Pricing Rule Overrides

A pricing rule override allows you to adjust the calculated sale price of equipment based on the series, model, cooling capacity, heating capacity, SEER, and/or AFUE. For example, this feature is frequently used to apply a different install kit cost to 20 SEER condensers. Pricing rule overrides can be applied to the margin and all cost categories.

Business Rules Company: Tetra Basic Action: Edit Business Rules \$ Go 差 Export (.xlsx) 🖉 Export (.csv) 🚔 Mai, 🕫 💿 Pr Equipment and Install Kit Tax Percent Last Update 6 % 07/25/17 8:32 PM June Getzinger Pricing Method Percent OEM Туре Series Last Update Gross Margin 🛊 45 % Default 🛊 Default 💠 Default 🗘 08/28/19 3:36 PM June Getzinger Ð

On the Business Rules page select **Preview Pricing**.

In this view, you can filter by OEM, equipment type, series, model and/or SEER, Cooling Capacity, AFUE and Heating Capacity.

| Comp | bany: Tetr | a Basic | | | | | | | | | | | | | | |
|--------|---------------------|----------------|-------------------|------------------------|--------|-------|--------------|-----------|---------|--------|----|-------|------------|-------|---------------|------------|
| ilter | By: Tetr | ra Basic | \$ | Select OEM | | ¢ | Select Type | \$ Select | Series | ¢ | | | | | | |
| | Sel | ect Model | | | | ¢ | Select SEER | | | × | H | | | | | |
| Selec | t By: SE | ER Coolin | | | | acity | Select All | | | | | | | | | |
| Honard | | Efficie | ncy a r | | | BS | □ 14 | | | | | | | | | |
| Optio | ns: 🗆 Prev | iew Calculatio | ns for all Mod | els 🚨 Expr | (xisx) | 🛎 Exp | □ 15 □ 16 | | | | | | | | | |
| | OEM | Туре | Series | Model | Sub- | SEER | 17 | | | | r | Labor | Labor | Labor | Cost of | Gross |
| Book | | | | Display Name | Туре | 1 | □ 18 ☑ 20 | | | | ur | Hours | Multiplied | \$ | Goods Sold | Margi % |
| | | Thermostat | Not | 1 Ecobee - | | | None | | | | | | | | | |
| Basic | Company | | Applicable 001 | green icon brochure | | | | | | | | | | | | |
| | | | | added | | | | | | | | | | | | |
| | Added by Company | Thermostat | Not Applicable | 2- Red Icon NO | | | | | | | | | | | | |
| | | | 002 | brochure | | | | 🖌 🖌 Se | elect 🗙 | Cancel | | | | | | |

After applying the filter, scroll to the bottom of the list. Notice the "pencil edit" icon at the bottom of each cost category. Click on the pencil to display Override Cost Value. Enter the override value and **"Save Override".**

| ude | SEEF | | ncy and C | apacity @ Busines | s Rules | acity 2 Depor | t (.cav) | | | | | | | | | | | | | |
|----------|-------|--------------------|-----------|-------------------------|--------------|------------------|---------------------|---------------------|------|-----------------|----------|--------|------------------|----------------|---------------------|-------------|--------------------------|-----------------|---------------|--|
| se sk | OEM | Туре | Series | Model Display Name | Sub- Type | SEER | Cooling Capacity | leating Capacity | | install Kit | Tax % | Tax | Labor \$/Hour | Labor Hours | Labor Multiplied | Labor \$ | Cost of Goods Sold | Gross Margin | | |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0024A1000A | | 20 | 24000 | | 3581 | 300.00 | 9% | 349.29 | 91.00 | 10.5 | 955.50 | | 5185.79 | 0 | Override Cost | Value |
| | | Air Conditioner | 4TTV0 | XV20i 4TTV0036B1000A | | 20 | 36000 | | 4431 | 300.00 | 9% | 425.79 | 91.00 | 10.5 | 955.50 | | 6112.29 | | | 1 |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0048A1000A | | 20 | 48000 | | 4040 | 300.00 | 9% | 390.60 | 91.00 | 10.5 | 955.50 | | 5686.10 | | | Install Kit |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0060A1000A | | 20 | 60000 | | 4399 | 300.00 | 9% | 422.91 | 91.00 | 10.5 | 955.50 | | 6077.41 | | | \$300.00 |
| | Trane | Heat Pump | 4TW/0 | XV20i 4TWV0024A1000A | | 20 | 24000 | | 4072 | 300.00 | 9% | 393.48 | | | | | 4765.48 | | ost | \$ 400 |
| | Trane | Heat Pump | 4TW/0 | XV20i 4TWV0036A1000A | | 20 | 36000 | | 4517 | 300.00 | 9% | 433.53 | | | | | 5250.53 | | | ing or resetting will update all st as specified by the current filters. |
| | Trane | Heat Pump | 4TW/0 | XV20i 4TWV0048A1000A | | 20 | 48000 | | 4882 | 300.00 | 9% | 465.38 | | | | | 5648.38 | | | |
| | Trane | Heat Pump | 4TW/0 | XV20i 4TWV0050A1000A | | 20 | 60000 | | 5010 | <u>ann (</u> 0) | | 502.58 | | | | | 60 38 | | Save Overrid | C Reset to Default Cancel |
| | | | | | | | | | | l. | | |) | | 1 | 1 | 7 | 1 | | |

Pricing overrides will be highlighted yellow in the preview pricing view and in the Preview Calculations **Export.**

| Includ | SEE | | ncy and C | apacity @ Business | _ | acity | t (.csv) | > | | | | | | | | | | | | | |
|---------------|-------|--------------------|-----------|-------------------------|--------------|-------|---------------------|------|---------------------|------|----------------|----------|--------|------------------|----------------|---------------------|-------------|--------------------------|----------------------|-----------------------|--------------------|
| Price Book | OEM | Туре | Series | Model Display Name | Sub- Type | SEER | Cooling Capacity | AFUE | Heating Capacity | Cost | Install Kit | Tax % | Тах | Labor \$/Hour | Labor Hours | Labor Multiplied | Labor \$ | Cost of Goods Sold | Gross Margin % | Gross Margin \$ | Calculate Price |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0024A1000A | | 20 | 24000 | | | 3581 | 400.00 | 9% | 358.29 | 91.00 | 10.5 | 955.50 | | 5294.79 | 35% | 2851.04 | 8146 |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0036B1000A | | 20 | 36000 | | | 4431 | 400.00 | 9% | 434.79 | 91.00 | 10.5 | 955.50 | | 6221.29 | 35% | 3349.93 | 9572 |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0048A1000A | | 20 | 48000 | | | 4040 | 400.00 | 9% | 399.60 | 91.00 | 10.5 | 955.50 | | 5795.10 | 35% | 3120.44 | 8916 |
| | Trane | Air Conditioner | 4TTV0 | XV20i 4TTV0060A1000A | | 20 | 60000 | | | 4399 | 400.00 | 9% | 431.91 | 91.00 | 10.5 | 955.50 | | 6186.41 | 35% | 3331.14 | 9518 |
| | Trane | Heat Pump | 4TWV0 | XV20i 4TWV0024A1000A | | 20 | 24000 | | | 4072 | 400.00 | 9% | 402.48 | | | | | 4874.48 | 35% | 2624.72 | 7500 |
| | Trane | Heat Pump | 4TWV0 | XV20i 4TWV0036A1000A | | 20 | 36000 | | | 4517 | 400.00 | 9% | 442.53 | | | | | 5359.53 | 35% | 2885.90 | 8246 |
| | Trane | Heat Pump | 4TWV0 | XV20i 4TWV0048A1000A | | 20 | 48000 | | | 4882 | 400.00 | 9% | 475.38 | | | | | 5757.38 | 35% | 3100.13 | 8858 |
| | Trane | Heat Pump | 4TWV0 | XV20i 4TWV0060A1000A | | 20 | 60000 | | | 5282 | 400.00 | 9% | 511.38 | | | | | 6193.38 | 35% | 3334.90 | 9529 |
| | | | | | | | | | | | N | | | | | N | ø | | 1 | | |

To activate the changes you have made, select **Publish and Activate**. The new pricing will be available on user tablets on their next refresh.

| Prev | iew P | ricing | | | | | | | | | | | (| | 🗸 Publ | ish and | Activat | • |
|---------------|-------------------|----------------------|----------------|--------------------------------|---------------------------|--------------|---------|---------------------|------------|------------------|----------|-----|------------------|----------------|---------------------|-------------|--------------------------|----------------------|
| Status | : Pre-P | roduction (U | npublished | l, Inactive) | | | | | | | | | | | | | | |
| Comp | any: Tel | tra Basic | | | | | | | | | | | | | | | | B |
| Filter | By: Te | etra Basic | \$ | Select OEM | 1 | \$ Selec | t Type | | \$ | Select Ser | ies | | \$ | | | | | |
| | Se | elect Model | | | | 🗘 🗹 Act | ve Only | | | | | | | | | | | |
| Select | tBy: S | EER Coolin | g Capacity | AFUE | leating Capaci | ity | | | | | | | | | | | | |
| Includ | le Colur | mns: 🛛 Efficie | ncv and Capa | C ^{it} BUSI | ness Bules | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| Option | 1S: Pre | eview Calculatio | ns for all Md | | | Export | | | | | | | | | | | | |
| Optior | n s: 🗆 Pre | eview Calculatio | ns for all M d | | | Export (2sv) | | | | | | | | | | | | |
| Price | OEM | eview Calculatio | ns for all Mid | | | | AFUE | Heating Capacity | Cos | t Install Kit | Tax % | Tax | Labor \$/Hour | Labor Hours | Labor Multiplied | Labor \$ | Cost of Goods Sold | Gross Margin % |
| Price Book | | Type y Thermostat | | els A Expo Model Display | ert (.xisx) 2 Sub- SEE | R Cooling | AFUE | | Cos | | | Tax | | | | | Goods | Margin |