# Hands-on-Lab 4.3: Configure Sales

## Exercise 1: Complete the customer card

### Scenario

As the functional consultant, you are collecting more information about the sales process, and more particularly about the customers who are buying your products and the conditions surrounding delivery.

In order to deliver the computer hardware items from the European warehouse to the European customers, Contoso uses DHL as a shipping agent. Web shop customers who are end-users will have the option to choose between home delivery or delivery at a pick-up point.

The following different pick-up points are set up as shipping addresses on the webshop customer (CWEB0001):

* PICK-UP DK: Carl Blochs Gade 7, DK-8000 Arhus C – contact: Hr. Jonathan Mollerup
* PICK-UP BE: Binkkampen 33, BE-1020 BRUSSEL – contact: Dhr. Luc van Vugt
* PICK-UP FR: 34 Avenue Parmentier, FR-75000 PARIS – contact: M. Jean E. TRENARY

Since this is a generic customer, different orders are never combined into one shipment. It is however possible that one order needs to be shipped parts because of item availability. This should be under rare circumstances, since Contoso has stated to his customers to guarantee a maximum delivery time within 2 days, which is compliant with DHL’s standard shipping service and time.

In the domestic areas sales activities are performed by sales representatives who each have their set of customers. All transactions need to be assigned to a specific sales person as follows:

* C00010 Spotsmeyer’s Furnishings is a customer from Annette Hill
* C00020 Progressive Home Furnishings is a customer from John Roberts
* C00030 New Concepts Furniture is a customer from Peter Saddow

Also don’t forget to assign de SALESPERSON dimension to each sales person.

### Tasks

1. Create a shipping address for the customer.
2. Specify shipping information.
3. Set up and assign a salesperson

### Steps

1. Create a shipping address for the customer.
   1. On the **Customers** list page, select the web shop customer (CWEB0001).
   2. To open the customer card, select **Manage** and then select **Edit**.
   3. In the customer card, select **Related**, then select **Customer** and then **Ship-to Addresses**.
   4. In the opened **Ship-to Address** List page, select **New**.
   5. In the opened ship-to addresses card, fill in the following fields:
      1. In the **Code** field, enter PICK-UP DK
      2. In the **Name** field, the value ‘Generic EU web shop’ is automatically filled in. Replace with ‘Pick-up point Denmark’.
      3. In the **Address** field, enter ‘Carl Blochs Gade 7’.
      4. In the **City** field, enter ‘Arhus C’
      5. In the **ZIP Code** field, the value ‘DK-8000’ is automatically filled in.
      6. In the **Country/Region Code** field, the value ‘DK’ is automatically filled in.
      7. In the **Contact** field, enter ‘Hr. Jonathan Mollerup’.
   6. Close the ship-to address card.
   7. In the customer card, select **Related**, then select **Customer** and then **Ship-to Addresses**.
   8. In the opened **Ship-to Address** **List** page, select **New**.
   9. In the opened ship-to addresses card, fill in the following fields:
      1. In the **Code** field, enter PICK-UP BE
      2. In the **Name** field, the value ‘Generic EU web shop’ is automatically filled in. Replace with ‘Pick-up point Belgium’.
      3. In the **Address** field, enter ‘Binkkampen 33’.
      4. In the **City** field, enter ‘Brussel’
      5. In the **ZIP Code** field, enter ‘BE-1020’.
      6. In the **Country/Region Code** field, the value ‘BE’ is automatically filled in.
      7. In the **Contact** field, enter ‘Dhr. Luc van Vugt’.
   10. Close the ship-to address card.
   11. In the customer card, select **Related**, then select **Customer** and then **Ship-to Addresses**.
   12. In the opened **Ship-to Address** List page, select **New**.
   13. In the opened ship-to addresses card, fill in the following fields:
       1. In the **Code** field, enter PICK-UP FR
       2. In the **Name** field, the value ‘Generic EU web shop’ is automatically filled in. Replace with ‘Pick-up point France’.
       3. In the **Address** field, enter ‘34 Avenue Parmentier’.
       4. In the **City** field, enter ‘Paris’
       5. In the **ZIP Code** field, the value ‘FR-75000’ is automatically filled in.
       6. In the **Country/Region Code** field, the value ‘FR’ is automatically filled in.
       7. In the **Contact** field, enter ‘M. Jean E. TRENARY’.
   14. Close the ship-to address card.
   15. Close the **Ship-to Address** **List** page.
2. Specify shipping information.
   1. On the customer card for the generic web shop customer (CWEB0001), go to the **Shipping** FastTab.
   2. Leave the **Ship-to Code** field blank.
   3. In the **Location Code** field, enter EUROP.
   4. In the **Agent** field, enter DHL
   5. In the **Agent Service** field, enter STANDARD
   6. In the **Shipping Time** field, the value 2D is automatically filled in.
3. Set up and assign a salesperson
   1. On the **Sales People/Purchasers** list page, select sales person Annette Hill.
   2. Select **Salesperson** and then select **Dimensions-single**.
   3. On the opened **Default Dimensions** page, select **New**.
   4. On the new line, fill in the following fields:
      1. In the **Dimension Code** field, enter SALESPERSON
      2. In the **Dimension Value Code** field, enter AH
      3. In the **Value Posting** field, select the **Same Code** option.
      4. Close the page.
   5. Repeat steps a. to d. for salespeople John Roberts and Peter Saddow.

*(Remark: you also repeat the steps for the other salespeople, but this is not required for further exercises.)*

* 1. On the **Customers** list page, select customer Spotsmeyer’s Furnishings (C00010)
  2. To open the customer card, select **Manage** and then select **Edit**.
  3. On the **General** FastTab, in the **Salesperson Code** field, enter AH
  4. Go to the next customer card for customer Progressive Home Furnishings.
  5. On the **General** FastTab, in the **Salesperson Code** field, enter JR
  6. Go to the next customer card for customer New Concepts Furniture.
  7. On the **General** FastTab, in the **Salesperson Code** field, enter PS

## Exercise 2: Configure sales pricing and discounts

### Scenario

The sales manager at Contoso, has determined the following rules regarding their sales of computer hardware:

* All sales prices are set in local currency, thus USD.
* For each item a general sales price for all EU customers is determined for the base unit of measure. However, when large amounts are ordered, a lower unit price is granted.
  + The 15” flat panel is sold at $ 499.95 a piece. However, if the customer orders a box of 10 pieces, the price is lowered to $ 4,800.00 for the entire box.
  + The 17” monitor is sold at $ 700.00 a piece, However, if the customer orders a box of 10 pieces, the price is lowered to $ 6,550.00 for the entire box.
  + For other customers (both domestic and non-EU) separate sales prices will be determined later.
* Depending on the customer group (small, medium, large) and item group (computer, monitor, accessories) a discount percentage is granted to achieve the net sales price.
  + The generic web shop customer and all other small businesses receive a standard 3% on all monitors. Medium sized customers receive 6% and large companies receive 10% on the same items.
* To boost web shop sales, a discount of 5% is granted on the total amount of the order for sales above $50.00 .

You have to set up this sales price structure as provided by Contoso.

### Tasks

1. Set up customer price groups
2. Set up customer discount groups
3. Assign customer price groups and customer discount groups
4. Set up and assign item discount groups
5. Configure sales prices
6. Configure line discount
7. Configure invoice discount

### Steps

1. Set up customer price groups
   1. On the **Customers Price Groups** page, select **New**.
   2. On the new line, fill in the following fields:
      1. In the **Code** field, enter EU.
      2. In the **Description** field, enter ‘EU customers’.
      3. Leave the **Allow Line Disc.** and **Allow Invoice Disc.** checkboxes selected.
   3. Repeat steps a. and b. to create also a DOMESTIC and EXPORT customer price group.
2. Set up customer discount groups
   1. On the **Customer Disc. Groups** page, select **New**.
   2. On the new line, fill in the following fields:
      1. In the **Code** field, enter SMALL.
      2. In the **Description** field, enter ‘Small business’.
   3. Repeat steps a. and b. to create also a MEDIUM and LARGE customer discount group.
3. Assign customer price groups and customer discount groups
   1. On the **Customers** list page, select the web shop customer (CWEB0001).
   2. To open the customer card, select **Manage** and then select **Edit**.
   3. Go to the **Invoicing** FastTab, and fill in the following fields:
      1. In the **Customer Price Group** field, enter EU.
      2. In the **Customer Disc. Group** field, enter SMALL
      3. Leave the **Allow Line Disc.** checkbox selected.
   4. Repeat steps d. to f. to assign the DOMESTIC customer price group to the customers C00010, C00020 and C00030 , and the SMALL customer discount group to customer C00010, the MEDIUM customer discount group to customer C00020 and the LARGE customer discount group to customer C00030.
4. Set up and assign item discount groups
   1. On the **Item Discount Groups** page, select **New**.
   2. On the new line, fill in the following fields:
      1. In the **Code** field, enter COMPUTER
      2. In the **Description** field, enter Computer
   3. Repeat step a. and b. to create an item discount group for MONITOR and ACCESSORIES
   4. On the **Items** list page, select the 15” Flat panel (CHW1002)
   5. Go to the **Invoicing** FastTab, in the **Item Disc. Group** field, enter MONITOR.
   6. On the **Items** list page, select the 15” Flat panel (CHW1002)
   7. Go to the **Invoicing** FastTab, in the **Item Disc. Group** field, enter MONITOR.
5. Configure sales prices
   1. On the **Items** list page, select the 15” flat panel (CHW1002).
   2. To open the item card, select **Manage** and then select **Edit**.
   3. On the opened item card, select **Special Sales Prices & Discounts** and then select **Set Sales Prices**.
   4. On the **Sales Prices** page, create a new line as follows:
      1. In the **Sales Type** field enter **Customer Price Group**.
      2. In the **Sales Code** field, enter **EU**.
      3. In the **Item No**. field, the value CHW1002 is automatically filled in.
      4. In the **Unit of Measure Code** field, the value PCS is automatically filled in.
      5. In the **Unit Price** field, enter 499.95.
   5. On the **Sales Prices** page, create a new line as follows:
      1. In the **Sales Type** field enter **Customer Price Group**.
      2. In the **Sales Code** field, enter **EU**.
      3. In the **Item No**. field, the value CHW1002 is automatically filled in.
      4. In the **Unit of Measure Code** field, the value PCS is automatically filled in. Change the value to BOX.
      5. In the **Unit Price** field, enter 4800.00.
   6. Close the sales prices page.
   7. Close the item card.
   8. On the Items list page, select the 17” monitor (CHW1003).
   9. To open the item card, select **Manage** and then select **Edit**.
   10. On the opened item card, select **Special Sales Prices & Discounts** and then select **Set Sales Prices**.
   11. On the **Sales Prices** page, create a new line as follows:
       1. In the **Sales Type** field enter **Customer Price Group**.
       2. In the **Sales Code** field, enter **EU**.
       3. In the **Item No**. field, the value CHW1003 is automatically filled in.
       4. In the **Unit of Measure Code** field, the value PCS is automatically filled in.
       5. In the **Unit Price** field, enter 700.00.
   12. On the **Sales Prices** page, create a new line as follows:
       1. In the **Sales Type** field enter **Customer Price Group**.
       2. In the **Sales Code** field, enter **EU**.
       3. In the **Item No**. field, the value CHW1003 is automatically filled in.
       4. In the **Unit of Measure Code** field, the value PCS is automatically filled in. Change the value to BOX.
       5. In the **Unit Price** field, enter 6,550.00.
6. Configure line discount
   1. On the **Item Discount Groups** page, select **Sales Lines Discounts**.
   2. Remove the value in the **Code Filter** filter.
   3. On the **Sales Discounts** page, create a new line as follows:
      1. In the **Sales Type** field enter **Customer Disc. Group**.
      2. In the **Sales Code** field, enter SMALL.
      3. In the **Type** field, enter **Item Discount Group**
      4. In the **Code** field, enter MONITOR.
      5. In the **Line Discount %** field, enter ‘3’.
   4. On the **Sales Discounts** page, create a new line as follows:
      1. In the **Sales Type** field enter **Customer Disc. Group**.
      2. In the **Sales Code** field, enter MEDIUM.
      3. In the **Type** field, enter **Item Discount Group**
      4. In the **Code** field, enter MONITOR.
      5. In the **Line Discount %** field, enter ‘6’.
   5. On the **Sales Discounts** page, create a new line as follows:
      1. In the **Sales Type** field enter **Customer Disc. Group**.
      2. In the **Sales Code** field, enter LARGE.
      3. In the **Type** field, enter **Item Discount Group**
      4. In the **Code** field, enter MONITOR.
      5. In the **Line Discount %** field, enter ‘10’.
   6. Close the **Sales Discounts** page.
7. Configure invoice discount
   1. On the **Customers** list page, select the web shop customer (CWEB0001)
   2. To open the customer card, select **Manage** and then select **Edit**.
   3. Select **Related**, then select **Prices and Discounts** and then select **Invoice Discounts**.
   4. On a new line, fill in the following fields.
      1. In the **Minimum Amount** field, enter 50.00.
      2. In the **Discount %** field, enter 5.
   5. Close the **Cust. Invoice Discounts** page.