

Debtors Group Discount Matrix Setup

You can use the Debtor Discount Matrix to set up a discount structure for specific debtors by product brand

This can be setup per a specific product group or various product groups that make up a product Brand

Example:

The brand may be: Matrixs

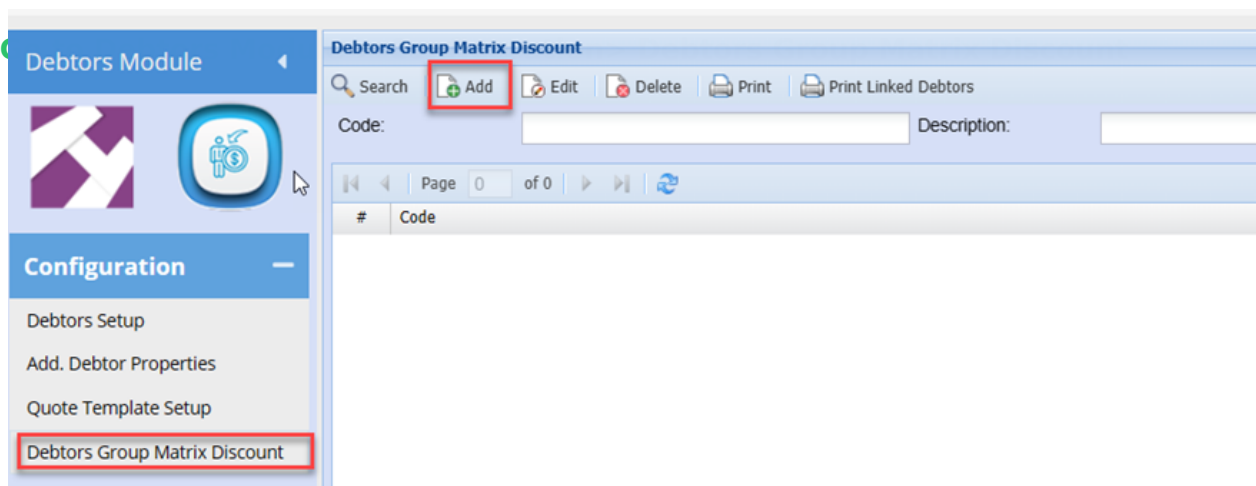
And Matrix may then have various groups such as Perms, Color Sync, Haircare

You can setup the discount Matrix either on the group level or the entire brand

To set this up:

1. Setup the various discount structures
2. Apply the discount Matrix to the Debtor

Setting up the Discount structure:



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Debtors Group Setup

+

Add

↶

Edit

✖

Delete

Close

Code:

TEST1

Description:

Missing test data

Valid From:

2000-01-01

Valid To:

3000-01-01

Active:

☒

⏪

⏩

Page

1

of 1

⏪

⏩

↺

Remove Paging:

☐

Displaying 1 - 3 of 3

#	Code	Description	Discount Percentage
1	DEL	Delivery	10
2	UF	Uniform	33
3	PP	Paper	5

💾

Save and Close

💾

Save

Debtors Group Setup

 Add  Edit  Delete

Code:

Description:

Valid From:

Active: ☒

Page 1 of 1

#	Code
1	DEL
2	UF
3	PP

Item Group setup

Group Code:

Discount Percentage:

Override Lock Pricing: ☐

 Save & New
  Save & Close
  Close

Debtor/Customer Group Setup

Debtors Group Setup

 Add  Edit  Delete  Close

Code:

Description:

Active: ☒

Page 0 of 0

#	Code	Description	Discount Percentage
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No data to display

The description of the discount matrix is not necessarily the product brand. It is ideally the debtor/ customer name. so if you need to edit the discounts at a later stage, it is easy to

identify the specific matrix you wish to edit.

Code	Enter a code for the discount matrix
Description	Enter a description for the discount matrix
Active	Put the tick to activate the discount matrix

Item Group Setup

The screenshot shows the 'Debtors Group Setup' window. The 'Add' button is highlighted with a red box. The 'Item Group setup' dialog box is open, showing the following fields:

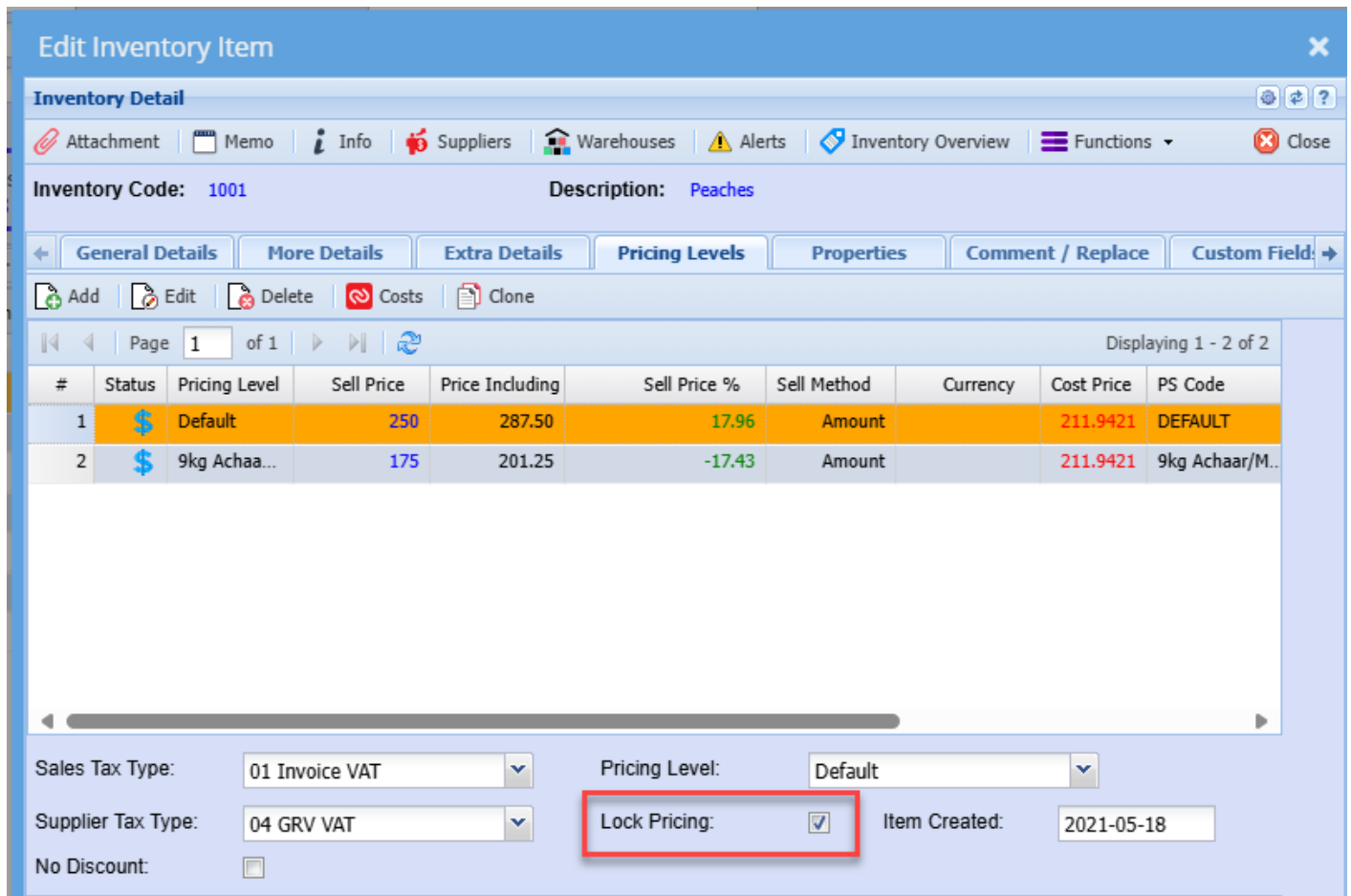
- Group Code: Paint - PT
- Discount Percentage: 10
- Override Lock Pricing: ☒

The dialog box has buttons for 'Save & New', 'Save & Close', and 'Close'. The background window shows the 'Debtors Group Setup' form with fields for Code (PT), Description (PT Group), Valid From (2022-08-15), Valid To (2024-08-15), and Active (checked). A table below shows one row with Code PT.

Group Code	Select the required Group code
Discount Percentage	Enter the discount percentage
Lock Pricing Override	This will enforce the discount matrix on the line even though the stock item is locked for pricing

Lock pricing override

This will override the Lock Pricing set against the item and apply the group discount to the item.



Edit Inventory Item

Inventory Detail

Attachment Memo Info Suppliers Warehouses Alerts Inventory Overview Functions Close

Inventory Code: 1001 Description: Peaches

General Details More Details Extra Details **Pricing Levels** Properties Comment / Replace Custom Field

Add Edit Delete Costs Clone

Page 1 of 1 Displaying 1 - 2 of 2

#	Status	Pricing Level	Sell Price	Price Including	Sell Price %	Sell Method	Currency	Cost Price	PS Code
1	\$	Default	250	287.50	17.96	Amount		211.9421	DEFAULT
2	\$	9kg Achar...	175	201.25	-17.43	Amount		211.9421	9kg Achar/M..

Sales Tax Type: 01 Invoice VAT Pricing Level: Default

Supplier Tax Type: 04 GRV VAT **Lock Pricing: ☒** Item Created: 2021-05-18

No Discount: ☐

Multiple item groups

If adding multiple item group: Select the next Group Code and the required percentage discount

Continue until all the discounts have been added for that specific brand Groups

Note: You do not have to select the groups that do not have a discount. The system will apply the default prices for these products.

By the time you are done, you should now have all the product groups you added a discount for listed in the grid with the respective discount percentage.

Debtors Group Setup

Add Edit Delete Close

Code: ABC001

Description: ABC Salon

Active: ☒

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#	Code	Description	Discount Percentage
1	007	MATRIX - PERMS	5
2	003	MATRIX - COLOR SYNC	5
3	010	MIZANI - HAIRCARE	5
4	035	REDKEN - MEN RETAIL	10
5	037	REDKEN - SCALP	10

If you have an instance where multiple customers receive the same discount structure, you need only setup the matrix once and apply the same discount matrix to the various customer. You may wish to rename the matrix description though: Eg. VIP clients instead of a specific customer name.

Click Add to add another matrix which will be for a different customer at different discount

Debtors Group Matrix Discount

Search Add Edit Delete Print Print Linked Debtors

Code:

Page 1 of 1

#	Code
1	Matrix ALL

Debtors Group Setup

Add Edit Delete

Code: REDKEN

Description: Redken

Active: ☒

Page 0 of 0

Select the Required Group codes and enter the respective discount percentage

Item Group setup

Group Code: 055 - REDKEN - OXIDANTS

Discount Percentage: 10

Continue in a similar manner you did above until all the required group codes have been entered with the discount.

Applying the Matrix to the debtor

Go to Debtors Module > Configuration> Debtor setup

Search for the required debtor

Debtors Module

Configuration

Debtor Setup

Add Debtor Properties

Quote Template Setup

Debtors Group Matrix Discount

Debtor Setup

Search Add Edit Delete Clone Create Reminder Debtor Enquiry Debtor History Functions Import Print / Export

Basic Search Custom Search Expand

Debtors Code: Debtor Name: the bored

Order By: Code Search Type: All

Search: Debtors and Prospects L

Contact Name: E-mail Address:

Division: All Mobile No:

Main Details Statutory CO Link Support Task Item Sales

#	Att	Memo	Status	Web	Code	Company Name	Short Name	Postal Address1	Postal Address2
1					10739	THE BOREDROOM		42 RYNEVELD STREET	STELLENBOSCH
2					11709	CHRISTINE @ THE BOREDROOM		42 REINEVELD STREET	STELLENBOSCH

Double-click the line on the grid to edit the debtor setup

Click the Accounts Tab

Select the required discount Matrix from the drop down

Edit Debtor

Debtors Details

Attachment Memo Create Reminder Debtor Enquiry View Attachments Functions Standard Alerts Close

Code: 10739 Debtor Name: THE BOREDROOM Outstanding Balance: 7 286.57

Details Address Contacts Account Details Gen Details Statutory Info Custom Fields Activity Tim

Default Currency: Rands

Price Level: Default

Discount: 12

Discount Matrix: VIP Clients

Rating:

Statement Type: Standard

Over Due: 886 327.25

Last Payment & Date: 2023-08-30 7 606.12

Last Invoiced & Date: 2023-09-18 901.60

Ageing: Date Of Statement Date Of Invoice

Account Terms: COD

Tax Type:

Payment Terms:

This will conclude the discount Matrix setup.

Any new invoice done for the debtor/ customer where you added a discount matrix for, will now automatically pull through the respective discounts for the product groups added on the matrix.

After the setup is complete, request the sales consultants to sync the Webatar Mobile app so that the discounts are available on the APP. This way, when they do order for these clients, the discounts will also pull through automatically.

For the discount matrix to pull through from order done by the sales consultants on the APP, they will have to press the "Discount" Button on their devices before syncing the orders to the main system.

Webatar

☰

← Quote Details

Quote Items

Discount

+

General Details

Show Deals

Quote Items

Special Items

Photos

Attachments

Email To Self

Order

Cancel

Line 1
GLA001
Glass Tubes
GL9583
2.00 x 446.37 = 892.73
Discount - 0
Total Including - 1 026.64

QTY - 2
Tax - 133.91

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