

MYOB Advanced Quick Guide Sales Prices and Discounts

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Introduction

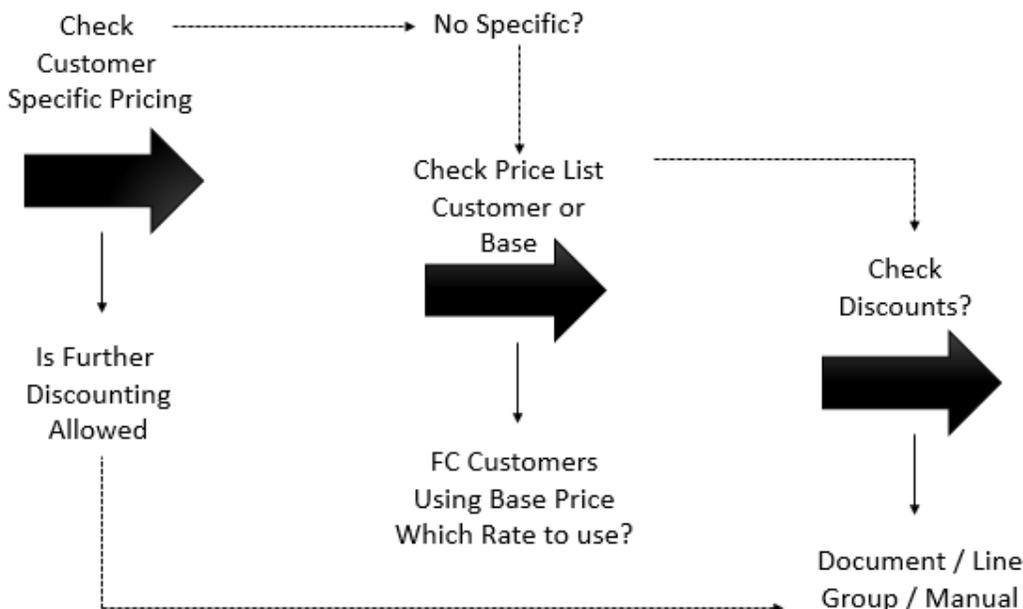
This quick guide discusses the available sales pricing strategies that can be deployed within MYOB Advanced sales transaction.

The sales strategies that are discussed are the setup of base prices, the price list structure and also various discount scenarios at hand with examples of how the discounts are applied.

This quick guide takes screen shots from and was tested using MYOB Advanced Enterprise edition Version 1.00.4412.00

Sales Pricing Methodology

The diagram below outlines the flow that determines how an inventory item is priced in a sales transaction. MYOB Advanced uses either Customer Prices or Sales Prices to determine how an item is priced for a sales transaction. Depending on which pricing method is used leads to the next option, should the item be discounted?



The starting point is the question does the customer have specific pricing for the item being sold? If the client does then the sales price list will be ignored for that item and the customer price will override the sales price used in the sales transaction.

When customer price is the method used to price the inventory item in the sales transaction the next question is determined from the setting *Ignore Configured Discounts When Customer-Specific Price is Defined*, which is found in the Price / Discount Calculation Tab found in menu path [Finance \ AR \ Configuration \ Setup \ AR Preferences].

Ignore Configured Discounts When Customer-Specific Price is Defined

By switching this option on you have the option to enforce that the customer price agreed will not be discounted by any further discounts. If this setting is switched off then the customer can enjoy a discount on this item if applicable.

If customer specific prices are not used then the sales price list will decide the inventory item sales price to be used in a sales transaction.

By default MYOB Advanced provides a default price list called the BASE price list.

Every stock and non-stock item that is created is immediately assigned to the BASE price list and the price assigned to the BASE price list is taken from the field Current Price on the Price / Cost tab on the item master record in the default currency.

It is not mandatory to work with multiple price lists, if that is the case then every transaction where there is no customer specific pricing will take the price from the BASE price list.

Should you sell on an infrequent basis to foreign customers and you are happy to invoice in the foreign currency without maintaining a foreign currency sales price list then it is important to enable the setting *Always Calculate Price from Base Currency Price*.

This setting will convert the BASE price in to the foreign currency based on the exchange rate used by the customer, this exchange rate is determined by the rate type linked to the customer. If this setting is not switched on then the Unit Price on the sales transaction will be \$0 and the end user would have to specify the price. This setting is found which in the Price / Discount Calculation Tab found in menu path [Finance \ AR \ Configuration \ AR Preferences].

The screenshot shows a configuration window titled "Price Calculation Details". It contains a "Default Rate Type" dropdown menu with "SPOT" selected. Below this, there is a checked checkbox labeled "Always Calculate Price from Base Currency Price".

If you want to sell an item at differing prices or currencies to differing sets of customers this can be achieved by using multiple price lists and assigning differing prices or currencies per price list.

The client can then be assigned to a price list that matches the price that you want the client to receive when ordering.

Every price list allows the ability to sell at a different price based on a quantity break, so the base price may be \$100 but the Trade Price list may be \$95 and this trade price can be lower, let's say \$90 when buying 10 or more items.

If a customer orders an item that is not included on the price list assigned to the customer then the price of the item is taken from the BASE price list.

Further pricing rules can be specified by using a discounting structure, this quick guide will discuss a number of discounting strategies including

- Document discounts
- Line item discounts
- Group discounts
- Manual discounts
- Enforcing Discount limits to protect margin

Working with Customer Specific Prices

Customer prices is the starting point for determining the sales price used on a sales transaction, if there is no customer price set then the customer price class (price list) associated to the customer will be used in the sales transaction. If the customer is not attached to a price list or the item sold is not attached to a price list linked to the customer then the BASE price list will be used.

Customer Prices

Customer prices are specified per customer in menu path [Finance \ AR \ Work Area \ Manage \ Customer Prices]. In the screen below you will see that this customer has a customer price of \$85 for this inventory stock item.

MAIN - Customer Prices

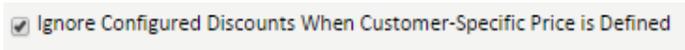
Customer: EXAMPLE0 - Example Zero Price Manager: Me
 Currency: USD Price Workgroup: My
 Promotional Prices Item Price Class:
 Item Class:

Preload from Inventory Select an Action: Copy Prices Process Process All

Inventory ID	Current Break Qty	Current Price	Effective Date	Last Break Qty	Currency	Pending Price	Pending Price Date	Pending Break Qty	Last Price
EXAMPLE0	1.00	85.000000	10/12/2014	0.00	USD	0.000000		0.00	0.000000

This price will override any given price that is included on a sales price list.

The following setting on the Price/Discount Calculation tab *Ignore Configured Discounts When Customer Specific Price* in menu path [Finance \ AR \ Configuration \ Setup \ AR Preferences] will determine if any further discount of the item will be allowed.



When this setting is enabled then the discount codes will be ignored in pricing the inventory item. If this option is switched off then the client may receive a further discount on the inventory item transaction.

In this example the customer sales order will take the customer specific price of \$85 and ignore all further discounts due to the setting "Ignore Configured Discounts when customer-specific price is defined" is enabled.

Order Type: SO Customer: EXAMPLE0 - Example Zero Ordered Qty.: 1.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 Date: 11/12/2014 Project: X - Non-Project Code. Order Total: 85.00
 Requested On: 11/12/2014 Description:
 Customer Order:
 Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

Branch	Inventory ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE0		RESALE	PC	1.00	0.00	1.00	85.000000	0.000000	0.00	

Working with Sales Price Lists

If a customer has no specific pricing arrangement then the item price used in the sales transaction will be taken from a price list, this may be the BASE price list or the price list linked to the customer.

Now it has been established that the sales transaction will retrieve the sales price from a price list, MYOB Advanced will check if the inventory item used in the sales transaction is listed on the price list linked to the customer. If the item is listed the next check is the quantity ordered is cross referenced to determine the correct sales price based on quantity breaks.

If the item is not on the price list linked to the customer then the BASE price will be used.

Customers that do not have specific pricing and are not linked to a price list will use sales price from the BASE price list in the sales transaction.

This section will explain the BASE price list and outline how to work with sales prices and cover possible scenarios that you may face.

Base Price List

The BASE price list is an inbuilt system price list based in the default currency of the company. Every inventory which is created in MYOB Advanced is automatically added to this price list when the inventory item is saved.

The price that is used on the BASE price list is taken from the Current Price from the Inventory Master record, the field current price is located on the tab Price/Cost Info tab of the item master record.

Example 1 – Reading the price from the BASE Price List

In this example the sales transaction will read the price from the BASE price list. In the screen shot below the inventory item is priced at \$50 on the master record under the tab Price/Cost.

The screenshot shows the 'Price/Cost Info' tab of an inventory item master record. The 'Base Price' section contains the following fields:

- Price Class: [Empty]
- Pending Price: 0.000000
- Pending Price Date: [Dropdown]
- Current Price: 50.000000** (highlighted with a red box)
- Effective Date: 08/12/2014
- Last Price: 0.000000

The 'Price Management' section contains the following fields:

- Price Workgroup: [Empty]
- Price Manager: [Empty]
- Subject to Commission
- Min. Markup %: 0.000000
- Markup %: 0.000000
- MSRP: 0.000000

The screen shot below demonstrates the current price of the item is consequently populated on to the BASE price list.

The screenshot shows the 'Customer Price Class' configuration screen. The 'Current Price' field is populated with 50.000000. Below the configuration is a table showing the current price for the item.

Inventory ID	Description	Price Class	*UOM	Current Break Qty	Current Tax Price	Effective Date	Last Break Qty	Last Price	Currency
EXAMPLE1	Using the Stock Item...		PC	0.00	50.000000	08/12/2014	0.00	0.000000	USD

In the screen shot below demonstrate that the customer master data reflects no price list is linked therefore the sales price used in the sales transaction is derived from the BASE pricelist.

Customer ID: EXAMPLE1 Status: Active Balance: 0.00
 Customer Name: Example 1 Prepayments Balance: 0.00

General Info Billing Settings **Delivery Settings** Locations Payment Methods Contacts Salespersons GL Accounts Mailing Settings

Shipping Contact **Default Location Settings**

Company Name: Example 1 Same as Main Location Name: Primary Location
 Attention: Tax Registration ID: Tax Zone: Shipping Branch: Price Class ID:

In the sales order transaction below the price of the item \$50 which is taken from the BASE price list.

Order Type: SO Customer: EXAMPLE1 - Example 1 Ordered Qty.: 1.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 Date: 15/12/2014 Project: X - Non-Project Code Order Total: 50.00
 Requested On: 15/12/2014 Description: Customer Order: Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

Bin/Lot/Serial	Add Invoice	Add Item	PO Link	Inventory Summary							
*Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE1	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	50.000000	0.000000	0.00	

Example 2 – Using the Base Price List to calculate the price in Foreign Currency

This example will demonstrate what happens when the setting *Always Calculate Prices from Base Currency Price* which is found on the Price/Discount Calculation tab in menu path [Finance \ AR \ Configuration \ AR Preferences] is enabled.

General Settings **Price/Discount Calculation** Dunning Settings Mailing Settings

Price Calculation Details

Default Rate Type: SPOT Always Calculate Price from Base Currency Price

The following customer who transacts in GBP will be used for this example.

Customer ID: EXAMPLE2 Status: Active Balance: 0.00
 Customer Name: Example 2 Prepayments Balance: 0.00

General Info | Billing Settings | Delivery Settings | Locations | Payment Methods | Contacts | Salespersons | GL Accounts | Mailing Settings

Main Contact

Company Name: Example 2
 Attention:
 Email:
 Web:
 Phone 1:
 Phone 2:
 Fax:
 Account Ref. #:
 Parent Record:

Financial Settings

Customer Class: DEFAULT - Customer within NY Area
 Terms: 07D - 7 Days
 Statement Cycle ID: 15
 Auto-Apply Payments
 Apply Overdue Charges
 Enable Write-Offs
 Write-Off Limit: 0.00
 Currency ID: GBP Enable Currency Override
 Curr. Rate Type: BANK Enable Rate Override

This client is also not linked to any price class ID therefore the BASE price list will be used, remember the BASE price list is in the default currency which is USD.

General Info | Billing Settings | Delivery Settings | Locations | Payment Methods | Contacts | Salespersons | GL Accounts | Mailing Settings

Shipping Contact

Same as Main
 Company Name: Example 2
 Attention:
 Email:
 Web:

Default Location Settings

Location Name: Primary Location
 Tax Registration ID:
 Tax Zone:
 Shipping Branch:
 Price Class ID:

The Sales transaction for this customer is as follows;

Order Type: SO Customer: EXAMPLE2 - Example 2 Ordered Qty.: 1.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: GBP 1.63934426 View base VAT Taxable Tot.: 0.00
 Hold Credit Hold Tax Total: 0.00
 Date: 15/12/2014 Project: X - Non-Project Code. Order Total: 30.50
 Requested On: 15/12/2014 Description:
 Customer Order:
 Customer Ref.:

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

Branch	Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE2	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	30.500000	0.000000	0.00	

The way that the above is calculated is as follows. As there was no customer specific pricing or price list used the sales transaction took the BASE price of \$50. Due to the enablement of the setting *Always Calculate Prices from Base Currency Price* the \$50 Base price is converted to GBP at the exchange rate that is used on the rate type linked to the customer.

Example 3 – Transacting with a foreign customer with no price list and ignoring the Base Price List

This example will demonstrate what happens when the setting *Always Calculate Prices from Base Currency Price* which is found on the Price/Discount Calculation tab in menu path [Finance \ AR \ Configuration \ AR Preferences] is disabled.

General Settings | Price/Discount Calculation | Dunning Settings | Mailing Settings

Price Calculation Details

Default Rate Type: SPOT

Always Calculate Price from Base Currency Price

The client in this example is also using the British Pound as its currency.

+ Customer ID: EXAMPLE3 | Status: Active | Balance: 0.00

+ Customer Name: Example 3 | Prepayments Balance: 0.00

General Info | Billing Settings | Delivery Settings | Locations | Payment Methods | Contacts | Salespersons | GL Accounts | Mailing Settings

Main Contact

Company Name: Example 3

Attention:

Email:

Web:

Phone 1:

Phone 2:

Fax:

Account Ref. #:

Parent Record:

Financial Settings

+ Customer Class: DEFAULT - Customer within NY Area

Terms: 07D - 7 Days

+ Statement Cycle ID: 15

Auto-Apply Payments

Apply Overdue Charges

Enable Write-Offs

Write-Off Limit: 0.00

Currency ID: GBP Enable Currency Override

Curr. Rate Type: BANK Enable Rate Override

Also this client is not linked to any price class ID therefore the BASE price list would be used in any sales transaction.

General Info | Billing Settings | Delivery Settings | Locations | Payment Methods | Contacts | Salespersons | GL Accounts | Mailing Settings

Shipping Contact

Same as Main

Company Name: Example 3

Attention:

Email:

Web:

Default Location Settings

Location Name: Primary Location

Tax Registration ID:

Tax Zone:

Shipping Branch:

Price Class ID:

From the above configuration the sales order transaction will populate a unit price of \$0. This configuration requires the end user to enter a GBP price for this sales transaction.

The screenshot shows a sales order configuration window. At the top, there are fields for Order Type (SO), Customer (EXAMPLE3 - Example 3), Location (MAIN - Primary Location), Currency (GBP), and Date (15/12/2014). Below these are tabs for Document Details, Tax Details, Commissions, Financial Settings, Payment Settings, Shipping Settings, Discount Details, Shipments, Payments, and Totals. A table below the tabs shows the following data:

Branch	Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE3	<input type="checkbox"/>	RESALE	PC	0.00	0.00	0.00	0.000000	0.000000	0.00	

Customer Price Lists

Customers can be grouped into differing categories such as customer types (Retail or trade) or customer locations (European or American). When categorizing these customers you may want to sell at different prices or sell in different currencies.

Customer price lists allow you to group your inventory items into price lists to meet these needs. These price lists are then assigned to the customers.

Example 4 – Working with a sales price List

This example will demonstrate the inventory pricing used in a sales transaction when a customer is linked to a price list.

In this example the following inventory item and price list will be used.

The screenshot shows a Customer Price List configuration window. It includes fields for Customer Price Class (CUPRICE001 - Customer price class 1), Currency (USD), and various other settings. Below the configuration is a table with the following data:

Inventory ID	Description	Price Class	UOM	Pending Price Date	Pending Break Qty	Pending Price	Pending Tax	Current Break Qty	Current Tax Price	Effective Date
EXAMPLE2	Using a Sales Price List		PC		0.00	0.000000		1.00	45.000000	08/12/2014
EXAMPLE2	Using a Sales Price List		PC		0.00	0.000000		5.00	40.000000	10/12/2014

Also the following customer will be used which is linked to the price list above.

The screenshot shows a Customer configuration window for 'EXAMPLE4'. It includes fields for Customer ID, Name, Status (Active), Balance (0.00), and Prepayments Balance (0.00). Below are tabs for General Info, Billing Settings, Delivery Settings, Locations, Payment Methods, Contacts, Salespersons, GL Accounts, and Mailing Settings. The 'Delivery Settings' tab is active, showing 'Shipping Contact' (Same as Main) and 'Default Location Settings' (Primary Location). The 'Price Class ID' field is highlighted with a red box and contains the value 'CUPRICE001'.

The sales order transaction will check the price list CURPRICE001 to get the correct sales price for the inventory item.

* Order Type: SO * Customer: EXAMPLE4 - Example4 Ordered Qty.: 6.00
 Order Nbr.: <NEW> * Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 * Date: 15/12/2014 * Project: X - Non-Project Code. Order Total: 240.00
 * Requested On: 15/12/2014 Description:
 Customer Order:
 Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

*Inventor ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
EXAMPLE2	<input type="checkbox"/>	RESALE	PC	6.00	0.00	6.00	40.000000	0.000000	0.00	

Changing the quantity from 6 to 1 will refresh the pricing in the sales transaction as per the sales price list.

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

*Inventor ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
EXAMPLE2	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	45.000000	0.000000	0.00	

Discounting

MYOB Advanced offers a number of discounting strategies that can be used in conjunction with customer specific pricing and sales prices.

This section will discuss the setup of discounts and provide a number of discounting example behavior that each configuration will offer.

Creating Discount Codes

MYOB Advanced uses discount codes as the mechanism for discounting in a sales transaction. Discount codes are created in menu path [Finance \ AR \ Configuration \ Manage \ Discount Codes].

Navigation: << Refresh MAIN ▾ Discount Codes ☆

Actions: Save, Undo

*Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
> EX4	Example 4 Document Discount over \$1k	Document	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EX5	Example 5 - 10% line discount on 10 or more	Line	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EX6	Group Discount Buy two get one free	Group	Warehouse and Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EX7	Line Discount to be used with document discount	Line	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EX8	Exclude from Discountable Amount	Line	Item	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
EX9	Group total excluded from document discount	Group	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EX91	Manual line item discount	Line	Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EX912	Example 12 Group Prorate on item	Group	Customer and Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Discount Type

There are 3 types of discount that you can work with which are Document, Line and Group discounts. A document discount is applied to the whole document. A line discount is a discount specified at line item level, these discounts can be included or excluded from a document discount. Finally group discounts allow you to offer discounts by free item, this is where you would want to offer a free item(s) instead of a percentage or amount.

Applicable To

This column setting is how the discount code will be applied in the sales transaction, the line and group discounts offer 15 options whereas the document discount only offers 5.

Manual

This column settings determines whether the discount would be automatically applied or manually applied. If this setting is ticked the discount will have to be manually applied to the sales transaction. If this column setting is not enabled then the discount will automatically be applied should the discounting criteria be met.

Exclude from Discountable Amount

This column setting is only available for line item discounts. When enabled this will exclude the line item discount from being included in any further discounts such as a document discount.

Skip Document Discounts

This column setting is only available for group item discounts. When enabled this will only apply the group discount to the whole sales transaction and all other discounts will be ignored.

Managing Discount Codes

Once a discount code has been created it is managed via menu path [Finance \ AR \ Work Area \ Manage \ Discounts].

In this menu path based is where you would set the characteristics and discounts rules of how the discount would be applied in a sales transaction.

For a discount to be available the discount needs to be active and also the pending values need to be applied by using the Update Discounts button.

MAIN ▾ Discounts ☆

Update Discounts

Discount Code: EX4 Discount by: Percent Prorate Discount

Sequence: 01 Break by: Amount

Active
 Promotional

Description: Example 4 Document Discount over \$1k

Discount Breakpoints Customers

Break Amount	Discount Percent	Pending Break Amount	Pending Discount Percent	Pending Date	Last Break Amount	Last Effective Date
1,000.000000	5.00	0.000000	0.00		0.000000	0.00 08/12/2014

If a discount requires to have an end date the setting *Promotional* should be enabled. Selecting this option will allow the discount to have a specified effective and expiration date for the discount.

MAIN ▾ Discounts ☆

Update Discounts

Discount Code: EX4 Discount by: Percent Prorate Discount

Sequence: 01 Break by: Amount

Active
 Promotional Effective Date: 08/12/2014 Expiration Date: 31/12/2014

Description: Example 4 Document Discount over \$1k

Discount Breakpoints Customers

Break Amount	Discount Percent
1,000.000000	5.00

Working with Discounts

In this section a number of discount examples are demonstrated. In each example the setup will be explained and how the discount will be used in the sales transaction will also be demonstrated.

Example 1 – Document Discount

In this document discount example a 5% discount will be applied to a sales transactions when the sales transaction is over \$1,000. This document discount will be applicable for specific customers only.

The following discount code has been created.

Navigation: << MAIN ▾ Discount Codes ☆

Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
> EX4	Example 4 Document Discount over \$1k	Document	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount code has the following characteristics

• Discount Code: Discount by: Prorate Discount
 • Sequence: Break by:
 Active
 Promotional
 Description:

Discount Breakpoints Customers

Break Amount	Discount Percent	Pending Break Amount	Pending Discount Percent	Pending Date	Last Break Amount	Last Discount Percent	Effective Date
> 1,000.000000	5.00	0.000000	0.00		0.000000	0.00	08/12/2014

And the discount is available to the following customers.

Discount Breakpoints Customers

*Customer	Customer Name
> EXAMPLE4	Example4
EXAMPLE7	EXAMPLE7

Line 1 of the sales transaction below is for \$1,000 and therefore the document discount is applied and the order total reflects the 5% discount that the customer qualifies for.

Order Type: SO	Customer: EXAMPLE4 - Example4	Ordered Qty.: 20.00
Order Nbr.: <NEW>	Location: MAIN - Primary Location	VAT Exempt Total: 0.00
Status: Open	Currency: USD 1.00	VAT Taxable Tot...: 0.00
	<input type="checkbox"/> Credit Hold	Tax Total: 0.00
Date: 15/12/2014	Project: X - Non-Project Code.	Order Total: 950.00
Requested On: 15/12/2014	Description:	
Customer Order:		
Customer Ref:		

Further details of the discount can be viewed from the Discount Details tab and also the totals tab.

Skip Discount	*Discount Code	Sequence ID	Type	Manual Discount	Discountabl Amt.	Discountabl Qty.	Discount Amt.	Discount	Free Item	Free Item Qty.
<input type="checkbox"/>	EX4	01	Document	<input type="checkbox"/>	1,000.00	0.00	50.00	5.00		0.00

Example 2 – Line Discount

In this line discount example a 10% discount will be applied at line level for every sales transaction for item EXAMPLE5 when 10 units or more are bought.

The following discount code has been created.

*Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX5	Example 5 - 10% line discount on 10 or more	Line	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount code has the following characteristics.

Discount Code: EX5	Discount by: Percent	<input type="checkbox"/> Prorate Discount
Sequence: 01	Break by: Quantity	
<input checked="" type="checkbox"/> Active		
<input type="checkbox"/> Promotional		
Description: Example 5 - 10% line discount on 10 or more		

Break Quantity	Discount Percent	Pending Break Quantity	Pending Discount Percent	Pending Date	Last Break Quantity	Last Discount Percent	Effective Date
10.00	10.00	0.00	0.00			0.00	08/12/2014

This line discount is only applicable to the following inventory item but available to all customers.

Discount Breakpoints		Items
*Inventory ID	Description	
> EXAMPLES	Line Discount	

The sales transaction below applies the discount as specified by the discount code.

Order Type: SO | Customer: EXAMPLE5 - Example5 | Ordered Qty.: 10.00
 Order Nbr.: 000717 | Location: MAIN - Primary Location | VAT Exempt Total: 0.00
 Status: Open | Currency: USD 1.00 | View base | VAT Taxable Tot...: 0.00
 Date: 15/12/2014 | Project: X - Non-Project Code. | Tax Total: 0.00
 Requested On: 15/12/2014 | Description: | Order Total: 450.00

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

*Branch	*Inventory ID	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount	Disc. Unit Price
MAIN	EXAMPLES	RESALE	PC	10.00	0.00	10.00	50.000000	10.000000	50.00	EX5	<input type="checkbox"/>	45.000000

The discount code and amount are shown at line level and are not specified on the discount details tab or the totals tab.

Example 3 – Group Discount

In this group discount example the following will occur, for every sales transaction that buys 2 or more units of item EXAMPLE6 will receive a free EXAMPLE6 item when bought from the warehouse RESALE.

The following discount code has been created.

Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
> EX6	Group Discount Buy two get one free	Group	Warehouse and Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount code has the following characteristics.

Discount Code: EX6 | Discount by: Free Item | Prorate Discount
 Sequence: 01 | Break by: Quantity
 Active
 Promotional
 Description: Group Discount Buy two get one free

Discount Breakpoints | Items | Warehouses | Free Item

Break Quantity	Free Item Qty.	Last Break Quantity	Last Free Item Qty.	Effective Date
> 2.00	1.00			08/12/2014

The discount is available only for item EXAMPLE6.

Discount Breakpoints		Items	Warehouses	Free Item
*Inventory ID	Description			
> EXAMPLE6	Group Discount			

The discount will only be applied when the above item is used and the quantity is greater than 2 and also the discount is also applying a further restriction based on the following warehouse.

Discount Breakpoints		Items	Warehouses	Free Item
Warehou	Description			
> RESALE	Wholesale purchase warn but allow on fly			

When all the criteria are met then the discount will include the following free item into the sales transaction.

Discount Breakpoints		Items	Warehouses	Free Item
Free Item:	EXAMPLE6 - Group Discoun			
Pending Free Item:				
Last Free Item:				
Last Update Date:	08/12/2014			

The following sales transaction demonstrates how the group discount will be applied.

Order Type: SO Customer: EXAMPLE6 - Example6 Ordered Qty.: 3.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 Date: 16/12/2014 Project: X - Non-Project Code. Order Total: 100.00
 Requested On: 16/12/2014 Description:
 Customer Order:
 Customer Ref:

Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE6	<input type="checkbox"/>	RESALE	PC	2.00	0.00	2.00	50.000000	0.000000	0.00	
MAIN	EXAMPLE6	<input checked="" type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	0.000000	0.000000	0.00	

If the quantity on line 1 is increased from 2 units to 4 the free item on line 2 does not change as expected.

Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE6	<input type="checkbox"/>	RESALE	PC	4.00	0.00	4.00	50.000000	0.000000	0.00	
MAIN	EXAMPLE6	<input checked="" type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	0.000000	0.000000	0.00	

Example 4 – Document and Line Discount Combination

In this example a document and line discount are combined, therefore sales transaction will apply the line discount and also the document discount afterwards should both discount criteria's be met.

The following discount codes has been created.

Document Discount

*Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX4	Example 4 Document Discount over \$1k	Document	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Line item Discount

*Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX7	Line Discount to be used with document discount	Line	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount codes have the following characteristics.

Discount EX4

* Discount Code: Discount by: Prorate Discount

* Sequence: Break by:

Active
 Promotional

Description:

Discount Breakpoints Customers

Break Amount	Discount Percent	Pending Break Amount	Pending Discount Percent	Pending Date	Last Break Amount	Last Discount Percent	Effective Date
1,000.000000	5.00	0.000000	0.00		0.000000	0.00	08/12/2014

This discount is available to the following customers.

Discount Breakpoints Customers

*Customer	Customer Name
EXAMPLE4	Example4
EXAMPLE7	EXAMPLE7

Discount Code EX7

• Discount Code: Discount by: Prorate Discount
 • Sequence: Break by:
 Active
 Promotional
 Description:

Discount Breakpoints Items

Break Quantity	Discount Percent	Pending Break Quantity	Pending Discount Percent	Pending Date	Last Break Quantity	Last Effective Discount Percent	Last Effective Date
10.00	20.00	0.00	0.00			0.00	08/12/2014

The discount is available to the following item.

Discount Breakpoints Items

*Inventory ID	Description
EXAMPLE7	Document and line discount combination

The sales transaction below demonstrates that the line discount has been applied but the document discount is not applied because the order total is less than \$1,000.

• Order Type: • Customer: Ordered Qty.: 20.00
 Order Nbr.: • Location: VAT Exempt Total: 0.00
 Status: Currency: 1.00 View base VAT Taxable Tot...: 0.00
 Hold • Project: Tax Total: 0.00
 • Date: Description: Order Total: 800.00
 • Requested On: Customer Order:
 Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

*Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE7	<input type="checkbox"/>	RESALE	PC	20.00	0.00	20.00	50.000000	20.000000	200.00	EX7

If the quantity of line 1 is increased to 30 units then the line discount will be applied and because the order total now exceeds \$1,000 the document discount is also applied.

The different discounts are shown in different areas, the line discount is shown at line item level.

Order Type:	SO	Customer:	EXAMPLE7 - EXAMPLE7	Ordered Qty.:	30.00
Order Nbr.:	<NEW>	Location:	MAIN - Primary Location	VAT Exempt Total:	0.00
Status:	Open	Currency:	USD 1.00	VAT Taxable Tot.:	0.00
Date:	17/12/2014	Project:	X - Non-Project Code.	Tax Total:	0.00
Requested On:	17/12/2014	Description:		Order Total:	1,140.00

Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
EXAMPLE7	<input type="checkbox"/>	RESALE	PC	30.00	0.00	30.00	50.000000	20.000000	300.00	EX7

And the discount and totals tab will be populated with the document discount that has been applied.

Skip Discount	Discount Code	Sequence ID	Type	Manual Discount	Discountable Amt.	Discountable Qty.	Discount Amt.	Discount	Free Item	Free Item Qty.
<input type="checkbox"/>	EX4	01	Document	<input type="checkbox"/>	1,200.00	0.00	60.00	5.00		0.00

Example 5 – Line Discount Excluded from Document Discount

In this example the line discount will be excluded from the document discount calculation and demonstrated.

Document Discount

Discount Code	Description	Discount Type	Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX4	Example 4 Document Discount over \$1k	Document	Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Line item discount has been marked to be excluded from the above document discount

Discount Code	Description	Discount Type	Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX8	Exclude from Discountable Amount	Line	Item	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The discount codes have the following characteristics.

Discount EX4

• Discount Code: Discount by: Prorate Discount

• Sequence: Break by:

Active
 Promotional

Description:

Discount Breakpoints Customers

Break Amount	Discount Percent	Pending Break Amount	Pending Discount Percent	Pending Date	Last Break Amount	Last Discount Percent	Effective Date
1,000.000000	5.00	0.000000	0.00		0.000000	0.00	08/12/2014

The discount is applicable to the following customers.

Discount Breakpoints Customers

* Customer	Customer Name
EXAMPLE4	Example4
EXAMPLE7	EXAMPLE7

Discount Code EX8

• Discount Code: Discount by: Prorate Discount

• Sequence: Break by:

Active
 Promotional

Description:

Discount Breakpoints Items

Break Quantity	Discount Percent	Pending Break Quantity	Pending Discount Percent	Pending Date	Last Break Quantity	Last Discount Percent	Effective Date
10.00	10.00	0.00	0.00			0.00	08/12/2014

This discount is applicable to the following item.

Discount Breakpoints Items

* Inventory ID	Description
EXAMPLE8	Line discount excluded from document discount

The sales transaction shows that the line discount has been applied at line level but because this line has been excluded from the document discount then the document discount will not be applied.

Order Type: SO Customer: EXAMPLE7 - EXAMPLE7 Ordered Qty.: 30.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot.: 0.00
 Tax Total: 0.00
 Date: 17/12/2014 Project: X - Non-Project Code. Order Total: 1,400.00
 Requested On: 17/12/2014 Description:
 Customer Order:
 Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

Branch	Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE8	<input type="checkbox"/>	RESALE	PC	20.00	0.00	20.00	50.000000	10.000000	100.00	EX8
MAIN	EXAMPLE1	<input type="checkbox"/>	RESALE	PC	10.00	0.00	10.00	50.000000	0.000000	0.00	

Example 6 – Group Discount Skipping Document Discount

This example will demonstrate what will occur in the sales transaction when a group discount which has the setting Skip Document Discounts enabled is included in the sales transaction and how it will affect the document discount.

Discount Code EX9

Discount Code	Description	Discount Type	Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX9	Group total excluded from document discount	Group	Item	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The discount code has the following characteristics.

Discount Code: EX9 Discount by: Free Item Prorate Discount
 Sequence: 01 Break by: Quantity
 Active
 Promotional
 Description: Group total excluded from document discount

Discount Breakpoints Items Free Item

Break Quantity	Free Item Qty.	Pending Break Quantity	Pending Free Item Qty.	Pending Date	Last Break Quantity	Last Free Item Qty.	Effective Date
1.00	1.00	0.00					08/12/2014
2.00	2.00	0.00					08/12/2014
3.00	3.00	0.00					08/12/2014
4.00	4.00	0.00					08/12/2014
5.00	5.00	0.00					08/12/2014

In the above example the group discount will give a free item with a maximum amount of 5 free items.

The discount is applicable for the following item.

Discount Breakpoints		Items	Free Item
*Inventory ID	Description		
▶ EXAMPLE9	Group item skipping document discount		

The discount will include the following free item based on the other conditions being met.

Discount Breakpoints	Items	Free Item
Free Item:	EXAMPLE9 - Group item ski	
Pending Free Item:		
Last Free Item:		
Last Update Date:	08/12/2014	

The sales transaction below is demonstrating the document discount being applied as this sales order is over \$1,000.

Order Type: SO | Customer: EXAMPLE7 - EXAMPLE7 | Ordered Qty.: 30.00
 Order Nbr.: <NEW> | Location: MAIN - Primary Location | VAT Exempt Total: 0.00
 Status: Open | Currency: USD 1.00 | VAT Taxable Tot...: 0.00
 Date: 17/12/2014 | Project: X - Non-Project Code. | Tax Total: 0.00
 Requested On: 17/12/2014 | Description: | **Order Total: 1,425.00**

Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE4	<input type="checkbox"/>	RESALE	PC	30.00	0.00	30.00	50.000000	0.000000	0.00	

When the group discount is applied in line two then the document discount is removed and only the group discount will be applied to the sales order.

Order Type: SO | Customer: EXAMPLE7 - EXAMPLE7 | Ordered Qty.: 32.00
 Order Nbr.: <NEW> | Location: MAIN - Primary Location | VAT Exempt Total: 0.00
 Status: Open | Currency: USD 1.00 | VAT Taxable Tot...: 0.00
 Date: 17/12/2014 | Project: X - Non-Project Code. | Tax Total: 0.00
 Requested On: 17/12/2014 | Description: | **Order Total: 1,700.00**

Branch	*Inventory ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE4	<input type="checkbox"/>	RESALE	PC	30.00	0.00	30.00	50.000000	0.000000	0.00	
MAIN	EXAMPLE9	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	200.000000	0.000000	0.00	
MAIN	EXAMPLE9	<input checked="" type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	0.000000	0.000000	0.00	

Example 7 – Prorate Group Discount

The previous example on group discount offered a free item for each item sold to a maximum of 5 free items. This example will demonstrate the setting prorate whereby a group discount of buy 2 get one free will be applied.

This example will demonstrate that for every 2 units sold a free unit will be given to the customer. Therefore if 2 units are ordered a free item will be added to the sales order. If 8 units are ordered then an extra 4 free items will be added to the order.

Discount Code EX912

Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts
EX912	Example 12 Group Prorate on item	Group	Customer and Item	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount code has the following characteristics.

• Discount Code: Discount by: Prorate Discount
 • Sequence: Break by:
 Active
 Promotional
 Description:

Discount Breakpoints Items Customers Free Item

Break Quantity	Free Item Qty.	Pending Break Quantity	Pending Free Item Qty.	Pending Date	Last Break Quantity	Last Free Item Qty.	Effective Date
2.00	1.00	0.00					09/12/2014

The discount is applicable for the following items.

Discount Breakpoints Items Customers Free Item

*Inventory ID	Description
EXAMPLE12	Example Prorate Discount / Buy two get one free

This discount code is applicable to the following customers.

Discount Breakpoints Items Customers Free Item

*Customer	Customer Name
EXAMPLE12	Example 12

The discount will include the following free item in the sales transaction should the discount rules be met.

Discount Breakpoints	Items	Customers	Free Item
Free Item:	EXAMPLE12 - Example Pror		
Pending Free Item:			
Last Free Item:			
Last Update Date:	09/12/2014		

The sales transaction below is demonstrating the condition of the discount code being met and also it is including the free item that the customer is entitled to. Line 2 of the sales order highlighted the fact that this item is a free item.

Order Type: SO Customer: EXAMPLE12 - Example 12 Ordered Qty.: 3.00
 Order Nbr.: <NEW> Location: MAIN - Primary Location VAT Exempt Total: 0.00
 Status: Open Currency: USD 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 Date: 17/12/2014 Project: X - Non-Project Code. Order Total: 100.00
 Requested On: 17/12/2014 Description:
 Customer Order:
 Customer Ref:
 Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

Branch	Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE12	<input type="checkbox"/>	RESALE	PC	2.00	0.00	2.00	50.000000	0.000000	0.00	
MAIN	EXAMPLE12	<input checked="" type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	0.000000	0.000000	0.00	

The screen shot below demonstrates that a change to the quantity will recalculate the number of free items that the customer is entitled to have based on the discount code used in the sales transaction.

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

Branch	Inventor ID	Free Item	Warehou	UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code
MAIN	EXAMPLE12	<input type="checkbox"/>	RESALE	PC	6.00	0.00	6.00	50.000000	0.000000	0.00	
MAIN	EXAMPLE12	<input checked="" type="checkbox"/>	RESALE	PC	3.00	0.00	3.00	0.000000	0.000000	0.00	

Example 8 – Manual Discount

This manual discount example will demonstrate that end users can offer discounts on an ad hoc basis in the form of a manual discount, these discounts can also have rules associated to them.

The following discount code has been created.

Discount Code	Description	Discount Type	*Applicable To	Manual	Exclude From Discountable Amount	Skip Document Discounts	Auto-Numbering
EX91	Manual line item discount	Line	Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The discount code has the following characteristics.

• Discount Code: Discount by: Prorate Discount
 • Sequence: Break by:
 Active
 Promotional
 Description:

Discount Breakpoints Items

Break Quantity	Discount Percent	Pending Break Quantity	Pending Discount Percent	Pending Date	Last Break Quantity	Last Discount Percent	Effective Date
5.00	7.50	0.00	0.00			0.00	08/12/2014
10.00	10.00	0.00	0.00			0.00	08/12/2014
15.00	12.50	0.00	0.00			0.00	08/12/2014

The discount code is applicable to the following items.

Discount Breakpoints Items

*Inventory ID	Description
EXAMPLE10	Manual Discount

The following sales transaction demonstrates what will occur when the above manual discount is applied to the sales transaction. MYOB Advanced will prompt the end user when the discount criteria is not met and therefore the discount will not be applied.

• Order Type: • Customer: Ordered Qty.: 1.00
 Order Nbr.: • Location: VAT Exempt Total: 0.00
 Status: Currency: 1.00 View base VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 • Date: • Project: Order Total: 50.00
 • Requested On: Description:

Customer Order:
 Customer Ref:

Document Details Tax Details Commissions Financial Settings Payment Settings Shipping Settings Discount Details Shipments Payments Totals

*Branch	*Inventory ID	Free Item	*Warehou	*UON	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount	Disc. Unit Price
MAIN	EXAMPLE10	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	50.000000	0.000000	0.00	EX91	<input checked="" type="checkbox"/>	50.000000

The Discount Code EX91 has no matching Discount Sequence to apply.

The sales transaction below demonstrates the manual discount being applied now that the criteria of the manual discount has been met.

• Order Type: • Customer: Ordered Qty.: 6.00
 Order Nbr.: • Location: VAT Exempt Total: 0.00
 Status: Currency: VAT Taxable Tot...: 0.00
 Hold Credit Hold Tax Total: 0.00
 • Date: • Project: Order Total: 277.50
 • Requested On: Description:
 Customer Order:
 Customer Ref:

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

* Branch	* Inventor ID	Free Item	*Warehou	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount
MAIN	EXAMPLE10	<input type="checkbox"/>	RESALE	PC	6.00	0.00	6.00	50.000000	7.500000	22.50	EX91	<input checked="" type="checkbox"/>

Protecting Margin from Discounting

MYOB Advanced allows you to ensure a sales discounts does not breach the minimum markup percentage rules that you may wish to enforce.

This section will advise of the setup required and provide an example to demonstrate how this can be applied.

Sales Order Preferences

The first setting to enable is the *Validate Min. Profit Margin* which is found within the sales order preferences on the General Settings tab found in menu path [Distribution \ Sales order \ Configuration \ Setup \ Sales order preferences].

Price Validation Settings

Validate Min. Profit Margin: No Validation

• Base Price Update Unit:

There are 3 options available, in this example the option Set to minimum will be selected.

Minimum Markup Percentage

The minimum markup percentage to be applied in the sales transactions can be set either at the individual item level or at the item class level.

At Item class level you would set this by selecting the item class in menu path [Distribution \ Inventory \ Configuration \ Manage \ Item Classes].

When the item class record has been selected on the General Settings tab you can specify the minimum markup percentage in the Price management section.

Price Management

Price Workgroup:

Price Manager:

Min. Markup %:

Markup %:

You can specify this at the individual item level, an item master record can be created and modified in menu path [Distribution \ Inventory \ Work Area \ Manage \ Stock Items]. Once a stock item master record is selected the minimum markup percentage is set using the field minimum markup percentage found under the price management section on the tab Price/Cost Info.

Inventory ID:	EXAMPLE11 - Enforcing Margin Example	Product Workgroup:	
Item Status:	Active	Product Manager:	
Description:	Enforcing Margin Example		
<div style="display: flex; justify-content: space-between;"> General Settings Price/Cost Info Warehouse Details Sales Prices Customer Prices Vendor Prices Vendor Details Attributes Packaging </div>			
Base Price		Price Management	
Price Class:		Price Workgroup:	
Pending Price:	0.000000	Price Manager:	
Pending Price Date:		<input type="checkbox"/> Subject to Commission	
Current Price:	50.000000	Min. Markup %:	50.000000
Effective Date:	08/12/2014	Markup %:	0.000000
Last Price:	0.000000	MSRP:	0.000000

Example 1 – Protecting Margin

In this example, item EXAMPLE11 is sold at \$50, the cost of the item is \$30 and the minimum markup percentage is 50%.

Therefore the item can be discounted but the minimum allowed discount amount is \$45 when using the current cost price of \$30.

Item Master Data

Inventory ID:	EXAMPLE11 - Enforcing Margin Example	Product Workgroup:	
Item Status:	Active	Product Manager:	
Description:	Enforcing Margin Example		
<div style="display: flex; justify-content: space-between;"> General Settings Price/Cost Info Warehouse Details Sales Prices Customer Prices Vendor Prices Vendor Details Attributes Packaging </div>			
Base Price		Price Management	
Price Class:		Price Workgroup:	
Pending Price:	0.000000	Price Manager:	
Pending Price Date:		<input type="checkbox"/> Subject to Commission	
Current Price:	50.000000	Min. Markup %:	50.000000
Effective Date:	08/12/2014	Markup %:	0.000000
Last Price:	0.000000	MSRP:	0.000000
Standard Cost		Cost Statistics	
Pending Cost:	0.000000	Last Cost:	30.000000
Pending Cost Date:		Average Cost:	30.000000
Current Cost:	0.000000	Min. Cost:	30.000000
Effective Date:		Max. Cost:	30.000000
Last Cost:	0.000000		

The sales transaction below demonstrates that the BASE price of the item has been applied.

* Order Type: * Customer: Ordered Qty.: 1.00
 Order Nbr.: * Location: VAT Exempt Total: 0.00
 Status: Currency: 1.00 View base VAT Taxable Tot...: 0.00
 Hold Tax Total: 0.00
 * Date: * Project: Order Total: 50.00
 * Requested On: Description:
 Customer Order:
 Customer Ref:

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

Bin/Lot/Serial	Add Invoice	Add Item	PO Link	Inventory Summary								
* Branch	* Inventor ID	Free Item	* Warehou	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	
MAIN	EXAMPLE11	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	50.000000	0.000000	0.00		

Apply a 20% discount to the line item as shown below.

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

Bin/Lot/Serial	Add Invoice	Add Item	PO Link	Inventory Summary								
* Branch	* Inventor ID	Free Item	* Warehou	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	
MAIN	EXAMPLE11	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	50.000000	20.000000	0.00		

When you save the sales order or you navigate to the next line a warning is displayed to notify the end user that the discount is not allowed and the lowest discount offered is instead replaced.

Document Details | Tax Details | Commissions | Financial Settings | Payment Settings | Shipping Settings | Discount Details | Shipments | Payments | Totals

Bin/Lot/Serial	Add Invoice	Add Item	PO Link	Inventory Summary									
* Branch	* Inventor ID	Free Item	* Warehou	* UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Discount Percent	Discount Amount	Discount Code	Manual Discount	Disc. Unit Price
MAIN	EXAMPLE11	<input type="checkbox"/>	RESALE	PC	1.00	0.00	1.00	50.000000	10.000000	5.00		<input checked="" type="checkbox"/>	45.000000
MAIN		<input type="checkbox"/>			0.00	0.00	0.00	0.000000	0.000000	0.00		<input type="checkbox"/>	0.0