Price List Enhancements

SAP Business One
Version 9.0
Objectives

At the end of this course, you will be able to:
- Describe the enhancements relating to price lists and special prices
- Explain how to:
  - Activate and deactivate a price list
  - Price an item or item unit of measure in an exact foreign currency
  - Set a default price list for a business partner group
  - Price and discount an item by its unit of measure
  - Offer free items based on the quantity purchased
  - Set effective discount for a business partner or business partner group
  - Ignore discount groups for a specific business partner or item
  - Remove items without prices from the price list table
- Evaluate the implications of using the new pricing options
Introduction

- To increase flexibility, new pricing options have been introduced in release 9.0
- New fields have been added to the price list and discount tables
- All new fields are exposed to the DI
- All fields supported by SAP implementation tools:
  - Solution Packager
  - Data Transfer Workbench
  - Import from Excel
  - Configuration Express
  - Quick Copy
OEC Computers has a large number of price lists. When they work with price lists, it is hard to manage this long list of price lists.

Furthermore, some of the price lists are out of date, and need to be removed.

**Solution:** Price lists can be marked inactive, and will not appear in the list of price lists.
1. Active and Inactive Price Lists
2. Additional Currencies in Price Lists and Special Prices
3. Pricing by Unit of Measure
4. Discount Enhancements
5. Zero priced items
Active and Inactive Price Lists

Inventory > Price Lists > Price List

- Ability to set price lists as active or inactive
- Inactive price lists do not show in list of price lists
- Price list can be active for specific date range
- New fields added to price list table OPLN

New fields added to price list form
Active and Inactive Price Lists

- Existing price lists automatically marked active after upgrade to release 9.0
- Inactive price list cannot be assigned to business partner payment terms
- An active price list with expired date range is considered inactive
Inactive Price Lists in Documents

- For price list with date range:
  - In documents, the posting date must fall within price list date range
  - For other windows, such as item master data, the system date must fall within the price list date range
- If document refers to inactive price list, item price is zero
- When you add the document, system will warn about inactive price list
Price Source in Documents

- New price list source field added to document row
- Price source field shows source of price list for item

Need to activate *Price Source* in form settings.
Price Source in Documents

- Price source field also provides information about the source of the discount on the item row.
Price List by Business Partner Group

Administration > Setup > Business Partners > Customer / Vendor Groups

- Option to assign active price list to business partner group
- Can choose whether to replace existing business partner payment terms with the new group price list
Price List by Business Partner Group

- New master data record:
  if business partner group has associated price list, the group price list will be used instead of price list from payment terms. *change in current behavior

<table>
<thead>
<tr>
<th>#</th>
<th>Group Name</th>
<th>Price List</th>
<th>Effective Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Customers</td>
<td></td>
<td>Lowest</td>
</tr>
<tr>
<td>2</td>
<td>Large Accounts</td>
<td>Regular Sales Price</td>
<td>Average</td>
</tr>
<tr>
<td>3</td>
<td>Distributors</td>
<td>Distributor Sales Price</td>
<td>Highest</td>
</tr>
<tr>
<td>4</td>
<td>Small Accounts</td>
<td></td>
<td>Lowest</td>
</tr>
<tr>
<td>5</td>
<td>Government</td>
<td>Discount Price List</td>
<td>Lowest</td>
</tr>
<tr>
<td>6</td>
<td>High Tech</td>
<td>Discount Price List</td>
<td>Lowest</td>
</tr>
<tr>
<td>7</td>
<td>Construction</td>
<td></td>
<td>Lowest</td>
</tr>
<tr>
<td>8</td>
<td>Production</td>
<td></td>
<td>Lowest</td>
</tr>
<tr>
<td>9</td>
<td>Non-Profits</td>
<td>Discount Price List</td>
<td>Lowest</td>
</tr>
<tr>
<td>10</td>
<td>Schools</td>
<td>Discount Price List</td>
<td>Lowest</td>
</tr>
<tr>
<td>11</td>
<td>Top Tier</td>
<td>Discount Price List</td>
<td>Average</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td>Lowest</td>
</tr>
</tbody>
</table>

- Price list assigned in groups table
- Use price list from group
- No price list in groups table (empty)
- Use payment terms price
Price List by Business Partner Group

- Existing master data record:

  if business partner group is changed, you can choose to use the new group’s price list or keep the existing price list
Agenda

1. Active and Inactive Price Lists

2. Additional Currencies in Price Lists and Special Prices

3. Pricing by Unit of Measure

4. Discount Enhancements

5. Zero priced items
Additional Currencies

- Option to set item price in up to three currencies – primary currency and two additional currencies
- New fields in price list details row – not visible by default
- Primary currency is default for document *unless* document currency matches one of the additional currencies

<table>
<thead>
<tr>
<th>#</th>
<th>Item No.</th>
<th>Item Description</th>
<th>Primary Currency</th>
<th>Additional Currency 1</th>
<th>Additional Currency 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Base Price</td>
<td>Unit Price</td>
<td>Base Price</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Unit Price</td>
</tr>
<tr>
<td>1</td>
<td>999-010</td>
<td>Basic laptop</td>
<td>100.00 $</td>
<td>100.00 $</td>
<td>80.00 EUR</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80.00 EUR</td>
</tr>
<tr>
<td>2</td>
<td>999-015</td>
<td>Int Laptop</td>
<td></td>
<td></td>
<td>79.00 CAN</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>79.00 CAN</td>
</tr>
<tr>
<td>3</td>
<td>999-020</td>
<td>Advanced laptop</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>999-040</td>
<td>Toner - black</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A00001</td>
<td>J.B. Officeprint 1420</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A00002</td>
<td>J.B. Officeprint 1111</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>A00003</td>
<td>J.B. Officeprint 1186</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>A00004</td>
<td>Rainbow Color Printer 5.0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>A00005</td>
<td>Rainbow Color Printer 7.5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>A00006</td>
<td>Rainbow 8000 Vision Series</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Item price defined in exact foreign currency prices
Additional Currencies

- Primary currency used for gross price calculation and in reports.
- If price list based on another price list, *Manual* checkbox is provided.
- Checkbox works the same as existing manual indicator for primary currency.

<table>
<thead>
<tr>
<th>#</th>
<th>Item No.</th>
<th>Item Description</th>
<th>Factor</th>
<th>Base Price</th>
<th>Unit Price</th>
<th>Manual</th>
<th>Base Price</th>
<th>Unit Price</th>
<th>Manual</th>
<th>Base Price</th>
<th>Unit Price</th>
<th>Manual</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>999-010</td>
<td>Basic laptop</td>
<td>0.800</td>
<td>100.00 $</td>
<td>80.00 $</td>
<td></td>
<td>80.00 EUR</td>
<td>80.00 EUR</td>
<td></td>
<td>79.00 CAN</td>
<td>79.00 CAN</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>999-015</td>
<td>Int Laptop</td>
<td>0.800</td>
<td>100.00 $</td>
<td>80.00 $</td>
<td></td>
<td>85.00 EUR</td>
<td>68.00 EUR</td>
<td></td>
<td>85.00 CAN</td>
<td>68.00 CAN</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>999-020</td>
<td>Advanced laptop</td>
<td>0.800</td>
<td>299.00 $</td>
<td>239.20 $</td>
<td></td>
<td>30.00 EUR</td>
<td>184.00 EUR</td>
<td></td>
<td>96.00 CAN</td>
<td>36.80 CAN</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>999-040</td>
<td>Toner - black</td>
<td>0.800</td>
<td>17.00 $</td>
<td>13.60 $</td>
<td></td>
<td>15.00 EUR</td>
<td>12.00 EUR</td>
<td></td>
<td>15.00 CAN</td>
<td>12.00 CAN</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A00001</td>
<td>J.B. Officeprint 1420</td>
<td>0.800</td>
<td>400.00 $</td>
<td>320.00 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A00002</td>
<td>J.B. Officeprint 1111</td>
<td>0.800</td>
<td>200.00 $</td>
<td>160.00 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>A00003</td>
<td>J.B. Officeprint 1186</td>
<td>0.800</td>
<td>300.00 $</td>
<td>240.00 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>A00004</td>
<td>Rainbow Color Printer 5.0</td>
<td>0.800</td>
<td>500.00 $</td>
<td>400.00 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>A00005</td>
<td>Rainbow Color Printer 7.5</td>
<td>0.800</td>
<td>400.00 $</td>
<td>320.00 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Using Additional Currencies in a Document

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Primary Currency</th>
<th>Additional Currency 1</th>
<th>Additional Currency 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base Price</td>
<td>Unit Price</td>
<td>Base Price</td>
</tr>
<tr>
<td>Basic laptop</td>
<td>100.00 $</td>
<td>100.00 $</td>
<td>80.00 EUR</td>
</tr>
</tbody>
</table>

Customer A: BP Currency EUR

- Unit Price: 80.00 EUR

Customer B: BP Currency CAN

- Unit Price: 79.00 CAN

Customer C: BP Currency GBP

- Unit Price: 100.00 $
Additional Currencies for Special Prices

Inventory > Price Lists > Period and Volume Discounts

Inventory > Price Lists > Special Prices > Special Prices for Business Partners

- New source price field is base for special price calculation

Can select a currency as base for special price calculation
Demo: New Price List Functionality
1. Active and Inactive Price Lists
2. Additional Currencies in Price Lists and Special Prices
3. Pricing by Unit of Measure
4. Discount Enhancements
5. Zero priced items
Pricing by Unit of Measure (UoM)

Inventory > Price Lists > Price Lists

- Can set item price for each Unit of Measure

Example:

- Bulk paper is purchased by the pallet, and sold to customers by the ream (500 sheets), by the case (12 reams) or by the individual sheet
Pricing by Unit of Measure (UoM)

*Inventory > Price Lists > Price Lists*

- New table for setting UoM prices for an item
- Access by double-clicking row in price list

![Diagram showing the process of setting UoM prices](image)

- Add row for each UoM
- Unit price based on UoM group definitions
### Additional Currencies for Units of Measure (UoM)

**Inventory > Price Lists > Price Lists**

- Additional currency fields added to UoM Prices table
- Can define exact UoM price and optional discount in up to two additional currencies as well as primary currency

<table>
<thead>
<tr>
<th>Additional Currency 1</th>
<th>Additional Currency 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>#</strong></td>
<td><strong>UoM Code</strong></td>
</tr>
<tr>
<td>1</td>
<td>Ream</td>
</tr>
<tr>
<td>2</td>
<td>Pallet</td>
</tr>
<tr>
<td>3</td>
<td>Case</td>
</tr>
</tbody>
</table>

**Exact price and optional discount for each additional currency**
Volume Discounts by UoM

Inventory > Price Lists > Period and Volume Discounts

- Define volume based discounts for each unit of measure for an item

Volume discount for each UoM
Inventory Unit of Measure (UoM)

- Can view unit of measure pricing from the item master data
Unit of Measure (UoM) Pricing in Documents

- Unit of measure code can be selected on item row.
- Appropriate UoM price will be taken from price list.
- Note: inventory transactions always posted using the inventory UoM (from the item master data).
Default Price for Unit of Measure

- If unit of measure selected in document has no price defined in price list, the price be calculated proportionately according to the inventory UoM price.

Ream = $6.25
Half case = 6 * $6.25 = $37.50
Pricing Hierarchy for UoM Pricing

- Special Prices: Special prices defined for business partner for specific UoM. Overrides all other prices.
- Discount Groups: Discount groups defined for item without UoM. Overrides period and volume discounts.
- Period and Volume Discounts: Periodic and Volume discounts defined for specific UoM. Overrides the basic price list assigned to the business partner.
- Price Lists: Price defined for specific UoM in price list.
Demo: Pricing by UoM
Agenda

1. Active and Inactive Price Lists
2. Additional Currencies in Price Lists and Special Prices
3. Pricing by Unit of Measure
4. Discount Enhancements
5. Zero priced items
OEC Computers wants to implement “Pay for 3 – Get One Free!” for a range of products, including mobile phones, ink cartridge refills, and DVD and Blu-ray discs. This is the equivalent of 33% discount when a quantity of 3 items is purchased at the same time.

OEC would like the flexibility to introduce this offer at short notice.

**Solution:** With release 9.0, OEC Computers can set up discounts which vary according to the quantity purchased by the customer. Furthermore, OEC can establish the pricing ahead of time and activate the discount when required.
New Discount Functionality

- Discount Groups for all business partners or for a business partner group
- Discount Groups for a specific item
- Excluding discount group pricing for a business partner or item
- Discount Groups as active or inactive
- Discount according to quantity purchased
- Effective Discount for business partners and business partner groups
- New price and discount reports
Discount Groups Selection

Inventory > Price Lists > Special Prices > Discount Groups

New selection for All BPs, Customer and Vendor group, and specific BP

New tab for defining discounts by item code
Excluding BPs from Discount Groups

- Discount group control set on Payment terms tab - *Do Not Apply Discount Groups* checkbox
- Affects only discount groups not other special prices
- Can still set discount in document header or row
Exclude Item from Discount Groups

- Can also set *Do Not Apply Discount Groups* checkbox for an item
Active and Inactive Discount Groups

**Inventory > Price Lists > Special Prices > Discount Groups**

- Can set discount groups active or inactive, with optional date range
Discount According to Quantity Purchased

Inventory > Price Lists > Special Prices > Discount Groups

Discount by quantity purchased can be set on all four tabs:
- Item Groups
- Properties
- Manufacturers
- Items

Discount according to quantity purchased

<table>
<thead>
<tr>
<th>#</th>
<th>Item Code</th>
<th>Item Description</th>
<th>Discount</th>
<th>Paid Qty</th>
<th>Free Qty</th>
<th>Max. Free Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I00031</td>
<td>Ink Cartridge - Black</td>
<td>0.0000</td>
<td>2.000</td>
<td>1.000</td>
<td>4.000</td>
</tr>
<tr>
<td>2</td>
<td>I00032</td>
<td>Ink Cartridge - Color</td>
<td>0.0000</td>
<td>4.000</td>
<td>2.000</td>
<td>8.000</td>
</tr>
</tbody>
</table>
## Discount Calculation for Multiple Quantity

<table>
<thead>
<tr>
<th>Item #</th>
<th>Paid Qty</th>
<th>Free Qty</th>
<th>Max. Free Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>I00031</td>
<td>2</td>
<td>1</td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity Purchased</th>
<th>Discount %</th>
<th>Total (LC)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>0</td>
<td>Unit Price * 2</td>
<td>No discount</td>
</tr>
<tr>
<td>3</td>
<td>33.33</td>
<td>Unit Price * 2</td>
<td>Pay for 2 and get 1 free</td>
</tr>
<tr>
<td>4</td>
<td>25</td>
<td>Unit Price * 3</td>
<td>Pay for 3 and get 1 free</td>
</tr>
<tr>
<td>5</td>
<td>20</td>
<td>Unit Price * 4</td>
<td>Pay for 4 and get 1 free</td>
</tr>
<tr>
<td>6</td>
<td>33.33</td>
<td>Unit Price * 4</td>
<td>Pay for 4 and get 2 free</td>
</tr>
<tr>
<td>12</td>
<td>33.33</td>
<td>Unit Price * 8</td>
<td>Pay for 8 and get 4 free</td>
</tr>
<tr>
<td>15</td>
<td>26.67</td>
<td>Unit Price * 8</td>
<td>Pay for 11 and get 4 free</td>
</tr>
</tbody>
</table>
Discount According to Quantity Purchased

- When item quantity entered in row, the system automatically enters the calculated discount % in the row.

- If customer returns an item, customer will receive refund based on the discounted price paid.

When quantity is changed to 3...

Discount is automatically applied based on purchased quantity.
Discount According to Quantity Purchased

Inventory > Price Lists > Special Prices > Discount Groups

Mutually exclusive discounts:
- Fixed discount by percentage
- Variable discount according to purchased quantity
Effective Discount for BPs and BP Groups

- Effective Discount:
  - Lowest (default)
  - Highest
  - Average
  - Total
  - Multiplied
Discount Relations for Discount Group Properties

Inventory > Price Lists > Special Prices > Discount Groups

- New option added to list of discount relations - Multiplied
## Price Report

### Inventory > Inventory Reports > Price Report

<table>
<thead>
<tr>
<th>Source of Price</th>
<th>Item No</th>
<th>Base Price List</th>
<th>Factor</th>
<th>Primary Currency</th>
<th>Addit. Currency</th>
<th>Discount %</th>
<th>UoM</th>
<th>Quantity</th>
<th>....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Price</td>
<td>B1000</td>
<td>Base Price</td>
<td>1</td>
<td>1.00 $</td>
<td>1.00 EUR</td>
<td>Manual</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Period and Volume discount</td>
<td>B1000</td>
<td>Base Price</td>
<td>0.75 $</td>
<td></td>
<td>25</td>
<td>Manual</td>
<td>50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discount Purchase Price</td>
<td></td>
<td></td>
<td>0.5</td>
<td>0.50 $</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

...
## Discount Group Report

### Inventory > Inventory Reports > Discount Group Report

<table>
<thead>
<tr>
<th>Discount Type</th>
<th>BP Code/Group</th>
<th>Discount Group Type</th>
<th>Discount Group</th>
<th>Discount %</th>
<th>Paid Qty</th>
<th>Free Qty</th>
<th>…</th>
</tr>
</thead>
<tbody>
<tr>
<td>All BPs</td>
<td></td>
<td>Items</td>
<td>I00031</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All BPs</td>
<td></td>
<td>Item Groups</td>
<td>Accessories</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specific BP</td>
<td>C107</td>
<td>Item Groups</td>
<td>HP Printers</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>…</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Demo: Discount Enhancements
Summary – New Pricing Options and Considerations

**Existing Pricing**
- Only active price lists (by default)
- Only primary currency for an item price
- Price list taken from payment terms
- Special prices for a specific business partner
- No pricing by UoM
- Fixed discount for discount group

**Option for Release 9.0**
- Active and inactive price lists
- Additional currencies for an item price
- Price list with business partner group
- Price list for all BPs, or for a BP group in addition to specific BP
- Pricing by UoM
- Variable discount according to quantity purchased
Agenda

1. Active and Inactive Price Lists
2. Additional Currencies in Price Lists and Special Prices
3. Pricing by Unit of Measure
4. Discount Enhancements
5. Zero priced items
Zero-priced Items

- New checkbox added to General Settings
- If selected, items with zero price are removed from the price list table
- If deselected, zero-priced items are restored to price list table
Hide Unpriced Items

Inventory > Price Lists > Price Lists

- Checkbox to hide unpriced items in price list display
In this unit, we covered the following enhancements to price lists and discounts:

- Active and inactive price lists and discount groups, with optional valid date range
- Price list selection by business partner group
- Exact pricing by additional foreign currencies
- Pricing by each unit of measure and new price hierarchy
- New discount group options, including discount according to quantity purchased
- Effective discount for discount groups
- Checkbox to ignore discount groups for a business partner or business partner group or item
- Option to remove zero-price items from the price list table