

HGI custom markup per option

Visit <https://www.hgiwebcenter.com/WEB/> and login to you WebCenter account.

1. Using the menu button at the top left, browse to Setup>Pricing>Tables.
2. Set the Table Type to Markup and select the category you want to assign a special markup to.
3. Next to the Markup Table Dropdown select the + to add a Table. Enter a table name for the Markup (ie. KeylessMarkup)
4. Using your newly created table, change the dropdown below Markup Table to say Options instead of Parts. This shows all the possible options for the pricing category.
5. A common item you don't want to Markup as much as the door is the lock. In this example we will change the markup for Keyless Deadbolt Locks.
6. With all the options showing, we need to change the Markup % for Keyless Handlesets which are CAMKEY and CENKEY. In the blank space to the right enter the Markup % you want.

CAMKEY - CAMELOT KEYLESS HANDLESET	{None}	150.0000	⊕
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7. With the Markup Table created, we now need to assign it to each Salesperson who will be quoting using this different.
8. Browse to Setup>Customers. Select the customer corresponding to the Salesperson. Select the Financial expander to see the pricing method. Using the Table dropdown next to each category, you will select the Markup Table you have previously created. Click Save.

ENTRY DOORS	400.0000	%	KeylessLocks
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9. Your Salesperson is now set up with a different % markup for an option than the main Markup % for that category.

Please note: Only the administrator can see the labor tables.