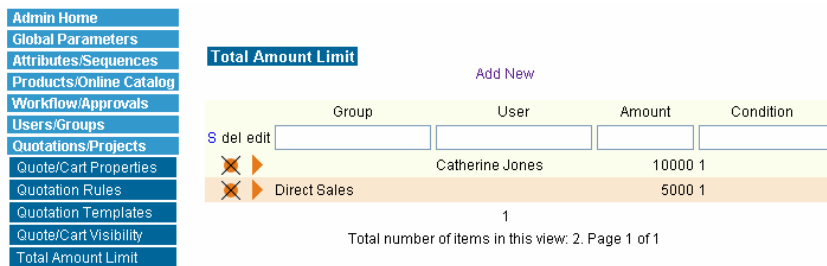


TOTAL AMOUNT LIMIT

Total Amount Limit allows rules to be created which limit the total amount each User or User Type can Quote or Place Order. If Cart amount limit is exceeded then a workflow rule will re-route the Cart accordingly (see Chapter 40 for more information). This chapter will discuss creating rules which limit the Carts total amount limit using simple and complex conditions.

Selecting the **Total Amount Limit** link under the **Quotations/Projects** drop down will bring up the Total Amount Limit screen shown in Figure 38-1.



Total Amount Limit			
Group	User	Amount	Condition
	Catherine Jones	10000	1
Direct Sales		5000	1

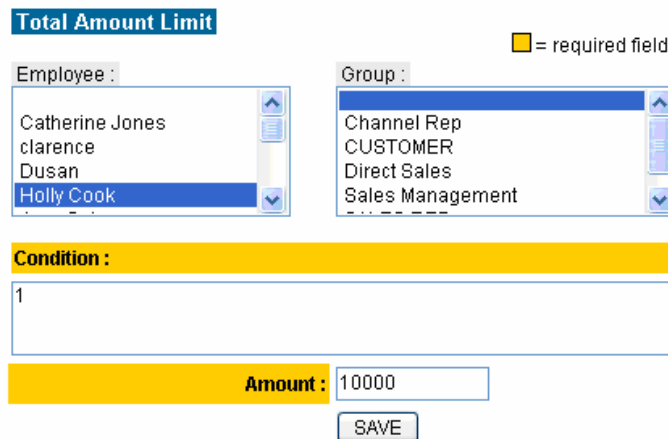
Total number of items in this view: 2. Page 1 of 1

Figure 38-1 - Total Amount Limit

Simple Cart Limits

Selecting **Add New** brings up the Total Amount Limit screen shown in Figure 38-2. In this example, user Holly Cook is limited to \$10000.

NOTE: Only whole numbers should be used. Do not insert dollar signs or decimals.



Total Amount Limit = required field

Employee :

Group :

Condition :

Amount :

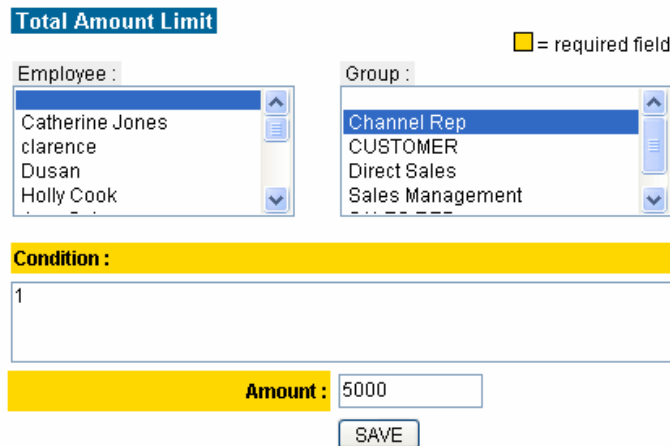
Figure 40-2 - Total Amount Limit - Holly Cook

The Condition field can contain any valid expression that can be evaluated as “1” (True) or “0” (False). If the result is “0” (False) the rule will not apply. If the expression evaluates to “1”

(True) then the limit will be applied.

The same simple rule can be created, but applied to an entire group. In Figure 38-3 the Entire Channel Rep group can only quote \$5000. If Holly Cook from the previous example was a part of the Channel Rep Group, she would still be able to quote up to her personal maximum of \$10000 because of the Priority Rules used in this example.

NOTE: Fields displayed on the left have a higher priority. To change priorities choose **Max Quote/Cart Amount** under the **Priorities** menu (see Chapter 36 for more information).



Total Amount Limit ■ = required field

Employee :
 Catherine Jones
 clarence
 Dusan
 Holly Cook

Group :
 Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management

Condition :
 1

Amount : 5000

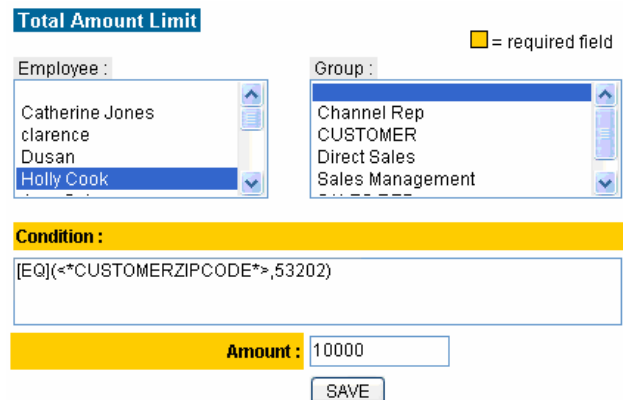
SAVE

Figure 38-3 - Total Amount Limit – Channel Rep

Complex Cart Limits

Using the 2 examples above we can also create complex rules that would evaluate to 0 or 1 in the condition field. Instead of using a 1 for Holly Cook, lets set her limit based on the location of the customer. In Figure 38-4, if the customer's zip code is equal to 53202 then Holly Cook can quote up to \$10000. This is accomplished with the expression:

[EQ](<*CUSTOMERZIPCODE*>, 53202)



Total Amount Limit ■ = required field

Employee :
 Catherine Jones
 clarence
 Dusan
 Holly Cook

Group :
 Channel Rep
 CUSTOMER
 Direct Sales
 Sales Management

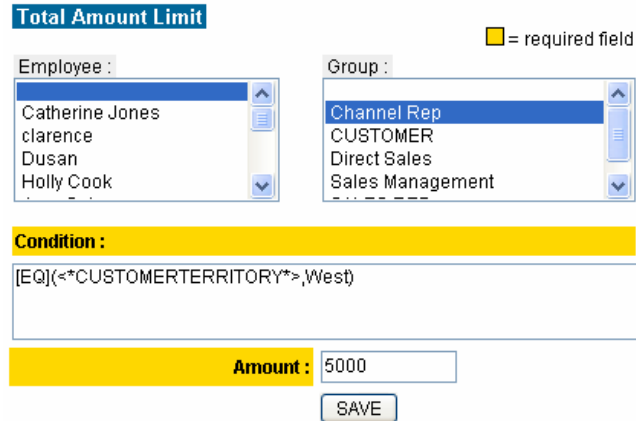
Condition :
 [EQ](<*CUSTOMERZIPCODE*>,53202)

Amount : 10000

SAVE

Figure 38-4 Total Amount Limit - Holly Cook – Zip Code

In the next example, the Channel Rep Group can only quote up to \$5000 if the Territory of the Customer equals West. Figure 38-5 uses the expression:
[EQ](<*CUSTOMERTERRITORY*>, WEST)



Total Amount Limit ■ = required field

Employee :
Catherine Jones
clarence
Dusan
Holly Cook

Group :
Channel Rep
CUSTOMER
Direct Sales
Sales Management

Condition :
[EQ](<*CUSTOMERTERRITORY*>,West)

Amount : 5000

SAVE

Figure 38-5 Total Amount Limit – Channel Rep – Territory

When finished, click the **Save** button. This adds the new rule to list on the Total Amount Limit page. To **Edit** or **Delete** a rule, click the respective symbol next to the group column.