Margin sheet

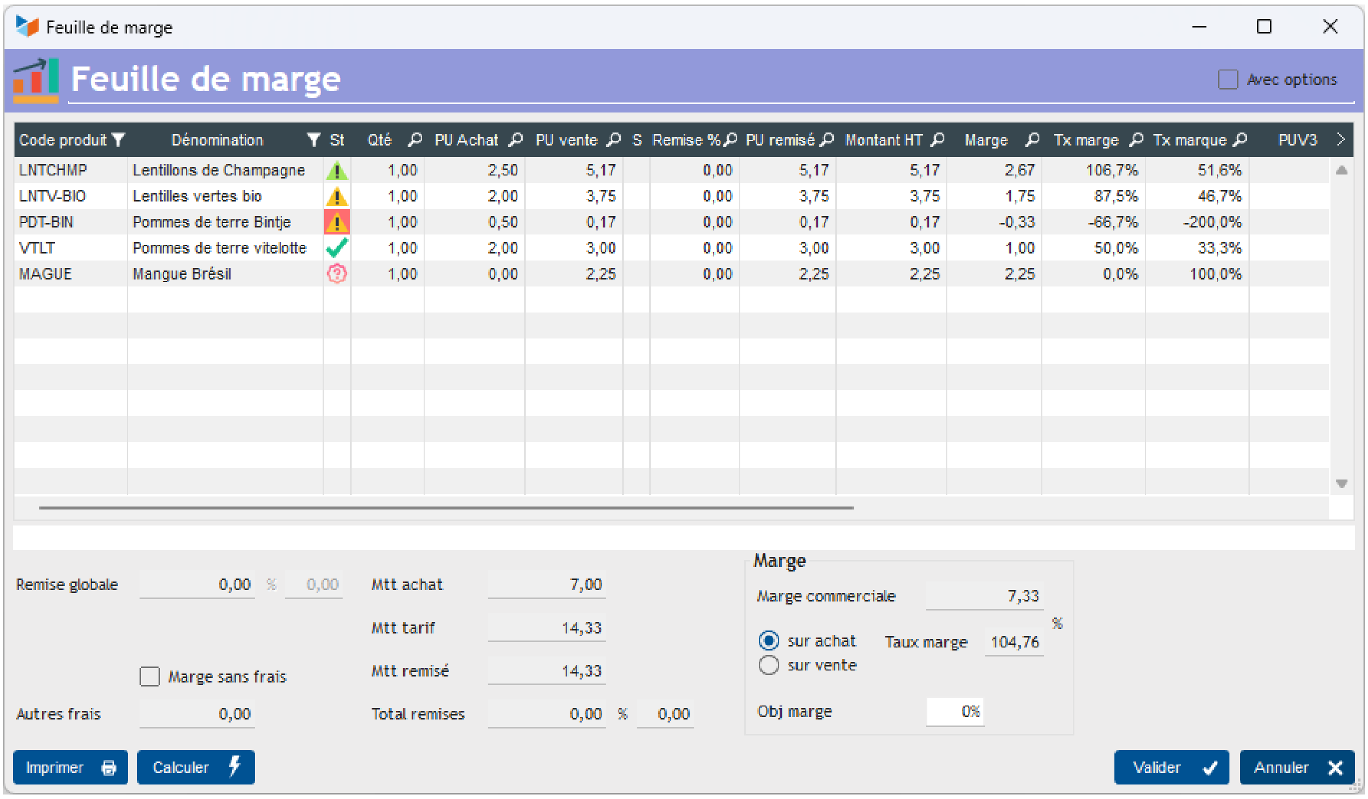
🔧 Fix Me! A1 proofreading not yet effective for this page. In the meantime, you can ask any questions on the forum.

The margin sheet shows the sales margin for a quote, order or invoice.

Using the screen

***Access : **From the "Margin" button below on the quote, order or invoice sheet.*

The screen displays each line of the part concerned, with details of the sales margin.



The **St** column shows the tariff status:

- green if the purchase price and sales price used are those indicated on the product sheet
- yellow warning if the sale price and/or purchase price of the product are not the same as the catalog prices (on the product sheet) and the margin has been downgraded.
- green warning if the product's selling price and/or purchase price are not the same as the catalog prices (on the product sheet) and the margin has been improved
- grey if the product is out of catalog.

The status is displayed on an orange background when the discounted sales price is lower than the purchase price: this is dumping, which is unfair and forbidden in many countries.

When a line is selected, detailed list prices are displayed below the table.

The **PU Purchase** and **PU Sale** columns are the purchase and sale unit prices, excluding VAT. You can modify these prices if you bought the product at a price other than the usual one, or if you sell it at a price different from the catalog price. You can also change the **Discount** rate (for the line).

The purchase price is expressed in sales units. For example, if you buy apple juice by the hectoliter (100 liters) at 100/hectoliter, and sell it by the liter, the purchase price displayed will be 1.

According to your modifications, the screen displays the **PU discounted**, and the **Margin amount before tax**, depending on the **Qty**.

The **Margin amount** is then recalculated for each line, along with the line status (column **St**).

You can also vary the overall discount rate, if necessary, and/or add any additional sales costs not invoiced directly, such as transport, training, communication, etc. The sales margin is recalculated with each modification. You can display it with or without the other costs.

The **Calculate** button launches a calculation that takes into account the parts of the same nature in the previous 90 days, and displays per line:

- **PUV3**: the average price (unweighted) at which you sold this item to this customer, over the last 3 months (90 days).
- **PUV3 others**: the average price (unweighted) at which you sold this item to other customers, in the last 3 months.
- **S** is the status of the price in relation to the average price charged to the customer in the last 90 days: up, down or identical.

The **Validate** button transfers the modifications made in the margin sheet (modification of purchase and sales prices, modification of discount rates, entry of ancillary costs) to the original data in the invoice lines.

Other “Customer Invoicing ” articles

Invoicing: common elements

Invoicing : Customer invoicing

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