts/surcharges, if the Rate record is set in the Styles & Pricing dialog. You should note that if you assign 1.00 or 0.00 in this field you are not affecting the Reports since it indicates 100%.
Price 6 = Discount or mark up countertop items	Use this field only if you want to apply a discount or a markup to countertop items. To assign a markup, remember that 10% = 1.10. To assign a discount, remember that 10% = 0.90. The Reports module would first reduce or mark up the list price of each line item listed above the Counter total, before applying the discounts/surcharges. If this Rate record is set in, the Styles & Pricing dialog. You should note that if you assign 1.00 or 0.00 in this field, you are not affecting the Reports since it indicates 100%.
Price 7 = Overall cost factor (i.e. enter 0.65 if your cost is 65% of the retail value)	Same as Price 2, but for the Cost/Sell reports. To display or print these reports, listed in the Reports on Design dialog, you must select a Rate record in the Styles & Pricing dialog. The Rate record selection offers discount fields for costing in Price fields 7, 8, 9, 10 and 11. Use Price 7 to assign an overall cost factor only. If your cost is 65% of the retail value of each line item in this catalog, then assign 0.65. *To generate Cost/Sell reports, you must use only the Rate record to specify the selling price, i.e. the discounts/surcharges are not considered in these reports. Therefore, make sure that the selling price fields (Price 1, 2, 3, 4, 5 and 6) are assigned correctly.*
Price 8 = Cost factor for items listed above the Cabinet total, i.e., cabinets, add-ons, fillers, moldings and toe kicks	Costing field for items listed above the Cabinet total, i.e. cabinets, add-ons, fillers moldings and toe kicks. This Price field works like Price 7.
Price 9 = Cost factor for items listed above the Accessories total	Costing field for items listed above the Accessories total. This Price field works like Price 7.
Price 10 = Cost factor for items listed above the Appliances total	Costing field for items listed above the Appliances total. This Price field works like Price 7.
Price 11 = Cost factor for items listed above the Counter total	Costing field for items listed above the Counter total. This Price field works like Price 7.