

Financials

F130 Prices and Discounts

Training Guide

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How to Use This Course

This course introduces pricing and discounting functionality available in Acumatica ERP. By completing the course activities, you will learn how to configure various types of sales prices and customer discounts, as well as how to calculate and update sales prices using a sales price worksheet. You will get an understanding of how sales prices are automatically suggested and how customer discounts are automatically applied in sales orders and AR invoices, learn how to update sales prices and customer discounts, and how to analyze GL batches the system creates when posting documents with discounts. The course also walks you through the process of uploading vendor price lists to the system by using a vendor price worksheet.

The course consists of three parts, each providing a set of activities that illustrate the basic configuration of prices and discounts in a midsize company. Part 1 deals with the process of defining, maintaining, and applying sales prices in the system. Part 2 covers multiple types of customer discounts and their application to financial documents. Part 3 touches upon uploading and updating vendor prices.

The course is to be completed on Acumatica ERP 2020 R1. For course activities, you will use an instance of Acumatica ERP with the *U100* data preloaded; this dataset provides the preconfigured settings and entities you will need as you complete the course. (You can find detailed instructions on creating a tenant below.)

You perform the following general steps to complete the course:

1. You prepare an Acumatica ERP 2020 R1 instance as described in [How to Create a Tenant with the U100 Dataset](#).
2. In the company with the *U100* dataset, you complete the activities in Parts 1–3.
3. In Partner University, you take F130 Certification Test.
4. In Partner University, you complete the course survey to finish the course and get the Partner University certificate of course completion.

What Is in an Activity?

Each activity provides a story describing a particular user scenario, a brief overview of the process that should be performed to complete the described scenario, and instructions that guide you through the process in Acumatica ERP. To complete a particular activity, you sign in to the U100 tenant with the credentials provided in the System Preparation section.

What Are the Documentation Resources?

The complete Acumatica ERP documentation is available on <https://help.acumatica.com/> and is included in the Acumatica ERP instance. While viewing any form used in the course, you can click the **Open Help** button in the top pane to bring up a form-specific Help menu; you can use the links on this menu to quickly access form-related concepts and procedures and to open a reference topic with detailed descriptions of the form elements.

How to Create a Tenant with the *U100* Dataset

To add to an existing Acumatica ERP instance a tenant with the *U100* dataset, which is required for the completion of this course, perform the following instructions:

1. Go to <http://acumatica-builds.s3.amazonaws.com/index.html?prefix=builds/>.
2. Open the folder of your Acumatica ERP instance version.
3. In this folder, open the **Snapshots** folder, and download the **u100.zip** file.
4. Launch the Acumatica ERP instance, and sign in.
5. Open the *Tenants* (SM203520) form, and click **Add New Record** on the form toolbar.
6. In the **Login Name** box, type the name to be used for the tenant.
7. On the form toolbar, click **Save**.
8. On the **Snapshots** tab, click **Import Snapshot**.
9. In the **Upload Snapshot Package** dialog box, select the **u100.zip** file, which you have downloaded, and click **Upload**.

The system uploads the snapshot to the **Snapshots** tab of the *Tenants* form.

10. On the form toolbar, click **Restore Snapshot**.
11. If the **Warning** dialog box appears, click **Yes**.
12. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded, and click **OK**.
13. Sign out of the current tenant.

You are now on the Sign-In page, and you can sign in to the tenant you have just created.

Licensing Information

For the educational purposes of this course, you will use Acumatica ERP under the trial license, which does not require activation and provides all available features. For production, you have to activate the purchased license; each particular feature may be subject to additional licensing; please consult the Acumatica ERP sales policy for details.

Company Story

This topic explains the organizational structure and operational activity of the company with which you will work during this training.

Company Structure

The SweetLife Fruits & Jams company is a midsize company located in New York City. The company consists of the following branches:

- SweetLife Head Office and Wholesale Center: This branch of the company consists of a jam factory and a large warehouse where the company stores fruit (purchased from wholesale vendors) and the jam it produces. Warehouse workers perform warehouse operations by using barcode scanners or mobile devices with barcode scanning support.
- SweetLife Store: This branch has a retail shop with a small warehouse to which the goods to be sold are distributed from the company's main warehouse.
- Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch sells juicers, installs juicers, trains customers' employees to operate juicers, and provides juicer servicing.

Operational Activity

The company has been operating starting in the *01-2019* financial period. In November 2019, the company started using Acumatica ERP as an ERP and CRM system and migrated all data of the main office and retail store to Acumatica ERP. Because the company has grown, the equipment center has begun its operations in *01-2020*.

Company Purchases

The company purchases fruits and spices from large fruit vendors for sale and for jam production. For producing jams and packing jams and fruits, the company purchases jars, labels, and paper bags from various vendors. For the internal needs of the main office and store, the company purchases stationery (printing paper, pens, and pencils), computers, and computer accessories from various vendors. The company also purchases juicers for sale from a large juicer vendor and either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

Company Sales and Services

Each company's branch has its own business processes, as follows:

- SweetLife Head Office and Wholesale Center: In this branch, jams and fruit are sold to wholesale customers, such as restaurants and cafés. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, small retail customers purchase fresh fruit, berries, and jams, or pick up the goods they have ordered on the website. Some of the goods listed in the website catalog are not stored in the retail warehouse, such as tropical fruits (which are purchased on demand) and tea (which is drop-shipped from a third-party vendor).

- Service and Equipment Sales Center: This branch sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services.

Part 1: Customer Prices

Lesson 1.1: Reviewing Sales Prices and Exploring Price Selection

Sales Prices: General Information

Acumatica ERP provides multiple mechanisms of maintaining sales prices. You can define a base price list, price lists applicable to a specific customer or a group of customers, lists of promotional prices or prices that depend on the quantity of the product being sold. You can also define a default price for each individual item to fall back on if no other price is defined for it in the system.

Learning Objectives

You will learn how sales prices of various types are defined in the system.

Applicable Scenarios

In Acumatica ERP, you can maintain sales prices for both non-stock items and stock items. Configuring sales prices for stock items is possible if the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Sales Price Types

You define sales prices by using the [Sales Prices](#) (AR202000) form or the [Sales Price Worksheets](#) (AR202010) form. When you create a sales price record for an item, you specify the item, the date when the price becomes effective, and assign the price a specific sales price type and code, which help you define what the price is applicable to. You select one of the following price types:

- **Base:** You use this price type for prices that you want to include in a base price list. Base prices are used if there are no more specific prices defined (for example, promotional or specific to individual customers). This price type does not have any price codes.
- **Customer Price Class:** You use this price type for prices aimed at customers of a particular customer price class. This price type also requires a price code to be specified. The price codes are identifiers of customer price classes defined in the system.



You use the [Customer Price Classes](#) (AR208000) form to define a customer price class—a group of customers that may be offered special prices because of their buying habits. For instance, you could define as a class those customers that buy the largest quantities and are offered the most competitive prices. By default, all

customers of the same customer price class are charged the same price for the same item.

- *Customer*: You use this price type for prices aimed at a particular customer. This price type also requires a price code to be specified. The price codes are identifiers of customer accounts defined in the system. This price type might be needed if you have customers that have unique buying habits even among customers of the same price class, or customers who buy especially large volumes of products.

Optionally, prices of the listed types can also be configured as promotional, applicable to sales from specific warehouses, to items sold in specific units of measure, or to products sold in specific quantities.

- *Promotional*: Prices aimed to draw customers' attention. Promotional prices are effective for a specific period of time.
- *Volume-dependent*: Prices that depend on the volume of products being sold. You can define these prices if the *Volume Pricing* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.
- *Specific to a warehouse*: Prices aimed to a particular warehouse. You can define these prices if the *Multiple Warehouses* feature is enabled on the [Enable/Disable Features](#) form.
- *Specific to a unit of measure* in which an item is sold.



A price can be of multiple types simultaneously—for example, a customer-specific price can be set as promotional and be volume-dependent at the same time.

Default Prices

Default prices are the sales prices of stock and non-stock items that can be maintained optionally—for instance, for the items whose prices do not vary depending on the quantity purchased, the season, special promotional periods, and other factors.

You maintain the default price of a particular non-stock item in the **Default Price** box on the **Price/Cost Info** tab of the [Non-Stock Items](#) (IN202000) form. If the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, which means that stock items-related functionality is available in the system, you can enter default prices for stock items as well. To enter the default price for a stock item, you use the **Default Price** box on the **Price/Cost Info** tab of the [Stock Items](#) (IN202500) form. The default prices for stock items and non-stock items are specified in the base currency and for the base units.

You can update the default prices for stock and non-stock items as often as you need to. When updating price lists by using the [Sales Price Worksheets](#) (AR202010) form, you can specify the method of calculating the updated prices (based on such factors as the item markup percent or the percent of increase), and the new prices will be calculated automatically. However, when you update the default prices, you cannot directly specify how to calculate the new values—you can calculate these prices externally by using any method you consider appropriate; then you enter the resulting prices manually on a per-item basis or import all of them from a file by using an import scenario.

Default prices have the following limitations:

- The system does not keep the history of default prices. A default price has no start date and no expiration date; once specified, the default price is used for the item until a new default price is entered.
- You cannot define default prices as promotional prices that are in effect for a particular date range or as tiered prices.

Sales Prices: To Review Existing Prices

In this activity, you will learn how to view sales prices configured in the system.

Story

Suppose that the SweetLife Fruits & Jams company has sales prices that were last updated in 2019. You want to review what prices exist in the system for the *ONLCOURSE* online training course for a particular customer, for a customer price class, and as the base price of this item.

Also, you are interested in whether any promotional prices exist in the system for another training course, *OFLCOURSE*.

Because SweetLife is going to start installing juicers for customers in 2020, you want to make sure that the default price of the installation service, *INSTALL*, has been specified in the system.

Process Overview

For a particular item, on the [Sales Prices](#) (AR202000) form, you can view the prices specified for a customer and for a customer price class; you can also view base prices and promotional prices for the item. You view the default price of a particular non-stock item on the [Non-Stock Items](#) (IN202000) form.

You do not need to save and release the invoices you create in this lesson; they are for training purposes only.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is

selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: View Sales Prices for a Particular Customer

To view sales prices defined for a particular customer, *COFFEESHOP*, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Price Type** box of the Selection area, select *Customer*.
3. In the form table, review the price of your company's online training course (*ONLCOURSE*) for the *COFFEESHOP* customer (\$13).

Step 2: View Sales Prices for a Customer Price Class

To view sales prices defined for local customers, do the following:

1. While you are still on the [Sales Prices](#) (AR202000) form, in the **Price Type** box of the Selection area, select *Customer Price Class*.
2. In the **Price Code** box, select *LOCAL*.
3. In the table, review the price of your company's online course (*ONLCOURSE*) for local customers (\$14.5).

Step 3: View an Item's Base Price

To view the base price of a particular item, *ONLCOURSE*, do the following:

1. While you are still on the [Sales Prices](#) (AR202000) form, in the **Price Type** box of the Selection area, select *Base*.
2. In the **Inventory ID** box, select *ONLCOURSE*.
3. In the table, review the base price of the *ONLCOURSE* non-stock item in the system (\$15).

Step 4: View Promotional Prices

To view the promotional prices existing in the system as of 1/1/2020, do the following:

1. While you are still on the [Sales Prices](#) (AR202000) form, clear the **Inventory ID** box of the Selection area.
2. In the **Price Type** box of the Selection area, select *All Prices*.
3. In the **Effective As Of** box, select *1/1/2020*.
4. In the table, click the **Promotion** column and, in the dialog box that opens, select *True* and click **OK**.
5. In the table, review the promotional price for the *OFLCOURSE* item (\$40) and notice its effective dates (12/17/2019 - 1/17/2020).

Step 5: View the Default Price for a Particular Non-Stock Item

To view the price set up as the default price of a non-stock item, do the following:

1. Open the [Non-Stock Items](#) (IN202000) form.
2. In the **Inventory ID** box, select *INSTALL*.
3. On the **Price/Cost Information** tab, in the **Default Price** box, review the default price of the installation services (\$100).

Automatic Price Selection: Rules of Price Selection

In Acumatica ERP, the system automatically suggests a price in a sales order or an AR invoice from the sales prices existing in the system.

Learning Objectives

You will learn how the system selects a price to suggest in a sales order or AR invoice based on the price priority.

Applicable Scenarios

In Acumatica ERP, you can maintain sales prices for both non-stock items and stock items. Configuring sales prices for stock items is possible if the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Price Selection Rules

You can define multiple prices, each with a different goal, for an item. When a user selects an item in a document line (or modifies the item's quantity), the system searches for an applicable price that is effective on the date of the document. The system bases this search on the price search priority (highest to lowest) and stops when it finds an applicable price for the item. The search proceeds as follows:

1. The system searches for a customer price for the item by using the following rules:
 - a. A promotional price for the item has a higher priority than a regular price of the same type for the item.
 - b. A price specified for the item with the unit of measure selected in the document line has a higher priority than a price specified for the item with the base unit of measure.
 - c. If multiple warehouses are defined in the system, an item price specific to the warehouse selected in the document has a higher priority than a price of the same type that is not specific to a warehouse.



The system does not use any of the warehouse-specific prices in accounts receivable documents, because these documents do not have information about warehouses.

2. The system searches for an item price defined for the customer price class by using the following rules:
 - a. A promotional price for the item has a higher priority than a regular price of the same type for the item.
 - b. A price specified for the item with the unit of measure selected in the document line has a higher priority than a price specified for the item with the base unit of measure.
 - c. If multiple warehouses are defined in the system, an item price specific to the warehouse selected in the document has a higher priority than a price of the same type that is not specific to a warehouse.
3. The system searches for the base price of the item by using the following rules:
 - a. A promotional price for the item has a higher priority than a regular price of the same type for the item.
 - b. A price specified for the item with the unit of measure selected in the document line has a higher priority than a price specified for the item with the base unit of measure.
 - c. If multiple warehouses are defined in the system, an item price specific to the warehouse selected in the document has a higher priority than a price of the same type that is not specific to a warehouse.
4. The system searches for the default price specified for the item.
5. The system searches for a price calculated for the item with the sales unit of measure in the following order:
 - a. Customer price class: A promotional price has a higher priority than a regular price of the same type.
 - b. Customer price: A promotional price has a higher priority than a regular price of the same type.
 - c. Base price: A promotional price has a higher priority than a regular price of the same type.



If price tiers are defined in the applicable price list, the system applies the price from the tier that applies to the item quantity.

Once the system finds an applicable price, it stops the search and inserts this price into the document, but you can override this price. The price search priority is illustrated in the diagram below.

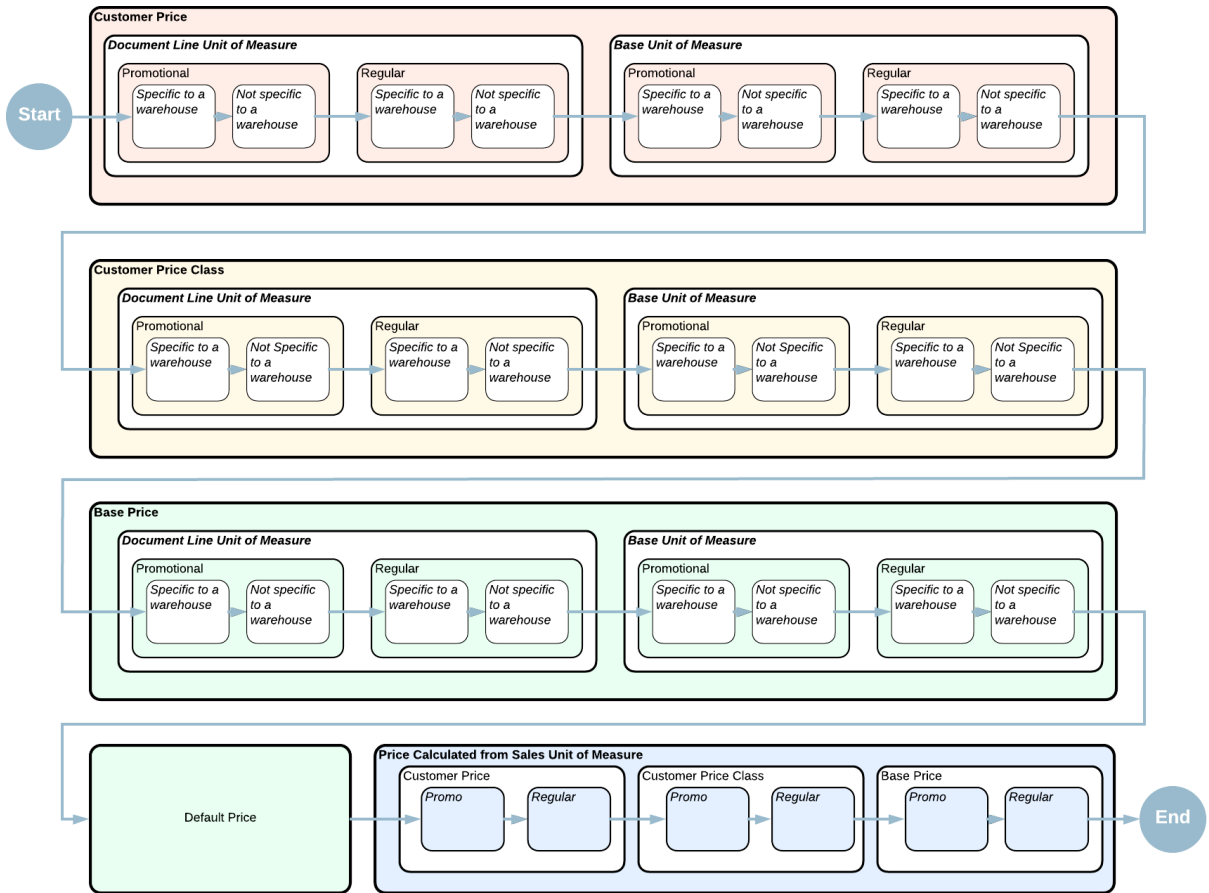


Figure: Search priority for sales prices

Automatic Price Selection: To Explore Regular and Promotional Prices

In this activity, you will create several invoices to see how the system suggests a price in each particular case depending on which prices exist in the system and which of them has the highest priority.

Story

In January 2020, three customers purchased online courses from SweetLife. Acting as SweetLife's accountant, you need to process an invoice for each of these customers for these purchases.

Process Overview

On the [Invoices and Memos](#) (AR301000) form, you start the creation of AR invoices for each of the customers that purchased the online course and review the price that the system suggests in each invoice. You do not have to complete the processing of the invoices.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: Create an AR Invoice for the COFFEESHOP customer

To create an AR invoice for the *COFFEESHOP* customer and analyze which sales price the system inserts in it, do the following:

1. Open the [Invoices and Memos](#) (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020*
 - **Post Period:** *01-2020*
 - **Description:** *One-day online course*
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ONLCOURSE*
 - **Quantity:** *1*
 - **UOM:** *DAY*
4. Notice that in the **Unit Price** column, the system has inserted the sales price configured for this customer (\$13).

Step 2: Create an AR Invoice for the GOODFOOD customer

To create an AR invoice for the *GOODFOOD* customer and analyze which sales price the system inserts in it, do the following:

1. While you are still on the *Invoices and Memos* (AR301000) form, click **Add New Record** on the form toolbar and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *GOODFOOD*
 - **Date:** *1/30/2020*
 - **Post Period:** *01-2020*
 - **Description:** *One-day online course*
2. On the **Document Details** tab, click **Add Row**, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ONLCOURSE*
 - **Quantity:** *1*
 - **UOM:** *DAY*
3. Notice that in the **Unit Price** column, the system has inserted the sales price configured for the *LOCAL* customer price class (\$14.50), because the *GOODFOOD* customer belongs to this price class and no customer-specific price has been specified for the *ONLCOURSE* item for this customer.

Step 3: Create an AR Invoice for the LAKECAFE Customer

To create an AR invoice for the *LAKECAFE* customer and analyze which sales price the system inserts, do the following:

1. While you are still on the *Invoices and Memos* (AR301000) form, click **Add New Record** on the form toolbar and specify the following settings in the Summary area:
 - **Customer:** *LAKECAFE*
 - **Date:** *1/30/2020*
 - **Post Period:** *01-2020*
 - **Description:** *One-day online course*
2. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*

- **Inventory ID:** *ONLCOURSE*
 - **Quantity:** 1
 - **UOM:** *DAY*
3. Notice that in the **Unit Price** column, the system has inserted the base sales price defined in the system for this non-stock item (\$15), because the *LAKECAFE* customer belongs to the *INTERN* customer price class, and no price for this item is configured for this customer or for this price class.

Step 4: Create an AR Invoice with a Promotional Price

To create an AR invoice with the *OFLCOURSE* non-stock item, do the following:

1. While you are still on the [Invoices and Memos](#) (AR301000) form, click **Add New Record** on the form toolbar, and specify the following settings in the Summary area:
 - **Customer:** *GOODFOOD*
 - **Date:** *1/13/2020*
 - **Post Period:** *01-2020*
 - **Description:** *One-day offline course*
2. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *OFLCOURSE*
 - **Quantity:** 1
 - **UOM:** *DAY*
3. Notice that in the **Unit Price** column, the system has inserted the promotional price for this non-stock item (\$40), because the invoice date (*1/13/2020*) is within the range of the effective dates specified for this promotional price.
4. In the **Date** box of the Summary area, change the date to *1/30/2020* (the current business date).
5. On the form toolbar, click **Actions > Recalculate Prices** and, in the **Recalculate Prices** dialog box, which opens, leave the default values, and click **OK**.

The system has updated the price in the **Unit Price** column, because now the invoice date (*1/30/2020*) is outside of the range of the effective dates specified for the promotional price, and the system has copied the default price of the item, because there are no other prices effective on this date and applicable to the *GOODFOOD* customer.

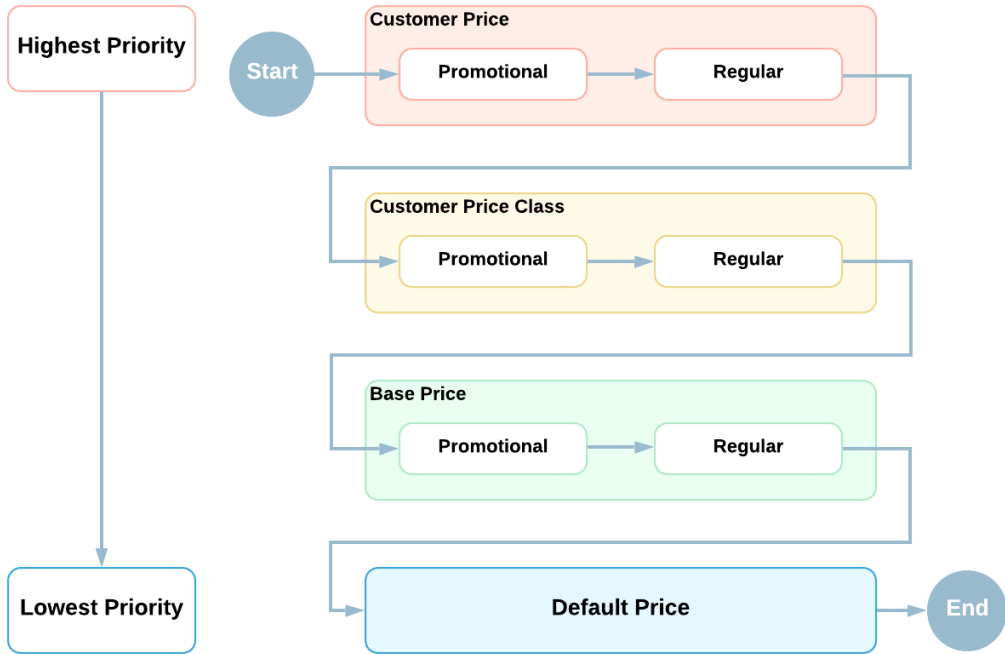


Figure: Price selection priorities: promotional prices

Automatic Price Selection: To Explore UOM-Specific Prices

In this activity, you will learn how to configure sales prices for different units of measure (UOMs) for a particular item and how to update prices in an existing sales order. You will also review how the system suggests a price when prices in multiple UOMs exist in the system.

Story

Suppose that, as the accountant of the SweetLife Fruits & Jams company, you have to record the sale of two boxes of 32-ounce jars of apple jam.

The system contains the sales price of 1 jar of apple jam (\$16.60), and one box of has been configured to be equal to six 32-ounce jars. After you have created the sales order , you will configure a sales price of one box of apple jam (\$96) and update the price in this sales order.

Process Overview

To configure a sales price for a unit of measure that is not defined for a particular stock item, in order to include the item with the new UOM in a sales order, you will review the existing sales price for the stock item on the [Sales Prices](#) (AR202000) form.

You will then create a sales order for the sale of a particular stock item on the [Sales Orders](#) (SO301000) form. After that, you will configure a sales price for a particular UOM of a stock item on the [Sales Prices](#) form.

Finally, you will update the price in the sales order on the [Sales Orders](#) form.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: View Existing Prices for a Particular Item

To view the existing sales price for the *APJAM32* stock item, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Inventory ID** box of the Summary area, select *APJAM32*.
3. In the table, review the price of this stock item valid on the current business date (\$16.60) and the UOM (*PIECE*, which is a jar in this case).

Step 2: Create a Sales Order

To create a sales order for apple jam, do the following:

1. Open the [Stock Items](#) (IN202500) form.
2. In the **Inventory ID** box, select *APJAM32*.
3. On the **General Settings** tab, in the **Unit of Measure** section, notice that the sales unit for this item is *BOX*. In the conversion table, review how this unit of measure is converted for this item (according to the settings, one box contains 6 pieces).
4. Open the [Sales Orders](#) (SO301000) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020*

- **Description:** Apple jam 2 boxes
6. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** HEADOFFICE
 - **Inventory ID:** APJAM32
 - **Warehouse:** WHOLESALE
 - **UOM:** BOX
 - **Quantity:** 2
 7. Notice the value in the **Unit Price** column (\$99.60). Because the system contains the price of 1 piece of this item (\$16.60), it has calculated the unit price of 1 box (6 pieces) as 16.60×6 (\$99.60).
 8. On the form toolbar, click **Save**.

Step 3: Configure a Sales Price for a Particular UOM

To configure a sales price for a box of apple jam, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the table toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Price Type:** Base
 - **Inventory ID:** APJAM32
 - **UOM:** BOX
 - **Price:** 96
 - **Effective Date:** 1/30/2020
3. On the form toolbar, click **Save**.

Step 4: Update the Prices in the Sales Order

To update the prices in the sales order, do the following:

1. Open the [Sales Orders](#) (SO3010PL) form.
2. Find the sales order you created in Step 2, and open it.
3. On the form toolbar, click **Actions > Recalculate Prices**.
4. In the **Recalculate Prices** dialog box, which opens, leave the default values, and click **OK**.

5. On the **Document Details** tab, review the price in the **Unit Price** column of the table. Because a sales price (\$96) has been now defined in the system for this unit of measure (*BOX*) of this particular stock item (*APJAM32*), the system has updated the previous price from \$99.60 to \$96.

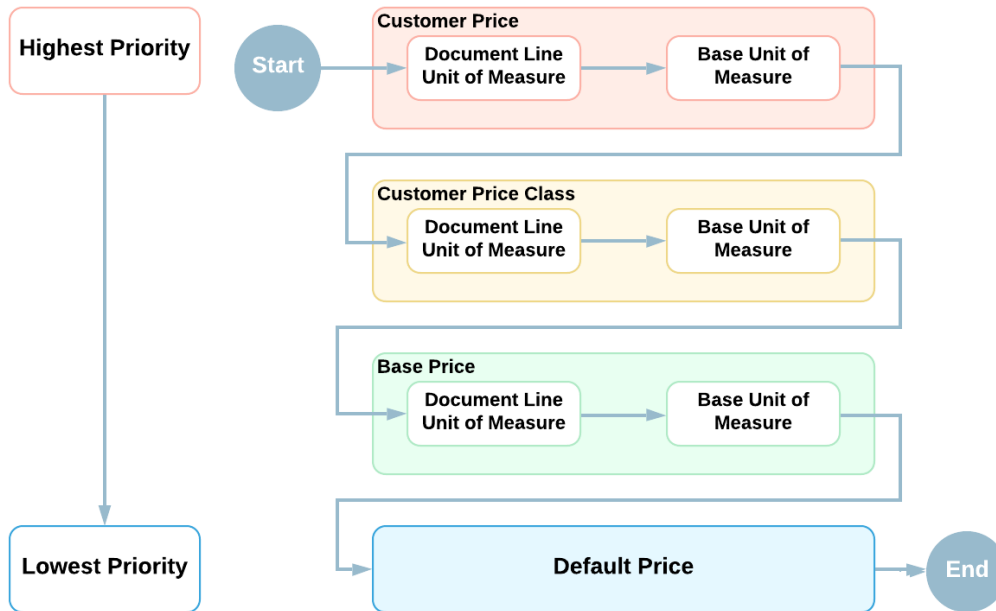


Figure: Price selection priorities: UOM-specific prices

Automatic Price Selection: To Explore Warehouse-Specific Prices

In this activity, you will learn how to configure sales prices for a particular warehouse.

Story

Suppose that the Sales Manager of the SweetLife Fruits & Jams company decided that on January 30, 2020 the company will start selling one of its products (a 96-ounce jar of lemon jam, defined in the system as *LEMJAM96*) from the wholesale warehouse at special prices.

Acting as the SweetLife accountant, you need to configure the sales price of the *LEMJAM96* stock item for this particular warehouse effective on the specified date. You also need to record the sale of 10 jars of lemon jam, 5 of which are sold from the wholesale warehouse.

Process Overview

You view sales prices configured for a particular warehouse on the [Sales Prices](#) (AR202000) form. By using the same form, you can configure a sales price of a particular item from a particular warehouse (that is, a warehouse-specific sales price). To test this configuration, you can create a sales order on the [Sales Orders](#) (SO301000) form, add lines to it (at least

one for the item being sold from the particular warehouse for which you have added the sales price, and at least one for the item at another warehouse), and review the sales prices the system uses for these lines.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
- 4.

Step 1: View Sales Prices for a Particular Warehouse

To view the sales prices configured for the *WHOLESALE* warehouse, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Warehouse** box of the Summary area, select *WHOLESALE*.

Notice that the table shows no records, because no sales prices that are specific to this warehouse have been configured in the system.

Step 2: Define the Sales Price of a Particular Item at the Wholesale Warehouse

To create a sales price for the *LEMJAM96* stock item at the *WHOLESALE* warehouse, do the following:

1. On the [Sales Prices](#) (AR202000) form, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Price Type:** *Base*
 - **Inventory ID:** *LEMJAM96*
 - **UOM:** *PIECE* (selected by default)
 - **Warehouse:** *WHOLESALE*
 - **Price:** 43

- **Effective Date:** *1/30/2020*
2. On the form toolbar, click **Save**.
 3. In the Summary area, select *LEMJAM96* in the **Inventory ID** box, clear the value in the **Warehouse** box, and review the prices that are defined in the system for the *LEMJAM96* item.

Step 3: Create a Sales Order

To make sure the system is inserting a different price for the item when it is sold from the *WHOLESALE* warehouse than when it is sold from another warehouse, you will create a sales order with two lines from different warehouses. Do the following:

1. Open the [Sales Orders](#) (SO301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *GOODFOOD*
 - **Date:** *1/30/2020*
 - **Description:** *Lemon jam 96 oz.*
3. On the table toolbar, click **Add Row**, and specify the following settings for the first order line:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *LEMJAM96*
 - **Warehouse:** *WHOLESALE*
 - **UOM:** *PIECE*
 - **Quantity:** *5*
4. Notice the value in the **Unit Price** column. Because you specified the warehouse, the system has inserted the unit price (\$43) that you have specified for this warehouse in Step 2.
5. On the table toolbar, click **Add Row**, and specify the following settings for the second order line:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *LEMJAM96*
 - **Warehouse:** *RETAIL*
 - **UOM:** *PIECE*

- **Quantity:** 5
6. Notice the value in the **Unit Price** column. Because no sales price has been specified for this stock item specific to the RETAIL warehouse, the system has used the base price for this stock item (\$49.49).
 7. On the form toolbar, click **Save** to save the sales order.

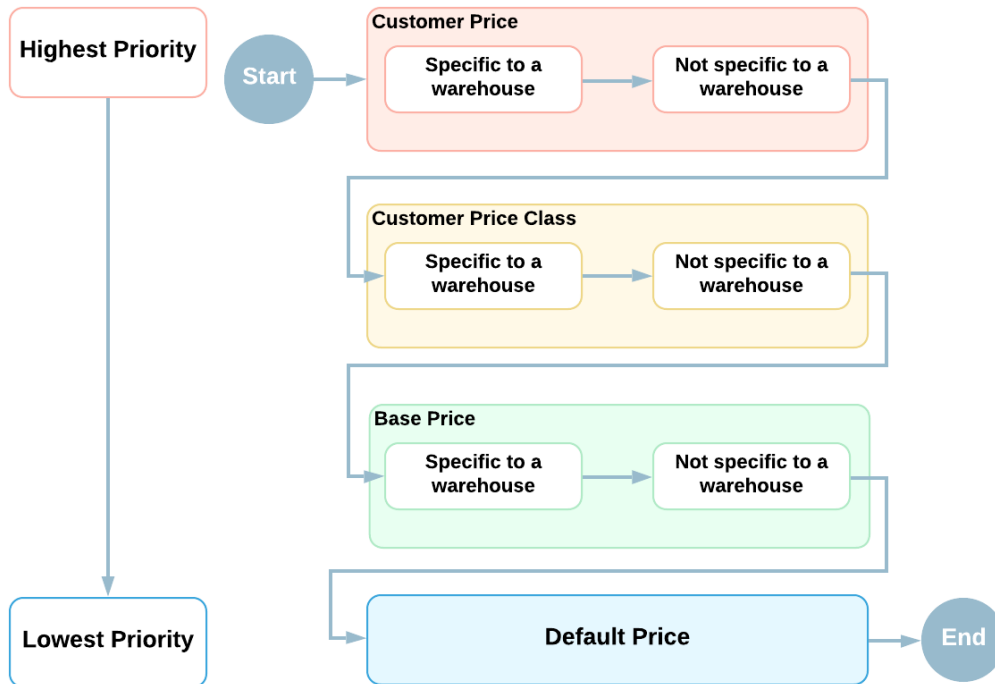


Figure: Price selection priorities: warehouse-specific prices

Automatic Price Selection: To Explore Volume-Based Prices

In this activity, you will learn how to configure volume-based sales prices for a particular stock item.

Story

Suppose that on December 2, 2019, the SweetLife Fruits & Jams company decided to introduce volume-based prices for 32-ounce jars of orange jam.

Acting as the SweetLife accountant, you need to define the following prices in the system:

- From 1 to 4 pieces: \$13.80
- From 5 to 9 pieces: \$12
- More than 9 pieces: \$10

Process Overview

You view the sales prices configured for a particular stock item on the [Sales Prices](#) (AR202000) form. Then, on the same form, you enter volume-based prices for this stock item. To test the volume-based prices you have entered, you create a sales order on the [Sales Orders](#) (SO301000) form, and add lines with different quantities to make sure that the system uses the needed prices for each line.

You do not need to save the sales order you create in this lesson; it is for training purposes only.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *12/2/2019*. If a different date is displayed, click the Business Date menu button and select *12/2/2019*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure the *Volume Pricing* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form by searching for it or navigating to it.
 - b. Locate the **Volume Pricing** check box under the **Standard Financials** section to see if it is selected.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the **Volume Pricing** check box, and then click **Enable** on the form toolbar.

Step 1: View the Sales Prices for a Particular Stock Item

To view the sales price configured for the *ORJAM32* stock item, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Inventory ID** box of the Summary area, select *ORJAM32*.

Notice that the table shows the \$13 price, which was effective starting on 3/30/2019.

Step 2: Specify Volume-Based Prices for a Particular Stock Item

To specify volume-based prices for the *ORJAM32* stock item, do the following.

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Inventory ID** box of the Summary area, select *ORJAM32*. The table displays the base price for this stock item defined in the system.

To configure a new price for this stock item, you must first set the expiration date for the current price.
3. In the **Expiration Date** column for the only row in the table, select *12/1/2019*. Click **Save** on the form toolbar.
4. On the table toolbar, click **Add Row**, and specify the following settings in the row, which apply to fewer than 5 pieces of the stock item:
 - **Price Type:** *Base*
 - **Inventory ID:** *ORJAM32*
 - **UOM:** *PIECE*
 - **Break Qty.:** 0
 - **Price:** 13.80
 - **Effective Date:** *12/2/2019* (selected by default)
5. On the table toolbar, click **Add Row**, and specify the following settings in the row, which apply to 5 to 9 pieces of the stock item:
 - **Price Type:** *Base*
 - **Inventory ID:** *ORJAM32*
 - **UOM:** *PIECE*
 - **Break Qty.:** 5
 - **Price:** 12
 - **Effective Date:** *12/2/2019* (selected by default)
6. On the table toolbar, click **Add Row**, and specify the following settings in the row, which apply to more than 9 pieces of the stock item:
 - **Price Type:** *Base*
 - **Inventory ID:** *ORJAM32*
 - **UOM:** *PIECE*
 - **Break Qty.:** 10
 - **Price:** 10

- **Effective Date:** *12/2/2019* (selected by default)

7. On the form toolbar, click **Save**.

8. Review all the prices that now exist in the system for this stock item.

The base price for this item, which was effective from 3/30/2019 to 12/1/2019, is \$13. Starting on 12/2/2019, volume-based prices (\$13.80, \$12, and \$10) are effective for fewer than 5 pieces, 5 to 9 pieces, and more than 9 pieces, respectively.

Step 3: Create a Sales Order

To begin the creation of a sales order in order to test the prices of different quantities of the *ORJAM32* stock item, do the following:

1. Open the [Sales Orders](#) (SO301000) form.

2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Order Type:** *SO*
- **Customer:** *GOODFOOD*
- **Date:** *12/5/2019*
- **Description:** *Orange jam 32 oz.*

3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings for the first line:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*
- **UOM:** *PIECE*
- **Quantity:** *2*

The system has inserted the price you specified for the break quantity of 0 in the **Unit Price** column, which means that the unit price is \$13.80 when the quantity of this stock item in the order line is less than the quantity specified in the second tier.

4. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the second line:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*

- **UOM:** *PIECE*
- **Quantity:** 6

Notice that the system has inserted the price you specified for the break quantity of 5 in the **Unit Price** column, which means that the unit price is \$12 when the quantity of this stock item in the order line is not less than 5, but does not reach the quantity in the third tier (10).

5. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the third line:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*
- **UOM:** *PIECE*
- **Quantity:** 15

The system has inserted the price you specified for the break quantity of 10 to the **Unit Price** column, which means that the unit price is \$10 when the quantity of this stock item in the order line is 10 or more.

Lesson 1.2: Uploading a Sales Price List

Uploading Sales Price Lists: General Information

In Acumatica ERP, users can update sales prices in a variety of ways. You can modify existing sales price records one by one on the [Sales Prices](#) (AR202000) form, if you need to make only minor updates to individual price records, or you can use sales price worksheets to upload multiple price records at once using the [Sales Price Worksheets](#) (AR202010) form.

Learning Objectives

You will learn how to upload a sales price list to Acumatica ERP using a sales price worksheet.

Applicable Scenarios

Sales price worksheets in Acumatica ERP are a convenient way of adding new sales prices or updating existing sales price lists in bulk.

By using a sales price worksheet, you can upload from an external source, for example, an Excel file, prices of any types, except for default prices—that is, base prices, prices specific to a customer or customer price class, including sales prices that have been marked as promotional, or that have been defined for a particular unit of measure or a particular warehouse.

Uploading Sales Price Lists By Using Sales Price Worksheets

You upload a sales price list prepared in an external Excel file, by performing the following steps. First, you create an empty worksheet on the [Sales Price Worksheets](#) (AR202010) form and then add to it the external price list by clicking **Load Records from File** and selecting the prepared Excel file with the prices to upload.

Prices defined in a worksheet become effective only after you release the worksheet (on a date specified as the effective date). Before the worksheet is released, you can edit records in it: by making changes manually to individual records or by recalculating price values for all records in the worksheet. For more information about recalculating existing prices, see [Mass-Update of Sales Prices: Process Activity](#).

Sales Price Retention

When you update sales price records in the system by using sales price worksheets on the [Sales Price Worksheets](#) (AR202010) form, it might be useful to keep the history of price changes over time.

In Acumatica ERP, you set up how the system keeps the historical sales prices on the **Price/Discount Settings** tab of the [Accounts Receivable Preferences](#) (AR101000) form. In the **Price Retention** group of settings, you can choose one of the following retention types in the **Retention Type** box:

- *Last Price*: To keep the last price and the current price for each item.
- *Fixed Number of Months*: To keep the changes of the price records for a specific number of months. If this option is selected, the **Number of Months** box becomes available, in which you specify a particular number.



By default, **Retention Type** is set to *Fixed Number of Months* and **Number of Months** is set to 0, which means that the history of prices will be kept forever.

Uploading Sales Price Lists: Activity

In this activity, you will learn how to upload sales price lists with regular prices and promotional prices. You will also review how the history of updated prices is kept in the system.

Story

Suppose that the SweetLife Fruits & Jams company decided to update the regular sales prices for 2020 and set up promotional prices for some items during the holiday season. Acting as the SweetLife accountant, you need to upload two Excel files with both sales price worksheets and see how the system uses them.

You also want to review how the sales prices are retained in the system.

Process Overview

You create sales price worksheets by uploading Excel files on the [Sales Price Worksheets](#) (AR202010) form. You then release each sales price worksheet and review the new prices on the [Sales Prices](#) (AR202000) form. To analyze how the system selects prices, you create an AR invoice on the [Invoices and Memos](#) (AR301000) form. You do not need to release the invoice you create in this lesson, it is for training purposes only.

System Preparation

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: Import a Sales Price Worksheet with Base Prices

To import a sales price worksheet with base prices effective from 1/1/2020, do the following:

1. Open the [Sales Price Worksheets](#) (AR202010) form.
2. On the form toolbar, click **Add New Record**.
3. In the **Effective Date** box, select *1/1/2020*.
4. In the **Description** box, enter *Base prices for 2020*.
5. On the table toolbar, click **Load Records from File**.
6. In the window that opens, find the **PricesAndDiscounts_SalesPrices_Base_2020_01_01.xlsx** file and select it for upload. While you are uploading the worksheet, in the **Columns** dialog box, for the **Price** column name, specify the **Pending Price** property name and leave the other default settings and column mapping.
7. Save the worksheet.
8. Clear the **Hold** check box and, on the form toolbar, click **Release** to release the worksheet.

Step 2: Import a Sales Price Worksheet with Promotional Prices

To import a sales price worksheet with promotional prices effective from 12/1/2019 to 1/15/2020, do the following:

1. While you are still on the [Sales Price Worksheets](#) (AR202010) form, on the form toolbar, click **Add New Record**.
2. In the **Effective Date** box, select *12/1/2019*.
3. Select the **Promotional** check box.
4. In the **Expiration Date** box, select *1/15/2020*.
5. In the **Description** box, enter *Promotional prices 12/1/2019 - 1/15/2020*.
6. On the table toolbar, click **Load Records from File**.
7. In the window that opens, find the **PricesAndDiscounts_SalesPrices_Promotion_2019_12_01.xlsx** file and select it for upload. While you are uploading the worksheet, in the **Columns** dialog box, for the **Price** column name, specify the **Pending Price** property name and leave the other default settings and column mapping.
8. Save the worksheet.
9. In the Summary area of the form, clear the **Hold** check box and, on the form toolbar, click **Release**.

Step 3: Review How the System Retains the Sales Prices

To review the sales prices for the *ONLCOURSE* non-stock item, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
2. In the **Price Type** box of the Summary area, make sure that *All Prices* is selected.
3. In the **Inventory ID** box, select *ONLCOURSE*.
4. In the table, review the prices that exist for the *ONLCOURSE* non-stock item.

The base price of \$15 is effective from 1/1/2019 to 12/31/2019. For the period from 12/1/2019 to 1/15/2020, the promotional price of \$12, which you uploaded in this step, is effective. Also, starting from 1/1/2020, a new base price of \$17, which you uploaded in Step 1, is effective.

Besides, the customer-specific price configured for *COFFEESHOP* (\$13) and the price for the *LOCAL* customer price class (\$14.50) are also effective in the system starting from 1/1/2019.

Step 4: Create an Invoice with the New Price

To create an AR invoice with a new sales price, do the following:

1. Open the [Invoices and Memos](#) (AR301000) form.
2. On the form toolbar, click **Add New Record** and specify the following settings in the Summary area:

- **Type:** *Invoice*
 - **Customer:** *LAKECAFE*
 - **Date:** *1/30/2020*
 - **Post Period:** *01-2020*
 - **Description:** *One-day online course*
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ONLCOURSE*
 - **Quantity:** *1*
 4. Review the price in the **Unit Price** column. It shows the new base price (\$17) effective from 1/1/2020, which you uploaded in Step 1.
 5. In the **Date** box of the Summary area, change the date to *1/3/2020*.
 6. On the form toolbar, click **Actions > Recalculate Prices**.
 7. In the **Recalculate Prices** dialog box, which opens, leave the default values and click **OK**.
 8. On the **Document Details** tab, review the price in the **Unit Price** column. It now shows the new promotional price (\$12) effective from 12/1/2019 to 1/15/2020, because the invoice date is within this date range, and promotional prices have a priority over base prices.

It is not necessary to release this AR invoice; you have created it only to see how the price is suggested.

Lesson 1.3: Recalculating Existing Sales Prices in Bulk

Mass-Update of Sales Prices: General Information

Every once in a while, you might need to update sales prices of your stock and non-stock items. Acumatica ERP provides you with the ability to recalculate the existing sales prices in bulk by using specific criteria.

Learning Objectives

You will learn how to recalculate existing sales prices based on the manufacturer's suggested retail price (MSRP).

Applicable Scenarios

By using sales price worksheets, you can bulk-calculate prices of any types, except for default prices—that is, base prices, prices specific to a customer or customer price class, including sales prices that have been marked as promotional, or that have been defined for a particular unit of measure or a particular warehouse.

Price Basis

Your company may use a cost-plus approach, or set prices to achieve specific profit targets. In Acumatica ERP, you can calculate pending sales prices for both non-stock items and stock items by using the approach—that is, by choosing the price basis—that makes the most sense at a particular time.

In Acumatica ERP, the options for the price basis can be divided into the following groups:

- **Inventory-related:** A cost-plus basis (the *Last Cost + Markup %* option or *Avg./Std. Cost + Markup %* option) or the manufacturer's suggested retail price (the *MSRP* option). You specify values for these options by using the [Stock Items](#) (IN202500) form for stock items. Also, on the [Item Warehouse Details](#) (IN204500) form, you can define the markup percentage and MSRP specific to a particular warehouse. For non-stock items, only the *Avg./Std. Cost + Markup %* option is applicable, and the system uses (instead of the average or standard cost) the current cost of a non-stock item, which is specified in the **Current Cost** box on the [Non-Stock Items](#) (IN202000) form.
- **Price record-related:** The item's current price (*Source Price*) or pending price (*Pending Price*). You specify values for these options by using the [Sales Price Worksheets](#) form.

Calculation of Pending Prices Based on MSRP

An item's MSRP—that is, the manufacturer's suggested retail price—is specified on the **Price/Cost Info** tab of the [Stock Items](#) (IN202500) form. A similar box is available on the **Price/Cost Info** tab of the [Non-Stock Items](#) (IN202000) form for non-stock items.

You perform mass-calculation of pending prices based on the items' MSRP by using the [Sales Price Worksheets](#) (AR202010) form. On this form, you add to the sales price worksheet the price records for the items for which you want to recalculate prices. Then, you click **Calculate Pending Prices** on the table toolbar to invoke the **Calculate Pending Prices** dialog box. In this dialog box, you select *MSRP* as the price basis and click **Update** to add to the worksheet the pending prices recalculated based on MSRP. The recalculated pending prices become effective after you release the worksheet (on a date specified as the effective date).

Mass-Update of Sales Prices: Process Activity

In this activity, you will calculate new sales prices based on the manufacturer's suggested retail price (MSRP).

Story

Suppose that on January 30, 2020 you, as the SweetLife accountant, need to update the price of one of the juicers that the Equipment Sale Center of SweetLife sells to customers. The company wants to sell this commercial juicer (*JUICER20C*) at 110% of the MSRP price set by the original manufacturer.

Process Overview

On the [Sales Price Worksheets](#) (AR202010) form, you create a sales price worksheet and fill it with the price records that you want to recalculate. Then you calculate sales prices based on the MSRP of the items and create a sales order on the [Sales Orders](#) (SO301000) form.

System Preparation

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: Review the Existing MSRP Value for *JUICER20C*

To review the MSRP set up for the *JUICER20C* stock item, do the following:

1. Open the [Stock Items](#) (IN202500) form.
2. In the **Inventory ID** box, select *JUICER20C*.
3. On the **Price/Cost Info** tab, make sure that the **MSRP** box in the **Price Management** section contains a price (\$4,100).

Step 2: Recalculate the Existing Sales Prices for *JUICER20C* Based on its MSRP

To recalculate the prices that exist in the system for the *JUICER20C* stock item:

1. Open the [Sales Price Worksheets](#) (AR202010) form.
2. On the form toolbar, click **Add New Record** and specify the following settings in the Summary area:
 - **Effective Date:** *1/30/2020*

- **Overwrite Overlapping Prices:** Selected
 - **Description:** Sales price for JUICER20C
3. On the table toolbar, click **Add Item**.
 4. In the **Add Item to Worksheet** dialog box, which opens, specify the following settings:
 - **Item Class ID:** *JUICER*
 - **Price Type:** *Base*
 5. In the table of this dialog box, select the unlabeled check box for the row with the *JUICER20C* stock item and click **Add & Close**.
The stock item you selected has been added to the worksheet.
 6. On the table toolbar, click **Calculate Pending Prices**.
 7. In the **Calculate Pending Prices** dialog box, which opens, specify the following settings:
 - **% of Original Price:** 110
 - **Decimal Places:** 2
 - **MSRP:** Selected
 8. In the **Calculate Pending Prices** dialog box, click **Update**.
The current price is now shown in the **Source Price** column and the price calculated based on MSRP is shown in the **Pending Price** column (\$4,510).
 9. In the Summary area, clear the **Hold** check box and click **Release** on the form toolbar to release the sales price worksheet.

Step 3: Create a Sales Order and Review the Suggested Price

To create a sales order for the *JUICER20C*, do the following:

1. Open the [Sales Orders](#) (SO301000) form.
2. On the form toolbar, click **Add New Record** and specify the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020*
 - **Description:** *Juicer 20C*

3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Inventory ID:** *JUICER20C*
 - **Quantity:** 1
4. Notice the value in the **Unit Price** box. The system has copied the price that you configured for this stock item in this activity.

Part 2: Customer Discounts

Customer Discounts: General Information

Acumatica ERP provides you with the ability to configure customer discounts to meet the needs of your organization.

Learning Objectives

You will learn how to configure customer discounts of different types in Acumatica ERP and how the system applies the discounts in AR invoices and sales orders.

Applicable Scenarios

Customer discounts can be used as an effective tool of your organization's overall marketing strategy—for example, to stimulate sales of new products, promote new branches of the organization, and accelerate sales of items that are becoming obsolete. In Acumatica ERP, your company can configure various types of customer discounts: unconditional or condition-based, simple or tiered, and automatically or manually applied (including rebates and coupons).

Discount Configuration

In Acumatica ERP, any customer discount is defined by a combination of parameters specified for a discount code on the [Discount Codes](#) (AR209000) form and for a discount sequence specified on the [Discounts](#) (AR209500) form.

- You design *discount codes* by using the [Discount Codes](#) (AR209000) form, where for each discount code, you specify the type of the discount (automatic or manual), the level on which the discount is applied (a particular line, group of lines, or the entire document), and the type of conditions under which the discounts of the discount code are applied. For more information about discount codes, see [Customer Discounts: Discount Codes](#).
- You create *discount sequences* for each discount code by using the [Discounts](#) (AR209500) form. A discount sequence defines a particular discount percent, fixed amount, or quantity of a free item; the sequence also defines the particular conditions of discount application. For more information about discount sequences, see [Customer Discounts: Discount Sequences](#).

GL Accounts for Customer Discounts

Line-level discounts. Line discounts are not accounted for in a separate GL account. The discount amount is simply deducted from the amount to be paid by the customer and the reduced amount is debited to an accounts receivable account specified in the **AR Account** box on the **GL Accounts** tab of the [Customers](#) (AR303000) form.

Group and document-level discounts. Unlike line discounts, discounts applied to a group of lines or a document as a whole are debited to a separate expense account specified for the customer in the **Discount Account** box on the **GL Accounts** tab of the [Customers](#) form.

Customer Discounts: Application of Manual Discounts

If your organization provides discounts that do not have formal conditions for automatic application (that is, document-specific discounts), you can enter line-level and document-level discounts manually in each document on the following forms:

- [Invoices and Memos](#) (AR301000)
- [Cash Sales](#) (AR304000)
- [Sales Orders](#) (SO301000)
- [Invoices](#) (SO303000)

You can enter manual discounts either by selecting an existing discount code with the **Manual** check box selected on the [Discount Codes](#) (AR209000) form (in this case, the system applies the discounts that correspond to this code) or by entering a discount percent or discount amount manually.

Application of Line-Level Manual Discounts

You can apply manual line-level discounts to a document on the **Document Details** tab of the appropriate form as follows:

- If you want to use an existing discount code, in the **Discount Code** column, you select this code.
- If you want to enter a discount manually, in the **Discount Percent** or **Discount Amount** column, you type the appropriate percent or amount and select the **Manual Discount** check box.

Application of Group-Level and Document-Level Manual Discounts

You can apply manual group-level or document-level discounts on the **Discount Details** tab of the appropriate form as follows:

- If you want to use an existing discount code, in the **Discount Code** column, you select this code, and in the **Sequence ID** column, you select the appropriate discount sequence for this code.
- If you want to enter a document discount manually, in the **Discount Percent** or **Discount Amt.** column, you type the appropriate percent or amount and select the **Manual Discount** check box.

If the *Customer Discounts* feature is disabled on the [Enable/Disable Features](#) (CS100000) form, you can enter a manual document-level discount in the **Discount Total** box in the Summary area of an appropriate form.

Recalculation of Discounts after Updating Item Quantities

If you change the line quantities after adding manual discounts, manual discounts will be recalculated. They will not, however, be replaced by automatic discounts, even if the automatic discounts would result in a greater discount amount. Recalculation rules apply as follows:

- *Line-level discounts.* Once you have applied a line-level discount to a line, its percentage value becomes fixed. If you update the quantity of the line item or its discountable amount, the discount amount will be recalculated automatically even if you initially specified the discount as a specific amount.
- *Document-level discounts.* When you save the document to which you have applied a document-level discount, its amount value becomes fixed. If anything changes in the document lines, the discount amount will remain the same unless you manually change its value.

Customer Discounts: To Create an AR Invoice with a Manual Discount

In this activity, you will create and release two invoices: one with a manual line discount, and the other with a manual document discount.

Story

Suppose that the SweetLife Fruits & Jams company has offered five days of the offline training course at a 15% discount to one of its customers, Thai Food Restaurant (*TOMYUM*), which wants to purchase both the online training course and the offline training course. Another customer, GoodFood One Restaurant (*GOODFOOD*), also wants to purchase three days of the online training course, and the SweetLife sales personnel agreed to give the customer a \$10 discount.

Acting as the SweetLife accountant, you need to enter invoices for these customers and manually enter these discounts.

Process Overview

You specify a manual line discount or a manual document discount on the [Invoices and Memos](#) (AR301000) form. To specify a manual line discount, on the **Document Details** tab, you enter either a **Discount Amount** or a **Discount Percent** for the line. To specify a manual document discount, you enter the amount in the **Discount Total** box in the Summary area.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.

2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, which is also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

Step 1: Create the AR Invoice with a Manual Line Discount

To create the AR invoice for Thai Food Restaurant and apply a manual line discount in it, do the following:

1. Open the *Invoices and Memos* (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *TOMYUM*
 - **Date:** *1/30/2020* (inserted by default)
 - **Post Period:** *01-2020*
 - **Description:** *Offline training*
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the new invoice line:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *OFLCOURSE*
 - **Quantity:** 5
 - **UOM:** *DAY*
 - **Unit Price:** 45
 - **Discount Percent:** 15
4. Save the invoice.

The system has calculated the 15% manual discount and applied it to the invoice line. For a manual line discount, you can specify either a discount percent or a discount amount. (Just as in this example, the system calculated the discount amount based on

the discount percent you entered for the line, if you enter a discount amount, the system automatically calculates the corresponding discount percent.)

5. In the Summary area, clear the **Hold** check box, and on the form toolbar, click **Release** to release the invoice.
6. On the **Financial Details** tab, click the link in the **Batch Nbr.** box to review the generated GL batch, which the system opens in a pop-up window on the [Journal Transactions](#) (GL301000) form.

The 11000 - *Accounts Receivable* account has been debited with the amount of \$191.25, which is the invoice amount less the manual line discount you applied to the invoice.

Step 2: Create the AR Invoice with a Manual Document Discount

To create the AR invoice for GoodFood One Restaurant with a manual document discount, do the following:

1. While you are still on the [Invoices and Memos](#) (AR301000) form, click **Add New Record** on the form toolbar, and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *GOODFOOD*
 - **Date:** *1/30/2020* (selected by default)
 - **Post Period:** *01-2020*
 - **Description:** *Online course 3 days*
2. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the new invoice line:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ONLCOURSE*
 - **Quantity:** *3*
 - **UOM:** *DAY*
 - **Unit Price:** *14.5*
3. On the form toolbar, click **Save** to save the invoice.
4. In the **Discount Total** box in the Summary area, enter 10.

This is the \$10 manual discount you have agreed to give your customer. The total amount of the invoice before the discount is displayed in the **Detail Total** box (\$43.50), and the amount due (with the manual document discount applied) is displayed in the **Balance** box (\$33.50).

5. On the form toolbar, clear the **Hold** check box, and on the form toolbar, click **Release** to release the invoice.

6. On the **Financial Details** tab, click the link in the **Batch Nbr.** box to review the generated GL batch, which the system opens in a pop-up window on the [Journal Transactions](#) (GL301000) form.

The *53000 - Discount Given* account has been debited in the amount of the document discount you specified for this invoice (\$10).

Customer Discounts: To Configure a Manual Promotional Discount

In this activity, you will learn how to configure and apply a manual promotional discount. These discounts may be useful, for example, if you want to provide customer discounts based on promotional coupons.

Story

Suppose that SweetLife Fruits & Jams company has decided to sell online training courses at a 20% discount, for which it has distributed promotional coupons. This discount is applicable from December 15, 2019 to January 10, 2020 for all customers.

Acting as the SweetLife accountant, you will configure the discount code and discount in the system. You also need to enter an AR invoice for five days of the online home canning course for Lake Cafe on December 20, 2019.

Process Overview

You create a discount code on the [Discount Codes](#) (AR209000) form, and then configure a manual promotional discount on the [Discounts](#) (AR209500) form.

To test how the configured manual promotional discount is applied, on the Invoices and Memos (AR301000) form, you create an AR invoice and apply the manual discount you configured.

System Preparation

Before you start the activity, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *12/20/2019*. If a different date is displayed, click the Business Date menu button and select *12/20/2019*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

4. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the Manual Promotional Discount

To configure the 20% manual promotional discount, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the row:
 - **Discount Code:** PROMO00000
 - **Description:** Promotional discount by item
 - **Discount Type:** *Line*
 - **Applicable To:** *Item*
 - **Manual:** Selected
 - **Auto-Numbering:** Selected
 - **Last Number:** PROMO00000

Discounts of this discount code are manual line discounts that are applicable if the document refers to a specific item.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *PROMO00000*
 - **Discount by:** *Percent*
 - **Break by:** *Quantity*
 - **Active:** Selected
 - **Promotional:** Selected
 - **Effective Date:** *12/15/2019*

- **Expiration Date:** 1/10/2020
- **Description:** Promo discount for online course

With these settings, the discount (of the discount code you just defined for manual line discounts that apply to a specific item) is by percent, with break points by quantity, and is promotional, effective from December 15, 2019 to January 10, 2020.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar and specify the following settings in the table:

- **Break Quantity:** 0
- **Discount Percent:** 20

Because the break quantity is 0, this discount of 20% applies to any quantity.

7. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *ONLCOURSE*. This is the only item to which the discount applies.
8. On the form toolbar, click **Save**.

Step 2: Create the AR Invoice and Apply the Manual Discount

To create the needed AR invoice for Lake Cafe and apply the manual discount, do the following:

1. Open the *Invoices and Memos* (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *LAKECAFE*
 - **Date:** 12/20/2019 (selected by default)
 - **Description:** Online course 5 days
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ONLCOURSE*
 - **Quantity:** 5
 - **UOM:** *DAY*
 - **Unit Price:** 15
 - **Discount Code:** *PROMO00000*

The **Discount Percent** column reflects the 20% discount that has been applied to the line.

4. In the Summary area, clear the **Hold** check box, and on the form toolbar, click **Release** to release the invoice.

Customer Discounts: Application of Automatic Discounts

The system always applies automatic discounts in the following order when a user saves a document:

1. Line-level discounts (which are applied to each line of the document): For each document line, the system checks the applicable line-level discounts and applies the one with the largest discount amount.
2. Group-level discounts (which are applied to multiple lines of the document): The system finds the applicable group-level discounts and applies all of them.
3. Document-level discounts: The system finds and applies the applicable document-level discount with the largest discount amount for a document. The system can apply only one (the best) document-level discount to the document.



You can use group-level discounts as document-level discounts. For example, if you create a group-level discount that is applicable to a specific customer price class, it will work as a document-level discount affecting each line of a document.

The following settings, which are specified on the [Discount Codes](#) (AR209000) form, affect the order of discount application and the calculation of the discounts:

- **Exclude from Discountable Amount:** If this check box (which is available only for line-level discounts) is selected, the discountable amount of the line-level discount is excluded from the discountable amount for higher-level (group or document) discounts. For example, suppose that you have a line-level clearance discount of 75% and a document-level discount of 5% for documents with total of more than \$2000. You select this check box if you do not want to apply an additional document-level discount of 5% to the already-discounted line amounts.
- **Skip Document Discount:** If this check box (which is available only for group-level discounts) is selected, the system does not apply document discounts when this group discount is applied to the document. For example, suppose that the following discounts have been defined: a group-level discount that is applicable to multiple lines and significantly reduces the document total, and a document-level discount. You select this check box if you do not want to apply the document-level discount to the documents to which this group-level discount has been applied.

Customer Discounts: To Configure Automatic Line Discounts

In this activity, you will learn how to configure line-level customer discounts of different types (discount by percent with the break point by amount and discount by amount with the break point by quantity) and explore how these discounts are applied in AR invoices.

Story

Suppose that starting in January 2020, the SweetLife Fruits & Jams company is offering the following discounts, which will be applied in AR invoices, for the offline training courses that the company sells to its customers:

- An automatic line discount of 5% that will be applied to the GOODFOOD customer when the invoice line amount exceeds \$200 (discount by percent with the break point by amount)
- An automatic line discount of \$100 that will be applied to local customers who order 10 or more days of offline training (discount by amount with the break point by quantity)

On January 30, 2020, GoodFood One Restaurant purchased 16 days of the home canning course (that is, the offline course).

Acting as the SweetLife accountant, you will configure these discounts and create the invoice for the GoodFood One Restaurant, noting how the discounts are applied.

Process Overview

Before you configure and apply an automatic line discount, on the [Enable/Disable Features](#) (CS100000) form, you enable the *Customer Discounts* feature. You create a discount code on the [Discount Codes](#) (AR209000) form, and then configure a discount on the [Discounts](#) (AR209500) form.

On the [Invoices and Memos](#) (AR301000) form, you create an AR invoice with lines to which discounts may be applied. You then review how the discounts you have configured are applied automatically.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure that the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. On the form toolbar, click **Modify** and select the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. On the form toolbar, click **Enable**.

Step 1: Configure the Discount by Percent for a Particular Customer

To configure the discount by amount for the *GOODFOOD* customer, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** LICUS00000
 - **Description:** Line discount by customer
 - **Discount Type:** *Line*
 - **Applicable To:** *Customer*
 - **Auto-Numbering:** Selected
 - **Last Number:** LICUS00000

With these settings, discounts of this discount code are line discounts that are applicable to specific customers; because the **Manual** check box is cleared, these line discounts will be applied automatically.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *LICUS00000*
 - **Discount by:** *Percent*
 - **Break by:** *Amount*
 - **Active:** Selected
 - **Description:** Line discount for GOODFOOD

These settings convey that this discount (of the discount code you just defined for line discounts that are applicable to particular customers) is by percent, with break points by line amount.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Amount:** 200
- **Pending Discount Percent:** 5
- **Pending Date:** 1/1/2020

With these settings, the discount of 5% is applicable to a line with an amount greater than or equal to \$200.

7. On the **Customers** tab, click **Add Row** on the table toolbar, and in the **Customer** column, select *GOODFOOD*. Because this is the only row defined on this tab, this discount can be applied to only the *GOODFOOD* customer.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Update Discounts**.
10. In the **Update Discounts** dialog box, which opens, leave the default value (1/30/2020) in the **Filter Date** box, and click **OK**.

Step 2: Configure the Discount by Amount for a Particular Customer Price Class

To configure the discount by quantity for the *LOCAL* customer price class, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row** and specify the following settings:
 - **Discount Code:** LIITE00000
 - **Description:** Line discount by item and customer price class
 - **Discount Type:** *Line*
 - **Applicable To:** *Customer Price Class and Item*
 - **Auto-Numbering:** Selected
 - **Last Number:** LIITE00000

Discounts of this discount code are automatic line discounts that are applicable if the line refers to a specific item and the document refers to a customer of a specific price class.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.

5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Discount Code:** *LIITE00000*
- **Discount by:** *Amount*
- **Break by:** *Quantity*
- **Active:** Selected
- **Description:** *Line discount for local customers by item*

With these settings, the discount (of the discount code you just defined for line discounts that are applicable to a specific item and a customer of a particular price class) is by amount, with break points by quantity.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Quantity:** 10
- **Pending Discount Amount:** 100
- **Pending Date:** *1/1/2020*

The discount of \$100 is applicable to a line with a quantity greater than or equal to 10.

7. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *OFLCOURSE*. Because this is the only row on the tab, this discount applies to only the *OFLCOURSE* item.

8. On the **Customer Price Classes** tab, click **Add Row** on the table toolbar and in the **Price Class ID** column, select *LOCAL*. The discount applies to only customers of the *LOCAL* customer price class.

9. On the form toolbar, click **Save**.

10. On the form toolbar, click **Update Discounts** to make the discounts you have just added effective.

11. In the **Update Discounts** dialog box, which opens, leave the default value (*1/30/2020*) in the **Filter Date** box, and click **OK**.

Step 3: Create the AR Invoice and Explore Discount Application

To create the AR invoice to GoodFood One Restaurant and explore how the automatic line discounts are applied, do the following:

1. Open the [Invoices and Memos](#) (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Type:** *Invoice*
 - **Customer:** *GOODFOOD*
 - **Date:** *1/30/2020* (inserted by default)
 - **Description:** *Offline training*
3. On the **Document Details** tab, click **Add Row**, and specify the following settings in the added row:
- **Branch:** *HEADOFFICE*
 - **Inventory ID:** *OFLCOURSE*
 - **Quantity:** 5
 - **UOM:** *DAY*
 - **Unit Price:** 45

The **Discount Percent** column contains the 5% discount that you configured in Step 1. The discount has been applied automatically, because the amount in the **Ext. Price** column exceeds the break point of \$200.

4. On the table toolbar, click **Add Row**, and specify the following settings in the row:
- **Branch:** *HEADOFFICE*
 - **Inventory ID:** *OFLCOURSE*
 - **Quantity:** 12
 - **UOM:** *DAY*
 - **Unit Price:** 45

The **Discount Amount** column contains the \$100 discount that you configured in Step 2. The discount has been applied automatically to this line, because the quantity exceeds 10 and the customer belongs to the *LOCAL* price class. Since this line meets the criteria for more than one discount, the system has applied the best available discount.

5. In the Summary area, clear the **Hold** check box, and on the form toolbar, click **Release** to release the invoice.
6. On the **Financial Details** tab, click the link in the **Batch Nbr.** box to review the GL batch, which the system opens in a pop-up window on the [Journal Transactions](#) (GL301000) form.

The *11000 - Accounts Receivable* account is debited and the *40000 - Sales Revenue* account is credited in the amount of the invoice.

Step 4: Make the Created Discounts Inactive

To make the discounts you created in this lesson inactive so that they will not affect other documents later, do the following:

1. Open the [Discounts](#) (AR209500) form.
2. In the **Discount Code** box, select *LICUS00000*.
3. In the **Sequence** box, select *LICUS00001*.
4. In the Summary area, clear the **Active** check box; save the discount.
5. Repeat Instructions 2 through 4 for the *LIITE00000* discount code.

Customer Discounts: To Configure Automatic Group Discounts

In this activity, you will learn how to configure and apply a promotional discount for particular stock items sold from a specific warehouse and a free item discount, and how the system applies these discounts to a sales order.

Story

Suppose that on January 30, 2020, the SweetLife Fruits & Jams company starts selling 32-ounce and 96-ounce jars of apple jam at a 3% discount from the *WHOLESALE* warehouse; also, for sales orders with dates from 1/30/2020 to 2/15/2020, the company also wants to add a free jar of 96-ounce of lemon jam for the customers who have bought the apple jam for the amount of \$350 and more.

Acting as the accountant, you need to configure an automatic group discount of 3% for the *APJAM96* and *APJAM32* stock items sold from the *WHOLESALE* warehouse, and a free-item promotional group discount for sales orders in which the total amount of the *APJAM96* and *APJAM32* stock items exceeds \$350. You will also create a sales order to see how the discounts are applied (you will not save or process this sales order), and then deactivate the discounts.



A group discount is based on the amount or quantity that is in one line or the sum of multiple lines. In this case, a group discount is used because the free-item discount is based on the sum of amounts of the 32-ounce jars of apple jam and the 96-ounce jars of apple jam.

Process Overview

To set up a promotional free-item discount and a warehouse-specific discount, you configure a discount code on the [Discount Codes](#) (AR209000) form and then configure the needed discount on the [Discounts](#) (AR209500) form.

To review how the discounts are applied to the sales order, you then create a sales order on the [Sales Orders](#) (SO301000) form and add items to observe the application of discounts.

System Preparation

Before you start the lesson, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the Warehouse-Specific Discount for Particular Items

To configure the warehouse-specific discount for particular stock items (for the *WHOLESALE* warehouse and the *APJAM96* and *APJAM32* items), do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** *WHSE000000*
 - **Description:** `Warehouse discount by items`
 - **Discount Type:** *Group*
 - **Applicable To:** *Warehouse and Item*
 - **Auto-Numbering:** Selected
 - **Last Number:** *WHSE000000*

These settings define discounts of this discount code as automatic group discounts that are applicable to specific items sold in specific warehouses (which will be just one warehouse in this example).

3. On the form toolbar, click **Save**.
4. Open the *Discounts* (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Discount Code:** *WHSE000000*
- **Discount by:** *Percent*
- **Break By:** *Amount*
- **Active:** Selected
- **Description:** *Warehouse discount for apple jam*

With these settings, the discount (of the discount code you just defined for group discounts that are applicable to specific items sold in particular warehouses) is by percent, with break points by amount.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Amount:** 0
- **Pending Discount Percent:** 3
- **Pending Date:** *1/30/2020*

The discount of 3% is applicable to all groups (because the break amount is 0).

7. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *APJAM32*.
8. Add another row, and in the **Inventory ID** column, select *APJAM96*. The discount applies to the *APJAM32* and *APJAM96* items.
9. On the **Warehouses** tab, click **Add Row** on the table toolbar, and in the **Warehouse** column, select *WHOLESALE*. Because this is the only row on the tab, the discount is applicable to only the *WHOLESALE* warehouse.
10. On the form toolbar, click **Save**.
11. On the form toolbar, click **Update Discounts** to make the discount you have just added effective.
12. In the **Update Discounts** dialog box, which opens, leave the *1/30/2020* default value, and click **OK**.

Step 2: Configure the Free-Item Promotional Discount

To configure the free-item promotional group discount in which the *LEMJAM96* stock item is the free item, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** *FRITE00000*
 - **Description:** *Free-item discount*
 - **Discount Type:** *Group*
 - **Applicable To:** *Item*
 - **Auto-Numbering:** Selected
 - **Last Number:** *FRITE00000*

Discounts of this discount code are automatic group discounts that are applicable to specific items.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *FRITE00000*
 - **Discount by:** *Free Item*
 - **Break by:** *Amount*
 - **Promotional:** Selected
 - **Effective Date:** *1/30/2020*
 - **Expiration Date:** *2/15/2020*
 - **Description:** *Free-item discount (lemon jam)*

The free-item discount (of the discount code you just defined for group discounts that are applicable to specific items) is a promotional discount, effective for the specified date range, with break points by amount.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Break Amount:** 350
 - **Free Item Quantity:** 1

With these settings, the discount of one free item is applicable to a group with an amount greater than or equal to \$350.

7. On the **Items** tab, click **Add Row** on the table toolbar, and select *APJAM96* in the **Inventory ID** column.
8. Add another row, and select *APJAM32* in the **Inventory ID** column. This discount is applicable to the *APJAM32* and *APJAM96* items.
9. On the **Free Items** tab, in the **Pending Free Item** box, select *LEMJAM96*.
10. In the Summary area of the form, select the **Active** check box.
11. On the form toolbar, click **Save**.

Step 3: Create a Sales Order and Explore Discount Application

To create a sales order for testing purposes and explore how the discounts are applied to it, do the following:

1. Open the [Sales Orders](#) (SO301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020* (inserted by default)
 - **Description:** *Jam*
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *ORJAM32*
 - **UOM:** *PIECE*
 - **Quantity:** *5*
 - **Unit Price:** *13*

Notice that the **Discount Percent** and **Discount Amount** columns are empty, indicating that no discounts have been applied to this stock item, because there are no active discounts in the system for this stock item.

4. On the **Document Details** tab, click **Add Row** and specify the following settings in the table:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *APJAM96*

- **UOM:** *PIECE*
 - **Quantity:** 5
 - **Unit Price:** 45.15
5. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
- **Branch:** *HEADOFFICE*
 - **Inventory ID:** *APJAM32*
 - **UOM:** *PIECE*
 - **Quantity:** 10
 - **Unit Price:** 16.60

Notice that another row, which contains the *LEMJAM96* stock item, has been automatically added to the order, and the **Free Item** check box has been selected in the row.

6. On the **Discount Details** tab, review the discounts, which you configured earlier in this lesson and which have been applied to the sales order.

The system does not select the best available group discount; instead, it adds all group discounts that are applicable to sales orders. The warehouse-specific discount (*WHSE000000*) has been applied because the *APJAM32* and *APJAM96* stock items were sold from the *WHOLESALE* warehouse specified in the discount. The free-item discount (*FRITE000000*) has been applied because the order date (1/30/2020) is within the range of effective dates of the promotional discount and the total price for *APJAM32* and *APJAM96* exceeds \$350, the break point.

You do not need to save or process this sales order; you created it solely to test how the discounts are applied.

Step 4: Make the Created Discounts Inactive

To make the discounts you created in this lesson inactive so that they will not affect other documents later, do the following:

1. Open the *Discounts* (AR209500) form.
2. In the **Discount Code** box, select *WHSE000000*.
3. In the **Sequence** box, select *WHSE000001*.
4. In the Summary area, clear the **Active** check box; save the discount.
5. Repeat Instructions 2 through 4 for the *FRITE000000* discount code.

Customer Discounts: To Configure Automatic Document Discounts

In this activity, you will learn how to configure automatic document discounts, and you will explore how they are applied to AR invoices.

Story

Suppose that the SweetLife Fruits & Jams company has given one of its customers, Thai Food Restaurant (*TOMYUM*), a 7% discount. In addition, SweetLife has offered a 15% discount to all customers who purchase \$200 or more in a single order (document).

Acting as SweetLife's accountant, you need to configure a customer-specific document discount of 7% for the *TOMYUM* customer and an unconditional document discount of 15% for all customers who buy SweetLife's products for a document amount of \$200 or more.

On January 30, 2020 *TOMYUM* bought 2 days of the offline training course and 10 days of the online training course. You need to enter an AR invoice, to which the discounts should be applied automatically.

Process Overview

You configure discount codes on the [Discount Codes](#) (AR209000) form, and then configure document discounts on the [Discounts](#) (AR209500) form. After that you create an AR invoice for a particular customer on the [Invoices and Memos](#) (AR301000) form, and review the **Discount Details** tab to see how the discounts are applied.

System Preparation

Before you start the activity, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.

- b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
- c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the Customer-Specific Document Discount

To configure the document discount specific to the *TOMYUM* customer, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** *DOCUM00000*
 - **Description:** *Document discount by customer*
 - **Discount Type:** *Document*
 - **Applicable To:** *Customer*
 - **Auto-Numbering:** Selected
 - **Last Number:** *DOCUM00000*

These settings define discounts of this discount code as automatic document discounts that are applicable to specific customers (which will be only the *TOMYUM* customer in this example).

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *DOCUM00000*
 - **Discount by:** *Percent*
 - **Active:** Selected
 - **Description:** *Document discount for TOMYUM*

These settings convey that this discount (of the discount code you just defined for document discounts that are applicable to specific customers) is by percent, with break points by amount. In this case, the value in the **Break by** box has been defined automatically based on the discount code configuration and cannot be changed by the user.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Amount:** 0
- **Pending Discount Percent:** 7
- **Pending Date:** 1/30/2020

With these settings, the discount of 7% is applicable to a document of any amount (because the break amount is 0).

7. On the **Customers** tab, click **Add Row** on the table toolbar, and in the **Customer** column, select *TOMYUM*.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Update Discounts** to make the discount you have just added effective, and in the **Update Discounts** dialog box, which opens, leave 1/30/2020 in the **Filter Date** box, and click **OK**.

Step 3: Configure the Unconditional Document Discount

To configure the unconditional document discount of 15% for documents of \$200 or more, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** *UNCON00000*
 - **Description:** Document discount unconditional
 - **Discount Type:** *Document*
 - **Applicable To:** *Unconditional*
 - **Auto-Numbering:** Selected
 - **Last Number:** *UNCON00000*

With these settings, discounts of this discount code are unconditional automatic document discounts. In this case, *Unconditional* conveys that the discount code is not applicable to a limited set of entities. However, a discount of this discount code may have particular break points defined for specific discounts, as is the case in this example.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *UNCON00000*
 - **Discount by:** *Percent*

- **Active:** Selected
- **Description:** Document discount unconditional

These settings convey that this discount (of the discount code you just defined for unconditional document discounts) is by percent, with break points by amount. In this case, the value in the **Break by** box has been defined automatically based on the discount code configuration and cannot be changed by the user.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Amount:** 200
- **Pending Discount Percent:** 15
- **Pending Date:** 1/30/2020

The discount of 15% is applicable to a document with an amount greater than or equal to \$200.

7. On the form toolbar, click **Save**.
8. On the form toolbar, click **Update Discounts**, and in the **Update Discounts** dialog box, which opens, leave 1/30/2020 in the **Filter Date** box, and click **OK**.

Step 4: Create the AR Invoice and Explore the Discount Application

To create the AR invoice for the *TOMYUM* customer and explore how the system automatically applies the discounts you have created, do the following:

1. Open the [Invoices and Memos](#) (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** Invoice
 - **Customer:** TOMYUM
 - **Date:** 1/30/2020
 - **Post Period:** 01-2020
 - **Description:** Training courses
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** HEADOFFICE
 - **Inventory ID:** OFLCOURSE
 - **Quantity:** 2

- **UOM:** *DAY*
 - **Unit Price:** 45
4. On the **Discount Details** tab, notice that a row with the *DOCUM00000* discount code, which you configured in Step 1, has been added, meaning that the discount has been applied to this document.

The **Discount Percent** column shows the discount percent (7%), the **Discount Amt.** column shows the discount amount and the same amount is shown in the **Discount Total** box in the Summary area.

5. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ONLCOURSE*
- **Quantity:** 10
- **UOM:** *DAY*
- **Unit Price:** 15

6. On the **Discount Details** tab, notice that a row with the *UNCON00000* discount code, which you configured in Step 2, has been added, meaning that the discount has been applied to this document. The 7% discount that was applied after you added the first document line has now disappeared.

Also notice that the **Discount Percent** column shows the discount percent (15%), the **Discount Amt.** column shows the discount amount, and the same amount is now shown in the **Discount Total** box in the Summary area. This discount has been applied because it is the best available discount for this document.

7. On the form toolbar, clear the **Hold** check box and click **Release** to release the invoice.

Step 5: Make the Created Discounts Inactive

To make the discounts you created in this lesson inactive so that they will not affect other documents later, do the following:

1. Open the *Discounts* (AR209500) form.
2. In the **Discount Code** box, select *DOCUM00000*.
3. In the **Sequence** box, select *DOCUM00001*.
4. In the Summary area, clear the **Active** check box; save the discount.
5. Repeat Instructions 2 through 4 for the *UNCON00000* discount code.

Customer Discounts: To Configure Automatic Volume Discounts

In this activity, you will learn how to configure an automatic volume discount for a particular stock item, and you will explore how it is applied to a sales order.

Story

Suppose that at the end of January, warehouse personnel at SweetLife Fruits & Jams found out that the company's wholesale warehouse contains a large lot of 32-ounce jars of orange jam with an approaching expiration date. Company personnel decided to sell these jars at the following discounts:

- 5% for 5 to 10 jars
- 10% for 11 to 19 jars
- 20% for 20 jars or more

Because no one can predict when the entire lot will be sold, this discount should be configured to start on 1/30/2020 and extend indefinitely.

Acting as the SweetLife accountant, you will configure this discount in the system and create a sales order to see how the discount is applied. You will then deactivate the discount.

Process Overview

To configure an automatic volume discount for a particular stock item, you create the needed discount code on the [Discount Codes](#) (AR209000) form, and then configure an automatic volume discount for the particular item on the [Discounts](#) (AR209500) form.

If the discount is broken by quantity, to see how the discount is applied, you can create a sales order on the [Sales Orders](#) (SO301000) form with lines that have different quantities.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is

selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

4. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the Automatic Volume Discount

To configure the automatic volume discount on the 32-ounce jars of orange jam, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the row:
 - **Discount Code:** VOLIT00000
 - **Description:** Volume discount by item
 - **Discount Type:** *Line*
 - **Applicable To:** *Item*
 - **Auto-Numbering:** Selected
 - **Last Number:** VOLIT00000

A discount of this discount code is an automatic line discount that is applicable to a specific item.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** VOLIT00000
 - **Discount by:** *Percent*
 - **Break by:** *Quantity*
 - **Active:** Selected
 - **Description:** Volume discount for ORJAM32

With these settings, the discount (of the discount code you just defined for line discounts that apply to a specific item) is by percent, with break points by quantity.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Quantity:** 5
- **Pending Discount Percent:** 5
- **Pending Date:** *1/30/2020*

This 5% discount applies to a line with a quantity of 5 or more.

7. Click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Quantity:** 11
- **Pending Discount Percent:** 10
- **Pending Date:** *1/30/2020*

This 10% discount applies to a line with a quantity of 11 or more.

8. Click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Pending Break Quantity:** 20
- **Pending Discount Percent:** 20
- **Pending Date:** *1/30/2020*

This 20% discount applies to a line with a quantity of 20 or more.

9. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *ORJAM32*. Because this is the only row specified on this tab, the discount is applied to only the *ORJAM32* item.

10. On the form toolbar, click **Save**.

11. On the form toolbar, click **Update Discounts** to make the discounts you have just added effective.

12. In the **Update Discounts** dialog box, which opens, leave *1/30/2020* in the **Filter Date** box, and click **OK**.

Step 2: Create a Sales Order and Explore the Application of the Discount

To create a sales order for testing purposes and explore how the discount is applied, do the following:

1. Open the [Sales Orders](#) (SO301000) form.

2. Click **Add New Record** on the form toolbar, and specify the following settings in the Summary area:

- **Order Type:** *SO*
- **Customer:** *COFFEESHOP*
- **Date:** *1/30/2020*
- **Description:** *Orange jam at a discount*

3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*
- **UOM:** *PIECE*
- **Quantity:** 6
- **Unit Price:** 13

In the **Discount Percent** column, notice that the 5% discount you configured in Step 1 has been applied, because the quantity in the line is between 5 and 10.

4. Click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*
- **UOM:** *PIECE*
- **Quantity:** 12
- **Unit Price:** 13

In the **Discount Percent** column, notice that the 10% discount you configured in Step 1 has been applied, because the quantity in the line is between 11 and 19.

5. Add one more row with the following settings:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ORJAM32*
- **Warehouse:** *WHOLESALE*
- **UOM:** *PIECE*

- **Quantity:** 22
- **Unit Price:** 13

In the **Discount Percent** column, notice that the 20% discount you configured in Step 1 has been applied, because the quantity in the line is more than 20.

You do not need to save or process the sales order; you created it solely to learn how the discounts are applied.

Step 3: Make the Discount Inactive

To make the discount you created in this lesson inactive so that it will not affect other documents later, do the following:

1. Open the *Discounts* (AR209500) form.
2. In the **Discount Code** box, select *VOLIT00000*.
3. In the **Sequence** box, select *VOLIT00001*.
4. In the Summary area, clear the **Active** check box; save the discount.

Customer Discounts: To Configure Multiple Discounts and Explore Their Application

In this activity, you will configure discounts of multiple types and learn how the system applies a combination of discounts to an AR invoice.

Story

Starting in January 2020, the SweetLife Fruits & Jams company is offering a discount of \$100 to local customers who order 10 or more days of offline training.

Suppose that on January 30, 2020 one of the SweetLife Fruits & Jams company's local customers, FourStar Coffee & Sweets Shop (*COFFEESHOP*), bought 12 days of offline training and 5 days of online training, for which your company is offering a 12% discount effective on 1/30/2020 for more than 5 days of training.

In addition, SweetLife has offered a 15% discount to all customers who purchase \$200 or more in a single order.

Acting as SweetLife's accountant, you need to define the discounts for the *OFLCOURSE* and *ONLCOURSE* non-stock items, which will be applied automatically.

Finally, you need to create and post the AR invoice for FourStar Coffee & Sweets Shop in the system, making sure that the three discounts are applied to this invoice.

Process Overview

To configure a group discount for particular non-stock items, you create a discount code on the [Discount Codes](#) (AR209000) form, and then configure this discount on the [Discounts](#) (AR209500) form.

You then create an AR invoice on the [Invoices and Memos](#) (AR301000) form and review how the discounts defined in the system are applied to the invoice. You release the invoice on this form, and you review the resulting GL batch on the [Journal Transactions](#) (GL301000) form.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the Automatic Group Discount for Particular Non-Stock Items

To create the automatic group discount for the *OFLCOURSE* and *ONLCOURSE* non-stock items, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** GRITE00000
 - **Description:** Group discount for items
 - **Discount Type:** *Group*

- **Applicable To:** *Item*
- **Auto-Numbering:** Selected
- **Last Number:** GRITE00000

These settings define discounts of this discount code as automatic group discounts that are applicable to specific items.

3. On the form toolbar, click **Save**.
4. Open the *Discounts* (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Discount Code:** GRITE00000
- **Discount by:** *Percent*
- **Break by:** *Quantity*
- **Active:** Selected
- **Description:** Group discount for training courses

With these settings, the discount (of the discount code you just defined for group discounts that are applicable to specific items) is by percent, with break points by quantity.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Pending Break Quantity:** 5
 - **Pending Discount Percent:** 12
 - **Pending Date:** 1/30/2020

The discount of 12% is applicable to a group with a quantity of 5 or more.

7. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *OFLCOURSE*.
8. Add another row, and in the **Inventory ID** column, select *ONLCOURSE*.
9. On the form toolbar, click **Save**.
10. On the form toolbar, click **Update Discounts** and, in the **Update Discounts** dialog box, which opens, leave 1/30/2020 in the **Filter Date** box, and click **OK**.

Step 2: Configure the Discount by Quantity for a Particular Customer Price Class



If you completed the [Customer Discounts: To Configure Automatic Line Discounts](#) activity, skip this step and make the *LIITE00000* discount active as follows:

1. Open the [Discounts](#) (AR209500) form.
2. In the **Discount Code** box, select *LIITE00000*.
3. In the **Discount Sequence** box, select *LIITE00001*
4. In the Summary area, make sure that the **Active** check box is selected; save the discount.
5. On the form toolbar, click **Save** to save your changes.

To configure the discount by quantity for the *LOCAL* customer price class, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row** and specify the following settings:
 - **Discount Code:** *LIITE00000*
 - **Description:** *Line discount by item and customer price class*
 - **Discount Type:** *Line*
 - **Applicable To:** *Customer Price Class and Item*
 - **Auto-Numbering:** Selected
 - **Last Number:** *LIITE00000*

Discounts of this discount code are automatic line discounts that are applicable if the line refers to a specific item and the document refers to a customer of a specific price class.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *LIITE00000*
 - **Discount by:** *Amount*
 - **Break by:** *Quantity*
 - **Active:** Selected
 - **Description:** *Line discount for local customers by item*

With these settings, the discount (of the discount code you just defined for line discounts that are applicable to a specific item and a customer of a particular price class) is by amount, with break points by quantity.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Pending Break Quantity:** 10
 - **Pending Discount Amount:** 100
 - **Pending Date:** 1/1/2020

The discount of \$100 is applicable to a line with a quantity greater than or equal to 10.
7. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *OFLCOURSE*. Because this is the only row on the tab, this discount applies to only the *OFLCOURSE* item.
8. On the **Customer Price Classes** tab, click **Add Row** on the table toolbar and in the **Price Class ID** column, select *LOCAL*. The discount applies to only customers of the *LOCAL* customer price class.
9. On the form toolbar, click **Save**.
10. On the form toolbar, click **Update Discounts** to make the discounts you have just added effective.
11. In the **Update Discounts** dialog box, which opens, leave the default value (1/30/2020) in the **Filter Date** box, and click **OK**.

Step 3: Configure the Unconditional Document Discount



If you completed the [Customer Discounts: To Configure Automatic Document Discounts](#) activity, skip this step and make the *UNCON00000* discount active as follows:

1. Open the [Discounts](#) (AR209500) form.
2. In the **Discount Code** box, select *UNCON00000*.
3. In the **Discount Sequence** box, select *UNCON00001*.
4. In the Summary area, make sure that the **Active** check box is selected; save the discount.
5. On the form toolbar, click **Save** to save your changes.

To configure the unconditional document discount of 15% for documents of \$200 or more, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:

- **Discount Code:** UNCON00000
- **Description:** Document discount unconditional
- **Discount Type:** *Document*
- **Applicable To:** *Unconditional*
- **Auto-Numbering:** Selected
- **Last Number:** UNCON00000

With these settings, discounts of this discount code are unconditional automatic document discounts. In this case, *Unconditional* conveys that the discount code is not applicable to a limited set of entities. However, a discount of this discount code may have particular break points defined for specific discounts, as is the case in this example.

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Discount Code:** *UNCON00000*
- **Discount by:** *Percent*
- **Active:** Selected
- **Description:** Document discount unconditional

These settings convey that this discount (of the discount code you just defined for unconditional document discounts) is by percent, with break points by amount. In this case, the value in the **Break by** box has been defined automatically based on the discount code configuration and cannot be changed by the user.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Pending Break Amount:** 200
 - **Pending Discount Percent:** 15
 - **Pending Date:** *1/30/2020*

The discount of 15% is applicable to a document with an amount greater than or equal to \$200.

7. On the form toolbar, click **Save**.
8. On the form toolbar, click **Update Discounts**, and in the **Update Discounts** dialog box, which opens, leave *1/30/2020* in the **Filter Date** box, and click **OK**.

Step 4: Create the AR Invoice and Explore Discount Application

To create the AR invoice for FourStar Coffee & Sweets Shop and observe how the system automatically applies the discounts, do the following:

1. Open the *Invoices and Memos* (AR301000) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** *Invoice*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020* (inserted by default)
 - **Post Period:** *01-2020*
 - **Description:** *Offline and online training*

3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *OFLCOURSE*
- **Quantity:** *12*
- **UOM:** *DAY*
- **Unit Price:** *45*

Notice that the **Discount Code** column in the line now contains *LIITE00000*. This is the automatic line discount of \$100 that you configured for 10 or more days of offline training on 1/1/2020. The **Ext. Price** column shows the amount before the discount (\$540), the **Discount Amount** column shows the discount amount (\$100), and the **Amount** column shows the amount with the discount applied (\$440). This amount (\$440) is also shown in the **Detail Total** box in the Summary area.

4. Click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** *HEADOFFICE*
- **Inventory ID:** *ONLCOURSE*
- **Quantity:** *5*
- **UOM:** *DAY*
- **Unit Price:** *13*

5. Review the **Discount Details** tab. Notice that lines have been added for the following discount codes, whose automatic discounts have been also applied to the AR invoice:

- The *GRITE00000* discount code (the group discount of 12% for offline training on 1/30/2020). The **Discountable Amount** for this discount is the **Detail Total** amount, which is the total amount after the line discount is applied. The **Discount Percent** column contains the discount percent (12%), and the **Discount Amt.** column contains the discount amount, which is automatically calculated by the system.
- The *UNCON00000* discount code (the unconditional document discount of 15% for amounts of \$200 or more on 1/30/2020). The **Discountable Amount** for this invoice is the detail total amount with the group discount subtracted from it. The **Discount Percent** column shows the discount percent (15%), and the **Discount Amt.** column shows the discount amount, which is automatically calculated by the system.

The sum of these group and document discounts is shown in the **Discount Total** box in the Summary area. The line discount applied on the **Document Details** tab is not shown on the **Discount Details** tab; it has already been subtracted from the **Detail Total** shown in the Summary area.

6. In the Summary area, clear the **Hold** check box so the system assigns the invoice the *Balanced* status, and on the form toolbar, click **Save**.

Step 5: Release the AR Invoice and Review the GL Batch

To release the invoice, review the corresponding GL batch, and analyze which accounts were updated, do the following:

1. While you are still on the *Invoices and Memos* (AR301000) form, click **Release** on the form toolbar to release the invoice.
2. On the **Financial Details** tab, click the link in the **Batch Nbr.** box.
3. On the *Journal Transactions* (GL301000) form, which opens, review the GL batch.

The *40000 - Sales Revenue* account is credited in the amount of \$505, and the *11000 Accounts Receivable* account is debited in the amount of \$377.74 (the balance of the invoice). The *53000 - Discount Given* account is debited in the amount of the group and document discounts applied to the invoice (\$127.26).



The applied discounts and the document amounts may differ if you have skipped any steps in this activity or previously configured any other applicable discounts.

Step 6: Make the Created Discounts Inactive

To make the discounts used in this lesson inactive so that they will not affect other documents later, do the following:

1. Open the *Discounts* (AR209500) form.
2. In the **Discount Code** box, select *LIITE00000*.
3. In the **Sequence** box, select *LIITE00001*.
4. In the Summary area, clear the **Active** check box; save the discount.

- Repeat Instructions 2 through 4 for the *UNCON00000* and *GRITE00000* discount codes.

Customer Discounts: To Add Sales Orders with Different Document Discounts in a Single SO Invoice

In this activity, you will configure two automatic document discounts. You will then explore how these discounts are applied to sales orders and learn how the system applies discounts to SO invoices that are prepared based on sales orders with different document discounts. Also, you will learn how to update the discount amount.

Story

Suppose that to facilitate sales in 2020, the SweetLife Fruits & Jams company has decided to introduce discounts for some customers. For FourStar Coffee & Sweets Shop, a \$70 discount should be applied to sales orders when the total amount of all lines is \$200 or more. For local customers, SweetLife is offering a 20% discount for sales orders when the total amount of all lines is \$400 or more.

Thus, as SweetLife's accountant, you need to configure the following discounts in the system:

- A customer-specific document discount of \$70
- A document discount of 20% specific for the *LOCAL* customer price class

You also need to create two sales orders for the FourStar Coffee & Sweets Shop (*COFFEESHOP*) customer, and notice how these discounts are applied. Further suppose that before you have processed the sales orders, the sales manager has informed you that the discount percent for the second order changed to 25%. You need to update the discount percent in the second sales order and issue one invoice for both sales orders.

Process Overview

You add discount codes on the [Discount Codes](#) (AR209000) form, and then configure document discounts on the [Discounts](#) (AR209500) form. You create sales orders for a particular customer on the [Sales Orders](#) (SO301000) form, to which discounts can be applied.

If a discount has changed while a sales order is being prepared, you update the discount on the [Discounts](#) (AR209500) form. On the [Sales Orders](#) form, you recalculate the prices of the sales orders being prepared in case any have changed.

To complete the processing of a sales order, you create and confirm a shipment for the sales order (or for multiple orders) on the [Shipments](#) (SO302000) form. On the [Invoices](#) (SO303000) form, you create an SO invoice for one sales order or multiple sales orders, making sure that the automatic discounts for these sales orders are applied, and then release the invoice.

System Preparation

To prepare the system, do the following:

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the company and branch selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. On the [Sales Prices](#) (AR202000) form, make sure that the price has been defined for the *APJAM32* stock item. If it has not been defined, add this price and save your changes.
5. On the [Stock Items](#) (IN202500) form, make sure that the default price specified for the *APJAM08* stock item on the **Price/Cost Info** tab is 4.15. Change the default price if required.
6. Make sure the *Customer Discounts* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form.
 - b. Locate the **Customer Discounts** check box under the **Advanced Financials** section.
 - c. If the check box is cleared, click **Modify** on the form toolbar, select the check box, and then click **Enable** on the form toolbar.

Step 1: Configure the \$70 Document Discount

To configure the \$70 document discount for the FourStar Coffee & Sweets Shop, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Discount Code:** DOC0100000
 - **Description:** Document discount by amount
 - **Discount Type:** *Document*
 - **Applicable To:** *Customer*
 - **Auto-Numbering:** Selected
 - **Last Number:** DOC0100000

These settings define discounts of this discount code as automatic document discounts that are applicable to specific customers (which will be only the FourStar Coffee & Sweets Shop in this example).

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Discount Code:** *DOC0100000*
- **Discount by:** *Amount*
- **Active:** Selected
- **Description:** *Document discount for COFFEESHOP (amount)*

With these settings, the discount (of the discount code you just defined for document discounts that are applicable to specific customers) is by amount, with break points by amount.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Pending Break Amount:** 200
 - **Pending Discount Amount:** 70
 - **Pending Date:** *1/30/2020*

The discount of \$70 is applicable to a document with an amount greater than or equal to \$200.

7. On the **Customers** tab, click **Add Row** on the table toolbar, and in the **Customer** column, select *COFFEESHOP*. This discount is applicable to only this customer.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Update Discounts** to make the discounts you have just added effective.
10. In the **Update Discounts** dialog box, which opens, leave *1/30/2020* in the **Filter Date** box, and click **OK**.

Step 2: Configure the 20% Document Discount

To configure the 20% document discount for local customers, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. On the form toolbar, click **Add Row**, and specify the following settings in the added row:

- **Discount Code:** DOC0200000
- **Description:** Document discount by percent
- **Discount Type:** *Document*
- **Applicable To:** *Customer Price Class*
- **Auto-Numbering:** Selected
- **Last Number:** DOC0200000

These settings define discounts of this discount code as automatic document discounts that are applicable to specific customer price classes (which will be only the *LOCAL* customer price class in this example).

3. On the form toolbar, click **Save**.
4. Open the [Discounts](#) (AR209500) form.
5. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Discount Code:** *DOC0200000*
 - **Discount by:** *Percent*
 - **Description:** Document discount for local customers

With these settings, the discount (of the discount code you just defined for document discounts that are applicable to specific customer price classes) is by percent, with break points by amount. In this case, the value in the **Break by** box is defined automatically based on the discount code configuration and cannot be changed by the user.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Pending Break Amount:** 400
 - **Pending Discount Percent:** 20
 - **Pending Date:** *1/30/2020*

The discount of 20% is applicable to a document with an amount greater than or equal to \$400.

7. On the **Customer Price Classes** tab, click **Add Row** on the table toolbar, and in the **Price Class ID** column, select *LOCAL*. This is the only price class to which the discount is applicable.
8. On the form toolbar, click **Save**.
9. On the form toolbar, click **Update Discounts** to make the discount you have just added effective.

10. In the **Update Discounts** dialog box, which opens, leave *1/30/2020* in the **Filter Date** box, and click **OK**.

Step 3: Create the Sales Orders and Explore Discount Application

To create the two needed sales orders for the *COFFEESHOP* customer and observe how discounts are applied, do the following:

1. Open the [Sales Orders](#) (SO301000) form.
2. On the form toolbar, click **Add New Record** and specify the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020* (inserted automatically)
 - **Description:** *Apple jam 8 oz*
3. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE* (inserted by default)
 - **Inventory ID:** *APJAM08*
 - **Warehouse:** *WHOLESALE* (inserted by default)
 - **Quantity:** *40*
 - **UOM:** *PIECE*
 - **Unit Price:** *5.15*
4. On the **Discount Details** tab, review the document discount that has been applied to this sales order.

The *DOC0100000* discount in the amount of \$70 has been applied because the total amount of the order lines exceeds the break point of \$200 (the value in the **Discountable Amt.** column is \$206).
5. On the form toolbar, click **Save** to save the sales order.
6. Create another sales order by clicking **Add New Record** on the form toolbar and specifying the following settings in the Summary area:
 - **Order Type:** *SO*
 - **Customer:** *COFFEESHOP*
 - **Date:** *1/30/2020* (inserted automatically)

- **Description:** Apple jam 32 oz
7. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE* (inserted by default)
 - **Inventory ID:** *APJAM32*
 - **Warehouse:** *WHOLESALE* (inserted by default)
 - **Quantity:** 25
 - **UOM:** *PIECE*
 - **Unit Price:** 16.6
 8. On the **Discount Details** tab, review the document discount that has been applied to this sales order.

The *DOC0200000* discount in the amount of \$83 (which is 20%) has been applied because the total amount of the order line meets the break point criterion of being \$400 or more (the value in the **Discountable Amt.** column is \$415).

9. On the form toolbar, click **Save** to save the sales order.

Step 4: Update the Discount Percent in a Sales Order

To update the discount percent for the *DOC0200000* discount code in the sales order, do the following:

1. While you are still on the [Sales Orders](#) (SO301000) form, on the **Discount Details** tab, make sure that the sales order with the *DOC0200000* discount code applied is opened.
2. Click the *DOC0200000* code in the **Discount Code** column.
The **Discounts** form will open in a pop-up window.
3. For the only row in the table, specify the following settings:
 - **Pending Break Amount:** 400
 - **Pending Discount Percent:** 25
 - **Pending Date:** *1/30/2020*
4. On the form toolbar, click **Update Discounts** to make the updated discount effective.
5. In the **Update Discounts** dialog box, which opens, leave *1/30/2020* in the **Filter Date** box, and click **OK**.
6. Go back to the sales order for which you applied a *DOC0200000* discount in Step 3, and in the form toolbar, click **Actions > Recalculate Prices**.

7. In the **Recalculate Prices** dialog box, which opens, leave the default values and click **OK**.

On the **Discount Details** tab, notice that the amount in the **Discount Percent** column has been updated to reflect the new value of 25%.

8. On the form toolbar, click **Save** to save the sales order.

Step 5: Prepare an SO Invoice for Both Sales Orders

To prepare an SO invoice for both sales orders, do the following:

1. While you are still on the [Sales Orders](#) (SO301000) form, on the form toolbar, click **Actions > Create Shipment**.
2. In the **Specify Shipment Parameters** dialog box, leave the default values and click **OK**.
3. On the [Shipments](#) (SO302000) form, which opens, review the shipment details in the Summary area.
4. On the **Document Details** tab, click **Add Order** on the table toolbar.
5. In the Summary area of the **Add Sales Order** dialog box, which opens, in the **Order Nbr.** box, select the sales order that you created in Step 3.
6. In the table of the dialog box, select the unlabeled check box for the sales order line with the *APJAM08* item and click **Add & Close**.
7. On the form toolbar, click **Save**.
8. On the form toolbar, click **Actions > Confirm Shipment**.

You have created and confirmed one shipment for the sales orders you created in Step 3.

9. On the form toolbar, click **Actions > Prepare Invoice**.
10. On the [Invoices](#) (SO303000) form, which opens, review the invoice that has been created for both sales orders.
11. On the **Discount Details** tab, review the discounts that have been applied to the invoice generated from the sales orders.

As the screenshot below shows, the table contains two lines, one with the *DOC0100000* document discount, in the amount of \$70, and the other with the *DOC0200000* document discount by percent (25%).



The amounts may be different from the ones in this step if some lessons in this course were skipped or the sales prices listed in the *Configuration Overview* section have not been defined in the system.

12. In the Summary area, click **Actions > Release** to release the invoice.

Step 6: Make the Created Discounts Inactive

To make the discounts you created in this lesson inactive so that they will not affect other documents later, do the following:

1. Open the [Discounts](#) (AR209500) form.
2. In the **Discount Code** box, select *DOC0100000*.
3. In the **Sequence** box, select *DOC0100001*.
4. In the Summary area, clear the **Active** check box; save the discount.
5. Repeat Instructions 2 through 4 for the *DOC0200000* discount code.

Part 3: Vendor Prices

Vendor Prices: General Information

By maintaining vendor price lists in your system, you can take advantage of promotional prices and volume-based offers when planning your purchases and order items for the best available prices.

Learning Objectives

You will learn how vendor prices are defined in Acumatica ERP and how you can upload a vendor price list by using a vendor price worksheet.

Applicable Scenarios

In Acumatica ERP, you can maintain vendor prices for both non-stock items and stock items. Configuring vendor prices for stock items is possible only if the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

Vendor Price Types

Regular Vendor Prices

Regular vendor prices are the most basic type of vendor prices supported in Acumatica ERP. Any price that is not promotional is considered regular. To define a regular vendor price, you specify the following parameters on the [Vendor Prices](#) (AP202000) form: the vendor who provided the price, the item to which the price is applicable, the unit of measure in which the item is purchased, the price and the start date on which the price becomes effective. Regular prices do not necessarily have an expiration date. Those that do, are not applicable after that date. You can also import a price list with regular vendor prices by using the [Vendor Price Worksheets](#) (AP202010) form.

Promotional Vendor Prices

If some of your vendors use promotions, in Acumatica ERP, you can enter promotional vendor prices—that is, temporary prices for specific items. Such prices have expiration dates, and they are not applicable after the expiration date. To enter promotional prices, you select the **Promotional** check box for each price record on the [Vendor Prices](#) form. You can also import the promotional price list by using the [Vendor Price Worksheets](#) form and mark all the prices as promotional by selecting the **Promotional** check box of the worksheet.

UOM-Specific Vendor Prices

If some of your vendors maintain prices in multiple units of measure (UOM), you can define a price record for an item in each of these UOMs on the [Vendor Prices](#) form. You can also import a list with prices defined in multiple UOMs by using the [Vendor Price Worksheets](#) form.

A unit of measure is a required parameter for vendor prices of all types. When you create a price record, you specify the UOM to which the price is applicable. Each UOM in which the item is purchased requires a new vendor price record to be created.

Volume-Dependent Vendor Prices

If the *Volume Pricing* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can enter information about a particular vendor's price tiers by using the [Vendor Prices](#) form. You can enter tiers by specifying for each tier a break quantity, a price, and a date when the price should be in effect.

Warehouse-Specific Vendor Prices

If the *Multiple Warehouses* feature is enabled on the [Enable/Disable Features](#) form, you can define warehouse-specific prices. If a warehouse is not specified for a price, this price applies to all warehouses. The system does not use warehouse-specific prices in accounts payable documents, because these documents do not include warehouse information.

Vendor Prices: Uploading Vendor Price Lists

In Acumatica ERP, users can update vendor prices in a variety of ways. You can modify existing vendor price records one by one on the [Vendor Prices](#) (AP202000) form, for example, if you need to make only minor updates to individual price records, or use vendor price worksheets to upload or update multiple vendor price records at once on the [Vendor Price Worksheets](#) (AP202010) form.

Learning Objectives

You will learn how to upload a vendor price list to Acumatica ERP by using vendor price worksheets.

Applicable Scenarios

Vendors share their product information by sending electronic versions of their catalogs or their price lists, or by making them available for download from their websites. Generally, some price lists include prices intended for all clients, others intended for those who buy occasionally, or those who buy in large volumes. If your company is a preferred customer of a specific vendor or buys in large volumes, the vendor might offer wholesale prices or special prices to your company on particular items or on its entire inventory.

Methods of updating vendor prices described in this section are applicable to both regular and promotional vendor prices maintained on the [Vendor Prices](#) (AP202000) form and the [Vendor Price Worksheets](#) (AP202010) form. These include prices defined for both stock items and non-stock items.

Depending on the type of the items (non-stock items or stock items) and the kind of vendor prices you want to work with, additional features might need to be enabled on the [Enable/Disable Features](#) (CS100000) form as follows:

- In order to be able to maintain vendor prices for stock items, you must enable the *Inventory* feature in the system.
- Warehouse-specific prices can only be maintained if the *Multiple Warehouses* feature is enabled.

- Volume-dependent vendor prices are supported if the *Volume Pricing* feature is enabled.

Uploading Vendor Price Lists Using Vendor Price Worksheets

In Acumatica ERP, you can upload price lists (or enter them manually) for each vendor separately by using the [Vendor Price Worksheets](#) (AP202010) form. Uploading an Excel file with the prices that you have received from a vendor is the most common way of maintaining vendor prices.

Prices defined in a worksheet become effective only after you release the worksheet (on a date specified as the effective date). Before the worksheet is released, you can edit records in it.

Price Retention Settings

You can specify how the system keeps the history of vendor prices on the [Accounts Payable Preferences](#) (AP202000) form:

- Keep only one previous price and update the previous price every time a new price is released.
- Keep the history of prices for the specified number of months.

When you add a new price, the system preserves the previous price. For new documents, the system inserts the price effective on the document date.

For a non-stock item, the system also saves the last vendor price that you have used for the item in the vendor's bills. Vendors' last prices for the non-stock item are shown on the **Vendor Details** tab of the [Non-Stock Items](#) (IN202000) form. When you create a bill, if there is no promotional or regular price for the item, the system inserts the last vendor price that has been used in a previously released bill (if any) for that vendor. If there is no such price for the item, the system suggests the standard cost, which you can specify for the non-stock item on the **Price/Cost Information** tab of the [Non-Stock Items](#) form. For more information on vendor price priorities, see [Vendor Prices: Automatic Price Selection](#).

Vendor Prices: Automatic Price Selection

Multiple prices of different types might be effective for an item at a particular time. When a user selects an item in a document line (or modifies the item's quantity), the system searches for an applicable price of the item that is effective on the date of the document. The system bases this search on the price search priority (highest to lowest) and stops searching when it finds an applicable price. The search for the item's price proceeds as follows:

1. The system searches for a promotional price for the item in the following order:
 - a. A price specified for the item with the unit of measure that is selected in the document line. If multiple warehouses are defined in the system, the price specific to the warehouse selected in the document has a higher priority than the price that is not specific to a warehouse.

- b.** A price specified for the item with its base unit of measure. If multiple warehouses are defined in the system, the price specific to the warehouse selected in the document has a higher priority than the price that is not specific to a warehouse.
- 2.** The system searches for a regular price for the item in the following order:
 - a.** A price specified for the item with the unit of measure that is selected in the document line. If multiple warehouses are defined in the system, the price specific to the warehouse selected in the document has a higher priority than the price that is not specific to a warehouse.
 - b.** A price specified for the item with its base unit of measure. If multiple warehouses are defined in the system, the price specific to the warehouse selected in the document has a higher priority than the price that is not specific to a warehouse.
- 3.** The system searches for a last vendor price for the item in the following order:
 - a.** A price specified for the item with the unit of measure that is selected in the document line
 - b.** A price specified for the base unit of measure
- 4.** The system searches for the statistical last cost of the item for the warehouse specified in the document.
- 5.** The system searches for the last cost of the item.

Once the system finds an applicable price, it stops the search and inserts this price into the document line, but you can override this price. The price search priority is illustrated in the following diagram.

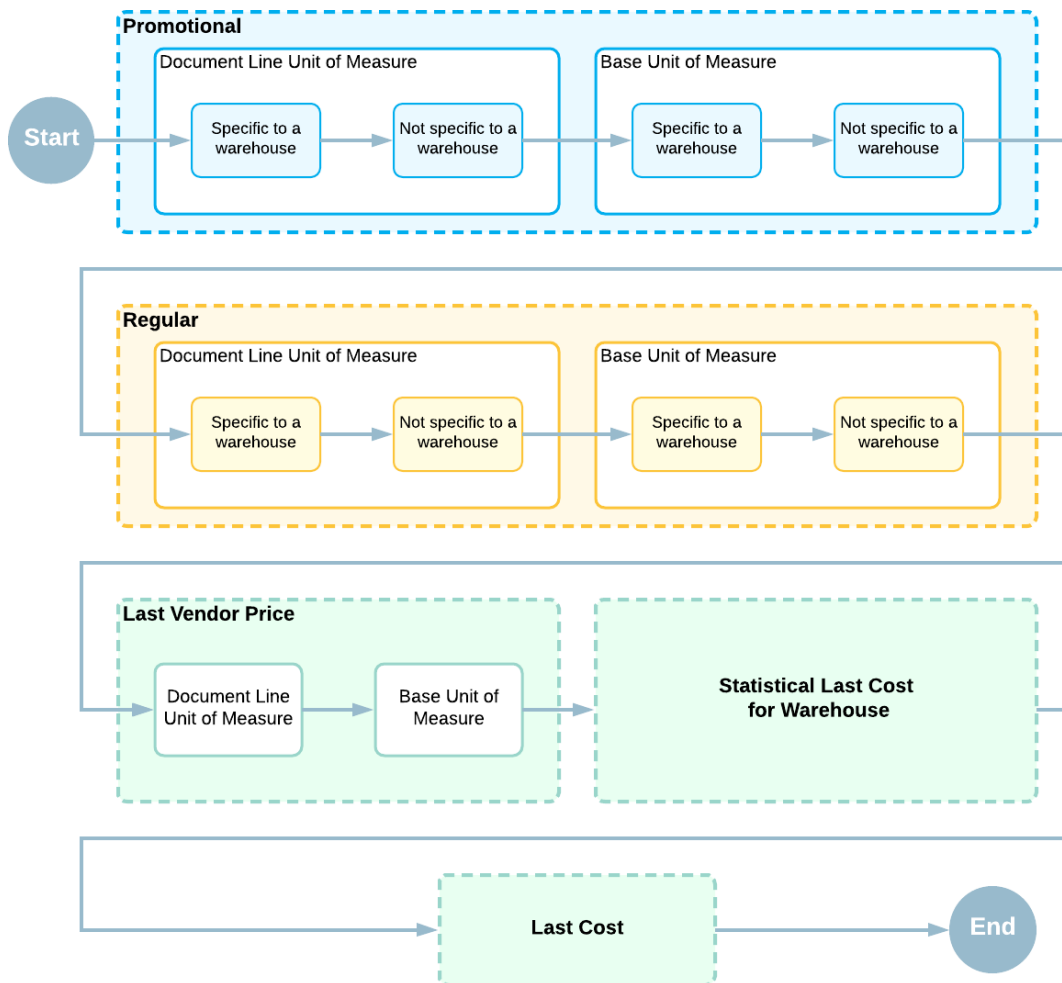


Figure: Search priority for vendor prices

Vendor Prices: To Upload a Price List and Explore Price Selection

In this activity, you will learn how to upload vendor price lists with regular prices and promotional prices and analyze how the system suggests vendor prices in bills and purchase orders.

Story

Suppose that, to make work with vendor documents easier, the SweetLife Fruits & Jams company decided to create a catalog of vendor prices for non-stock items. The system should be able to automatically suggest the vendor price of a specific non-stock item when a user enters this item in a line of a purchase order. SweetLife ordered advertising services from the BlueLine Advertisement agency before, and wants to keep these prices in the system.

Also, the agency offers prices that depend on the number of purchased hours of consulting services:

- \$110/hour for 0 to 4 hours of consulting services
- \$100/hour for 5 to 9 hours of consulting services
- \$90/hour for 10 or more hours of consulting services

On March 15, 2019, the marketing manager of SweetLife decided to purchase consulting services from Blueline Advertisement and you, acting as the SweetLife accountant, need to create a purchase order for this agency in the system.

Process Overview

You create a list of regular prices on the [Vendor Price Worksheets](#) (AP202010) form. You then configure the price retention settings on the [Accounts Payable Preferences](#) (AP101000) form, and then, on the [Vendor Prices](#) (AP202000) form, analyze how the system keeps a history of vendor prices depending on the selected settings.

You create a list of vendor prices broken down by item quantity on the [Vendor Price Worksheets](#) form and review how the system suggests such prices when you create a purchase order for the vendor on the [Purchase Orders](#) (PO301000) form. You configure the standard cost for an item on the [Non-Stock Items](#) (IN202000) form, and then analyze how the system suggests the last purchase price and standard cost on the [Purchase Orders](#) form.

Finally, you add a promotional price for this vendor on the [Vendor Prices](#) form, create a purchase order for this vendor on the [Purchase Orders](#) form, and analyze how the system suggests the vendor prices.

System Preparation

1. Launch the Acumatica ERP website, and sign in as an accountant by using the *johnson* login and the *123* password.
2. In the info area, in the upper-right corner of the top pane of the Acumatica ERP screen, make sure that the business date in your system is set to *1/30/2020*. If a different date is displayed, click the Business Date menu button and select *1/30/2020*. For simplicity, in this lesson, you will create and process all documents in the system on this business date.
3. On the Company and Branch Selection menu, also on the top pane of the Acumatica ERP screen, make sure that the *SweetLife Head Office and Wholesale Center* branch is selected. If it is not selected, click the selection menu to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.
4. Make sure the *Volume Pricing* feature is enabled as follows:
 - a. Open the [Enable/Disable Features](#) (CS100000) form by searching for it or navigating to it.
 - b. Locate the **Volume Pricing** check box under the **Standard Financials** section to see if it is selected.

- c. If the check box is cleared, click **Modify** on the form toolbar, select the **Volume Pricing** check box, and then click **Enable** on the form toolbar.

Step 1: Upload a List of Regular Prices for the Vendor

To upload a list of regular vendor prices, do the following:

1. Open the [Vendor Price Worksheets](#) (AP202010) form.
2. Click **Add New Record** on the form toolbar, and specify the following settings in the Summary area:
 - **Effective Date:** *1/1/2019*
 - **Description:** *Regular prices of Blueline Advertisement*
3. On the table toolbar, click **Load Records from File**.
4. In the window that opens, find the **PricesAndDiscounts_VendorPrices_BLUELINE_2019_01_01.xlsx** file and select it for upload. While you are uploading the worksheet, leave the default settings and column mapping.
5. On the form toolbar, clear the **Hold** check box and click **Release** to release the worksheet and make the prices effective in the system. The prices from the worksheet will be suggested in documents starting on 1/1/2019.

Step 2: Analyze How the System Keeps the History of Prices

To analyze how the system keeps the history of vendor prices, do the following:

1. Open the [Accounts Payable Preferences](#) (AP101000) form.
2. On the **Price/Discount Settings** tab, make sure that *Last Price* is selected in the **Retention Type** box.

This is the default setting, which means that the system keeps both the new price defined in the worksheet and the previous regular price.

3. Open the [Vendor Price Worksheets](#) (AP202010) form.
4. On the form toolbar, click **Add New Record**, and specify the following settings for a worksheet effective starting on 6/1/2019:
 - **Effective Date:** *6/1/2019*
 - **Description:** *Regular prices of Blueline Advertisement*
5. On the table toolbar, click **Load Records from File**.
6. In the window, which opens, find the **PricesAndDiscounts_VendorPrices_BLUELINE_2019_06_01.xlsx** file and select it

for upload. While you are uploading the worksheet, leave the default settings and column mapping.

7. In the Summary area of the form, clear the **Hold** check box, and click **Release** on the form toolbar to release the worksheet and make the prices effective in the system.
8. Open the [Vendor Prices](#) (AP202000) form.
9. In the table, review the prices that are now defined in the system for the non-stock items.

The prices that you uploaded in Step 1 expire on 5/31/2019, because you have uploaded new prices effective from 6/1/2019.

10. Open the [Vendor Price Worksheets](#) form again and, on the form toolbar, click **Add New Record** and specify the following settings for a worksheet effective starting on 9/1/2019:
 - **Effective Date:** 9/1/2019
 - **Description:** Regular prices of Blueline Advertisement
11. On the table toolbar, click **Load Records from File**.
12. In the window that opens, find the **PricesAndDiscounts_VendorPrices_BLUELINE_2019_09_01.xlsx** file and select it for upload. While you are uploading the worksheet, leave the default settings and column mapping.
13. In the Summary area of the form, clear the **Hold** check box, and click **Release** on the form toolbar to release the worksheet and make the prices effective in the system.
14. Open the [Vendor Prices](#) (AP202000) form.
15. In the **Vendor** box of the Summary area, select *BLUELINE*.
16. In the **Inventory ID** box, select *ADVERT* and, in the table, review how the system has updated the prices.

The system has kept two prices—the most recent price (\$45) effective from 9/1/2019 and the previous price (\$30) that expired on 8/31/2019.

The system sets the expiration date automatically if you release a new price from a worksheet. If you add a new price directly on the [Vendor Prices](#) form, you have to specify the expiration date for the previous price manually.

Step 3: Create a List of Vendor Prices Broken Down by Item Quantity

To create a list of vendor prices broken down by item quantity, do the following:

1. Open the [Vendor Price Worksheets](#) (AP202010) form.
2. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Effective Date:** 1/1/2019
 - **Description:** Volume-based prices (consulting)
3. On the table toolbar, click **Add Row**, and specify the following settings for 0 to 4 hours of consulting services:
 - **Vendor:** *BLUELINE*
 - **Inventory ID:** *CONSULT*
 - **UOM:** *HOUR*
 - **Break Qty:** 0.00
 - **Pending Price:** 110.00
 4. On the table toolbar, click **Add Row**, and specify the following settings for 5 to 9 hours of consulting services:
 - **Vendor:** *BLUELINE*
 - **Inventory ID:** *CONSULT*
 - **UOM:** *HOUR*
 - **Break Qty:** 5.00
 - **Pending Price:** 100.00
 5. On the table toolbar, click **Add Row**, and specify the following settings for 10 and more hours of consulting services:
 - **Vendor:** *BLUELINE*
 - **Inventory ID:** *CONSULT*
 - **UOM:** *HOUR*
 - **Break Qty:** 10.00
 - **Pending Price:** 90.00
 6. In the Summary area of the form, clear the **Hold** check box, and click **Release** on the form toolbar to release the worksheet.
 7. Open the [Purchase Orders](#) (PO301000) form.
 8. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
 - **Type:** *Normal*
 - **Vendor:** *BLUELINE*

- **Date:** 4/1/2019
 - **Description:** Consulting services
9. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings for 1 hour of consulting services:
- **Branch:** HEADOFFICE
 - **Inventory ID:** CONSULT
 - **Order Qty.:** 1
10. Click **Add Row** on the table toolbar, and specify the following settings for 5 hours of consulting services:
- **Branch:** HEADOFFICE
 - **Inventory ID:** CONSULT
 - **Order Qty.:** 5
11. Click **Add Row** on the table toolbar, and specify the following settings for 12 hours of consulting services:
- **Branch:** HEADOFFICE
 - **Inventory ID:** CONSULT
 - **Order Qty.:** 12

Depending on the quantity, the system suggests the different unit costs that you configured for these quantities. You do not need to save the purchase order created in this step.

Step 4: Analyze How the System Suggests the Last Purchase Price and Standard Cost

To analyze how the system suggests the last purchase price and standard cost, do the following:

1. Open the [Non-Stock Items](#) (IN202000) form.
2. In the **Inventory ID** box, select *CAMPAIGN*.
3. On the **Price/Cost Information** tab, specify 390 in the **Pending Cost** box in the **Standard Cost** section and 1/1/2019 in the **Pending Cost Date** box.
4. On the form toolbar, click **Actions > Update Cost**.
5. Open the [Purchase Orders](#) (PO301000) form.
6. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:

- **Type:** *Normal*
 - **Vendor:** *BLUELINE*
 - **Date:** *1/2/2019*
 - **Description:** Advertising campaign
7. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
- **Branch:** *HEADOFFICE*
 - **Inventory ID:** *CAMPAIGN*
 - **Order Qty.:** 1
- In the **Unit Cost** column, the system has suggested the \$390 standard cost because there is no regular or promotional price effective for this vendor on the specified date.
8. In the **Unit Cost** column, change the value to 350 and save the purchase order.
9. In the Summary area of the form, clear the **Hold** check box, and on the form toolbar, click **Actions > Enter AP Bill** to create an AP bill for the order.
10. On the [Bills and Adjustments](#) (AP301000) form, which opens, clear the **Hold** check box and click **Release** on the form toolbar to release the bill.
11. Open the [Non-Stock Items](#) (IN202000) form.
12. In the **Inventory ID** box, select *CAMPAIGN*.
13. On the **Vendor Details** tab, review the information displayed on the tab. The last purchase price (\$350) has been saved in the **Last Vendor Price** column for the *BLUELINE* vendor.
14. Open the [Bills and Adjustments](#) (AP301000) form.
15. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
- **Type:** *Bill*
 - **Vendor:** *BLUELINE*
 - **Date:** *1/2/2019*
 - **Description:** Advertising campaign
16. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
- **Inventory ID:** *CAMPAIGN*

- **Quantity:** 1

In the **Unit Cost** column, the system has suggested the last purchase price, which is now \$350, because there is no regular or promotional price effective for this vendor on the specified date.

Step 5: Add a Promotional Price and Create a Purchase Order

To add a promotional price for the *BLUELINE* vendor and create a purchase order, do the following:

1. Add a promotional price of \$95/hour for the consulting services as follows:
 - a. Open the *Vendor Prices* (AP202000) form.
 - b. On the table toolbar, click **Add Row**, and specify the following settings in the added row:
 - **Vendor:** *BLUELINE*
 - **Inventory ID:** *CONSULT*
 - **UOM:** *HOURLY*
 - **Promotional:** Selected
 - **Price:** 95.00
 - **Effective Date:** 1/1/2019
 - **Expiration Date:** 3/31/2019
 - c. Click **Save** to save the price.
2. Open the *Purchase Orders* (PO301000) form.
3. On the form toolbar, click **Add New Record**, and specify the following parameters in the Summary area:
 - **Type:** *Normal*
 - **Vendor:** *BLUELINE*
 - **Date:** 03/15/2019
 - **Description:** Consulting services
4. On the **Document Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
 - **Branch:** *HEADOFFICE*
 - **Inventory ID:** *CONSULT*

- **UOM:** *HOUR*
- **Order Qty.:** 2

5. On the form toolbar, click **Save** to save the purchase order.

Because the system contains a vendor price for this non-stock item for the *BLUELINE* vendor, the system has copied this price (\$95) to the **Unit Cost** column. This is a promotional price for this vendor that you have set up in this step, it is effective from 1/1/2019 to 3/31/2019 and overrides the regular vendor price defined in the system.

6. In the **Date** box in the Summary area, change the date to *4/15/2019*.

7. In the **Warning** message that opens, click **Yes**.

8. On the form toolbar, click **Actions > Recalculate Prices**.

9. In the **Recalculate Prices** dialog box, which opens, leave the default values and click **OK**.

10. Review the value in the **Unit Cost** column.

The unit cost of this item has changed to \$110, because it is a regular vendor price for 0 to 4 hours of consulting services, which you set up in Step 3.