Steps to creating your own 2020 Rates

1) Close out of 2020 Design.

2) From your desktop, double click on the Catalog Manager icon.

3) Click on the **Charges Editor** button.

4) Click on the **Rates** tab. Pull the down arrow and select your desired catalog. For this example I've selected the SAMPLE_F catalog. This catalog is pre-loaded with some sample Promotional Rates. If you catalog doesn't have rate records already available, this list would simply appear blank, and that's OK.
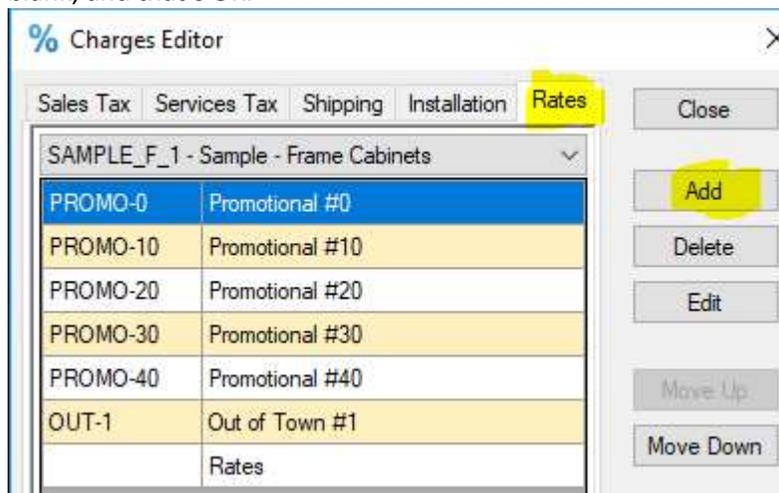
5) Using the buttons on the right side, you can click on Delete to remove a highlighted records. You can also use Move Up or Move Down to reorganize the list as you prefer. For this example, we'll click the **Add** button to create a new Rate.

6) Now we go down the list and fill in the blanks. In the chart below, you'll find all the information you need to know to properly set rates. Tip: Price2-6 are used on both the Quote report and Cost/Sell report. Price7-11 are *only* used on the Cost/Sell report. So if you only use Quote, you can skip over Prices 7-11. The last page has my Cheat Sheet which will help you populate the correct fields;

FIELD	INFORMATION
Description – Long description	The long form description field. Type in a maximum of 24 characters. Example: *Retail Selling Price*
User Code – Short description	Assign a short form description. Example: *RETAIL*
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,	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.

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.
Price 4 = Discount or mark up accessories	Use this field only if you want to apply a discount or a markup to accessories. 20-20 Accessories are defined as non-graphic items that are typically added in the 'shopping cart', and may not match accessories as defined by the manufacturer. 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.

Tip: If your multiplier is 3 or 4 digits after the decimal (ie a selling multiplier of .6789) then set a Price2 value of 0.01 and set Price3-6 with values of 67.89. See the Cheat Sheet below for more examples.

7) Once you've completed filling in the required values, click on **OK.** You can create as many rates as you want. When you're done, click **Close**, then simply click on the (x) in the top right corner to close out of Charges Editor.

8) Now you're ready to use it in Design. Open an existing design, or create a new one, using that catalog. When you are ready to price it, click on Items tab and click **Styles and Pricing**. Select your catalog from the list on the left. Click on the Catalog Charges tab. On line 1 next to Rates, pull the down arrow and pick your desired rate.

Cheat Sheet

Example 1:
A cabinet has a List price of $100.00. You buy it for $26.75 and then sell it to a builder for $55.00

Description Long description = Builder Rate
User Code – Short Description = BUILD1
MENUCH = 0
Price 2 = 0.55
Price 3 = 0
Price 4 = 0
Price 5 = 0
Price 6 = 0
Price 7 = 0.01 (Since it only handles 2 digits after the decimal, we use this value to factor upto 4-digit multipliers.)
Price 8 = 26.75
Price 9 = 26.75
Price 10 = 26.75
Price 11 = 26.75

Example 2:
You have a cost multiplier of .284 and want to add 40% to sell at retail.
Therefore a cabinet with a $100 list price would retail for (100*0.284*1.4)=$39.76
Thus your selling multiplier is ($100-$39.76)=60.24

Description Long description = Retail Rate
User Code – Short Description = RETAIL40
MENUCH = 0
Price 2 = 0.01
Price 3 = 60.24
Price 4 = 60.24
Price 5 = 60.24
Price 6 = 60.24
Price 7 = 0.01
Price 8 = 28.40
Price 9 = 28.40
Price 10 = 28.40
Price 11 = 28.40