

# End-User Course



**Financials**

## Prices and Discounts 2025 R1

Revision: 5/3/2025

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# Copyright

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# How to Use This Course

This course introduces the pricing and discounting functionality 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 by 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. You will also learn how to update sales prices and customer discounts and how to analyze the GL batches the system creates when documents with discounts are posted. 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 the uploading and updating of vendor prices.

## What Is in This Guide

The guide includes the *Company Story* topic and process activities. The *Company Story* topic explains the organizational structure of the company that has been preconfigured in the *U100* dataset, as well as the company's business processes and requirements. Each of the process activities of the course is dedicated to a particular user scenario and consists of processing steps that you complete.

## Which Training Environment You Should Use

All lessons of the course should be completed in an instance of Acumatica ERP 2025 R1 with the *U100* training dataset preloaded; this dataset provides the predefined settings and entities you will need as you complete the activities of this course.

You or your system administrator should prepare an instance of Acumatica ERP 2025 R1, as described in the *How to Create a Tenant with the U100 Dataset* section below.

## What Is in a Lesson

Each lesson provides a story describing a particular user scenario and an overview of the relevant features that have been enabled in the system; configuration settings that are related to the described scenario are also listed. The lesson provides 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.



The lessons are independent and can be completed in any order. However, depending on the sequence in which you complete the course lessons, the settings in the screenshots may differ from the settings in the system.

## What the Documentation Resources Are

Acumatica ERP provides a wide variety of documentation resources, which you can access from this course, from the system, or from the [Help portal](#). Links to related information are provided at relevant places throughout the course. 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 (or any other Acumatica ERP form), 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 activities and to open a reference topic with detailed descriptions of the form elements.

## How to Create a Tenant with the U100 Dataset

Before you complete this course, you need to add a tenant with the *U100* dataset to an existing Acumatica ERP instance. You will then prepare the tenant for completing the activities. To complete this preparation, perform the following instructions:

1. Go to [Amazon Storage](#).
2. Open the folder that corresponds to the version of your Acumatica ERP instance.
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**.



When you create a system tenant, you may be signed out after its creation, depending on how many non-System tenants your Acumatica ERP instance already had:

- If you started with one non-System tenant (to which you are signed in) and you create a new one, the system signs you out to switch from single-tenant mode to multitenant mode.
- If the instance had multiple non-System tenants and you create another, it is already in multitenant mode. Instead of being signed out, you wait until the system completes the operation and then proceed.

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 and lists it on the **Snapshots** tab of the [Tenants](#) form.
10. Open the [Apply Updates](#) (SM203510) form and click **Schedule Lockout**.
11. In the **Schedule Lockout** dialog box, click **OK**.
12. Open the [Tenants](#) form again.
13. On the form toolbar, click **Restore Snapshot**.
14. If the **Warning** dialog box appears, click **Yes**.
15. In the **Restore Snapshot** dialog box, make sure that the correct snapshot package is being uploaded and click **OK**. The system will restore the snapshot and sign you out.
16. Sign in to the tenant that you have just created.
17. Open the [Apply Updates](#) form again.
18. On the form toolbar, click **Stop Lockout**.

## Which Credentials You Should Use

To complete the lessons, sign in as the following users:

1. Part 1: *johson*
2. Part 2: *johson, chubb*
3. Part 3: *johson*

The password for each user is *123*.

## Which License You Should Use

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

# Company Story

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This topic explains the organizational structure and operational activities of the company you will work with 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. This branch is also planning on selling goods via a website created on an e-commerce platform to accept orders online. The e-commerce integration project is underway.
- SweetLife Service and Equipment Sales Center: This branch is a service center with a small warehouse where juicers are stored. This branch assembles, sells, installs, and services juicers, in addition to training customers' employees to operate juicers.

## Operational Activity

The company has been operating starting in the 01-2024 financial period. In November 2024, 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. The equipment center began its operations in 01-2025 in response to the company's growth.

The base currency of the company and its subsidiaries is the US dollar (USD). All amounts in documents and reports are expressed in US dollars unless otherwise indicated.

## SweetLife Company Sales and Services

Each SweetLife 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 cafes. The company also conducts home canning training at the customer's location and webinars on the company's website.
- SweetLife Store: In the store, 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).
- SweetLife Service and Equipment Sales Center: This branch assembles juicers, sells juicers, provides training on equipment use, and offers equipment installation, including site review and maintenance services. The branch performs short-term service provision.

The company has local and international customers. The ordered items are delivered by drivers using the company's own vehicle. Customers can pay for orders by using various payment methods (cash, checks, or credit cards).

## 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 and juicer parts from large juicer vendors, and it either purchases the installation service for the juicers or provides the installation service on its own, depending on the complexity of the installation.

# Part 1: Sales Prices

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In this part of the course, you will learn how to review existing prices and explore different prices, how to upload a sales price list to Acumatica ERP by using a sales price worksheet, and how to update sales prices of stock and non-stock items.

## Lesson 1.1: Reviewing Sales Prices and Exploring Price Selection

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In this lesson, you will learn the rules of price selection. You will also learn how to review existing sales prices and explore different prices.

### Sales Prices: General Information

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Acumatica ERP provides multiple mechanisms of maintaining sales prices. You can define a base price list, price lists that apply to a specific customer or a group of customers, and lists of promotional prices or prices that depend on the quantity of the product being sold.

In addition to the price list functionality, you can specify a default price for the item. This price will be used for the item if no other price is defined for it in the system. For more information about the way the system determines the default price to be inserted, see [Sales Prices: Rules of Price Selection](#).

### Learning Objectives

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

### Applicable Scenario

You may want to configure sales prices if your organization sells items and you want the system to reflect the way your organization establishes prices for these items.

You can define sales prices for stock items if the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

### Non-Default Sales Prices

You define items' non-default sales prices and their effective dates by using the [Sales Prices](#) (AR202000) or [Sales Price Worksheets](#) (AR202010) form. You add a price (that is, create a sales price record) for an item by adding a row to the table of one of these forms.

You specify the prices' effective dates as follows:

- On the [Sales Prices](#) form, in the **Effective Date** column for each price.
- On the [Sales Price Worksheets](#) form, in the **Effective Date** box of the Summary area. This effective date applies to the worksheet as a whole—that is, to all listed prices.

In the table on either form, you assign each non-default price a price type, which determines when the system uses this price. For some types, you also need to specify a price code, which provides more specific information about when the system should select this price. You select one of the following price types:

- *Base*: You use this price type for prices that are not related to a specific customer or customer price class. If a base price is specified for an item, the system uses it for the item if the item has no price specified for the specific customer or customer price class. For this price type, you do not specify a price code.

- **Customer Price Class:** You use this price type for a price that is applicable to the item only if it is sold to customers of a particular customer price class. This price type requires a price code to be specified in the **Price Code** column of either form. In this case, the price code is the identifier of the applicable customer price class.



*Customer price classes*, which are defined on the [Customer Price Classes](#) (AR208000) form, are groups of customers that may be offered special prices because of their buying habits. For instance, a customer price class may consist of those customers that buy the largest quantities and are offered the most competitive prices.

- **Customer:** You use this price type for a price that is applicable to the item only if it is sold to a particular customer: the one specified in the **Price Code** column. Thus, the price code is a required setting for this price type.

This price type might be needed for a customer that has unique buying habits (such as buying especially large quantities of the item) even among customers of the same price class.

In this course, *regular price* is used to refer to a non-default price that is not promotional. A regular price may have any of the following types: *Base*, *Customer*, or *Customer Price Class*.

On either of these forms, you can also define non-default sales prices as one or more of the following:

- Promotional: Prices that are effective for a specific period of time. For promotional prices, you must specify an effective date and an expiration date.
- Volume-dependent (tiered): Prices that depend on the volume (that is, the quantity) of products being sold. You can define these prices if the *Volume Pricing* feature is enabled on the [Enable/Disable Features](#) (CS100000) form. These prices can have an effective date range, if needed.
- Warehouse-specific: Prices that are applicable to only units of the item that are stored in a particular warehouse. You can define these prices if the *Multiple Warehouses* feature is enabled on the [Enable/Disable Features](#) form. These prices can have an effective date range, if needed.
- UOM-specific: Prices that are defined for only a specific unit of measure (UOM) in which the item is sold. You can define these prices if the *Multiple Units of Measure* feature has been enabled on the [Enable/Disable Features](#) form. These prices can have an effective date range, if needed.

## Default Sales Prices

A *default sales price* (also referred to as a *default price*) is a sales price of a stock or non-stock item that the system uses when no other price is defined for the item on the [Sales Prices](#) (AR202000) or [Sales Price Worksheets](#) (AR202010) form. That is, the system uses the default price when the item has no applicable price with the *Base*, *Customer Price Class*, or *Customer* type defined on one of these forms. Default prices can be maintained for the items whose prices do not vary depending on the customer, customer price class, purchased quantity, season, promotional period, or any other factor.

You enter the default price of a particular non-stock item in the **Default Price** box (**Price/Cost** tab) of the [Non-Stock Items](#) (IN202000) form.

If the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, 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 (**Price/Cost** 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.

On these forms, you can manually update the default prices for stock and non-stock items as often as you need to. However, when you update the default prices, you cannot direct the system to calculate the new values. Instead, you can calculate these prices externally by using any method you consider appropriate. Then you can 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 tiered, promotional, warehouse-specific, or UOM-specific prices.

## Sales Prices: To Review Existing Prices

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In this activity, you will learn how to view sales prices that have been defined in the system.

### Story

Suppose that the SweetLife Fruits & Jams company has sales prices that were last updated in 2024. Acting as SweetLife's accountant, 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 2025, you want to make sure that the default price of the installation service (*/INSTALL*) has been specified in the system.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Volume Pricing* and *Multiple Warehouses* features have been enabled.
- On the *Non-Stock Items* (IN202000) form, the *ONLCOURSE*, *OFLCOURSE*, and */INSTALL* non-stock items have been created.
- On the *Customer Price Classes* (AR208000) form, the *LOCAL* customer price class has been created.
- On the *Customers* (AR303000) form, the *COFFEESHOP* customer has been created.

### Process Overview

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

### System Preparation

To prepare to perform the instructions of this activity, do the following:

1. Sign in to the system as an accountant by using the *johson* username 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 *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025*. For simplicity, in this activity, 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 Company and Branch Selection menu button to view the list of branches that you have access to, and then click *SweetLife Head Office and Wholesale Center*.

## Step 1: Viewing Sales Prices for a Particular Customer

To view the 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 **Price Code** box, select *COFFEESHOP*.
4. In the form table, review the price of your company's online training course (*ONLCOURSE*) for the *COFFEESHOP* customer (\$13), as shown in the following screenshot.

The screenshot shows the Sales Prices (AR202000) form. The Selection area has 'Price Type' set to 'Customer' and 'Price Code' set to 'COFFEESHOP'. The table below shows one record: a customer named 'COFFEESHOP' with price code 'ONLCOURSE' and description 'Home canning courses online (website session)' has a price of \$13.0000 effective from 1/1/2024.

Price Type	Price Code	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Customer	COFFEESHOP	ONLCOURSE	DAY				0.00	13.0000	1/1/2024

*Figure: The price specified for the COFFEESHOP customer*

## Step 2: Viewing Sales Prices for a Customer Price Class

To view the sales prices defined for local customers (that is, customers assigned to the *LOCAL* customer price class), 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 (\$14.50), as shown in the following screenshot.

The screenshot shows the Sales Prices (AR202000) form. The Selection area has 'Price Type' set to 'Customer Price Class' and 'Price Code' set to 'LOCAL - Local Pricing'. The table below shows two records: one for 'ONLCOURSE' at \$14.5000 and another for 'PEARJAM96' at \$43.7000.

Price Type	Price Code	Description	UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Customer Price Class	LOCAL	ONLCOURSE	DAY				0.00	14.5000	1/1/2024
Customer Price Class	LOCAL	PEARJAM96	PIECE				0.00	43.7000	7/1/2024

*Figure: The price specified for the LOCAL customer price class*

## Step 3: Viewing 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) as shown in the following screenshot.

The screenshot shows the Sales Prices (AR202000) form. The Price Type is set to 'Base'. The Inventory ID is 'ONLCOURSE - Home cannning course'. The table below shows one record for 'ONLCOURSE' with a Price of 15.0000 and Effective Date of 1/1/2024.

Price Type	Price Code	Inventory ID	Description	*UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date
Base	ONLCOURSE	Home cannning courses online (website session)	DAY					0.00	15.0000	1/1/2024

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

## Step 4: Viewing an Item's Promotional Prices

To view the promotional prices in the system as of 1/1/2025, 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, select **All Prices**.
3. In the **Effective As Of** box, select **1/1/2025**.
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 (12/17/2024 - 1/17/2025).

The screenshot shows the Sales Prices (AR202000) form. The Price Type is set to 'All Prices'. The Effective As Of is '1/1/2025'. The table below shows one record for 'OFLCOURSE' with a Price of 40.0000 and Effective Dates of 12/17/2024 and 1/17/2025.

Price Type	Price Code	Inventory ID	Description	*UOM	Warehouse	Promotion	Break Qty	Price	Effective Date	Expiration Date	
Base	OFLCOURSE	Home cannning courses at customer's place (materials included)	DAY			<input checked="" type="checkbox"/>		0.00	40.0000	12/17/2024	1/17/2025

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

## Step 5: Viewing the Default Price of an Item

To view the price set up as the default price of the **INSTALL** 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** tab, which is shown in the following screenshot, in the **Default Price** box, review the default price of the installation services (\$100).

The screenshot shows the Acumatica Non-Stock Items screen. At the top, the inventory ID 'INSTALL - Installation of equipment at the customers' place' is selected. Below the header, there are tabs for GENERAL, PRICE/COST (which is currently selected), VENDORS, CROSS-REFERENCE, RELATED ITEMS, PACKAGING, GL ACCOUNTS, ATTRIBUTES, DESCRIPTION, and ECOMMERCE. The PRICE/COST tab is divided into several sections: PRICE MANAGEMENT, STANDARD COST, and POSTING OF ITEM COST. In the PRICE MANAGEMENT section, the 'Default Price' field is highlighted with a red box and contains the value '100.0000'.

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

## Sales Prices: 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's priority.

### Applicable Scenarios

In Acumatica ERP, you can maintain sales prices for both non-stock items and stock items.

You can maintain sales prices for stock items 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's 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 an item price defined for the *Customer* price type 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.



In this course, *regular price* is used to refer to a non-default price that is not promotional. A regular price may have any of the following types: *Base*, *Customer*, or *Customer Price Class*.

- 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.



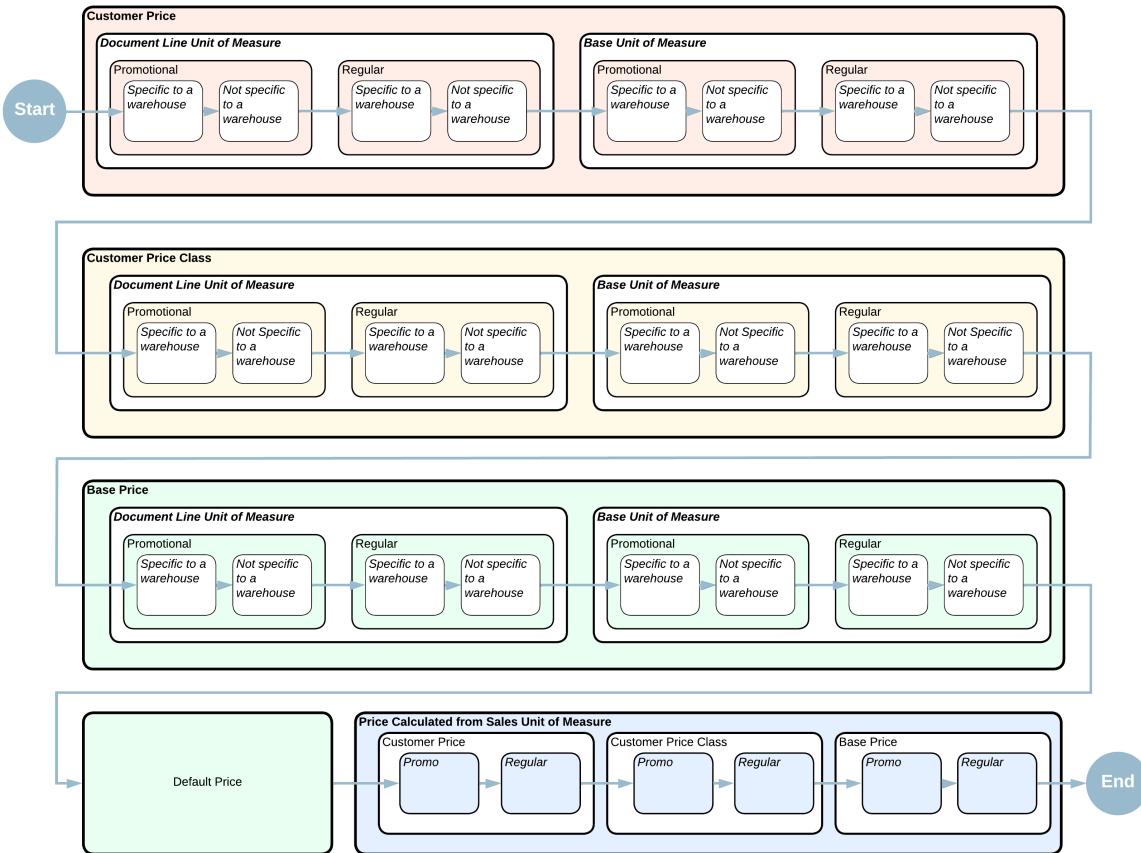
The system does not use any of the warehouse-specific prices in accounts receivable documents, because these documents do not have information about warehouses.

2. The system searches for an item price defined for the *Customer Price Class* price type 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 an item price defined for the *Base* price type 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 on the *Non-Stock Items* (IN202000) or *Stock Items* (IN202500) form (**Price/Cost** tab).
5. The system searches for a price calculated for the item with the sales unit of measure in the following order:
  - a. Customer price: A promotional price has a higher priority than a regular price of the same type.
  - b. Customer price class: 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.



## Sales Prices: 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.



In this course, *regular price* is used to refer to a non-default price that is not promotional. A regular price may have any of the following types: *Base*, *Customer*, or *Customer Price Class*.

### Story

Suppose that in January 2025, three customers FourStar Coffee & Sweets Shop (*COFFEESHOP*), GoodFood One Restaurant (*GOODFOOD*), and Allen's Bakery (*ABAKERY*) purchased one-day online courses from SweetLife. The GoodFood One Restaurant customer also purchased a one-day offline course with a promotional price.

Acting as SweetLife's accountant, you need to process an invoice for each of these customers for these purchases.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Non-Stock Items* (IN202000) form, the *ONLCOURSE* and *OFLCOURSE* non-stock items have been created.
- On the *Customer Price Classes* (AR208000) form, the *LOCAL* and *INTERN* customer price classes have been created.

- On the **Customers** (AR303000) form, the COFFEESHOP, GOODFOOD, and ABAKERY customers have been predefined.
- On the **Shipping** tab of the **Customers** (AR303000) form, the GOODFOOD and COFFEESHOP customers have been assigned to the LOCAL customer price class.

## Process Overview

In this activity, on the **Customers** (AR303000) form, you will update the settings of the ABAKERY customer. Then on the **Invoices and Memos** (AR301000) form, you will start the creation of AR invoices for each of the customers that purchased the one-day online and offline courses. Finally, you will review the price that the system suggests in each invoice.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Specifying Price Class for the ABAKERY Customer

To specify the *INTERN* price class for the Allen's Bakery customer, do the following:

1. Open the **Customers** (AR303000) form.
2. In the **Customer ID** box, select ABAKERY.
3. In the **Price Class** box of the **Shipping** tab, select *INTERN*.
4. On the form toolbar, click **Save** to save the changes.

### Step 2: Creating an AR Invoice for the COFFEESHOP Customer

To create an AR invoice for the FourStar Coffee & Sweets Shop 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:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** One-day online course
3. On the table toolbar of the **Details** tab, click **Add Row**, and specify the following settings in the added row:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** ONLCOURSE
  - **Quantity:** 1
  - **UOM:** DAY

Notice that in the **Unit Price** column, the system has inserted the sales price defined for this customer (\$13).

You do not need to save the invoice. You created it solely to test how the sales prices are applied.

### Step 3: Creating an AR Invoice for the GOODFOOD Customer

To create an AR invoice for the GoodFood One Restaurant 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 to create a new invoice.
2. In the Summary area, specify the following settings:
  - **Type:** *Invoice*
  - **Customer:** GOODFOOD
  - **Date:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** One-day online course
3. On the table toolbar of the **Details** tab, click **Add Row**, and specify the following settings in the added row:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** ONLCOURSE
  - **Quantity:** 1
  - **UOM:** DAY

Notice that in the **Unit Price** column, the system has inserted the sales price defined 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.

You do not need to save the invoice. You created it solely to test how the sales prices are applied.

### Step 4: Creating an AR Invoice for the ABAKERY Customer

To create an AR invoice for the Allen's Bakery 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 to create a new invoice.
2. In the Summary area, specify the following settings:
  - **Type:** *Invoice*
  - **Customer:** ABAKERY
  - **Date:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** One-day online course
3. On the table toolbar of the **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

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 Allen's Bakery customer belongs to the *INTERN* customer price class, and no price for this item is specified for this customer or for this price class.

You do not need to save the invoice. You created it solely to test how the sales prices are applied.

## Step 5: Creating 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 to create a new invoice.
2. In the Summary area, specify the following settings:
  - **Type:** *Invoice*
  - **Customer:** *GOODFOOD*
  - **Date:** *1/13/2025*
  - **Post Period:** *01-2025*
  - **Description:** *One-day offline course*
3. On the table toolbar of the **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*
4. In the **Date** box of the Summary area, change the date to *1/30/2025* (the current business date).

The system has updated the price in the **Unit Price** column, because now the invoice date (1/30/2025) is outside of the range of the effective dates specified for the promotional price. Thus, the system has copied the default price of the item (\$45), because there are no other sales prices effective on this date and applicable to the *GOODFOOD* customer (see the following screenshot).

The screenshot shows the *Invoices and Memos* (AR301000) form for creating an AR invoice. The summary area includes fields for Type (Invoice), Customer (GOODFOOD - GoodFood One Restaurant), Date (1/30/2025), and Description (One-day offline course). The Details tab displays a single line item for Inventory ID OFLCOURSE, Branch HEADOFFICE, Quantity 1.00, UOM DAY, and Unit Price 45.00. The table toolbar shows the **ADD ROW** button highlighted.

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount
HEADOFFICE	OFLCOURSE	Home canning courses at customer's place...	1.00	DAY	45.0000	45.00	0.000000	0.00	45.00

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

5. Close the form without saving your changes to the invoice, which was created solely for testing purposes.

## Sales Prices: To Explore UOM-Specific Prices

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In this activity, you will learn how to define 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 units of measure exist in the system.

### Story

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

The system contains the sales price for 1 jar of apple jam (\$16.60), and one box has been defined to be equal to six 32-ounce jars.

After you have created the sales order, you will define a sales price for one box of apple jam (\$96.00) and update the price in this sales order.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Units of Measure](#) (CS203500) form, the *PIECE* and *BOX* units of measure have been created.
- On the [Stock Items](#) (IN202500) form, the *APJAM32* stock item has been created with *PIECE* as a base unit and *BOX* as a sales unit. One box is defined to be equal to 6 pieces.
- On the [Customers](#) (AR303000) form, the *COFFEESHOP* customer has been created.
- On the [Warehouses](#) (IN204000) form, the *WHOLESALE* warehouse has been created.

### Process Overview

To define 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 unit of measure in a sales order, you will first 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 define a sales price for a particular unit of measure 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 to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Viewing 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 Selection area, select *APJAM32*. In the table, review the price of this stock item that is valid on the current business date (\$16.60) and the UOM (*PIECE*), which is a jar in this case.

3. Open the **Stock Items** (IN202500) form.
4. In the **Inventory ID** box, select **APJAM32**.
5. On the **General tab (Unit of Measure)** section of the **Stock Items** form, 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).

## Step 2: Creating a Sales Order

To create a sales order for apple jam, 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:** 1/30/2025
  - **Description:** Apple jam 2 boxes
3. On the **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
 Notice the value in the **Unit Price** column (\$99.60). Since the price that is set for APJAM32 is \$16.60 for one piece, the unit price of one box (6 pieces) is equal to \$99.60 (\$16.60 x 6).
4. On the form toolbar, click **Save**.

## Step 3: Defining a Sales Price for a Particular Unit of Measure

To define 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:** 1/30/2025
3. On the form toolbar, click **Save**.

## Step 4: Updating 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 More menu (under **Other**), click **Recalculate Prices**.

4. In the **Recalculate Prices** dialog box, which opens, leave the default values, and click **OK**. On the **Details** tab, which is shown in the following screenshot, review the price in the **Unit Price** column of the table. Because a sales price (\$96.00) has been defined in the system for this unit of measure (*BOX*) of this stock item (*APJAM32*), the system has updated the previous price from \$99.60 to \$96.00.

Branch	Inventory ID	Free Item	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price
	APJAM32		WHOLESALE	Apple jam 32 oz	BOX	2.00	0.00	2.00	96.0000		192.00

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

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

## Sales Prices: To Explore Warehouse-Specific Prices

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

### Story

Suppose that the sales manager of the SweetLife company decided that on January 30, 2025, 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 (*WHOLESALE*) at special prices.

Acting as SweetLife's accountant, you need to define 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.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Warehouses](#) (IN204000) form, the *WHOLESALE* and *RETAIL* warehouses have been created.
- On the [Stock Items](#) (IN202500) form, the *LEMJAM96* stock item has been created.
- On the [Units of Measure](#) (CS203500) form, the *PIECE* unit of measure has been created.
- On the [Customer Price Classes](#) (AR208000) form, the *LOCAL* customer price class has been created.
- On the [Customers](#) (AR303000) form, the *GOODFOOD* customer has been created and assigned to the *LOCAL* customer price class.

## Process Overview

On the [Sales Prices](#) (AR202000) form, you will first view sales prices defined for a particular warehouse. By using the same form, you will define a sales price of a particular item from a particular warehouse (that is, a warehouse-specific sales price).

To test this configuration, you will then 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 inserts for these lines.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Viewing Sales Prices for a Particular Warehouse

To view the sales prices that have been defined for the *WHOLESALE* warehouse, do the following:

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

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

### Step 2: Defining a 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*
  - **Warehouse:** *WHOLESALE*
  - **Price:** 43
  - **Effective Date:** 1/30/2025
2. On the form toolbar, click **Save**.
3. In the Selection area, select *LEMJAM96* in the **Inventory ID** box, and clear the value in the **Warehouse** box. Review the prices that are defined in the system for the *LEMJAM96* item.

Now in the **Price** column, two prices are shown: the *LEMJAM96* price (for which the warehouse is not specified) of \$49.49, and the *LEMJAM96* price (for which the *WHOLESALE* warehouse is specified) of \$43.00.

### Step 3: Creating 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:** 1/30/2025
  - **Description:** Lemon jam 96 oz.
3. On the table toolbar of the **Details** tab, click **Add Row**, and specify the following settings for the first order line:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** LEMJAM96
  - **Warehouse:** WHOLESALE
  - **UOM:** PIECE
  - **Quantity:** 5

Notice the value in the **Unit Price** column. Because you specified the *WHOLESALE* warehouse, the system has inserted the unit price (\$43) that you have specified for this warehouse in Step 2, as shown in the following screenshot.

Branch	Inventory ID	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price
HEADOFFICE	LEMJAM96	WHOLESALE	Lemon jam 96 oz.	PIECE	5.00	0.00	5.00	43.0000

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

4. On the table toolbar of the **Details** tab, click **Add Row**, and specify the following settings for the second order line:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** LEMJAM96
  - **Warehouse:** RETAIL
  - **UOM:** PIECE
  - **Quantity:** 5

Notice the value in the **Unit Price** column, which is shown in the following screenshot. Because no sales price has been specified for this stock item that is specific to the *RETAIL* warehouse, the system has inserted the base price for this stock item (\$49.49).

The screenshot shows the Sales Orders screen with the following details:

- Header:** SO - GoodFood One Restaurant
- Toolbar:** Includes icons for back, forward, search, and various process buttons like Quick Process, Create Shipment, Hold, etc.
- Form Fields:**
  - \* Order Type: SO
  - \* Customer: GOODFOOD - GoodFood One Restar
  - \* Location: MAIN - Primary Location
  - Status: Open
  - Contact: Darrell M. Kramer
  - \* Date: 1/30/2025
  - \* Project: X - Non-Project Code.
  - \* Requested On: 1/30/2025
  - Description: Lemon jam 96 oz.
  - Customer Ord... (empty)
  - External Refer... (empty)
- Summary:** Shows Ordered Qty.: 10.00, Detail Total: 462.45, Line Discounts: 0.00, Document Dis... 0.00, Freight Total: 0.00, Tax Total: 41.04, Order Total: 503.49
- Tab Navigation:** DETAILS (selected), TAXES, FINANCIAL, SHIPPING, ADDRESSES, SHIPMENTS, PAYMENTS, RELATIONS, TOTALS
- Table View:** Displays items by warehouse. The first row is for 'WHOLESALE' with a quantity of 5.00 and a unit price of 43.0000. The second row is for 'RETAIL' with a quantity of 5.00 and a unit price of 49.4900.

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

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

## Sales Prices: To Explore Volume-Based Prices

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

### Story

Suppose that on December 2, 2024, the SweetLife Fruits & Jams company decided to introduce volume-based prices for 32-ounce jars of orange jam.

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

- From 1 to 4 pieces: \$13.80
- From 5 to 9 pieces: \$12.00
- More than 9 pieces: \$10.00

### Configuration Overview

In the U100 dataset, the following tasks have been performed to support this activity:

- On the [Enable/Disable Features](#) (CS100000) form, the *Volume Pricing* feature has been enabled.
- On the [Stock Items](#) (IN202500) form, the *ORJAM32* stock item has been created.
- On the [Units of Measure](#) (CS203500) form, the *PIECE* unit of measure has been created.
- On the [Customer Price Classes](#) (AR208000) form, the *LOCAL* customer price class has been created.
- On the **Shipping** tab of the [Customers](#) (AR303000) form, the *GOODFOOD* customer has been created and assigned to the *LOCAL* customer price class.
- On the [Warehouses](#) (IN204000) form, the *WHOLESALE* warehouse has been created.

## Process Overview

First, you will view the sales prices that have been defined for a particular stock item on the [Sales Prices](#) (AR202000) form. Then on the same form, you will enter volume-based prices for this stock item.

To test the volume-based prices you have entered, you will 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.

## System Preparation

To prepare to perform the instructions of this activity, 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 12/2/2024. If a different date is displayed, click the Business Date menu button and select 12/2/2024. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Viewing the Sales Prices of a Particular Stock Item

To view the sales price that has been defined for the ORJAM32 stock item and set its expiration date, do the following:

1. Open the [Sales Prices](#) (AR202000) form.
  2. In the **Inventory ID** box of the Selection area, select ORJAM32 and make sure that **Effective As Of** is set to 12/2/2024.
- Notice that the table shows only one row with the base price of \$13, which was effective starting on 3/30/2024.
3. In the **Expiration Date** column, select 12/1/2024.
  4. On the form toolbar, click **Save**. Notice that the price has disappeared from the list because it is no longer active on the date that is selected in the **Effective As Of** box.

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

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

1. While you are still viewing the [Sales Prices](#) (AR202000) form, on the table toolbar, click **Add Row**, and specify the following settings in the added 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:** 12/2/2024
2. 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:** 12/2/2024

3. 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:** 12/2/2024
4. On the form toolbar, click **Save**.
5. In the Selection area, clear the **Effective As Of** box. Review all the prices that now exist in the system for this stock item.

The base price for this item, which was effective from 3/30/2024 to 12/1/2024, is \$13.00. Starting on 12/2/2024, the following volume-based prices are effective

- \$13.80 for fewer than 5 pieces
- \$12.00 for 5 to 9 pieces
- \$10.00 for more than 9 pieces

### Step 3: Creating 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:** 12/2/2024
  - **Description:** Orange jam 32 oz.
3. On the **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

In the **Unit Price** column, the system has inserted the price you specified in Step 2 on the [Sales Prices](#) (AR202000) form for the break quantity of 0, 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 **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

In the **Unit Price** column, the system has inserted the price you specified in Step 2 on the [Sales Prices](#) form for the break quantity of 5. This 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 **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

In the **Unit Price** column, the system has inserted the price you specified in Step 2 on the [Sales Prices](#) form for the break quantity of 10, which means that the unit price is \$10 when the quantity of this stock item in the order line is 10 or more (see the following screenshot).

Branch	Inventory ID	Warehouse	Line Description	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent
HEADOFFICE	ORJAM32	WHOLESALE	Orange jam 32 oz	PIECE	2.00	0.00	2.00	13.8000		27.60	0.000000
HEADOFFICE	ORJAM32	WHOLESALE	Orange jam 32 oz	PIECE	6.00	0.00	6.00	12.0000		72.00	0.000000
HEADOFFICE	ORJAM32	WHOLESALE	Orange jam 32 oz	PIECE	15.00	0.00	15.00	10.0000		150.00	0.000000

**Figure: The suggested unit price based on the ordered quantity**

6. Close the form without saving your changes to the sales order, which was created solely for testing purposes.

## Lesson 1.2: Uploading a Sales Price List

In this lesson, you will learn how to upload sales price lists with regular prices and promotional prices.



In this course, *regular price* is used to refer to a non-default price that is not promotional. A regular price may have any of the following types: *Base*, *Customer*, or *Customer Price Class*.

## Sales Price Uploading: 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 upload multiple price records at once by 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 prices of any types, except for default prices, from an external source, such as an Excel file. That is, you can upload base prices, prices specific to a customer, and prices specific to a customer price class. These prices can include 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. Then you add the external price list to the worksheet by clicking **Load Records from File** and selecting the prepared Excel file with the prices to be uploaded.

Prices defined in a worksheet become effective only after you release the worksheet (on the 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 prices 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 **Pricing** tab of the [Accounts Receivable Preferences](#) (AR101000) form. In the **Price Retention** group of settings, you can select 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 12, which means that the history of prices will be kept for one year.

## Sales Price Uploading: Process 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.



In this course, *regular price* is used to refer to a non-default price that is not promotional. A regular price may have any of the following types: *Base*, *Customer*, or *Customer Price Class*.

## Story

Suppose that the SweetLife Fruits & Jams company has decided to update regular sales prices for 2025 and set up promotional prices for some items during the holiday season.

Acting as SweetLife's 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.

## Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Non-Stock Items* (IN202000) form, the *ONLCOURSE* non-stock item has been created.
- On the *Customer Price Classes* (AR208000) form, the *LOCAL* customer price class has been created.
- On the *Customers* (AR303000) form, the *ABAKERY* and *COFFEEESHOP* customers have been created.

## Process Overview

First, you will create sales price worksheets by uploading Excel files on the *Sales Price Worksheets* (AR202010) form. Then you will release each sales price worksheet and review the new prices on the *Sales Prices* (AR202000) form.

Finally, to analyze how the system selects prices, you will create an AR invoice on the *Invoices and Memos* (AR301000) form.

## System Preparation

1. Download the *PricesAndDiscounts\_SalesPrices\_Base\_2025\_01\_01.xlsx* and *PricesAndDiscounts\_SalesPrices\_Promotion\_2024\_12\_01.xlsx* files to your computer.
2. To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this lesson, you will create and process all documents in the system on this business date.

## Step 1: Importing a Sales Price Worksheet with Base Prices

To import a sales price worksheet with base prices effective from 1/1/2025, 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 1/1/2025.
4. In the **Description** box, enter *Base prices for 2025*.
5. On the table toolbar, click **Load Records from File**.
6. In the **File Upload** dialog box, which opens, click **Choose file**.
7. In the dialog box that opens, find the *PricesAndDiscounts\_SalesPrices\_Base\_2025\_01\_01.xlsx* file and select it for upload.
8. In the **File Upload** dialog box, click **Upload**.
9. In the **Common Settings** dialog box, which opens, leave the default values and click **OK**.
10. In the **Columns** dialog box, which opens, for the **Price** column name, specify the **Pending Price** property name and click **OK**.
11. Make sure that the worksheet contains four lines (see the following screenshot), and save it.

The screenshot shows the 'Sales Price Worksheets' form with the title '000002 - Base prices for 2025'. The toolbar includes standard navigation buttons and a 'REMOVE HOLD' button. The main area displays a table of price records:

Price Type	Price Code	Alternate ID	* Inventory ID	Description	* UOM	Warehouse	Break Qty	Source Price	Pending Price
Base			LEMJAM96	Lemon jam 96 oz	PIECE		0.00	48.4900	49.5000
Base			OFLCOURSE	Home canning courses at customer's place (materials included)	DAY		0.00	45.0000	47.0000
Base			ONLCOURSE	Home canning courses online (website session)	DAY		0.00	15.0000	17.0000
Base			ORJAM32	Orange jam 32 oz	PIECE		0.00	13.0000	14.2000

**Figure: The newly created sales price worksheet**

12. On the form toolbar, click **Remove Hold**, and then click **Release** to release the worksheet.

## Step 2: Importing a Sales Price Worksheet with Promotional Prices

To import a sales price worksheet with promotional prices that are effective from 12/1/2024 to 1/15/2025, 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 12/1/2024.
3. Select the **Promotional** check box.
4. In the **Expiration Date** box, select 1/15/2025.
5. In the **Description** box, enter *Promotional prices 12/1/2024 - 1/15/2025*.
6. On the table toolbar, click **Load Records from File**.
7. In the **File Upload** dialog box, which opens, click **Choose file**.
8. In the dialog box that opens, find the [PricesAndDiscounts\\_SalesPrices\\_Promotion\\_2024\\_12\\_01.xlsx](#) file, and select it for upload.
9. In the **File Upload** dialog box, click **Upload**.
10. In the **Common Settings** dialog box, which opens, leave the default values, and click **OK**.
11. In the **Columns** dialog box, which opens, for the **Price** column name, specify the **Pending Price** property name, and click **OK**.
12. Make sure that the worksheet contains five lines (see the following screenshot) and save it.

Price Type	Price Code	Alternate ID	*Inventory ID	Description	*UOM	Warehouse	Break Qty	Source Price	Pending Price
> Base			APJAM32	Apple jam 32 oz	PIECE	0.00	16.6000	14.9000	
Base			LEMJAM96	Lemon jam 96 oz	PIECE	0.00	48.4900	45.2000	
Base			OFLCOURSE	Home canning courses at customer's place (materials included)	DAY	0.00	45.0000	38.0000	
Base			ONLCOURSE	Home canning courses online (website session)	DAY	0.00	15.0000	12.0000	
Base			ORJAM32	Orange jam 32 oz	PIECE	0.00	13.0000	12.5000	

**Figure:** The newly created sales price worksheet with promotional prices

13. On the form toolbar, click **Remove Hold**, and then click **Release**.

### Step 3: Reviewing 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 Selection area, make sure that *All Prices* is selected.
3. In the **Inventory ID** box, select *ONLCOURSE*.
4. In the Selection area, clear the **Effective As Of** box. In the table, review the prices that exist for the *ONLCOURSE* non-stock item.

The base price of \$15 is effective from 1/1/2024 to 12/31/2024.

For the period from 12/1/2024 to 1/15/2025, the promotional price of \$12, which you uploaded in the previous step, is effective.

Also, starting from 1/1/2025, a new base price of \$17, which you uploaded in Step 1, is effective.

Besides, the customer-specific price configured for *COFFEESHOP* (\$13.00) and the price for the *LOCAL* customer price class (\$14.50) are also effective in the system starting from 1/1/2024, as shown in the following screenshot.

Price Type	Price Code	*Inventory ID	Description	*UOM	Warehouse	Promotion	Break Qty	Price Effective Date	Expiration Date	
> Base		ONLCOURSE	Home canning courses online (website session)	DAY		<input type="checkbox"/>	0.00	15.0000	1/1/2024	12/31/2024
> Base		ONLCOURSE	Home canning courses online (website session)	DAY		<input checked="" type="checkbox"/>	0.00	12.0000	12/1/2024	1/15/2025
> Base		ONLCOURSE	Home canning courses online (website session)	DAY		<input type="checkbox"/>	0.00	17.0000	1/1/2025	
> Customer	COFFEES...	ONLCOURSE	Home canning courses online (website session)	DAY		<input type="checkbox"/>	0.00	13.0000	1/1/2024	
> Customer Pri...	LOCAL	ONLCOURSE	Home canning courses online (website session)	DAY		<input type="checkbox"/>	0.00	14.5000	1/1/2024	

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

## Step 4: Creating 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:** ABAKERY
  - **Date:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** One-day online course
3. On the **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
- Review the price in the **Unit Price** column. It shows the new base price (\$17) effective from 1/1/2025, which you uploaded in Step 1.
4. In the **Date** box of the Summary area, change the date to 1/3/2025.
5. On the **Details** tab, review the price in the **Unit Price** column. It now shows the new promotional price (\$12) effective from 12/1/2024 to 1/15/2025, as shown in the following screenshot, because the invoice date is within this date range, and promotional prices have a priority over base prices.

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount	Account
HEADOFFICE	ONLCOURSE	Home canning courses online (website session)	1.00	DAY	12.0000	12.00	0.000000	0.00	12.00	40000

*Figure: The invoice with the promotional price specified for the ONLCOURSE non-stock item*

6. Close the form without saving your changes to the invoice, which was created solely for testing purposes.

## Lesson 1.3: Recalculating Existing Sales Prices in Bulk

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

## Mass-Update of Sales Prices: General Information

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Occasionally, you might need to update the sales prices of your stock and non-stock items. Acumatica ERP provides you with the ability to mass-recalculate the existing sales prices 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 mass-calculate prices of any type, except for default prices. That is, you can mass-calculate base prices or 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 **Price/Cost** tab of 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 instead of using the average or standard cost, the system uses the current cost of a non-stock item, which is specified in the **Current Cost** box on the **Price/Cost** tab of 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](#) (AR202010) form.

### Calculation of Pending Prices Based on the MSRP

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

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

### Story

Suppose that on January 30, 2025 you, as SweetLife's accountant, need to update the price of one of the juicers that the Service and Equipment Sales Center of SweetLife sells to customers.

The company wants to sell this commercial juicer (*JUICER20C*) at 110% of the MSRP.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Stock Items](#) (IN202500) form, the *JUICER20C* stock item has been created.
- On the [Customer Price Classes](#) (AR208000) form, the *LOCAL* customer price class has been created.
- On the [Customers](#) (AR303000) form, the *COFFEESHOP* customer has been created.

### Process Overview

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

### System Preparation

To prepare to perform the instructions of this activity, 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 *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025*. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Reviewing the MSRP for JUICER20C

To review the MSRP that has been specified 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** tab, make sure that the **MSRP** box in the **Price Management** section contains a price (*4,100*).

### Step 2: Recalculating the Existing Sales Prices for JUICER20C Based on Its MSRP

To recalculate the prices 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:** *1/30/2025*
  - **Overwrite Overlapping Prices:** Selected
  - **Description:** Sales price for *JUICER20C*

3. On the table toolbar, click **Add Items**.
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; 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:
  - **Multiplier (% of Price Basis):** 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 (4,000) and the price calculated based on MSRP is shown in the **Pending Price** column (4,510).
9. On the form toolbar, click **Remove Hold**, and then click **Release** to release the sales price worksheet.

### Step 3: Creating a Sales Order and Reviewing the Suggested Price

To create a sales order for the JUICER20C 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:** COFFEESHOP
  - **Date:** 1/30/2025
  - **Description:** Juicer 20C
3. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** JUICER20C
  - **Quantity:** 1

Notice the value in the **Unit Price** column, which is shown in the following screenshot. The system has copied the price of \$4,510 that you configured for this stock item in this activity.

The screenshot shows a Sales Orders interface for 'SO - FourStar Coffee & Sweets Shop'. The top bar includes buttons for 'NOTES', 'ACTIVITIES', 'FILES', and 'TOOLS'. The main form displays a sales order with the following details:

- Order Type:** SO
- Customer:** COFFEESHOP - FourStar Coffee & Sweets Shop
- Location:** MAIN - Primary Location
- Status:** Open
- Contact:** Andrea A. Weaver
- Date:** 1/30/2025
- Project:** X - Non-Project Code
- Requested On:** 1/30/2025
- Description:** Juicer 20C
- Ordered Qty.:** 1.00
- Detail Total:** 4,510.00
- Line Discounts:** 0.00
- Document Dis...:** 0.00
- Freight Total:** 0.00
- Tax Total:** 0.00
- Order Total:** 4,510.00

The 'DETAILS' tab is selected, showing the item configuration table:

* Branch	* Inventory ID	Free Item	Warehouse	Line Description	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price
HEADOFFICE	JUICER20C		EQUIPHOUSE	Commercial citrus juicer with a production rate of 2 litres per minute	PIECE	1.00	0.00	1.00	4,510.0000

Figure: Unit price configured for the JUICER20C stock item

4. Close the form without saving your changes to the sales order, which was created solely for testing purposes.

# Part 2: Customer Discounts

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In this part of the course, 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.

## Lesson 2.1: Application of Manual Discounts

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In this lesson, you will learn how to configure and apply manual and promotional customer discounts.

### Learning Objectives

In this lesson, you will learn how to do the following:

- Create AR invoices with manual line and manual document discounts
- Create AR invoices with the manual promotional discount
- Make existing discounts inactive

## Customer Discounts: General Information

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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 the 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 .

### Discount Configuration

In Acumatica ERP, any configurable customer discount is defined by a combination of the settings specified for a discount code and a discount sequence. You configure these entities as follows:

- 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, a 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 the 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](#).



The ability to configure customer discounts is available if the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

## GL Accounts for Customer 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 the accounts receivable account specified in the **AR Account** box on the **GL Accounts** tab of the [Customers](#) (AR303000) form.

Discounts applied to a group of lines or to a document as a whole are debited to a separate expense account specified that is for the customer in the **Discount Account** box on the **GL Accounts** tab of the [Customers](#) form.

## Manual Customer Discounts: Application of Manual Discounts

In this topic, you will read about application of manual discounts in Acumatica ERP. If your organization provides discounts that do not have formal conditions for automatic application (that is, document-specific discounts), you can enter line, group, and document discounts manually in each document on the following forms:

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

### Application of Manual Line Discounts

You can apply manual line discounts to a document on the **Details** tab of the document's creation form as follows:

- If the *Customer Discounts* feature is disabled on the [Enable/Disable Features](#) (CS100000) form, you type the appropriate percent or amount in the **Discount Percent** or **Discount Amount** column.
- If the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) form, you can do either of the following:
  - Select an existing discount code in the **Discount Code** column.
  - Type the appropriate percent or amount in the **Discount Percent** or **Discount Amount** column, and select the **Manual Discount** check box.

### Application of Manual Group Discounts

If the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can apply a manual group discount to a document. To do this, on the **Discounts** tab, you select the appropriate discount code in the **Discount Code** column and then select the appropriate discount sequence for this code in the **Sequence ID** column.

If the *Customer Discounts* feature is disabled on the [Enable/Disable Features](#) form, you cannot configure or apply group discounts.

### Application of Manual Document Discounts

You can apply manual document discounts on the appropriate form as follows:

- If the *Customer Discounts* feature is enabled on the [Enable/Disable Features](#) (CS100000) form, you can apply a discount on the **Discounts** tab in either of the following ways:

- To use an existing discount code, in the **Discount Code** column, you select the existing discount code, and in the **Sequence ID** column, you select the appropriate discount sequence for this code.
- To enter a document discount manually, you type the percent or amount in the **Discount Percent** or **Discount Amt.** column. The system will automatically select the **Manual Discount** check box.
- If the *Customer Discounts* feature is disabled on the [Enable/Disable Features](#) form, you can enter a manual document discount in the **Document Discounts** box in the Summary area of the 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 discounts:* Once you have applied a line 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 discounts:* When you save the document to which you have applied a document 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.

## Manual Customer Discounts: To Create AR Invoices with Manual Discounts

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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 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 SweetLife's accountant, you need to enter invoices for these customers and manually enter these discounts.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Discounts* feature has been disabled to support the manual discount functionality.
- On the [Non-Stock Items](#) (IN202000) form, the *OFLCOURSE* and *ONLCOURSE* non-stock items have been created.
- On the [Customers](#) (AR303000) form, the *TOMYUM* and *GOODFOOD* customers have been created.

### Process Overview

You will specify a manual line discount and a manual document discount on the [Invoices and Memos](#) (AR301000) form.

To specify a manual line discount, on the **Details** tab, you will enter either a **Discount Amount** or a **Discount Percent** for the line.

To specify a manual document discount, you will enter the amount in the **Document Discounts** box in the Summary area of the *Invoices and Memos* form.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Creating 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:** *1/30/2025*
  - **Post Period:** *01-2025*
  - **Description:** *Offline training*
3. On the **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 line discount and applied it to the invoice line. The line amount is \$191.25 (\$225 - \$33.75). The value of the discount, which is reflected in the **Discount Amount** column, has been calculated automatically based on the discount percentage. Notice that discount amount in the **Line Discounts** box of the Summary area is 33.75, as shown in the following screenshot.

The screenshot shows the 'Invoices and Memos' form for Invoice 000119 - Thai Food Restaurant. The 'DETAILS' tab is selected. In the summary area, the 'Line Discounts' field is highlighted with a red box and contains the value '33.75'. Below the summary, a table lists a single line item:

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount
HEADOFFICE	ONLCOURSE	Home canning courses at customer's place (materia...	5.00	DAY	45.0000	225.00	15.000000	33.75	191.25

**Figure: The line manual discount in the invoice**

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. On the form toolbar, click **Remove Hold** and then click **Release** to release the invoice.
6. On the **Financial** tab, click the link in the **Batch Nbr.** box to review the generated GL batch, which the system opens 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: Creating 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:** *1/30/2025*
  - **Post Period:** *01-2025*
  - **Description:** *Online course 3 days*
2. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the new row:
  - **Branch:** *HEADOFFICE*
  - **Inventory ID:** *ONLCOURSE*
  - **Quantity:** *3*
  - **UOM:** *DAY*
  - **Unit Price:** *14.50*
3. On the form toolbar, click **Save**.
4. In the **Document Discounts** box in the Summary area, enter *10*.

This is the \$10 manual document 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), as shown in the following screenshot.

The screenshot shows the Acumatica Invoices and Memos interface for Invoice 000120. The 'DETAILS' tab is selected. In the top right corner, several fields are highlighted in red boxes: 'Detail Total: 43.50', 'Line Discounts: 0.00', 'Document Dis... 10.00', 'Retained Amo... 0.00', 'Tax Total: 0.00', 'Balance: 33.50', and 'Cash Discount: 0.00'. Below these, the 'Description' field contains 'Online course 3 days'. The main grid displays a single line item:

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Amount
HEADOFFICE	ONLCOURSE	Home canning courses online (website session)	3.00	DAY	14.5000	43.50	0.000000	0.00	43.50

*Figure: The manual document discount in the invoice*

5. On the form toolbar, click **Remove Hold** and then click **Release** to release the invoice.
  6. On the **Financial** tab, click the link in the **Batch Nbr.** box to review the generated GL batch, which the system opens 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: Discount Codes

In Acumatica ERP, a customer discount is defined by the combination of settings specified for the following:

- A discount code on the *Discount Codes* (AR209000) form. A discount code is a template that provides the following general information about the discount:
  - Which level the discounts of this document type are applied to: a specific line, a group of lines, or the entire document
  - Whether the discounts are applied automatically or manually
  - Whether the discounts are applied unconditionally or based on a set of conditions
- A discount sequence specified on the *Discounts* (AR209500) form. The discount sequence specifies exactly how the discount is calculated, based on the amount or quantity of the line item or on the amount of the document.

In this topic, you will read about discount codes you create in Acumatica ERP.

### Line, Group, and Document Discounts

For a discount code that you create on the *Discount Codes* (AR209000) form, in the **Discount Type** column, you select the level at which this discount is applied, which is one of the following:

- *Line*: The discount applies to a document line. A line-level discount may be based on the line amount or quantity, and it can be expressed as a percentage or a fixed amount.

A line-level discount can be applied to the unit price of an item or the extended price of the item (that is, the line amount), depending on the option in the **Line Discount Basis** box on the *Pricing* tab of the *Accounts Receivable Preferences* (AR101000) form.

- *Group:* This discount applies to multiple lines of the same document. A group-level discount may be based on the amount or quantity that is in the sum of multiple lines, and the discount can be expressed as a percentage, fixed amount, or specific quantity of free items.



Because some group discounts may be free items, the system cannot determine which of the applicable group discounts is the best, so it applies all the group discounts that are applicable based on the discount rules.

- *Document:* This discount applies to and is based on the document total, and it can be expressed as a percentage or as a fixed amount.



Document and group discounts are not applicable to the following orders:

- Transfer orders
- Orders of an order type that has the *RMA Order* automation behavior and *No Update* selected in the **AR Document Type** box on the **Template** tab of the [Order Types](#) (SO201000) form

## Automatic and Manual Discounts

For a discount code, you can specify if the system should apply this discount automatically or a user needs to apply the discount manually.

To mark the discount as manual, you select the **Manual** check box on the [Discount Codes](#) (AR209000) form in the row with the discount. You can use manual discounts, for example, for rebates or coupons. You can apply a manual discount to a document on one of the following forms:

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

You can view the details of the automatic or manual document-level and group-level discounts, that were applied to the document on the **Details** tab of the [Cash Sales](#) form as well as on the **Discounts** tab of the [Sales Orders](#), [Invoices and Memos](#), and [Invoices](#) forms.

For details, see [Manual Customer Discounts: Application of Manual Discounts](#) and [Automatic Customer Discounts: Application of Automatic Discounts](#).

## Conditional and Unconditional Discounts

In the table of the [Discount Codes](#) (AR209000) form (**Applicable To** column), for each discount code, you can specify whether the discount is applicable to an entity or multiple entities (that is, the discount is conditional) or it is applicable to any entity (that is, the discount is unconditional).

For a line-level or group-level discount, you can select one of the following options in this column to apply the discount to the corresponding entity or combination of entities:

- *Customer*
- *Item*
- *Item Price Class*
- *Customer and Item*
- *Customer Price Class*
- *Customer and Item Price Class*
- *Customer Price Class and Item*
- *Customer Price Class and Item Price Class*

- *Warehouse*
- *Warehouse and Item*
- *Warehouse and Customer*
- *Warehouse and Item Price Class*
- *Warehouse and Customer Price Class*
- *Branch*

You can instead select *Unconditional* in the **Applicable To** column, to create a discount code for an unconditional line or group discount.

For a document-level discount, you can select one of the following options in the **Applicable To** column of the [Discount Codes](#) form to apply the discount to the corresponding entity or combination of entities:

- *Customer*
- *Customer and Branch*
- *Customer Price Class*
- *Customer Price Class and Branch*

In this case, too, you can select *Unconditional* in the **Applicable To** column, to create a discount code for an unconditional document discount.



- The *Warehouse*, *Warehouse and Item*, *Warehouse and Customer*, *Warehouse and Item Price Class*, and *Warehouse and Customer Price Class* options are available if the *Multiple Warehouses* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.
- The *Branch* option is available if the *Multibranch Support* feature is enabled on the [Enable/Disable Features](#) form.

After defining the discount codes on the [Discount Codes](#) form, you create discount sequences on the [Discounts](#) (AR209500) form and specify the values for entities (that is, select a particular records to which the discounts will be applied). For more information, see [Customer Discounts: Discount Sequences](#).

## Customer Discounts: Discount Sequences

In Acumatica ERP, once you have configured a discount code for your customer discount, you proceed to creating at least one discount sequence for the discount code. (You can define multiple discount sequences for each discount code or only one sequence.) In Acumatica ERP, *discount sequences* are predefined sets of settings that determine how discounts are applied in a system.

You create a discount sequence on the [Discounts](#) (AR209500) form by specifying the values for each entity to which the discounts will apply. That is, you specify the particular records to which the discounts will be applied. Also, for each discount sequence, you can specify the discount percent or the discount amount.

In this topic, you will read about discount sequences for customer discounts in Acumatica ERP.

### Settings of Discount Sequence

Discount sequences are defined on the [Discounts](#) (AR209500) form; each discount sequence is related to a discount code and inherits its settings. Discount sequences can define simple discounts (which are applicable to any amount or quantity) or tiered discounts (for which you can specify different percents or fixed amounts based on the quantities or amounts of items).

Discount sequences may be regular or promotional. A *regular discount sequence* is a discount that is not marked as promotional—that is, the **Promotional** check box is cleared in the Summary area of the [Discounts](#) (AR209500) form.

A regular discount sequence has only a start date and does not have an expiration date. You can have the following versions of a regular sequence:

- The current (active) version, which is the discount currently in effect
- The future (pending) version, which is the discount to be in effect on a particular date in the future
- The previous (last) version, which is the discount that was in effect before the current discount

A *promotional discount sequence*—for which the **Promotional** check box is selected—is effective for a limited time, so this sequence must have an effective (start) date and an expiration date. After the expiration date, a promotional discount is not applicable.

Because a discount code can have multiple sequences, each sequence related to the same discount code must have a unique identifier. If auto-numbering is configured for the discount code, when you create a new sequence for this discount code, the system assigns its sequence ID automatically. By default, the discount code is used as a prefix for generating sequence IDs. If auto-numbering is not configured for the discount code, you must enter an identifier for each sequence manually.

For each discount sequence, on the *Discounts* form, you specify the following:

- Whether the discount is regular or promotional.  
If the discount is promotional, it is effective only during the date range that you specify. When you mark a discount as promotional, you must specify the start and end dates of the period during which it is effective. Regular discounts have the start date (also referred to as effective date) but do not have an expiration date.
- How the discount is expressed: as a percentage, an amount, or a specific quantity of a free item.
- To which records of the entity type (such as items, customers, or warehouses) the discount can be applied.  
The applicable entity type or combination of entity types is defined by the discount code. Tabs that apply to the entity type or types specified for the discount code appear on the *Discounts* form after you save the new discount code. For instance, if the discount code was defined for discounts to be applied to items, this form will have the **Items** tab, which you can use to list the particular items to which the sequence is applicable.
- How the discount is tiered or broken down (optional): by amount (for a discount code of any type) or by quantity (for only a discount code of the *Line* and *Group* type).
- Whether the discount is active or not.
- Whether the discount is prorated or not.

## Updating of Discount Sequences

In Acumatica ERP, on the *Discounts* (AR209500) form, you can update a regular or promotional discount sequence.

You can update a regular discount sequence on the **Discount Breakpoints** tab by entering the start date in the **Pending Date** column and a new breakdown value in the following columns:

- **Pending Discount Amount**
- **Pending Discount Percent**
- **Pending Break Amount**
- **Pending Break Quantity**

Then you update the discount sequence by clicking the **Update Discounts** button on the form toolbar. This opens the **Update Discounts** dialog box, which you can use to select pending discount sequences by their start date (pending date) for updating. After the update, the current sequence version becomes the previous version, and the future version becomes the current one.



The **Update Discounts** button becomes active only after you save a newly created discount on the *Discounts* form.

If you need to change properties of multiple discount sequences, you can use the [Update Discounts](#) (AR502500) form to update these sequences at once.

You can update the promotional discount sequence by modifying the needed settings on the [Discounts](#) form and saving the changes. You do not need to use the **Update Discounts** button and dialog box to update the promotional discount sequence; this button remains inactive on the promotional discount sequence.

## Updating of Discounts Applied to Documents

For documents with the *On Hold* status, you can update discounts to include any new discounts or updates to existing ones.

To update the discounts, you use the **Recalculate Prices** dialog box, which opens when you click **Recalculate Prices** under **Other** on the More menu of the respective data entry form, such as [Invoices](#) (SO303000) or [Sales Orders](#) (SO301000).

In this dialog box, you can select the types of discounts the system will update as follows:

- If you want the system to recalculate discounts in the document, you select the **Recalculate Discounts** check box.
- If you want the system to replace manual line-level discounts with the applicable automatic discounts in the document, you select the **Override Manual Line Discounts** check box.
- If you want the system to replace manual group-level and document-level discounts with the applicable automatic discounts in the document, you select the **Override Manual Group and Document Discounts** check box.

## Manual Customer Discounts: To Create AR Invoice with a Manual Promotional Discount

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In this activity, you will learn how to set up 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 the 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 12/15/2024 to 1/10/2025 for all customers.

Acting as SweetLife's accountant, you need to 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 the Allen's Bakery (*ABAKERY*) customer on December 20, 2024.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Non-Stock Items](#) (IN202000) form, the *ONLCOURSE* non-stock item has been created.
- On the [Customers](#) (AR303000) form, the *ABAKERY* customer has been created.

### Process Overview

You will 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 will create an AR invoice and apply the manual promotional discount you have configured.

## System Preparation

To prepare to perform the instructions of this activity, 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 12/20/2024. If a different date is displayed, click the Business Date menu button and select 12/20/2024. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Activating the Customer Discounts Feature

To activate the *Customer Discounts* feature to use the customer discount functionality, do the following:

1. Open the [Enable/Disable Features](#) (CS100000) form.
2. On the form toolbar, click **Modify**.
3. Under **Advanced Financials**, select the **Customer Discounts** check box.
4. On the form toolbar, click **Enable**.

### Step 2: Configuring 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
3. 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:** 12/15/2024
  - **Expiration Date:** 1/10/2025
  - **Description:** Promo discount for online course

With these settings, the discount (of the discount code that you defined for manual promotional discount that apply to a specific item) is by percent, with break points by quantity. It also is promotional, effective from December 15, 2024 to January 10, 2025.

6. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the row:
  - **Break Quantity:** 0
  - **Discount Percent:** 20
 Because the break quantity is 0, this discount of 20% applies to any quantity of items.
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 3: Creating the AR Invoice and Applying the Manual Discount

To create the needed AR invoice for the Allen's Bakery customer and apply the manual promotional 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:** *ABAKERY*
  - **Date:** *12/20/2024*
  - **Post Period:** *12-2024*
  - **Description:** *Online course 5 days*
3. On the **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, as shown in the following screenshot.

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
HEADOFFICE	<a href="#">ONLCOURSE</a>	Home canning courses online (website session)	5.00	DAY	15.0000	75.00	20.00000	15.00	<input checked="" type="checkbox"/>	<a href="#">PROMO00000</a>	60.00

Figure: Manual promotional discount applied to the line

4. On the form toolbar, click **Remove Hold**, and then click **Release** to release the invoice.

## Lesson 2.2: Application of Automatic Discounts

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In this lesson, you will learn how to configure and apply automatic customer discounts.

### Learning Objectives

In this lesson, you will learn how to do the following:

- Create AR invoices with an automatic line discount by percent (for a particular customer) and an automatic line discount by amount (for a particular customer price class)
- Create sales orders with automatic group discounts by percent (warehouse-specific for a particular stock item) and free-item group promotional discounts
- Create AR invoices with automatic document discounts by percent (for a particular customer) and automatic unconditional document discounts by percent
- Create sales orders with automatic volume line discounts by percent (for a particular stock item)
- Make existing discounts inactive

## Automatic Customer Discounts: Application of Automatic Discounts

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In this topic, you will read about the application of automatic discounts in Acumatica ERP.

### Order of Automatic Discount Application Order

In Acumatica ERP, the system always applies automatic discounts in the following order when a user saves a document:

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



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

### Additional Settings for Discount Application

On the [Discount Codes](#) (AR209000) form, you can specify the following settings for the line and group discounts, which affect the rules of discount application and calculation:

- For a line discount, select the **Exclude from Discountable Amount** check box to exclude the discountable amount of the line discount from the discountable amount for higher-level (group or document) discounts. For example, suppose that you have a line discount of 75% and a document 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 discount of 5% to the already-discounted line amounts.



This check box is available on the [Discount Codes](#) form only for line-level discounts.

- For a group discount, select the **Skip Document Discounts** check box to apply only the group discount to the document's lines, excluding document discounts.

For example, suppose that the following discounts have been defined in the system: a group discount that is applicable to multiple lines and significantly reduces the document total, and a document discount. For the group discount, you select this check box if you do not want to apply the document discount to the documents to which this group discount has been applied.



This check box is available on the [Discount Codes](#) form only for lines that contain group-level discounts.

For more information, see [Customer Discounts: Discount Codes](#).

## Automatic Customer Discounts: To Set Up Automatic Line Discounts

In this activity, you will learn how to set up automatic line discounts of different types (discount by percent with a break point by amount and discount by amount with a break point by quantity) and explore how these discounts are applied to AR invoices.

### Story

Suppose that starting in January 2025, the SweetLife Fruits & Jams company is offering the following discounts, which will be applied to 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 One Restaurant (*GOODFOOD*) customer when the invoice line amount exceeds \$200. That is, it is a discount by percent with a 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. That is, it is a discount by amount with a break point by quantity.

On January 30, 2025, GoodFood One Restaurant purchased 16 days of the home canning course (that is, the offline course).

Acting as SweetLife's accountant, you need to configure automatic line discounts and create an invoice for GoodFood One Restaurant, noticing how the discounts are applied.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the [Non-Stock Items](#) (IN202000) form, the *OFLCOURSE* non-stock item has been created.
- On the [Customer Price Classes](#) (AR208000) form, the *LOCAL* customer price class has been created.
- On the [Customers](#) (AR303000) form, the *GOODFOOD* customer has been created and assigned to the *LOCAL* customer price class.

### Process Overview

You will create discount codes on the [Discount Codes](#) (AR209000) form and configure line discounts by percent and by amount on the [Discounts](#) (AR209500) form.

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

Finally, you will deactivate the line discounts.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Configuring the Automatic Line Discount by Percent for a Particular Customer

To configure the automatic line discount by percent for the GoodFood One Restaurant customer and make it effective, 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, the automatic line 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 automatic line discount (of the discount code that you 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:** 1/1/2025

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 (1/30/2025) in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains 1/1/2025.

## Step 2: Configuring the Automatic Line Discount by Amount for a Particular Customer Price Class

To configure the automatic line discount by amount 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 in the added row:

- **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 automatic line 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:** 1/1/2025

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; otherwise, the system considers your discounts pending.

11. In the **Update Discounts** dialog box, which opens, leave the default value (1/30/2025) in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains 1/1/2025.

### Step 3: Creating the AR Invoice and Exploring 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:** 1/30/2025
  - **Description:** Offline training
3. On the **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 (which is \$11.25 in the **Discount Amount** column) 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, as shown in the following screenshot.

Line	Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
1	HEADOFFICE	OFLCOURSE	Home canning courses at customer's place (materials included)	5.00	DAY	45.0000	225.00	5.000000	11.25	<input type="checkbox"/>	L1CUS00000	213.75
2	HEADOFFICE	OFLCOURSE	Home canning courses at customer's place (materials included)	12.00	DAY	45.0000	540.00	18.518519	100.00	<input type="checkbox"/>	L1TE00000	440.00

Figure: Automatic discount applied to the line

5. On the form toolbar, click **Remove Hold**, and then click **Release** to release the invoice.
6. On the **Financial** tab, click the link in the **Batch Nbr.** box to review the GL batch, which the system opens on the *Journal Transactions* (GL301000) form.

The *11000 - Accounts Receivable* account is debited in the amount of \$653.75, and the *40000 - Sales Revenue* account is credited in the same amount in total (\$213.75 + \$440).

## Step 4: Making 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 Summary area, specify the following settings:
  - **Discount Code:** *LICUS00000*
  - **Sequence:** *LICUS00001*
3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.
5. In the Summary area, specify the following settings:
  - **Discount Code:** *LIITE00000*
  - **Sequence:** *LIITE00001*
6. Clear the **Active** check box to make the discount inactive.
7. Save your changes.

## Automatic Customer Discounts: To Set Up an Automatic Group Discount and a Free-Item Group Promotional Discount

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

### Story

Suppose that on January 30, 2025, the SweetLife Fruits & Jams company starts selling 32-ounce and 96-ounce jars of apple jam at a 3% discount from the Wholesale warehouse (*WHOLESALE*). Also, for sales orders with dates from *1/30/2025* to *2/15/2025*, 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 SweetLife's accountant, you need to configure an automatic group discounts of 3% for the *APJAM32* and *APJAM96* stock items sold from the Wholesale warehouse, and a free-item promotional group discount for sales orders in which the total amount of the *APJAM32* and *APJAM96* stock items exceeds \$350. You also need to create a sales order to see how the discounts are applied.



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.

## Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the *Stock Items* (IN202500) form, the *APJAM32*, *APJAM96*, *ORJAM32*, and *LEMJAM96* stock items have been created.
- On the *Customers* (AR303000) form, the *COFFEE SHOP* customer has been created.
- On the *Warehouses* (IN204000) form, the *WHOLESALE* warehouse has been created.

## Process Overview

To set up a free-item group promotional discount and a warehouse-specific group discount, you will 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 will then create a sales order on the *Sales Orders* (SO301000) form and add items to observe the application of discounts. You will not need to save or process this sales order.

Finally, you will deactivate the discounts.

## System Preparation

To prepare to perform the instructions of this activity, 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 *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025*. For simplicity, in this activity, you will create and process all documents in the system on this business date.

## Step 1: Configuring the Warehouse-Specific Group Discount for Particular Items

To configure the warehouse-specific group 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:** 1/30/2025
 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*.
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 1/30/2025 default value, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains this date (1/30/2025).

## Step 2: Configuring the Free-Item Group Promotional Discount

To configure the free-item group promotional 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 promotional discount
  - **Discount Type:** *Group*
  - **Applicable To:** *Item*
  - **Auto-Numbering:** Selected
  - **Last Number:** FRITE00000
 Discounts of this discount code are automatic group discounts that are promotional and 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:** 1/30/2025

- **Expiration Date:** 2/15/2025

- **Description:** Free-item promotional 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. It is 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 APJAM32 in the **Inventory ID** column.
8. Add another row, and select APJAM96 in the **Inventory ID** column.
9. On the **Free Items** tab, in the **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: Creating a Sales Order and Exploring an Application of the Automatic Group Discounts

To create a sales order for testing purposes and explore how the automatic group 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:** 1/30/2025
  - **Description:** Jam
3. On the **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 values in the **Discount Percent** and **Discount Amount** columns are 0, 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 **Details** tab, click **Add Row** on the table toolbar, and specify the following settings for the added row:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** APJAM96
  - **UOM:** PIECE
  - **Quantity:** 5
  - **Unit Price:** 45.15
5. On the **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 (see the following screenshot).

The screenshot shows the Sales Orders screen for 'SO - FourStar Coffee & Sweets Shop'. The 'DETAILS' tab is selected. In the header, 'Customer' is set to 'COFFEE SHOP - FourStar Coffee & Sweets Shop'. The 'Description' field contains 'Jam'. The 'Line Details' table shows three items:

Branch	Inventory ID	Free Item	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	Ext. Price	Discount Percent
HEADOFFICE	APJAM32	<input type="checkbox"/>	WHOLESALE	Orange jam 32 oz	PIECE	5.00	0.00	5.00	13.0000	<input checked="" type="checkbox"/>	65.00	0.000000
HEADOFFICE	APJAM96	<input type="checkbox"/>	WHOLESALE	Apple jam 96 oz	PIECE	5.00	0.00	5.00	45.1500	<input type="checkbox"/>	225.75	0.000000
HEADOFFICE	APJAM32	<input type="checkbox"/>	WHOLESALE	Apple jam 32 oz	PIECE	10.00	0.00	10.00	16.6000	<input type="checkbox"/>	166.00	0.000000
HEADOFFICE	LEMJAM96	<input checked="" type="checkbox"/>	WHOLESALE	Lemon jam 96 oz	PIECE	1.00	0.00	1.00	0.0000	<input type="checkbox"/>	0.00	0.000000

Figure: Details tab of the Sales Orders form with a free-item group promotional discount

6. On the **Discounts** 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.

As shown in the screenshot below, the free-item discount (FRITE000000) has been applied because the order date (1/30/2025) is within the range of effective dates of the promotional discount and the total price for APJAM32 and APJAM96 exceeds \$350, the break point.

The screenshot shows the Sales Orders screen for the 'SO - FourStar Coffee & Sweets Shop'. The 'DISCOUNTS' tab is selected. A table displays two discount entries:

Skip Discount	Line Nbr.	* Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item	Free Item Qty.
<input type="checkbox"/>	1	WHSE000000	WHSE000001	Group	<input type="checkbox"/>	391.75	15.00	11.75	3.000000	0.00	
<input type="checkbox"/>	2	FRITE000001	FRITE000001	Group	<input type="checkbox"/>	391.75	15.00	0.00	0.000000	LEMJAM96	1.00

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

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

#### Step 4: Making 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 Summary area, specify the following settings:
  - **Discount Code:** WHSE000000
  - **Sequence:** WHSE000001
3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.
5. In the Summary area, specify the following settings:
  - **Discount Code:** FRITE000000
  - **Sequence:** FRITE000001
6. Clear the **Active** check box to make the discount inactive.
7. Save your changes.

#### Automatic Customer Discounts: To Set Up Automatic Customer-Specific and Unconditional Document Discounts

In this activity, you will learn how to set up 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 set up a customer-specific document discount of 7% for the Thai Food Restaurant 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, 2025, Thai Food Restaurant bought 2 days of the offline training course and 10 days of the online training course.

Acting as SweetLife's accountant, you need to enter an AR invoice, to which the discounts should be applied automatically.

## Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Enable/Disable Features](#) (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the [Non-Stock Items](#) (IN202000) form, the *OFLCOURSE* non-stock item has been created.
- On the [Customers](#) (AR303000) form, the *TOMYUM* customer has been created.

## Process Overview

First, you will configure discount codes on the [Discount Codes](#) (AR209000) form. Then on the [Discounts](#) (AR209500) form, you will configure an automatic document discount specific to the Thai Food Restaurant company and an automatic unconditional document discount for all customers.

Then you will create an AR invoice for a particular customer on the [Invoices and Memos](#) (AR301000) form, and review the **Discounts** tab to see how automatic document discounts are applied.

Finally, you will deactivate the discounts.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

## Step 1: Configuring the Customer-Specific Document Discount

To configure the automatic document discount specific to the Thai Food Restaurant 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
  - **Break By:** Amount (inserted by default)
  - **Description:** Document discount for TOMYUM

These settings convey that this discount (of the discount code which you 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:** 1/30/2025

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 1/30/2025 in the **Filter Date** box, and click **OK**.
- On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains 1/30/2025.

## Step 2: Configuring the Unconditional Document Discount

To configure the automatic 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:** Unconditional document discount
  - **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
  - **Break By:** Amount (inserted by default)
  - **Active:** Selected
  - **Description:** Unconditional document discount

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:** 1/30/2025

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 1/30/2025 in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains this date (1/30/2025).

### Step 3: Creating the AR Invoice and Explore the Discount Application

To create the AR invoice for the Thai Food Restaurant 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:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** Online and offline courses
3. On the **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

On the **Discounts** 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 (6.30), and the same amount is shown in the **Document Discounts** box in the Summary area (see the following screenshot).

The screenshot shows the 'Invoices and Memos' screen for 'Invoice - Thai Food Restaurant'. The 'DISCOUNTS' tab is selected. In the summary area, the 'Document Dis...' field is highlighted with a red box, showing a value of 6.30. Below the summary, a table lists a single row with a discount code of 'DOCUM00000' and a type of 'Document', resulting in a discount amount of 6.30.

Skip Discount	Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Retained Discount	Discount Percent
> <input checked="" type="checkbox"/>	<a href="#">DOCUM00000</a>	<a href="#">DOCUM00001</a>	Document	<input type="checkbox"/>	90.00	0.00	6.30	0.00	7.000000

Figure: Automatic document discount for the specific customer applied to the document

- On the **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

On the **Discounts** 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 (36), and the same amount is now shown in the **Document Discounts** box in the Summary area (see the following screenshot). This discount has been applied because it is the best available discount for this document.

The screenshot shows the 'Invoices and Memos' screen for 'Invoice - Thai Food Restaurant'. The 'DISCOUNTS' tab is selected. In the summary area, the 'Document Dis...' field is highlighted with a red box, showing a value of 36.00. Below the summary, a table lists a single row with a discount code of 'UNCON00000' and a type of 'Document', resulting in a discount amount of 36.00.

Skip Discount	Discount Code	* Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Retained Discount	Discount Percent	Free Item	Order Qty.	Order Type	Order Nbr.	External Discount Code	Description
> <input checked="" type="checkbox"/>	<a href="#">UNCON00000</a>	<a href="#">UNCON00001</a>	Document	<input type="checkbox"/>	240.00	0.00	36.00	0.00	15.000000	0.00					Unconditional document discount

Figure: An automatic unconditional document discount applied to the document

- On the form toolbar, click **Remove Hold** and then click **Release** to release the invoice.

## Step 4: Making 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:

- Open the *Discounts* (AR209500) form.
- In the Summary area, specify the following settings:
  - Discount Code:** *DOCUM00000*
  - Sequence:** *DOCUM00001*
- Clear the **Active** check box to make the discount inactive.
- Save your changes.
- In the Summary area, specify the following settings:
  - Discount Code:** *UNCON00000*
  - Sequence:** *UNCON00001*
- Clear the **Active** check box to make the discount inactive.
- Save your changes.

## Automatic Customer Discounts: To Set Up Automatic Volume Line Discounts

---

In this activity, you will learn how to set up an automatic volume line 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 Wholesale warehouse (*WHOLESALE*) contains a large lot of 32-ounce jars of orange jam with an approaching expiration date. Company personnel have 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 January 30, 2025 and extend indefinitely.

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

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the *Stock Items* (IN202500) form, the *ORJAM32* stock item has been created.
- On the *Customers* (AR303000) form, the *COFFEESHOP* customer has been created.
- On the *Warehouses* (IN204000) form, the *WHOLESALE* warehouse has been created.

## Process Overview

To set up an automatic volume discount for a particular stock item, you will create the needed discount code on the [Discount Codes](#) (AR209000) form. Then you will define an automatic volume discount for the particular item on the [Discounts](#) (AR209500) form.

To see how the discount is applied, on the [Sales Orders](#) (SO301000) form, you will create a sales order with lines that have different quantities.

Finally, you will deactivate the discount.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Configuring the Automatic Volume Discount

To set up 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:** 1/30/2025

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:** 1/30/2025

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:** 1/30/2025

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*.

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 1/30/2025 in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and the **Effective Date** column now contains 1/30/2025.

## Step 2: Creating a Sales Order and Exploring the Application of the Discount

To create a sales order for testing purposes and explore how the automatic volume line 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:** 1/30/2025
  - **Description:** Orange jam at a discount
3. On the **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, which is shown in the following screenshot, notice that the 20% discount you configured in Step 1 has been applied, because the quantity in the line is more than 20.

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	Discount Code
HEADOFFICE	ORJAM32		WHOLESALE	Orange jam 32 oz	PIECE	6.00	0.00	6.00	13.0000	<input checked="" type="checkbox"/>	78.00	5.000000	3.90	VOLIT00000
HEADOFFICE	ORJAM32		WHOLESALE	Orange jam 32 oz	PIECE	12.00	0.00	12.00	13.0000	<input checked="" type="checkbox"/>	156.00	10.000000	15.60	VOLIT00000
HEADOFFICE	ORJAM32		WHOLESALE	Orange jam 32 oz	PIECE	22.00	0.00	22.00	13.0000	<input checked="" type="checkbox"/>	286.00	20.000000	57.20	VOLIT00000

Figure: Automatic volume line discount applied to the sales order

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

### Step 3: Making the Created 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 Summary area, specify the following settings:
  - **Discount Code:** VOLIT00000
  - **Sequence:** VOLIT00001
3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.

### Lesson 2.3: Application of Multiple Discounts

In this lesson, you will learn how to configure and apply multiple customer discounts.

#### Learning Objectives

In this lesson, you will learn how to do the following:

- Activate automatic line and unconditional discounts

- Create automatic group discounts for particular non-stock items
- Create AR invoices with the automatic line, unconditional, and group discounts
- Make existing discounts inactive

## Multiple Customer Discounts: To Create Multiple Discounts and Explore Their Application

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

### Story

Starting in January 2025, the SweetLife Fruits & Jams company is offering a discount of \$100 to local customers who order 10 or more days of the offline training course.

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

Suppose that on January 30, 2025, one of the SweetLife's local customers, FourStar Coffee & Sweets Shop (*COFFEESHOP*), bought 12 days of the offline training course and 5 days of the online training course for which your company is offering a 12% discount effective on 1/30/2025 for more than 5 days of training.

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.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the *Non-Stock Items* (IN202000) form, the *ONLCOURSE* and *OFLCOURSE* non-stock items have been created.
- On the *Customer Price Classes* (AR208000) form, the *LOCAL* customer price class has been created.
- On the *Customers* (AR303000) form, the *COFFEESHOP* customer has been created and assigned to the *LOCAL* customer price class.

### Process Overview

To configure a group discount for particular non-stock items, you will create a discount code on the *Discount Codes* (AR209000) form, and then configure this discount on the *Discounts* (AR209500) form. You will activate the automatic line discount (*LITE00000*) and automatic unconditional document discount (*UNCON00000*), which you deactivated earlier.

You then will 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 will release the invoice on this form, and you will review the GL batch on the *Journal Transactions* (GL301000) form.

Finally, you will deactivate the discounts.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Activating the Automatic Line Discount by Amount for a Particular Customer Price Class

To activate the *LIITE00000* automatic line discount by amount for a particular customer price class, do the following:

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, select the **Active** check box.
5. On the form toolbar, click **Save** to save your changes.

### Step 2: Activating the Automatic Unconditional Document Discount

To activate the *UNCON00000* unconditional document discount, do the following:

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, select the **Active** check box.
5. On the form toolbar, click **Save** to save your changes.

### Step 3: Configuring 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:** Automatic 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:** Automatic group discount for courses

With these settings, the discount (of the discount code you just defined for automatic 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:** 1/30/2025

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** to make the discount you have just added effective.
11. In the **Update Discounts** dialog box, which opens, leave 1/30/2025 in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and the **Effective Date** column now contains 1/30/2025.

## Step 4: Creating the AR Invoice and Exploring 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:** 1/30/2025
  - **Post Period:** 01-2025
  - **Description:** Offline and online training courses
3. On the **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 *L1TE00000*. This is the automatic line discount of \$100 that you configured for 10 or more days of offline training on January 30, 2025.

The **Ext. Price** column shows the amount before the discount (540) and the **Amount** column shows the amount with the automatic line discount applied (440).

The **Discount Amount** column shows the discount amount (\$100). The same amount is shown in the **Line Discounts** box in the Summary area (see the following screenshot).

The screenshot shows the Invoices and Memos form for an AR invoice. The Details tab is active. The invoice details include:

- Type: Invoice
- Reference Nbr.: <NEW>
- Status: On Hold
- \* Date: 1/30/2025
- \* Post Period: 01-2025
- Customer: COFFEESHOP - FourStar Coffee & Swee
- \* Location: MAIN - Primary Location
- \* Terms: 30D - 30 Days
- \* Due Date: 3/1/2025
- \* Cash Discount: 3/1/2025
- \* Project: X - Non-Project Code
- Description: Offline and online training courses

Financial summary:

Detail Total:	540.00
Line Discounts:	100.00
Document Dis...	110.88
Retained Amo...	0.00
Tax Total:	0.00
Balance:	329.12
Cash Discount:	0.00

Table of items:

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
HEADOFFICE	OFLCOURSE	Home canning courses at customer's place (materials included)	12.00	DAY	45.0000	540.00	18.518519	100.00	<input type="checkbox"/>	LITE00000	440.00

Figure: Invoice with automatic line discount applied

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

Review the **Discounts** 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 1/30/2025).
- The **Discountable Amt.** for this discount is 505, which is the total amount for the OFLCOURSE and ONLCOURSE non-stock items after the line discount is applied (\$540 + \$65 - \$100) (see the **Ext. Price** and **Discount Amount** columns on the **Details** tab in the following screenshot).

The screenshot shows the Invoices and Memos form with the Details tab selected. The invoice details are the same as the previous screenshot. The table of items shows two rows:

Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
HEADOFFICE	OFLCOURSE	Home canning courses at customer's place (materia...	12.00	DAY	45.0000	540.00	18.518519	100.00	<input type="checkbox"/>	LITE00000	440.00
HEADOFFICE	ONLCOURSE	Home canning courses online (website session)	5.00	DAY	13.0000	65.00	0.000000	0.00	<input type="checkbox"/>		65.00

Figure: Details tab of the Invoices and Memos form with the automatic line discount applied

The **Discount Percent** column of the **Discounts** tab contains the discount percent (12), and the **Discount Amt.** column contains the discount amount, which is automatically calculated by the system (60.60).

- The **UNCON00000** discount code (the unconditional document discount of 15% for amounts of \$200 or more on 1/30/2025).

The **Discountable Amt.** for this discount is 444.40, which is the total amount for the OFLCOURSE and ONLCOURSE non-stock items after the group discount is applied (\$505 - \$60.60). The **Discount Percent**

column shows the discount percent (15), and the **Discount Amt.** column shows the discount amount (66.66), which is automatically calculated by the system (see the following screenshot).

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

Figure: Invoice with multiple discounts applied

- On the form toolbar, click **Remove Hold** to assign the invoice the *Balanced* status, and then click **Save**.

## Step 5: Releasing the AR Invoice and Reviewing the GL Transaction

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

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

The *40000 - Sales Revenue* account is credited in the amount of \$505 (\$440 + \$65), 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), as shown in the following screenshot.

Branch	* Account	Description	Project/Contract	Project Task	Cost Code	Ref. Number	Transaction Date	Quantity	UOM	Debit Amount	Credit Amount	Transaction Description
HEADOFFICE	11000	Accounts Receivable	X		00-000	000124	1/30/2025	0.00		377.74	0.00	Offline and online training courses
HEADOFFICE	40000	Sales Revenue	X		00-000	000124	1/30/2025	12.00	DAY	0.00	440.00	Home canning courses at customer's place (materials included)
HEADOFFICE	53000	Discount Given	X		00-000	000124	1/30/2025	0.00		127.26	0.00	Group and Document Discount
HEADOFFICE	40000	Sales Revenue	X		00-000	000124	1/30/2025	5.00	DAY	0.00	65.00	Home canning courses online (website session)
HEADOFFICE	24100	Tax Payable	X		00-000	000124	1/30/2025	0.00		0.00	0.00	NYNOTAX

Figure: GL batch with applied multiple discounts



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: Making 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 Summary area, specify the following settings:
  - **Discount Code:** *LIITE00000*
  - **Sequence:** *LIITE00001*
3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.
5. In the Summary area, specify the following settings:
  - **Discount Code:** *UNCON00000*
  - **Sequence:** *UNCON00001*
6. Clear the **Active** check box to make the discount inactive.
7. Save your changes.
8. In the Summary area, specify the following settings:
  - **Discount Code:** *GRITE00000*
  - **Sequence:** *GRITE00001*
9. Clear the **Active** check box to make the discount inactive.
10. Save your changes.

## Lesson 2.4: Creation of a Sales Invoice for Sales Orders with Discounts

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In this lesson, you will learn how to create sales orders with automatic document discounts, update discounts, and add sales orders to a sales invoice.

### Learning Objectives

In this lesson, you will learn how to do the following:

- Create automatic document discounts (for a particular customer and for a particular customer price class)
- Create two sales orders for a customer and learn how the system applies discounts
- Update the discount percent in a sales order
- Create a sales invoice for a sales order and add another sales order to it
- Make existing discounts inactive

## Sales Invoice for Discounted Orders: To Add Discounted Sales Orders to a Sales Invoice

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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 sales 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 2025, the SweetLife Fruits & Jams company has decided to introduce discounts for some customers. For FourStar Coffee & Sweets Shop (*COFFEESHOP*), \$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 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.

### Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the *Stock Items* (IN202500) form, the *APJAM08* and *APJAM32* stock items have been created.
- On the *Customer Price Classes* (AR208000) form, the *LOCAL* customer price class has been created.
- On the *Customers* (AR303000) form, the *COFFEESHOP* customer has been created and assigned to the *LOCAL* customer price class.

### Process Overview

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

You will update the discount on the *Discounts* form. On the *Sales Orders* form, you will recalculate the prices of the sales order being prepared.

To complete the processing of the sales orders, you will create and confirm a shipment for the sales orders on the *Shipments* (SO302000) form. On the *Invoices* (SO303000) form, you will create a sales invoice for two sales orders, making sure that the automatic document discounts for these sales orders are applied, and then release the invoice.

Finally, you will deactivate the discounts.

## System Preparation

To prepare to perform the instructions of this activity, 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Configuring the \$70 Automatic Document Discount

You will configure the \$70 automatic document discount to be applicable to only specific customers (at this time, only 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:** Automatic document discount by customer
  - **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
  - **Break By:** Amount (inserted by default)
  - **Active:** Selected
  - **Description:** Automatic document discount for COFFEESHOP (by amount)
 With these settings, the discount (of the discount code you just defined for automatic document discounts that are applicable to specific customers) is by amount, with break points by amount.
 In this case, the value in the **Break By** box is inserted 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 Amount:** 70
  - **Pending Date:** 1/30/2025
 The automatic document 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 automatic document 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 1/30/2025 in the **Filter Date** box, and click **OK**.

On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and the **Effective Date** column now contains 1/30/2025.

## Step 2: Configuring the 20% Automatic Document Discount

To configure the 20% automatic 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:** Automatic document discount by customer price class
  - **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
  - **Break By:** Amount (inserted by default)
  - **Description:** Automatic document discount for local customers (by percent)

With these settings, the discount (of the discount code you just defined for automatic 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:** 1/30/2025

The automatic document 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 1/30/2025 in the **Filter Date** box, and click **OK**.

## Step 3: Creating Sales Orders and Exploring Discount Application

To create two 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:** 1/30/2025
  - **Description:** Apple jam 8 oz
3. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Branch:** HEADOFFICE
  - **Inventory ID:** APJAM08
  - **Warehouse:** WHOLESALE
  - **Quantity:** 40
  - **UOM:** PIECE
  - **Unit Price:** 5.15
4. On the **Discounts** 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:** 1/30/2025
  - **Description:** Apple jam 32 oz
7. On the **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
  - **Quantity:** 25
  - **UOM:** PIECE
  - **Unit Price:** 16.60
8. On the **Discounts** 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: Updating 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 **Discounts** 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** (AR209500) form will open in a pop-up window.
3. For the only row in the table on the **Discounts** form, specify the following settings:
  - **Pending Break Amount:** 400

- **Pending Discount Percent:** 25
  - **Pending Date:** 1/30/2025
- On the form toolbar, click **Update Discounts** to make the updated discount effective.
  - In the **Update Discounts** dialog box, which opens, leave 1/30/2025 in the **Filter Date** box, and click **OK**.  
On the **Discount Breakpoints** tab, notice that the system has cleared the **Pending Date** column and the **Effective Date** column now contains 1/30/2025.
  - Close the pop-up window and return to the sales order on the *Sales Orders* form.
  - On the More menu (under **Other**), click **Recalculate Prices**.
  - In the **Recalculate Prices** dialog box, which opens, leave the default values and click **OK**.  
On the **Discounts** tab, notice that the amount in the **Discount Percent** column has been updated to reflect the new value of 25%.

The screenshot shows the Microsoft Dynamics 365 Sales Orders form for SO 000077. The 'DISCOUNTS' tab is selected. A message bar at the top right indicates that an operation has completed. The 'Discount Percent' column in the grid is highlighted with a red box, showing a value of 25.000000. Other columns in the grid include Skip Discount, Line Nbr., Discount Code, Sequence ID, Type, Manual Discount, Discountable Amt., Discountable Qty., Discount Amt., and Free Item.

Skip Discount	Line Nbr.	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent	Free Item
	1	<a href="#">DOC0200000</a>	<a href="#">DOC0200001</a>	Document	<input type="checkbox"/>	415.00	0.00	103.75	25.000000	

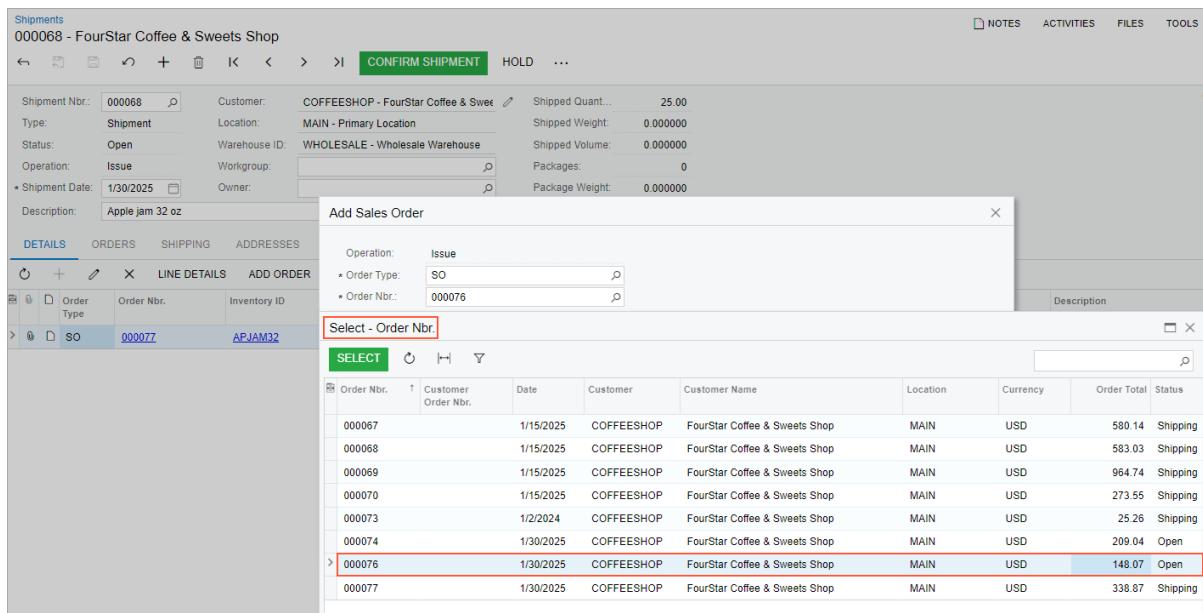
Figure: Updated discount on the Discounts tab of the Sales Orders form

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

## Step 5: Preparing a Sales Invoice for Both Sales Orders

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

- While you are still on the *Sales Orders* (SO301000) form, on the form toolbar, click **Create Shipment**.
- In the **Specify Shipment Parameters** dialog box, leave the default values and click **OK**.
- On the *Shipments* (SO302000) form, which opens with the newly created shipment, review the shipment details in the Summary area.
- On the **Details** tab, click **Add Order** on the table toolbar.
- In the Summary area of the **Add Sales Order** dialog box, which opens, open the lookup table for the **Order Nbr.** box, and select the sales order in the amount of \$148.07 (see the following screenshot). You created this order in Step 3.



**Figure: The added sales order for the shipment**

- 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**.
- On the form toolbar, click **Save**.
- On the form toolbar, click **Confirm Shipment**.

You have created and confirmed a single shipment for the sales orders that you created earlier in this activity.

- On the form toolbar, click **Prepare Invoice**.
- On the [Invoices](#) (SO303000) form, which opens with the prepared invoice, review the invoice that has been created for both sales orders.
- On the **Discounts** tab, review the discounts that have been applied to the invoice generated from the sales orders.

As the following screenshot shows, the table contains two lines, one with the *DOC0100000* automatic document discount in the amount of \$70, and the other with the *DOC0200000* automatic document discount by percent (25%) in the amount of \$103.75.

The screenshot shows the Invoices screen with the following details:

- Type:** Invoice
- Customer:** COFFEE SHOP - FourStar Coffee & Sweets
- Detail Total:** 621.00
- Line Discounts:** 0.00
- Document Dis...:** 173.75 (highlighted with a red box)
- Freight Total:** 0.00
- Tax Total:** 39.69
- Balance:** 486.94
- Cash Discount:** 0.00

The **DISCOUNTS** tab is selected. Below it is a table with the following data:

Skip Discount	Line Nbr.	Order Type	Order Nbr.	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Percent
>	1	SO	000076	DOC0100000	DOC0100001	Document	<input type="checkbox"/>	206.00	0.00	70.00	33.980583
	2	SO	000077	DOC0200000	DOC0200001	Document	<input type="checkbox"/>	415.00	0.00	103.75	25.000000

Figure: Sales invoices with applied automatic document discounts



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

12. On the form toolbar, click **Release** to release the invoice and complete the processing of sales order.

## Step 6: Making 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 Summary area, specify the following settings:
  - **Discount Code:** DOC0100000
  - **Sequence:** DOC0100001
3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.
5. In the Summary area, specify the following settings:
  - **Discount Code:** DOC0200000
  - **Sequence:** DOC0200001
6. Clear the **Active** check box to make the discount inactive.
7. Save your changes.

## Lesson 2.5: Creation of a Sales Invoice with Automatic and Manual Discounts

In this lesson, you will learn how to create a sales invoice with various automatic and manual discounts.

## Learning Objectives

In this lesson, you will learn how to do the following:

- Create item-specific discount codes for automatic group and line discounts and unconditional document discounts
- Define item-specific automatic group and line discounts and unconditional document discounts
- Make multiple pending discounts effective at the same time
- Create a sales invoice and learn how the system applies discounts
- Apply an external manual discount to the sales invoice
- Make existing discounts inactive

## Discounted Sales Invoice: To Create a Sales Invoice with Automatic Document and Manual Discounts

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In this activity, you will create three automatic document discounts and a manual discount in Acumatica ERP. You will then explore how these discounts are applied to sales invoices when the *Advanced SO Invoices* feature is enabled in the system.

### Story

Suppose that starting in January 2025, the SweetLife Fruits & Jams company is offering the following discounts for fruit that the company's customers purchase:

- A discount of 5% that will be applied to the cost of the fruit when the customer buys 100 pounds or more of oranges, grapefruit, or both
- A discount of 4% if the total invoice amount of all fruit sold to the customer greater than or equal \$300
- A \$5 discount for every 20 pounds of purchased apples

Suppose that in February 2023, the FourStar Coffee & Sweets Shop (*GOODFOOD*) company decided to have a large party with fruit and cocktails. A representative of the FourStar Coffee & Sweets Shop company's purchasing department called a sales manager of the SweetLife company and submitted an order for 170 pounds of fruit. After the SweetLife sales manager confirmed the availability of the fruit in stock, the customer's manager visited the SweetLife Store and ordered the necessary fruit.

Because the customer mentioned its plans to order fruit from SweetLife for its next party, the SweetLife sales manager decided to offer an additional discount of 3% for the first order total to acknowledge the loyalty of the FourStar Coffee & Sweets Shop company.

Acting as SweetLife's sales manager, you need to create the necessary discounts in the system and create a sales invoice.

## Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the *Enable/Disable Features* (CS100000) form, the *Customer Discounts* feature has been enabled to support the discount functionality.
- On the *Enable/Disable Features* form, the *Advanced SO Invoices* feature has been enabled to support the use of sales invoices.
- On the *Stock Items* (IN202500) form, the *APPLES*, *ORANGES*, and *GRAPEFRUIT* stock items have been created. All these items are available in stock.

- On the [Customers](#) (AR303000) form, the COFFEESHOP customer has been created.
- On the [Warehouses](#) (IN204000) form, the WHOLESALE warehouse has been created.

## Process Overview

To set up discounts, you will define discount codes on the [Discount Codes](#) (AR209000) form. You will then configure a line-item discount, group-item discount, and document discount on the [Discounts](#) (AR209500) form. Then on the [Update Discounts](#) (AR502500) form, you will update all these discounts to make multiple pending discounts effective at the same time.

To view how the discounts are automatically applied to the sales invoice, on the [Invoices](#) (SO303000) form, you will create a sales invoice of the *Invoice* type and add the necessary items. You will also apply an external manual discount to the sales invoice.

At the end of activity, you will make the discounts inactive.

## System Preparation

To prepare to perform the instructions of this activity, do the following:

1. Launch the provided Acumatica ERP instance and sign in as a sales manager by using the *chubb* username 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 1/30/2025. If a different date is displayed, click the Business Date menu button and select 1/30/2025. For simplicity, in this activity, you will create and process all documents in the system on this business date.

## Step 1: Creating Discount Codes

To configure the automatic discounts for the GoodFood One Restaurant customer, do the following:

1. Open the [Discount Codes](#) (AR209000) form.
2. Click **Add Row** on the form toolbar, and specify the following settings in the added row:
  - **Discount Code:** GRITD00000
  - **Description:** Group-item discount for grapefruit and oranges (5% for 100 units)
  - **Discount Type:** *Group*
  - **Applicable To:** *Item*
  - **Manual:** *Cleared*
  - **Auto-Numbering:** Selected
  - **Last Number:** GRITD00000
 With these settings, the discounts of this discount code are group discounts that are applicable to specific items. Because the **Manual** check box is cleared (the default setting for the row), these group discounts will be applied automatically to applicable lines of a document.
3. Save your changes.
4. Again click **Add Row** on the form toolbar, and specify the following settings in the added row:
  - **Discount Code:** DOCD00000
  - **Description:** Unconditional document discount (4% for \$300)
  - **Discount Type:** *Document*
  - **Applicable To:** *Unconditional*
  - **Manual:** *Cleared*

- **Auto-Numbering:** Selected
- **Last Number:** DOCD00000

With these settings, discounts of this discount code are unconditional discounts that are applicable to the entire document if the amount of goods sold equal or exceeds \$300. Because the **Manual** check box is cleared (the default setting), these document discounts will be applied automatically to applicable documents.

5. Save your changes.
6. Again click **Add Row** on the form toolbar, and specify the following settings in the added row:

- **Discount Code:** LINED00000
- **Description:** Line-item discount for apples (\$5 for every 20 units)
- **Discount Type:** Line
- **Applicable To:** Item
- **Manual:** Cleared
- **Auto-Numbering:** Selected
- **Last Number:** LINED00000

With these settings, discounts of this discount code are line discounts that are applicable to specific items. Because the **Manual** check box is cleared, these line discounts will be applied automatically to applicable lines of a document.

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

## Step 2: Defining the Automatic Group Discount for Items

To define the automatic group discount for particular stock items (*ORANGES* and *GRAPEFRUIT*), do the following:

1. On the *Discounts* (AR209500) form, add a new record.
2. In the Summary area, specify the following settings:
  - **Discount Code:** GRITD00000
  - **Discount By:** Percent
  - **Break By:** Quantity
  - **Active:** Selected
  - **Description:** Group-item discount for grapefruit and oranges (5% for 100 units)

With these settings, the discount (of the discount code *GRITD00000*, which you defined for group discounts that are applicable to specific items sold) is by percent, with break points by quantity.

3. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Pending Break Quantity:** 100
  - **Pending Discount Percent:** 5
  - **Pending Date:** 1/30/2025 (inserted by default)

4. On the **Items** tab, click **Add Row** on the table toolbar, and select *ORANGES* in the **Inventory ID** column.
5. Add another row, and in the **Inventory ID** column, select *GRAPEFRUIT*.

With the settings you have specified, the 5% discount will be applied to a group of lines of a sales document if the total quantity of the *ORANGES* and *GRAPEFRUIT* items is equal to 100 or more than 100.

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

## Step 3: Defining the Automatic Unconditional Document Discount

To define the automatic unconditional document discount, do the following:

1. On the **Discounts** (AR209500) form, add a new record.
2. In the Summary area, specify the following settings:
  - **Discount Code:** *DOCD00000*
  - **Discount By:** *Percent*
  - **Break By:** *Amount* (inserted by default)
  - **Active:** Selected
  - **Description:** Unconditional document discount (4% for \$300)

With these settings, the discount (of the discount code *DOCD00000*, which you defined for documents) 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.

3. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Pending Break Amount:** 300
  - **Pending Discount Percent:** 4
  - **Pending Date:** *1/30/2025* (inserted by default)
4. On the form toolbar, click **Save**.

## Step 4: Defining the Automatic Line Discount

To define the automatic line-item discount that applies to every 20 units of particular items (*APPLES*), do the following:

1. On the **Discounts** (AR209500) form, add a new record.
2. In the Summary area, specify the following settings:
  - **Discount Code:** *LINED00000*
  - **Discount By:** *Amount*
  - **Break By:** *Quantity*
  - **Prorate Discount:** Selected
  - **Active:** Selected
  - **Description:** Line-item discount for apples (\$5 for every 20 units)
3. With these settings, the discount (of the discount code *LINED00000*, which you defined for line discounts that are applicable to specific items) is by amount, with break points by quantity.
3. On the **Discount Breakpoints** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Pending Break Quantity:** 20
  - **Pending Discount Amount:** 5
  - **Pending Date:** *1/30/2025* (inserted by default)
4. On the **Items** tab, click **Add Row** on the table toolbar, and in the **Inventory ID** column, select *APPLES*.

With these settings specified, the \$5 discount will be applied to the line of the sales document containing the *APPLES* item for every 20 units. For example, if 23 items are ordered, \$5 will be applied, and if 45 items are ordered, \$10 will be applied.

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

## Step 5: Making the Pending Discounts Effective

In this step, you will make multiple pending discounts effective at the same time. Do the following:

1. Open the *Update Discounts* (AR502500) form.
2. In the **Update Discounts with Pending Date Before** box, select *1/30/2025*.  
The system displays a list of discount codes whose pending discount date is the same as or later than the current date.
3. In the table, select the unlabeled check boxes in the rows with the *DOCD00000*, *GRITD00000*, and *LINED00000* discount codes (as shown in the following screenshot).

	<input type="checkbox"/>	Discount Code	Sequence	Description	Discount by	Break by	Effective Date	Last Update Date
	<input checked="" type="checkbox"/>	DOCD00000	DOCD00001	Unconditional document discount (4% for \$300)	Percent	Amount	1/30/2025	
>	<input checked="" type="checkbox"/>	GRITD00000	GRITD00001	Group-item discount for grapefruit and oranges (5% for 100 units)	Percent	Quantity	1/30/2025	
	<input type="checkbox"/>	LINED00000	LINED00001	Line-item discount for apples (\$5 for every 20 units)	Amount	Quantity	1/30/2025	

Figure: Updating of multiple discounts

4. On the form toolbar, click **Process**. After processing has completed, close the **Processing** dialog box. Notice that in the **Last Update Date** column, the current date *1/30/2025* has appeared for the processed discounts.
5. Open the *DOCD00000*, *GRITD00000*, or *LINED00000* discount code on the *Discounts* (AR209500) form. On the **Discount Breakpoints** tab, for the sequences *DOCD00001*, *GRITD00001*, or *LINED00001* accordingly notice that the system has cleared the **Pending Date** column and that the **Effective Date** column now contains the current date *1/30/2025*.

## Step 6: Creating a Sales Invoice with Discounts

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

1. On the *Invoices* (SO303000) form, add a new record.
2. In the Summary area, specify the following settings:
  - **Order Type:** *Invoice*
  - **Customer:** *COFFEESHOP*
  - **Date:** *1/30/2025* (inserted by default)
  - **Description:** Selling fruit for *COFFEESHOP*
3. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Branch:** *RETAIL*
  - **Inventory ID:** *APPLES*
  - **Warehouse:** *WHOLESALE*

- **Location:** MAIN
- **Quantity:** 50
- **UOM:** LB
- **Unit Price:** 2.5

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

- **Branch:** RETAIL
- **Inventory ID:** ORANGES
- **Warehouse:** WHOLESALE
- **Location:** MAIN
- **Quantity:** 60
- **UOM:** LB
- **Unit Price:** 2.15

5. Again click **Add Row** on the table toolbar, and specify the following settings in the added row:

- **Branch:** RETAIL
- **Inventory ID:** GRAPEFRUIT
- **Warehouse:** WHOLESALE
- **Location:** MAIN
- **Quantity:** 60
- **UOM:** LB
- **Unit Price:** 1.30

6. Save your changes.

7. On the **Details** tab, review the line with *LINED00000* in the **Discount Code** column.

In the **Discount Amount** column, you can see that the line discount is \$10 for the apples. This is because the break point quantity is 20 units of measure (UOMs) and the COFFESHOP company has ordered 50 units (so the 20-unit discount of \$5 was applied twice) as shown in the following screenshot.

Branch	Inventory ID	Description	Warehouse	Location	Quantity	UOM	Unit Price	Manual Price	Ext. Price	Discount Percent	Discount Amount	Manual Discount	Discount Code	Amount
RETAIL	APPLES	Fresh apples 1 lb	WHOLESALE	MAIN	50.00	LB	2.5000		125.00	8.000000	10.00		LINED00000	115.00
RETAIL	ORANGES	Fresh oranges 1 lb	WHOLESALE	MAIN	60.00	LB	2.1500		129.00	0.000000	0.00			129.00
RETAIL	GRAPEFRUIT	Fresh grapefruit 1 lb	WHOLESALE	MAIN	60.00	LB	1.3000		78.00	0.000000	0.00			78.00

Figure: Line discount applied to the sales invoice

8. Go to the **Discounts** tab. Notice that the system has applied the automatic group discount (*GRITD00000*), which is 5% of the total cost of fruit (oranges and grapefruit) or \$10.35. In addition, the system has applied the automatic document discount (*DOCD00000*) of 4% of the discountable amount (\$311.65) because the amount exceeds \$300: 4% of \$311.65 is \$12.47 as shown in the following screenshot.

The screenshot shows the Invoices form for Invoice 000126. The top section displays basic invoice details: Type: Invoice, Customer: COFFEE SHOP - FourStar Coffee & Sweets, Status: On Hold, Date: 1/30/2025, Post Period: 01-2025, and Description: Selling fruit for COFFEE SHOP. Below this, the Discounts tab is selected, showing two rows of discounts applied to the invoice.

Skip Discount	Line Nbr.	Order Nbr.	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Free Percent Item	Free Item Qty.	External Discount Qty.	Description	
<input type="checkbox"/>	1		GRITD00000	GRITD00001	Group	<input type="checkbox"/>	207.00	120.00	10.35	5.000000	0.00			Group-item discount for grapefruit and oranges (5% for 100 units)
<input type="checkbox"/>	2		DOCD00000	DOCD00001	Document	<input type="checkbox"/>	311.65	0.00	12.47	4.000000	0.00			Unconditional document discount (4% for \$300)

Figure: Group and document discounts applied to the sales invoice

## Step 7: Applying the External Manual Discount

To apply the external manual discount to the sales invoice, while you are still viewing the sales invoice on the [Invoices](#) (SO303000) form, do the following:

1. On the table toolbar of the **Discounts** tab, click **Add Row** and specify 3 in the **Discount Percent** column.
2. Save your changes.
3. Review the discount amount that the system has applied to the sales invoice, which is \$9.35.

Also, notice that the balance of the sales invoice has decreased from \$325.73 to \$315.55 (see the following screenshot):

The screenshot shows the Invoices form for Invoice 000126. The top section displays basic invoice details. In the bottom right corner of the main area, the **Balance** field is highlighted with a red box and contains the value 315.55. The Discounts tab is selected, showing three rows of discounts applied to the invoice.

Skip Discount	Line Nbr.	Order Nbr.	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount Free Percent Item	Free Item Qty.	External Discount Qty.	Description	
<input type="checkbox"/>	1		GRITD00000	GRITD00001	Group	<input type="checkbox"/>	207.00	120.00	10.35	5.000000	0.00			Group-item discount for grapefruit and oranges (5% for 100 units)
<input type="checkbox"/>	2		DOCD00000	DOCD00001	Document	<input type="checkbox"/>	311.65	0.00	12.47	4.000000	0.00			Unconditional document discount (4% for \$300)
<input checked="" type="checkbox"/>	3				External Document	<input checked="" type="checkbox"/>	311.65		9.35	3.000000				

Figure: Applying of the external manual discount

4. Close the [Invoices](#) form. You do not need to process this sales invoice; you created it solely to test how the discounts are applied.

## Step 8: Making the Created Discounts Inactive

Now you will make the discounts that 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 Summary area, specify the following settings:
  - Discount Code:** GRITD00000
  - Sequence:** GRITD000001

3. Clear the **Active** check box to make the discount inactive.
4. Save your changes.
5. In the Summary area, specify the following settings:
  - **Discount Code:** *DOCD00000*
  - **Sequence:** *DOCD000001*
6. Clear the **Active** check box to make the discount inactive.
7. Save your changes.
8. In the Summary area, specify the following settings:
  - **Discount Code:** *LINED00000*
  - **Sequence:** *LINED000001*
9. Clear the **Active** check box to make the discount inactive.
10. Save your changes.

# Part 3: Vendor Prices

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In this part of the course, you will learn how vendor prices are defined in Acumatica ERP and how to upload a vendor price list with regular prices and promotional prices by using a vendor price worksheet. Also, you will analyze how the system suggests the last purchase price and standard cost in bills and purchase orders.

## Vendor Prices: General Information

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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. Specifying vendor prices for stock items is possible only if the *Inventory* feature is enabled on the [Enable/Disable Features](#) (CS100000) form.

### Vendor Price Types

The following types of vendor prices can be defined in the system:

- Regular vendor prices: Regular vendor prices are non-promotional prices. 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. If a regular price has an expiration date, it is 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. These prices have expiration dates, after which they are not applicable.

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 (UOMs), 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 this topic, you will read about uploading of 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.



In this lesson, a *regular* vendor price refers to a non-promotional price.

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](#) (AP101000) 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 **Vendors** 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** 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

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In this topic, you will read about automatic price selection in Acumatica ERP.

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:

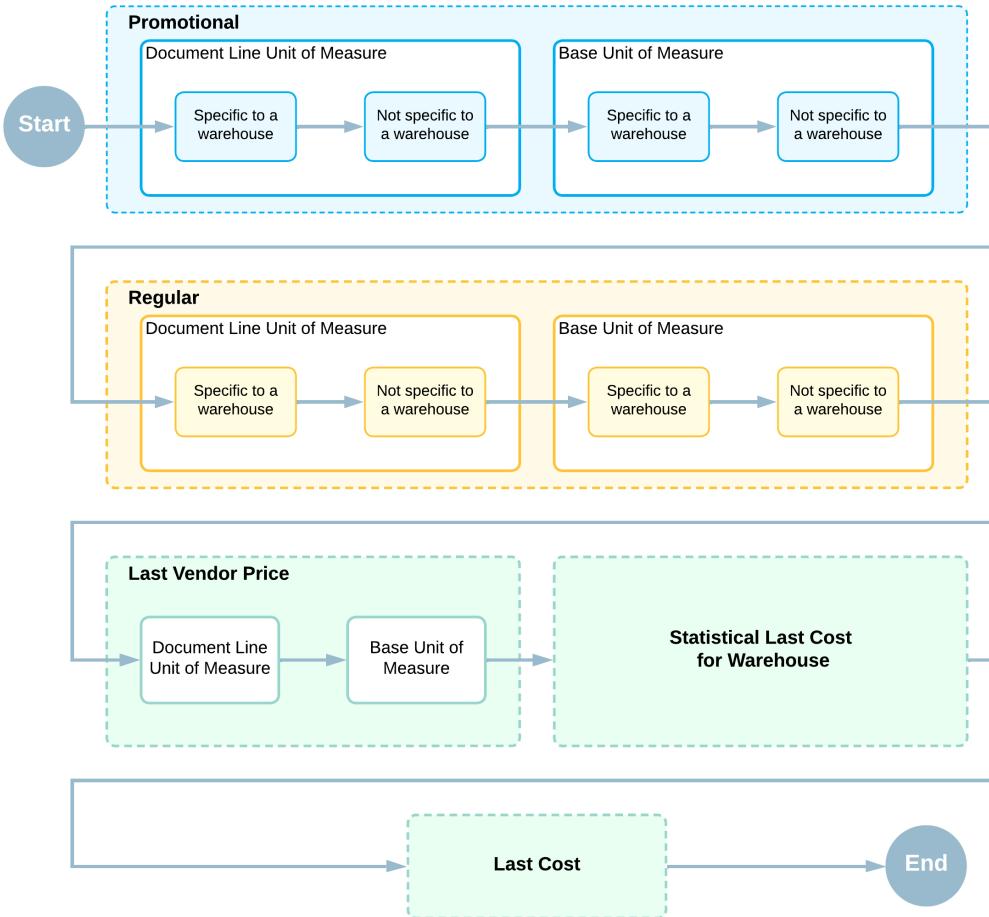
1. The system searches for a promotional price for the item in the following order:
  - a. A price specified for the item with the unit of measure that is selected in the document line. If multiple warehouses are defined in the system, the price specific to the warehouse selected in the document has 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.



In this lesson, a *regular* vendor price refers to a non-promotional price.

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.



## 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.



In this lesson, a *regular* vendor price refers to a non-promotional price.

### 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 (*BLUELINES*) 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 per hour for 0 to 4 hours of consulting services
- \$100 per hour for 5 to 9 hours of consulting services
- \$90 per hour for 10 or more hours of consulting services

On January 30, 2025, the marketing manager of SweetLife decided to purchase consulting services from Blueline Advertisement agency and you, acting as SweetLife's accountant, need to create a purchase order for this agency in the system.

## Configuration Overview

In the *U100* dataset, the following tasks have been performed to support this activity:

- On the [Enable/Disable Features](#) (CS100000) form, the *Volume Pricing* feature has been enabled.
- On the [Non-Stock Items](#) (IN202000) form, the *CONSULT*, *CAMPAIGN*, and *ADVERT* non-stock items have been created.
- On the [Vendors](#) (AP303000) form, the *BLUELINE* vendor has been created.

## Process Overview

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

You will create a list of vendor prices broken down by item quantity on the [Vendor Price Worksheets](#) form and review how the system suggests these prices when you create a purchase order for the vendor on the [Purchase Orders](#) (PO301000) form. You will 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 will 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

To prepare to perform the instructions of this activity, do the following:

1. Sign in to the system as an accountant by using the *johson* username and the *123* password.
2. Download the [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_01\\_01.xlsx](#), [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_06\\_01.xlsx](#), and [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_09\\_01.xlsx](#) files to your computer.
3. To prepare to perform the instructions of this activity, 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 *1/30/2025*. If a different date is displayed, click the Business Date menu button and select *1/30/2025*. For simplicity, in this activity, you will create and process all documents in the system on this business date.

### Step 1: Enabling the Needed Features

To enable the *Vendor Discounts* feature, do the following:

1. Open the [Enable/Disable Features](#) (CS100000) form.
2. On the form toolbar, click **Modify**.
3. Under the **Advanced Financials** group of features, select the **Vendor Discounts** check box.
4. On the form toolbar, click **Enable**.

### Step 2: Uploading 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:** 1/1/2025
  - **Description:** Regular prices of Blueline Advertisement, January
3. On the table toolbar, click **Load Records from File**.
4. In the **File Upload** dialog box, which opens, click **Choose File**.
5. In the window that opens, find the [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_01\\_01.xlsx](#) file and select it for upload.
6. In the **File Upload** dialog box, click **Upload**.
7. In the **Common Settings** dialog box, which opens while you are uploading the worksheet, leave the default settings and click **OK**.
8. In the **Columns** dialog box, which opens next, leave the default column mapping and click **OK**.
9. Make sure that the worksheet contains five lines and save the worksheet.
10. On the form toolbar, click **Remove Hold**, and then 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 1/1/2025.

### Step 3: Analyzing 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 **Pricing** 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 that is effective starting on 6/1/2025:
  - **Effective Date:** 6/1/2025
  - **Description:** Regular prices of Blueline Advertisement, June
5. On the table toolbar, click **Load Records from File**.
6. In the **File Upload** dialog box, which opens, click **Choose file**.
7. In the window that opens, find the [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_06\\_01.xlsx](#) file and select it for upload.
8. In the **File Upload** dialog box, click **Upload**.
9. In the **Common Settings** dialog box, which opens while you are uploading the worksheet, leave the default settings and click **OK**.
10. In the **Columns** dialog box, which opens next, leave the default column mapping and click **OK**.
11. Make sure that the worksheet contains five lines and save the worksheet.
12. On the form toolbar, click **Remove Hold**, and then click **Release** on the form toolbar to release the worksheet and make the prices effective in the system.
13. Open the [Vendor Prices](#) (AP202000) form.
14. Clear the **Effective As Of** box.
15. 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 5/31/2025, because you have uploaded new prices effective from 6/1/2025.

16. 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 9/1/2025:
  - **Effective Date:** 9/1/2025
  - **Description:** Regular prices of Blueline Advertisement, September
17. On the table toolbar, click **Load Records from File**.
18. In the **File Upload** dialog box, which opens, click **Choose file**.
19. In the window that opens, find the [PricesAndDiscounts\\_VendorPrices\\_BLUELINE\\_2025\\_09\\_01.xlsx](#) file and select it for upload.
20. In the **File Upload** dialog box, click **Upload**.
21. In the **Common Settings** dialog box, which opens while you are uploading the worksheet, leave the default settings and click **OK**.
22. In the **Columns** dialog box, which opens next, leave the default column mapping and click **OK**.
23. Make sure that the worksheet contains five lines and save the worksheet.
24. On the form toolbar, click **Remove Hold**, and then click **Release** to release the worksheet and make the prices effective in the system.
25. Open the [Vendor Prices](#) form.
26. In the **Vendor** box of the Summary area, select *BLUELINE*.
27. In the **Inventory ID** box, select *ADVERT*.
28. Clear the **Effective As Of** box 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 9/1/2025 and the previous price (\$30) that expired on 8/31/2025.

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 4: Creating 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:** 1/1/2025
  - **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 or more hours of consulting services:
- **Vendor:** *BLUELINE*
  - **Inventory ID:** *CONSULT*
  - **UOM:** *HOUR*
  - **Break Qty:** 10.00
  - **Pending Price:** 90.00
6. On the form toolbar, click **Remove Hold**, and then click **Release** to release the worksheet (see the following screenshot).

*Vendor	*Inventory ID	Description	*UOM	Warehouse	Break Qty	Source Price	Pending Price
BLUELINE	CONSULT	Consulting (advertisement)	HOUR		0.00	0.0000	110.0000
BLUELINE	CONSULT	Consulting (advertisement)	HOUR		5.00	0.0000	100.0000
BLUELINE	CONSULT	Consulting (advertisement)	HOUR		10.00	0.0000	90.0000

**Figure: Volume-based vendor prices**

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:** *1/30/2025*
  - **Description:** Consulting services
9. On the **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 (see the following screenshot).

The screenshot shows a Purchase Orders screen with the following details:

- Type:** Normal
- Vendor:** BLUELINES - Blueline Advertisement
- Location:** MAIN - Primary Location
- Status:** On Hold
- Date:** 1/30/2025
- Order Total:** 1,690.00
- Description:** Consulting services

The **DETAILS** tab is selected, showing the following table:

Branch	Inventory ID	Line Type	Warehouse	Line Description	UOM	Order Qty.	Qty. On Receipts	Unit Cost	Ext. Cost
HEADOFFICE	CONSULT	Service		Consulting (advertisement)	HOUR	1.00	0.00	110.0000	110.00
HEADOFFICE	CONSULT	Service		Consulting (advertisement)	HOUR	5.00	0.00	100.0000	500.00
HEADOFFICE	CONSULT	Service		Consulting (advertisement)	HOUR	12.00	0.00	90.0000	1,080.00

**Figure: Purchase order with volume-based vendor prices**

You do not need to save or process this purchase order. You created it solely to test how the vendor prices are selected.

## Step 5: Analyzing 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** tab, specify 390 in the **Pending Cost** box in the **Standard Cost** section and 1/20/2025 in the **Pending Cost Date** box.
4. On the More menu (under **Other**), click **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:** *BLUELINES*
  - **Date:** *1/30/2025*
  - **Description:** Advertising campaign
7. On the **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. On the form toolbar, click **Remove Hold**, and then on the More menu (under **Processing**), click **Enter AP Bill** to create an AP bill for the order.
10. On the [Bills and Adjustments](#) (AP301000) form, which opens, click **Remove Hold**, and then on the form toolbar, click **Release** to release the bill.

11. Open the **Non-Stock Items** form.
12. In the **Inventory ID** box, select **CAMPAIGN**.
13. On the **Vendors** 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 (see the following screenshot).

The screenshot shows the 'Non-Stock Items' application interface. At the top, it displays 'Non-Stock Items' and 'CAMPAIGN - Advertising campaign'. The toolbar includes standard icons for back, forward, search, and file operations. Below the toolbar, there are input fields for 'Inventory ID' (set to 'CAMPAIGN - Advertising campaign'), 'Item Status' (set to 'Active'), 'Product Workgroup' (empty), and 'Product Manager' (empty). A description field contains 'Advertising campaign'. The main area features a tabbed navigation bar with 'GENERAL', 'PRICE/COST', 'VENDORS' (which is selected and highlighted in blue), 'CROSS-REFERENCE', 'RELATED ITEMS', 'PACKAGING', 'GL ACCOUNTS', and 'ATTRIBUTES'. Below the tabs is a toolbar with icons for refresh, add, delete, and search. The 'VENDORS' section contains a table with columns: Active, Default, \*Vendor ID, Vendor Name, Location, \*Purchase Unit, Vendor Inventory ID, Last Vendor Price, and Prepayment Percent. A single row is visible for 'BLUELINE' with the vendor name 'Blueline Advertisement', location 'MAIN', purchase unit 'DAY', and last vendor price '350.0000'.

**Figure: Last vendor price on the Non-Stock Items form**

14. Open the **Bills and Adjustments** form.
15. On the form toolbar, click **Add New Record**, and specify the following settings in the Summary area:
  - **Type:** Bill
  - **Vendor:** BLUELINE
  - **Date:** 1/30/2025
  - **Description:** Advertising campaign
16. On the **Details** tab, click **Add Row** on the table toolbar, and specify the following settings in the added row:
  - **Branch:** HEADOFFICE
  - **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.

The screenshot shows the 'Bills and Adjustments' form with a single record for a bill from 'BLUELINES Blueline Advertisement'. The 'DETAILS' tab is active, displaying a table with one row. The table has columns for Branch, Inventory ID, Transaction Descr., Quantity, UOM, Unit Cost, Ext. Cost, Discount Amount, and Amount. The 'Unit Cost' field contains '350.0000', which is highlighted with a red border.

* Branch	Inventory ID	Transaction Descr.	Quantity	UOM	Unit Cost	Ext. Cost	Discount Amount	Amount
HEADOFFICE	CAMPAIGN	Advertising campaign	1.00	DAY	350.0000	350.00	0.00	350.00

**Figure: The last vendor price on the Bills and Adjustments form**

You do not need to save or process this bill. You created it solely to test how the purchase price is suggested.

## Step 6: Adding a Promotional Price and Creating a Purchase Order

To add a promotional price for the *BLUELINES* 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:** *BLUELINES*
    - **Inventory ID:** *CONSULT*
    - **UOM:** *HOUR*
    - **Promotional:** Selected
    - **Price:** 95.00
    - **Effective Date:** 1/1/2025
    - **Expiration Date:** 3/31/2025
  - c. On the form toolbar, 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:** *BLUELINES*
  - **Date:** *1/30/2025*
  - **Description:** *Consulting services*
4. On the **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 1/1/2025 to 3/31/2025 and overrides regular vendor price defined in the system.

6. In the **Date** box in the Summary area, change the date to 4/30/2025.
7. In the **Warning** message that opens, click **Yes**.
8. Review the value in the **Unit Cost** column.

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

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

*Figure: Updated unit cost in the purchase order*

You do not need to save or process this purchase order. You created it solely to test how the unit costs are suggested.