

## Discounting

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## Discounting Overview

BOOMS supports the following types of discounts:

- Net Name Arrangements
- Standard Mailer/Broker 10% Discount
- Mailer/Broker Discount based on a Volume Discount Schedule
- Mailer/Broker Discount based on a Single Order Rental or Exchange
- List Discount based on a Single Order Rental

Item 1 above is handled directly from Order Entry or Invoicing. Item 2 is handled by a flag in the Mailer's (or Broker's) Promotion File entry. The remaining items are handled from the Discounting Maintenance Screens (although a "Discount Exists" Flag must still be set in the appropriate List or Promotion File entry). In general, discount information is applied when an Order is "posted" for Invoicing.

The three types of discounts discussed in this section are:

- **Mailer Discounting (based on a Schedule)** - used to maintain discounts to be received by a Mailer (or from a Broker) based on a VOLUME DISCOUNT SCHEDULE. Up to 5 Discount Levels can be defined.
- **Mailer Discounting (based on a Single Order's Volume)** - used to maintain discounts to be received by a Mailer (or from a Broker) based on the VOLUME FOR A SINGLE ORDER. Either a Rental Volume or an Exchange Volume can be discounted. Up to 3 Rental discount levels can be defined.
- **List Discounting (based on a Single Order's Volume)** - used to maintain discounts to be received by a Mailer (or Broker) based on the VOLUME FOR A SINGLE ORDER. Up to 3 Rental discount levels can be defined.

## Mailer Discounting (Based on a Schedule)

Selecting Function, "Discounting", Sub-Function "Mailer Schedule" ("D1") from the Additional Functions Menu results in:

- Replacing of the Additional Functions Menu by the "MAILER/BROKER DISCOUNTING Screen" (Figure 19.1).
- The disappearance of the cursor

You must press a Function Key to select an Option. If you press any key other than a Function Key, the PC speaker will BEEP. The valid Functions Keys are:

- **F3** - ADD a new Discount record
- **Shift-F3** - ADD-NOCLEAR a new Discount record
- **F4** - DELETE a record
- **F5** - UPDATE a record
- **F7** - DISPLAY a record
- **Shift-F7** - DISPLAY Next record (same as PgDn)
- **Ctrl-F7** - DISPLAY Prior record (same as PgUp)

## Add Mailer Discount Schedule Record (F3, Shift-F3)

To Add a Discount Record, select option Add (F3). This results in:

- The clearing of all input fields
- STATUS message:  

**Add Request .....**
- The positioning of the cursor at the first input field (Mailer/Broker)

The valid values for this screen are:

- **Mailer/Broker** - Mailer to get the discount or Broker giving the discount.

☞ **The Promotion File entry must indicate that discounting is in effect.**

- **Current Volume** - the year-to-date volume. This field is maintained by BOOMS (but you can update it manually). This number must be manually reset at the start of the next schedule

☞ **This is a total of the SHIPPED quantities for Orders for this Broker/Mailer.**

- **“Orders” Begin Date** - indicates the effective date for the beginning of the schedule. This date must be manually reset for the start of the next schedule.
- **Discount on Selections?** - is “Y” if you want to include Brokerage Commission on Selections in the discount calculation. Normally (“N”) the Brokerage Commission is not included.
- **Use “EXCHANGES” in Vol?** - is “Y” if you want to include Exchange quantities, in addition to Rental quantities, when calculating total quantity to arrive at a Discount Level. Normally (“N”) Exchange quantities are not included.
- **Volume/ Discount Percent** - 5 pairs of values indicating the discount levels. Volume is compared against CURRENT VOLUME. DISCOUNT PERCENT is a percent off Actual Brokerage Commission.

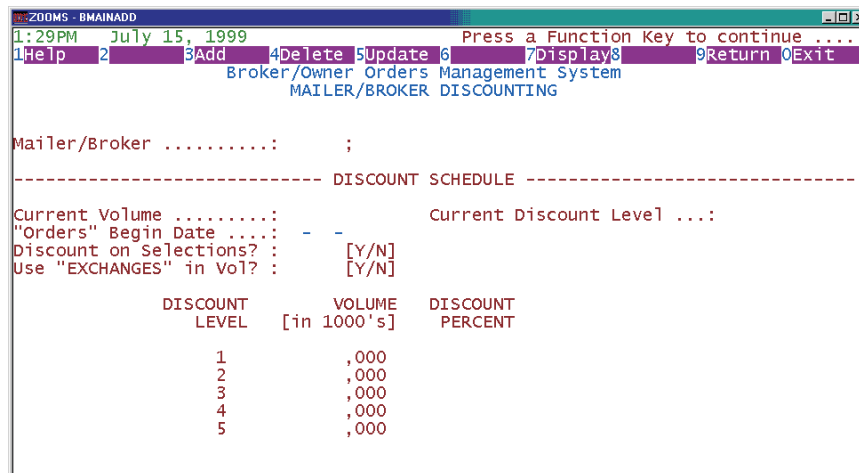


Figure 19.1. Mailer/Broker Discounting (based on a Schedule)

## Display Mailer Discount Schedule Record (F7, Shift-F7, Ctrl-F7)

Selecting option Display (F7) results in:

- STATUS message

### **Display Request .....**

- The positioning of the cursor at the first, and only, input field (MAILER/BROKER)
- The record will be Displayed after you fill in field “MAILER/BROKER”. Once a record has been displayed, following records can be displayed in succession by repeatedly pressing **Shift-F7** (or **PgDn**). Also, preceding records can be displayed in succession by repeatedly pressing **Ctrl-F7** (or **PgUp**).

## Update Mailer Discount Schedule Record (F5)

Selecting option Update (F5) when record is being displayed, results in:

- STATUS message:
  - Update Request .....**
- The positioning of the cursor at the first input field ELIGIBLE for UPDATE (CURRENT VOLUME)

Fields are entered just as if they were being Added to the file.

## Delete Mailer Discount Schedule Record (F4)

Selecting option Delete (F4) when a record is being displayed, results in the record being removed from the Discount File, a BEEP of the PC Speaker, and the STATUS message:

**Deleted .....**

## Mailer Discounting Based on a Single Order

Selecting Function, "Discounting", Sub-Function "Mailer S.O." ("D2") from the Additional Functions Menu results in:

- Replacing of the Additional Functions Menu by the "MAILER/BROKER DISCOUNTING (SINGLE ORDER) Screen" (Figure 19.2).
- The disappearance of the cursor

You must press a Function Key to select an Option. If you press any key other than a Function Key, the PC speaker will BEEP. The valid Functions Keys are:

- **F3** - ADD a new Discount record
- **Shift-F3** - ADD-NOCLEAR a new Discount record
- **F4** - DELETE a record
- **F5** - UPDATE a record
- **F7** - DISPLAY a record
- **Shift-F7** - DISPLAY Next record (same as PgDn)
- **Ctrl-F7** - DISPLAY Prior record (same as PgUp)

## Add Mailer Single Order Discount Record (F3, Shift-F3)

To Add a Discount Record, select option Add (F3). This results in:

- The clearing of all input fields
- STATUS message:
  - Add Request .....**
- The positioning of the cursor at the first input field (Mailer/Broker)

The valid values for this screen are:

- **Mailer/Broker** - Mailer to get the discount or Broker giving the discount.



**The Promotion File entry must indicate that discounting is in effect.**

- **List** - is a specific List for which the above Mailer is to receive a discount. In general, discounts do not usually apply to just a specific List. You may, however, find it useful to define a specific Mailer/List discount when there is an unusual situation (e.g. the List only gives 10% commission and you still want to give some discount, perhaps 5%). You can define both a non-specific discount and a specific discount. The specific discount will apply for orders of that specific List and the non-specific discount will apply in all other cases.

- **Continuations Only?** - indicates (“Y”) that the Discount applies to Orders on Continuation only.
- **20% Commission Required?** indicates whether the discount applies only to Orders for Lists which have 20% or more commission (“Y”) or whether the discount is valid for Orders for Lists with less than 20% commission.
- **20% BrokerComm required for “internal” Orders?** - indicates (“Y”) that only Brokerage Commission will be considered when calculating Mailer Discount when your company is both the Manager and Broker for an Order. If “N” is specified, the discount will only be allowed if the combination of Management and Brokerage commission is at least 20% (when 20% Commission is required).
- **Discount on Selections?** - is “Y” if you want to include Brokerage Commission on Selections in the discount calculation. Normally (“N”) the Brokerage Commission is not included.
- **Discount = ALL BCOMM?** - indicates (“Y”) that all Brokerage Commission is to be credited as a discount to the Mailer. This may be useful if you are receiving a FLAT fee from a Mailer in lieu of a Commission percent.
- **Use Netname/Adjusted Quantity?** - indicates (“Y”) that NetName or Adjusted Quantity will be used for volume on current Order. The default (“N”) is to use Shipped Quantity.
- **Net Name %** - Net Name percent to be associated with a specific Mailer/List combination. Unlike other fields, this value is used at Order Entry time.
- **Running Charges (/M)** - Running Charges to be associated with a specific Mailer/List combination. Unlike other fields, this value is used at Order Entry time.
- **Volume/Discount Percent** - 3 pairs of values indicating the discount amount. If an order’s rental quantity is greater than or equal to a volume at a certain level, then the related discount is deducted from Brokerage Commission (e.g. if Brokerage Commission for the List being ordered is 20.00% and this value is 5.00%, then the new Brokerage Commission will be 15.00%).
- **Required Single Order Exchange Volume** - the Exchange volume required for Discounting to be in effect.
- **New Rate** - the new Exchange Rate to be applied if the Order is eligible for Discounting. The rate can be “flat” or “/M”

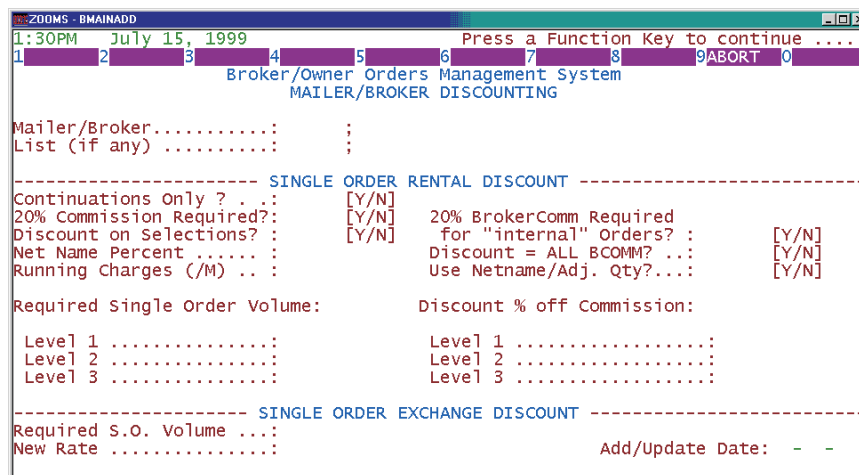


Figure 19.2. Mailer/Broker Discounting (based on a Single Order)

☞ Setting “Required Single Order Rental Volume” to zero, “Discount Percent off Commission” to “10%”, “20% Commission Required” to “Y”, “20% BrokerComm Required for “internal” Orders to “N”, “Discount = ALL BCOMM” to “N”, “Discount on Selections” to “N” and “Continuations only” to “N” gives the same effect as applying the “Standard Mailer 10% Discount” (See “Promotion File”)

## Display Mailer Single Order Discount Record (F7, Shift-F7, Ctrl-F7)

Selecting option Display (F7) results in:

- STATUS message
  - Display Request .....**
- The positioning of the cursor at the first input field (Mailer/Broker)

The record will be Displayed after you fill in field “Mailer/Broker” (and optionally a “List”). Once a record has been displayed, following records can be displayed in succession by repeatedly pressing **Shift-F7** (or **PgDn**). Also, preceding records can be displayed in succession by repeatedly pressing **Ctrl-F7** (or **PgUp**).

 **When scrolling, if you have not specified a specific List, only non-specific Mailer discounts are displayed. If you have specified a specific List, only lists for the selected Mailer are displayed.**

## Update Mailer Single Order Discount Record (F5)

Selecting option Update (F5) when a record is being displayed, results in:

- STATUS message:
  - Update Request .....**
- The positioning of the cursor at the first input field ELIGIBLE for UPDATE (CONTINUATIONS ONLY?)

Fields are entered just as if they were being Added to the file.

## Delete Mailer Single Order Discount Record (F4)

Selecting option Delete (F4) when a record is being displayed, results in the record being removed from the Discount File, a BEEP of the PC Speaker, and the STATUS message:

**Deleted .....**

## List Discounting (Based on a Single Order)

Selecting Function, “Discounting”, Sub-Function “List S.O.” (“D3”) from the Additional Functions Menu results in:

- Replacing of the Additional Functions Menu by the “List Discounting” screen (Figure 19.3).
- The disappearance of the cursor

You must press a Function Key to select an Option. If you press any key other than a Function Key, the PC speaker will BEEP. The valid Functions Keys are:

- **F3** - ADD a new Discount record
- **Shift-F3** - ADD-NOCLEAR a new Discount record
- **F4** - DELETE a record
- **F5** - UPDATE a record
- **F7** - DISPLAY a record
- **Shift-F7** - DISPLAY Next record (same as PgDn)
- **Ctrl-F7** - DISPLAY Prior record (same as PgUp)

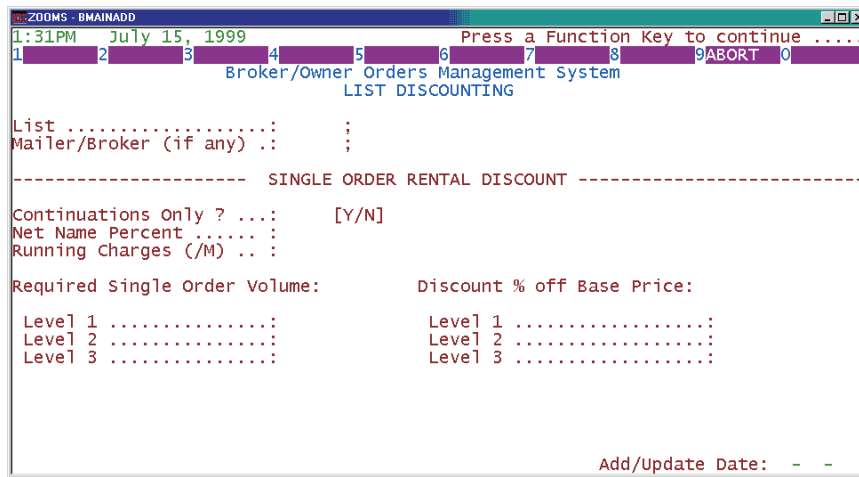


Figure 19.3. List Discounting (based on a Single Order Volume)

## Add List Single Order Discount Record (F3, Shift-F3)

To Add a Discount Record, select option Add (F3). This results in:

- The clearing of all input fields
- STATUS message:

**Add Request .....**

- The positioning of the cursor at the first input field (List Number)

The valid values for this screen are:

- **List Number** - List Number of the MANAGED or Non-MANAGED List giving the Discount.

**The list file entry must indicate that discounting is in effect.**

- **Mailer/Broker** - is a specific Mailer/Broker for which the above List is to give a discount. In general, discounts do not usually apply to just a specific Mailer/Broker. You may, however, find it useful to define a specific List/Mailer discount when there is an unusual situation (e.g. the List only gives a 10% discount to a specific mailer on volumes over 100,000) . You can define both a non-specific discount and a specific discount. The specific discount will apply for orders places by the particular Mailer/Broker and the non-specific discount will apply in all other cases.
- **Continuations Only?** - indicates (“Y”) that the Discount applies to Orders on Continuation only.
- **Net Name %** - Net Name percent to be associated with a specific List/Mailer combination. Unlike other fields, this value is used at Order Entry time.
- **Running Charges (/M)** - Running Charges to be associated with a specific List/Mailer combination. Unlike other fields, this value is used at Order Entry time.
- **Volume/Discount Percent** - 3 pairs of values indicating the discount amount. If an order’s rental quantity is greater than or equal to a volume at a certain level, then the related discount is deducted from the List’s Base Price. (e.g. if the List’s Base price is \$100/M and this value is 15.00%, then the new List Base Price will be \$85/M.).

## Display List Single Order Discount Record (F7, Shift-F7, Ctrl-F7)

Selecting option Display (F7) results in:

- STATUS message
  - Display Request .....**
- The positioning of the cursor at the first input field (List Number)

The record will be Displayed after you fill in the “List Number” (and optionally the “Mailer/Broker”). Once a record has been displayed, following records can be displayed in succession by repeatedly pressing **Shift-F7** (or **PgDn**). Also, preceding records can be displayed in succession by repeatedly pressing **Ctrl-F7** (or **PgUp**).

 **When scrolling, if you have not specified a specific Mailer, only non-specific List discounts are displayed. If you have specified a specific Mailer, only mailers for the selected List are displayed.**

## Update List Single Order Discount Record (F5)

Selecting option Update (F5) when record is being displayed, results in:

- STATUS message:
  - Update Request .....**
- The positioning of the cursor at the first input field ELIGIBLE for UPDATE (CONTINUATIONS ONLY?)

Fields are entered just as if they were being Added to the file.

## Delete List Single Order Discount Record (F4)

Selecting option Delete (F4) when a record is being displayed, results in the record being removed from the Discount File, a BEEP of the PC Speaker, and the STATUS message:

**Deleted .....**