

SOP BONUSES

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AIM

- To define a part as a bonus, to be awarded to customers upon the purchase of a given part, or upon the purchase of any part(s) belonging to a given part family.

There are two types of bonuses:

- A regular bonus is given to all customers (i.e., that are eligible to receive them), for free or at a reduced price, in exchange for purchasing a given part.
- A special bonus is only given to a specific customer.

PROCEDURE

STAGE ONE: DEFINING A REGULAR BONUS FOR A PART OR PART FAMILY

1. Enter the Bonuses for Ordering Parts form or the Bonuses for Ordering from Family form.
2. Select the Part Number or Family that must be ordered to receive the bonus.
3. Record the start and end dates of the bonus offer.
4. Record the minimum quantity of this part or part family that customers must order to be eligible for the bonus.
5. Choose the part number of the bonus item, and record the quantity of parts offered as the bonus.
6. If the bonus item is not free, record its price and the currency.
7. Enter the Customers form, and retrieve the desired customer(s).
8. Click the Details tab and flag the Gets Reg. Bonus column.

STAGE TWO: DEFINING A SPECIAL BONUS FOR A PART OR PART FAMILY

1. Enter the Customers form, and retrieve the desired customer.
2. Enter the Special Part Bonuses or Special Family Bonuses sub-level form.
3. Select the Part Number or Family that must be ordered to receive the bonus.
4. Record the start and end dates of the bonus offer.
5. Record the minimum quantity of this part or part family that the customer must order so as to be eligible for the bonus.
6. Choose the part number of the bonus item, and record the quantity of it being offered.
7. If the bonus item is not free, record its price and the currency.

STAGE THREE: OFFERING BONUSES IN ORDERS

When you record a sales order item for which a bonus is available, you receive a message informing you of this. In order to award the bonus, click OK.

RESULT

Priority adds a “bonus line” to the order, filling in the quantity and price (if not free) of the bonus part. In this line, the Bonus Item column is automatically flagged.