

Prices and Discounts

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Pre-Sales Engineer

Timing and Agenda

September 7, 2022 -10:00-11:30 AM

Day 1

Part 1: Sales Prices

Lesson 1.1: Reviewing Sales Prices and Exploring Price Selection

Lesson 1.2: Uploading a Sales Price List

September 8 2022 -10:00-11:30 APM

Day 2

Lesson 1.3: Recalculating Existing Sales Prices in Bulk

Part 2: Customer Discounts:

General Information

Application of Manual Discounts

To Create an AR Invoice with a Manual Discount

To Configure a Manual Promotional Discount

Application of Automatic Discounts

To Configure Automatic Line Discounts

To Configure Automatic Group Discounts

Timing and Agenda

September 9, 2022 -10:00-11:30 AM

Day 3

Part 2: Customer Discounts


To Configure Automatic Document Discounts

To Configure Automatic Volume Discounts

To Configure Multiple Discounts and Explore Their Application

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

Part 3: Vendor Prices

A woman with blonde hair in a ponytail, wearing glasses and a grey t-shirt with an American flag patch, is working at a metalworking machine. She is using a pair of pliers to work on a piece of metal. The machine has a "DANGER" label that reads "KEEP FINGERS CLEAR OF MACHINE WHILE IN MOTION". To the left of the machine is a rack filled with various small metal parts. The workshop is filled with various tools and materials.

Day 1

Part 1: Sales Prices

Lesson 1.1: Reviewing Sales Prices and Exploring Price Selection

Learning Objectives

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

Sales Prices: To Review Existing Prices

Story

Suppose that the SweetLife Fruits & Jams company has sales prices that were last updated in 2021. 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 2022, you want to make sure that the default price of the installation service, INSTALL, has been specified in the system.

Figure: The price specified for the COFFESHOP customer

Sales Prices

CREATE PRICE WORKSHEET

Price Type:	Customer	Item Class ID:		Price Class:	
Price Code:	COFFEESHOP	Inventory ID:		Price Manager:	
Effective As Of:	1/30/2022	Warehouse:		Price Workgroup:	

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☺	☒	Price Type	Price Code	*Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
✓	☒	Customer	COFFEESHOP	ONLCOURSE	Home canning courses online (website ses...	DAY		<input type="checkbox"/>	0.00	13.0000	1/1/2021	

Figure: The price specified for the LOCAL customer price class

Sales Prices

CREATE PRICE WORKSHEET

Price Type:	Customer Price Class	Item Class ID:		Price Class:	
Price Code:	LOCAL	Inventory ID:		Price Manager:	
Effective As Of:	1/30/2022	Warehouse:		Price Workgroup:	

Me My

Price Type	Price Code	*Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Customer Price Cl...	LOCAL	ONLCOURSE	Home canning courses online (website ses...	DAY			0.00	14.5000	1/1/2021	
Customer Price Cl...	LOCAL	PEARJAM96	Pear jam 96 oz	PIECE			0.00	43.7000	1/1/2022	

Figure: The base price of the ONLCOURSE non-stock item

Sales Prices

CREATE PRICE WORKSHEET

Price Type:	Base	Item Class ID:		Price Class:	
Price Code:		Inventory ID:	ONLCOURSE - Home canning course	Price Manager:	
Effective As Of:	1/30/2022	Warehouse:		Price Workgroup:	

Me My

Price Type	Price Code	* Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Base		ONLCOURSE	Home canning courses online (website ses...	DAY			0.00	15.0000	1/1/2021	

Figure: The promotional price of the OFLCOURSE non-stock item

Sales Prices

CREATE PRICE WORKSHEET

Price Type:	All Prices	Item Class ID:		Price Class:	
Price Code:		Inventory ID:		Price Manager:	
Effective As Of:	1/1/2022	Warehouse:		Price Workgroup:	

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Price Type	Price Code	*Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Base		OFLCOURSE	Home canning courses at customer's place...	DAY		<input checked="" type="checkbox"/>	0.00	40.0000	12/17/2021	1/17/2022

Figure: The default price of the INSTALL non-stock item

Non-Stock Items

INSTALL - Installation of equipment at the customers' place

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* Inventory ID:	INSTALL - Installation of equipment at	Product Workgroup:	
Item Status:	Active	Product Manager:	
Description:	Installation of equipment at the customers' place		

⚠️ GENERAL

PRICE/COST

VENDORS

CROSS-REFERENCE

RELATED ITEMS

PACKAGING

GL ACCOUNTS

ATTRIBUTES

DESCRIPTION

ECOMMERCE

PRICE MANAGEMENT		STANDARD COST	
Price Class:		Pending Cost:	0.0000
Price Workgroup:		Pending Cost Date:	
Price Manager:		Current Cost:	80.0000
Min. Markup %:	0.000000	Effective Date:	1/1/2022
Markup %:	0.000000	Last Cost:	0.0000
MSRP:	0.0000	COST ACCRUAL	
Default Price:	100.0000	<input type="checkbox"/> Accrue Cost	
		Cost Based On:	Standard Cost
		Percent of Sales ...	0.000000

Automatic Price Selection: Rules of Price Selection

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.

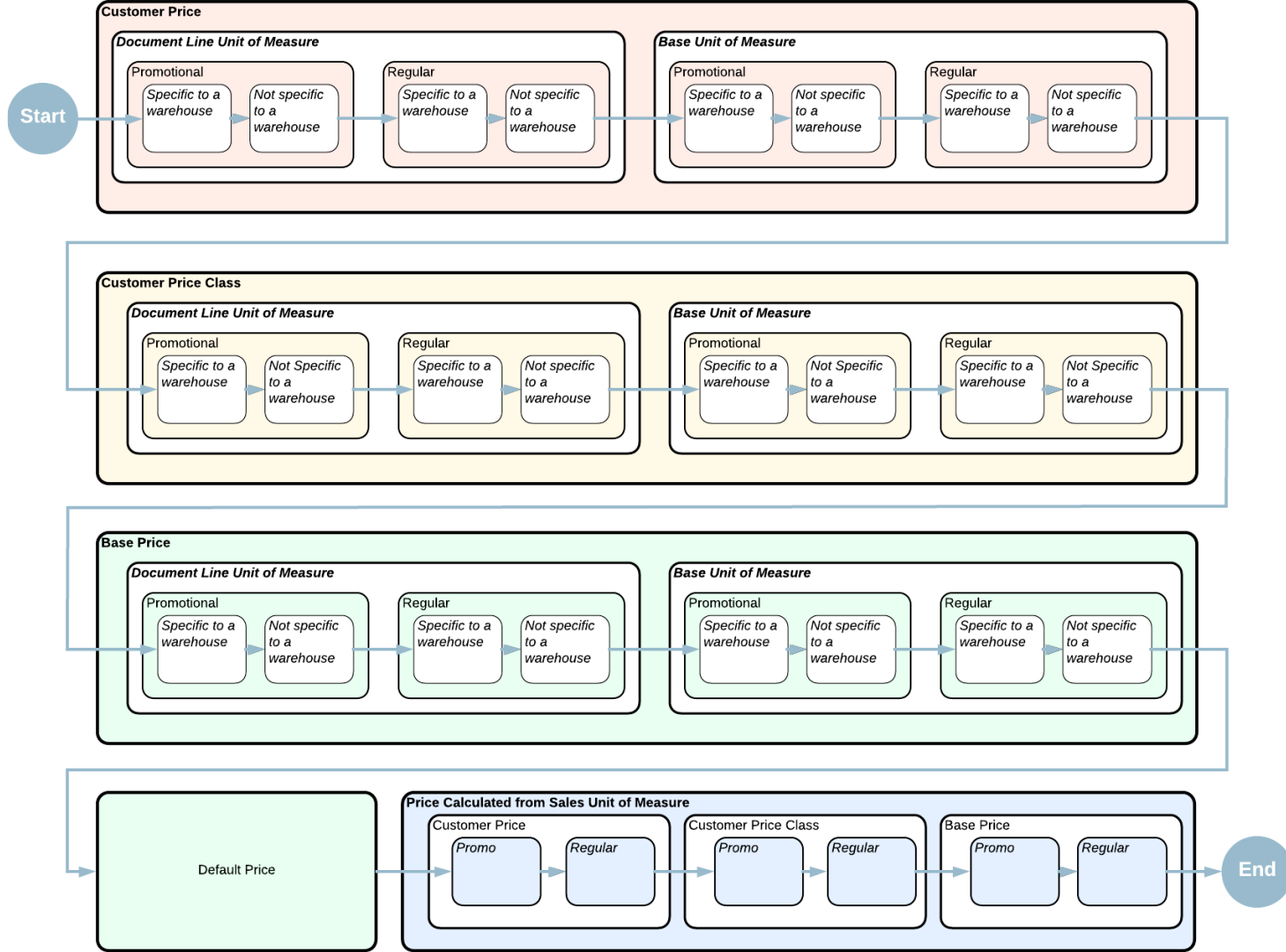


Figure: Search priority for sales prices

Automatic Price Selection: To Explore Regular and Promotional Prices

Story

In January 2022, 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.

Figure: Unit price selected based on the default price of the OFLCOURSE non-stock item

Invoices and Memos

Invoice - GoodFood One Restaurant

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Type:	Invoice ▾	Customer:	GOODFOOD - GoodFood One Restaurant ✎	Detail Total:	45.00
Reference Nbr.:	<NEW> 🔍	* Location:	MAIN - Primary Location 🔍	Discount Total:	0.00
Status:	On Hold	* Terms:	30D - 30 Days 🔍	VAT Taxable T...	0.00
* Date:	1/30/2022 ▾	* Due Date:	3/1/2022 ▾ <input type="checkbox"/> Apply Retainage	VAT Exempt T...	0.00
* Post Period:	01-2022 🔍	* Cash Discount...	3/1/2022 ▾ <input type="checkbox"/> Pay by Line	Tax Total:	0.00
Customer Ord...		* Project/Contract:	X - Non-Project Code. 🔍 ✎	Balance:	45.00
				Cash Discount:	0.00
Description:	One-day offline course				

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS APPLICATIONS COMPLIANCE

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📄 🔍 📄	* Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price
> 🔍 📄	HEADOFFICE	<u>OFLCOURSE</u>	Home canning courses at customer's place...	1.00	DAY	45.0000	45.00

Automatic Price Selection: To Explore UOM-Specific Prices

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.

Figure: Unit price updated on the basis of the UOM-specific price of the APJAM32 stock item

Sales Orders

SO 000063 - FourStar Coffee & Sweets Shop

NOTES ACTIVITIES

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* Order Type:	SO	* Customer:	COFFEESHOP - FourStar Coffee & S	Ordered Qty.:	2.00
Order Nbr.:	000063	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	1/30/2022			Tax Total:	17.04
Customer Ord...				Order Total:	209.04
External Refer...		Description:	Apple jam 2 boxes		

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS TOTALS

🔄	+	✍️	×	ADD ITEMS	ADD MATRIX ITEMS	ADD INVOICE	ADD BLANKET SO LINE	LINE DETAILS	PO LINK	ITEM AVAILABILITY				
				* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price
>	🔍	📋		HEADOFFICE	APJAM32	<input type="checkbox"/>	WHOLESALE	Apple jam 32 oz	BOX	2.00	0.00	2.00	96.0000	<input type="checkbox"/>

Automatic Price Selection: To Explore Warehouse-Specific Prices

Story

Suppose that the sales manager of the SweetLife company decided that on January 30, 2022 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.

Figure: Unit price updated on the basis of the warehouse-specific price of the LEMJAM96 stock item

[Sales Orders](#)

SO 000064 - GoodFood One Restaurant

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* Order Type:	SO	* Customer:	GOODFOOD - GoodFood One Resta	Ordered Qty.:	5.00
Order Nbr.:	<NEW>	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	1/30/2022			Tax Total:	19.08
Customer Ord...				Order Total:	234.08
External Refer...		Description:	Lemon jam 96 oz.		

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS TOTALS

🔄		+	✎	×	ADD ITEMS	ADD MATRIX ITEMS	ADD INVOICE	ADD BLANKET SO LINE	LINE DETAILS	PO LINK	ITEM AVAILABILITY	↔️	☒	⬇️
📄	🔍	📄	*Branch	*Inventory ID	Free Item	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price		
>	🔍	📄	HEADOFFICE	LEMJAM96	<input type="checkbox"/>	WHOLESALE	Lemon jam 96 oz	PIECE	5.00	0.00	5.00	43.0000		

Figure: Base price and warehouse-specific price of the LEMJAM96 stock item

Sales Orders

SO 000064 - GoodFood One Restaurant

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* Order Type:	SO	* Customer:	GOODFOOD - GoodFood One Resta	Ordered Qty.:	10.00
Order Nbr.:	000064	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	1/30/2022			Tax Total:	41.04
Customer Ord...				Order Total:	503.49
External Refer...		Description:	Lemon jam 96 oz.		

DETAILS

TAXES

FINANCIAL

SHIPPING

ADDRESSES

SHIPMENTS

PAYMENTS

TOTALS

		+	✎	×	ADD ITEMS	ADD MATRIX ITEMS	ADD INVOICE	ADD BLANKET SO LINE	LINE DETAILS	PO LINK	ITEM AVAILABILITY				
					* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price
					HEADOFFICE	LEMJAM96	<input type="checkbox"/>	WHOLESALE	Lemon jam 96 oz	PIECE	5.00	0.00	5.00	43.0000	<input type="checkbox"/>
>					HEADOFFICE	LEMJAM96	<input type="checkbox"/>	RETAIL	Lemon jam 96 oz	PIECE	5.00	0.00	5.00	49.4900	<input type="checkbox"/>

Automatic Price Selection: To Explore Volume-Based Prices

Story

Suppose that on December 2, 2021, 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

Figure: The suggested unit price based on the ordered quantity

Sales Orders

SO 000065 - GoodFood One Restaurant

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* Order Type:	SO	* Customer:	GOODFOOD - GoodFood One Restau	Ordered Qty.:	23.00
Order Nbr.:	000065	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	12/2/2021	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	12/2/2021			Tax Total:	16.22
Customer Ord...				Order Total:	265.82
External Refer...		Description:	Orange jam 32 oz.		

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES SHIPMENTS PAYMENTS TOTALS

ADD ITEMS ADD MATRIX ITEMS ADD INVOICE ADD BLANKET SO LINE LINE DETAILS PO LINK ITEM AVAILABILITY																		
		*Branch	*Inventory ID	Free Item	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount	Disc. Unit Price		
>		HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	2.00	0.00	2.00	13.8000	<input type="checkbox"/>	27.60	0.000000	0.00	13.8000		
		HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	6.00	0.00	6.00	12.0000	<input type="checkbox"/>	72.00	0.000000	0.00	12.0000		
		HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	15.00	0.00	15.00	10.0000	<input type="checkbox"/>	150.00	0.000000	0.00	10.0000		

Lesson 1.2: Uploading a Sales Price List

Learning Objectives

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

Uploading Sales Price Lists: Process Activity

Story

Suppose that the SweetLife Fruits & Jams company decided to update the regular sales prices for 2022 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.

Figure: The sales prices specified for the ONLCOURSE non-stock item

Sales Prices

CREATE PRICE WORKSHEET

Price Type:	All Prices	Item Class ID:		Price Class:	
Price Code:		Inventory ID:	ONLCOURSE - Home canning course	Price Manager:	
Effective As Of:		Warehouse:		Price Workgroup:	

Price Workgroup: ☐ Me ☐ My

Price Type	Price Code	*Inventory ID	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Base		ONLCOURSE	Home canning courses online (website ses...	DAY		<input type="checkbox"/>	0.00	15.0000	1/1/2021	12/31/2021
Base		ONLCOURSE	Home canning courses online (website ses...	DAY		<input checked="" type="checkbox"/>	0.00	12.0000	12/1/2021	1/15/2022
Base		ONLCOURSE	Home canning courses online (website ses...	DAY		<input type="checkbox"/>	0.00	17.0000	1/1/2022	
Customer	COFFEESHOP	ONLCOURSE	Home canning courses online (website ses...	DAY		<input type="checkbox"/>	0.00	13.0000	1/1/2021	
Customer Price Cl...	LOCAL	ONLCOURSE	Home canning courses online (website ses...	DAY		<input type="checkbox"/>	0.00	14.5000	1/1/2021	



Day 2

Lesson 1.3: Recalculating Existing Sales Prices in Bulk

Learning Objectives

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

Mass-Update of Sales Prices: Process Activity

Story

Suppose that on January 30, 2022 you, as the SweetLife Fruits & Jams 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.

Figure: Unit price configured for the JUICER20C stock item

Sales Orders

SO - FourStar Coffee & Sweets Shop

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* Order Type:	SO	* Customer:	COFFEESHOP - FourStar Coffee & S	Ordered Qty.:	0.00
Order Nbr.:	<NEW>	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	1/30/2022			Tax Total:	0.00
Customer Ord...				Order Total:	0.00
External Refer...		Description:	Juicer 20C		

DETAILS

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PAYMENTS

TOTALS

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📄	🔍	📄	* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price
✎	🔍	📄	HEADOFFICE	JUICER20C	<input type="checkbox"/>	EQUIPHOUSE	Commercial citrus juicer with a production r...	PIECE	1.00	0.00	0.00	4,510.0000

Part 2: Customer Discounts

Part 2: Customer Discounts

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.

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

Figure: The total amount and the amount due of the invoice

Invoices and Memos

Invoice 000122 - GoodFood One Restaurant

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Type: **Invoice** Customer: **GOODFOOD - GoodFood One Restaurant**
Reference Nbr.: **000122** Location: **MAIN - Primary Location**
Status: **Open** Terms: **30D - 30 Days**
Date: **1/30/2022** * Due Date: **3/1/2022**
Post Period: **01-2022** * Cash Discount: **3/1/2022** ☐ Pay by Line
Customer Ord... Project/Contract: **X - Non-Project Code.**

Description: **Online course 3 days**

Detail Total: **43.50**
Discount Total: **10.00**
VAT Taxable T... **0.00**
VAT Exempt T... **0.00**
Tax Total: **0.00**
Balance: **33.50**
Amount: **33.50**
Cash Discount: **0.00**

DETAILS

FINANCIAL

ADDRESSES

TAXES

APPROVALS

APPLICATIONS

COMPLIANCE

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📄	🔍	📄	* Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent
>	🔍	📄	HEADOFFICE	<u>ONLCOURSE</u>	Home canning courses online (website ses...	3.00	DAY	14.5000	43.50	0.000000

Customer Discounts: To Configure a Manual Promotional Discount

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, 2021 to January 10, 2022 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, 2021.

Invoice 000123 - Lake Cafe

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS DISCOUNTS APPLICATIONS COMPLIANCE

Acumatica
The Cloud ERP 36

Customer Discounts: To Configure Automatic Line Discounts

Story

Suppose that starting in January 2022, 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, 2022, 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.

Figure: Automatic discount amount applied to the line

Invoices and Memos

Invoice 000115 - GoodFood One Restaurant

NOTES ACTIVITIES FILES TOOLS

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Type:	Invoice	Customer:	GOODFOOD - GoodFood One Restaurant	Detail Total:	653.75
Reference Nbr.:	000115	Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Terms:	30D - 30 Days	VAT Taxable T...	0.00
Date:	1/30/2021	* Due Date:	3/1/2021	VAT Exempt T...	0.00
Post Period:	01-2021	* Cash Discount...	3/1/2021	Tax Total:	0.00
Customer Ord...		<input type="checkbox"/> Pay by Line		Balance:	653.75
		Project/Contract:	X - Non-Project Code.	Amount:	653.75
Description:	Offline training			Cash Discount:	0.00

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS DISCOUNTS APPLICATIONS COMPLIANCE

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		* Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
>	🔍	HEADOFFICE	OFLCOURSE	Home canning cour...	5.00	DAY	45.0000	225.00	5.000000	11.25	<input type="checkbox"/>	LICUS00000	213.75
	🔍	HEADOFFICE	OFLCOURSE	Home canning cour...	12.00	DAY	45.0000	540.00	18.518519	100.00	<input type="checkbox"/>	LIITE00000	440.00

Customer Discounts: To Configure Automatic Group Discounts

Story

Suppose that on January 30, 2022, 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 1/30/2022 to 2/15/2022, 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.

Figure: The free-item group discount applied to the order

Sales Orders

SO 000067 - FourStar Coffee & Sweets Shop

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* Order Type:	SO	* Customer:	COFFEESHOP - FourStar Coffee & S	Ordered Qty.:	21.00
Order Nbr.:	<NEW>	* Location:	MAIN - Primary Location	Discount Total:	11.75
Status:	Open	Contact:		VAT Exempt T...	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...	0.00
* Requested On:	1/30/2022			Tax Total:	39.49
Customer Ord...				Order Total:	484.49
External Refer...		Description:	Jam		

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

☐ Disable Automatic Discount Update

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☒	Skip Discount	LineNbr	* Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item	Free Item Qty.	External Discount Code	Description
>	<input type="checkbox"/>	1	WHSE000000	WHSE000001	Group	<input type="checkbox"/>	391.75	15.00	11.75	3.000000		0.00		Warehouse discount for apple jam
	<input type="checkbox"/>	2	FRITE000000	FRITE000001	Group	<input type="checkbox"/>	391.75	15.00	0.00	0.000000	LEMJAM96	1.00		Free-item discount (lemon jam)

Customer Discounts: To Configure Automatic Document Discounts

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, 2022 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.

Figure: Discount applied to the document based on the discount code

Invoices and Memos

Invoice - Thai Food Restaurant

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Type:	Invoice	Customer:	TOMYUM - Thai Food Restaurant	Detail Total:	240.00
Reference Nbr.:	<NEW>	* Location:	MAIN - Primary Location	Discount Total:	36.00
Status:	On Hold	* Terms:	30D - 30 Days	VAT Taxable T...	0.00
* Date:	1/30/2022	* Due Date:	3/1/2022	VAT Exempt T...	0.00
* Post Period:	01-2022	* Cash Discount...	3/1/2022	Tax Total:	0.00
Customer Ord...		* Project/Contract:	X - Non-Project Code.	Balance:	204.00
				Cash Discount:	0.00
Description:	Training courses				

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS DISCOUNTS APPLICATIONS COMPLIANCE

Skip Discount	Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Retained Discount	Discount Percent
> <input type="checkbox"/>	UNCON00000	UNCON00001	Document	<input type="checkbox"/>	240.00	0.00	36.00	0.00	15.000000

Customer Discounts: To Configure Automatic Volume Discounts

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 1/30/2022 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.

Figure: Automatic volume discount applied to the sales order

Sales Orders

SO - FourStar Coffee & Sweets Shop

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* Order Type:	SO	* Customer:	COFFEESHOP - FourStar Coffee & S	Ordered Qty.:	40.00
Order Nbr.:	<NEW>	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	Open	Contact:		VAT Exempt T...:	0.00
* Date:	1/30/2022	* Project:	X - Non-Project Code.	VAT Taxable T...:	0.00
* Requested On:	1/30/2022			Tax Total:	39.34
Customer Ord...				Order Total:	482.64
External Refer...		Description:	Orange jam at a discount		

DETAILS TAXES FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS TOTALS

🔄	+	✎	×	ADD ITEMS	ADD MATRIX ITEMS	ADD INVOICE	ADD BLANKET SO LINE	LINE DETAILS	PO LINK	ITEM AVAILABILITY	↔	🔍	↑			
🔍	🔍	🔍	🔍	* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent
🔍	🔍	🔍	🔍	HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	6.00	0.00	6.00	13.0000	<input checked="" type="checkbox"/>	78.00	5.000000
🔍	🔍	🔍	🔍	HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	12.00	0.00	12.00	13.0000	<input checked="" type="checkbox"/>	156.00	10.000000
>	🔍	🔍	🔍	HEADOFFICE	ORJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	22.00	0.00	22.00	13.0000	<input checked="" type="checkbox"/>	286.00	20.000000

Customer Discounts: To Configure Multiple Discounts and Explore Their Application

Story

Starting in January 2022, 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, 2022 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 1/30/2022 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.

Figure: Invoice with multiple discounts applied

Invoices and Memos

Invoice 000126 - FourStar Coffee & Sweets Shop

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Type:	Invoice	Customer:	COFFEESHOP - FourStar Coffee & Sweets	Detail Total:	505.00
Reference Nbr.:	000126	Location:	MAIN - Primary Location	Discount Total:	127.26
Status:	Open	Terms:	30D - 30 Days	VAT Taxable T...	0.00
Date:	1/30/2022	* Due Date:	3/1/2022	VAT Exempt T...	0.00
Post Period:	01-2022	* Cash Discount...	3/1/2022 <input type="checkbox"/> Pay by Line	Tax Total:	0.00
Customer Ord...		Project/Contract:	X - Non-Project Code.	Balance:	377.74
Description:	Offline and online training			Amount:	377.74
				Cash Discount:	0.00

DETAILS FINANCIAL ADDRESSES TAXES APPROVALS DISCOUNTS APPLICATIONS COMPLIANCE

	Skip Discount	Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Retained Discount	Discount Percent
>	<input type="checkbox"/>	GRITE00000	GRITE00001	Group	<input type="checkbox"/>	505.00	17.00	60.60	0.00	12.000000
	<input type="checkbox"/>	UNCON00000	UNCON00001	Document	<input type="checkbox"/>	444.40	0.00	66.66	0.00	15.000000

Figure: GL batch with applied multiple discounts

Journal Transactions

AR AR000184 - Offline and online training

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Module: **AR** Branch: **HEADOFFICE - SweetLife Head Office ar** Type: **Normal**
Batch Number: **AR000184** Ledger: **ACTUAL - Actual Ledger** Orig. Batch Number:
Status: **Posted** ☐ Auto Reversing ☐ Reversing Entry Debit Total: **505.00**
Transaction D... **1/30/2022** Credit Total: **505.00**
Post Period: **01-2022**

Description: **Offline and online training**

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🗄️	🔍	📄	*Branch	*Account	Description	Project/Contrac	Project Task	Cost Code	Ref. Number	Transaction Date	Quantit	UOM	Debit Amount	Credit Amount	Transaction Description
>	🔍	📄	HEADOFFICE	11000	Accounts Receiva...	X		00-000	000126	1/30/2022	0.00		377.74	0.00	Offline and online training
	🔍	📄	HEADOFFICE	40000	Sales Revenue	X		00-000	000126	1/30/2022	12.00	DAY	0.00	440.00	Home canning courses at customer's place...
	🔍	📄	HEADOFFICE	53000	Discount Given	X		00-000	000126	1/30/2022	0.00		127.26	0.00	Group and Document Discount
	🔍	📄	HEADOFFICE	40000	Sales Revenue	X		00-000	000126	1/30/2022	5.00	DAY	0.00	65.00	Home canning courses online (website ses...
	🔍	📄	HEADOFFICE	24100	Tax Payable	X		00-000	000126	1/30/2022	0.00		0.00	0.00	NYNOTAX

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

Story

Suppose that to facilitate sales in 2022, 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.

Figure: SO invoices with applied document discounts

Invoices

Invoice 000128 - FourStar Coffee & Sweets Shop

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Type:	Invoice	Customer:	COFFEESHOP - FourStar Coffee & Sweets Shop	Detail Total:	621.00
Reference Nbr.:	000128	* Location:	MAIN - Primary Location	Discount Total:	173.75
Status:	Balanced	* Terms:	30D - 30 Days	VAT Taxable T...	0.00
* Date:	1/30/2022	* Due Date:	3/1/2022	VAT Exempt T...	0.00
* Post Period:	01-2022	* Cash Discount...	3/1/2022	Tax Total:	39.69
Customer Ord...				Write-Off Total:	0.00
* Project/Contract:	X - Non-Project Code.			Balance:	486.94
Description:				Cash Discount:	0.00

DETAILS	TAXES	FREIGHT	FINANCIAL	ADDRESSES	DISCOUNTS	APPLICATIONS
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🗑️	Skip Discount	LineNbr	Order Type	Order Nbr.	Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item
>	<input type="checkbox"/>	1	SO	000069	DOC0100000	DOC0100001	Document	<input type="checkbox"/>	206.00	0.00	70.00	33.980583	
	<input type="checkbox"/>	2	SO	000070	DOC0200000	DOC0200001	Document	<input type="checkbox"/>	415.00	0.00	103.75	25.000000	

Part 3: Vendor Prices

Part 3: Vendor 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.

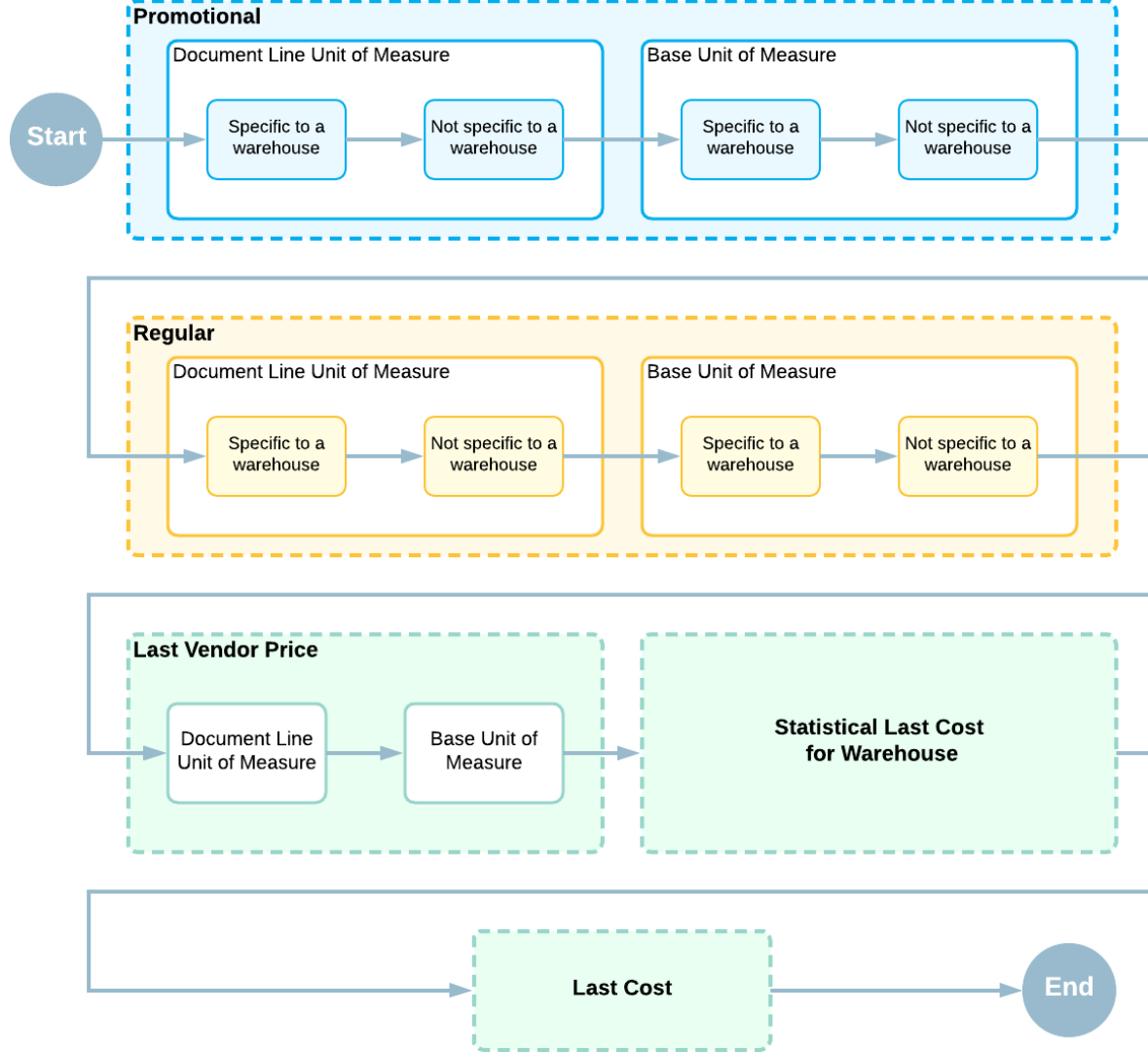


Figure: Search priority for vendor prices

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

Story

Suppose that, to make work with vendor documents easier, theSweetLife 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, 2021, 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.

Figure: Unit cost after the price recalculation

Purchase Orders

Normal 000031 - Blueline Advertisement

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Type:	Normal	* Vendor:	BLUELINE - Blueline Advertisement	Line Total:	220.00
Order Nbr.:	000031	* Location:	MAIN - Primary Location	Discount Total:	0.00
Status:	On Hold	Owner:	EP00000013 - Anna Johnson	VAT Exempt T...	0.00
	<input checked="" type="checkbox"/> Approved	Vendor Ref.:		VAT Taxable T...	0.00
* Date:	4/15/2021			Tax Total:	0.00
Promised On:	4/15/2021			Order Total:	220.00
Description:	Consulting services			Control Total:	220.00

DETAILS TAXES SHIPPING VENDOR INFO PO HISTORY PREPAYMENTS OTHER COMPLIANCE

🔄 + ✎ × ADD ITEMS ADD MATRIX ITEMS ADD PROJECT ITEM ADD BLANKET PO ADD BLANKET PO LINE VIEW SO DEMAND 🔍 📄 ⬆												
📄	🔍	📄	* Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Unit Cost	Ext. Cost
>	🔍	📄	HEADOFFICE	CONSULT	Service		Consulting (advertisement)	HOUR	2.00	0.00	110.0000	220.00

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Thank you

Jeff Spears