

Price List Enhancements

SAP Business One
Version 9.0



Objectives



At the end of this course, you will be able to:

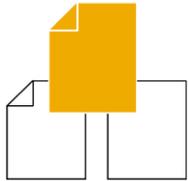
- Describe the enhancements relating to price lists and special prices
- Explain how to:
 - Activate and deactivate a price list
 - Price an item or item unit of measure in an exact foreign currency
 - Set a default price list for a business partner group
 - Price and discount an item by its unit of 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

Business Example



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Furthermore, some of the price lists are out of date, and need to be removed.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

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

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

| Column | Visible | Active |
|---------------------|-------------------------------------|-------------------------------------|
| # | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Price List Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Base Price List | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Factor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rounding Method | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Authorization Group | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Active | <input type="checkbox"/> | <input type="checkbox"/> |
| Valid From | <input type="checkbox"/> | <input type="checkbox"/> |
| Valid To | <input type="checkbox"/> | <input type="checkbox"/> |

| # | Price List Name | Base Price ... | Factor | Rounding ... | Authorization Group | Active | Valid From | Valid To |
|---|---------------------------|----------------|--------|--------------|---------------------|-------------------------------------|------------|------------|
| | Last Evaluated Price | | | | | <input checked="" type="checkbox"/> | | |
| | Last Purchase Price | | | | | <input checked="" type="checkbox"/> | | |
| 1 | Base Price | Base Price ▾ | 1 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 2 | Discount Purchase Price | Base Price ▾ | 0.5 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 3 | Regular Purchase Price | Base Price ▾ | 0.75 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 4 | Distributor Sales Price | Base Price ▾ | 1.25 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 5 | Regular Sales Price | Base Price ▾ | 1.5 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 6 | Small Account Sales Price | Base Price ▾ | 1.75 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | | |
| 7 | Seasonal Sales Price | Base Price ▾ | 0.8 | No Roundir ▾ | Group 1 ▾ | <input checked="" type="checkbox"/> | 11/01/2012 | 12/31/2012 |

New fields added to price list form

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

The screenshot shows a SAP Sales Order window with the following details:

- Customer: C00080 (Susan's Boutique)
- No.: Primary 280
- Status: Open
- Posting Date: 12/13/2012
- Delivery Date:
- Document Date: 12/13/2012

The Contents tab is active, showing a table with the following data:

| # | Item No. | Quantity | Unit Price | Discm. | Tax C... | Total (LC) | Price Source | UoM C... |
|---|----------|----------|------------|--------|----------|------------|-------------------|----------|
| 1 | I00022 | 1 | 0.000 | 0.000 | | | Inactive Price Li | Manual |
| 2 | | | | 0.000 | | | Manual | |

Yellow boxes highlight the Posting Date (12/13/2012) and the Unit Price (0.000) in the table.

Price Source in Documents

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

The image shows two overlapping SAP screenshots. The foreground window is 'Form Settings - Sales Order', with the 'Document' tab selected. A table lists various columns with 'Visible' and 'Active' checkboxes. The 'Price Source' row is highlighted with a yellow box, and its 'Visible' checkbox is checked. A yellow callout bubble points to this checkbox with the text: 'Need to activate Price Source in form settings'. The background window is a 'Sales Order' document. The top section shows order details: Order No. C00080, Person Susan's Boutique, Posting Date 12/13/2012, and Document Date 12/13/2012. Below this is a table with columns: Item No., Quantity, Unit Price, Disc..., Tax C..., Total (L...), Price Source, and LOM C... The first row of the table has Item No. I00022, Quantity 1, and Price Source Inactive Price Li Manual. A yellow box highlights the 'Price Source' column header and the value 'Inactive Price Li Manual' in the first row.

| Column | Visible | Active |
|-----------------|-------------------------------------|--------------------------|
| Base Type | <input type="checkbox"/> | <input type="checkbox"/> |
| Base Ref. | <input type="checkbox"/> | <input type="checkbox"/> |
| Base Key | <input type="checkbox"/> | <input type="checkbox"/> |
| Base Row | <input type="checkbox"/> | <input type="checkbox"/> |
| Price Source | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Length | <input type="checkbox"/> | <input type="checkbox"/> |
| Width | <input type="checkbox"/> | <input type="checkbox"/> |
| Height | <input type="checkbox"/> | <input type="checkbox"/> |
| Volume | <input type="checkbox"/> | <input type="checkbox"/> |
| Vol. Unit | <input type="checkbox"/> | <input type="checkbox"/> |
| Weight | <input type="checkbox"/> | <input type="checkbox"/> |
| Tax Amount (LC) | <input type="checkbox"/> | <input type="checkbox"/> |
| Block No. | <input type="checkbox"/> | <input type="checkbox"/> |

| Item No. | Quantity | Unit Price | Disc... | Tax C... | Total (L... | Price Source | LOM C... |
|----------|----------|------------|---------|----------|-------------|--------------------------|----------|
| I00022 | 1 | | 0.000 | | | Inactive Price Li Manual | |
| | | | 0.000 | | | Manual | |

Price Source in Documents

- Price source field also provides information about the source of the discount on the item row

The screenshot displays a SAP Sales Order document. At the top, the 'Sales Order' header is visible. Below it, customer and order details are shown in a grid format. The main part of the screen is a table with columns for item details and price sources. A yellow box highlights the 'Price Source' column for the first five items.

| # | Item No. | Quan... | Unit Price | Disc... | Tax C... | Total (LC) | Price Source | UoM... |
|---|----------|---------|------------|---------|----------|------------|-------------------------------------|--------|
| 1 | A00001 | 1 | 400.00 \$ | 0.000 | NY | 400.00 \$ | Special Prices for Business Partner | Manual |
| 2 | A00002 | 1 | 200.00 \$ | 0.000 | NY | 200.00 \$ | Special Prices for Business Partner | Manual |
| 3 | A00004 | 1 | 625.00 \$ | 20.000 | NY | 500.00 \$ | Active Price List, Discount Groups | Manual |
| 4 | C00001 | 1 | 500.00 \$ | 0.000 | NY | 500.00 \$ | Active Price List | Manual |
| 5 | I00005 | 1 | 112.50 \$ | 30.000 | NY | 78.75 \$ | Period and Volume Discounts | Manual |
| 6 | | | | 0.000 | | | | |

Additional fields at the bottom of the form include Sales Employee (Bill Levine), Owner, Total Before Discount (1,678.75 \$), Discount (%), and Freight.

Price List by Business Partner Group

Administration > Setup > Business Partners > Customer / Vendor Groups

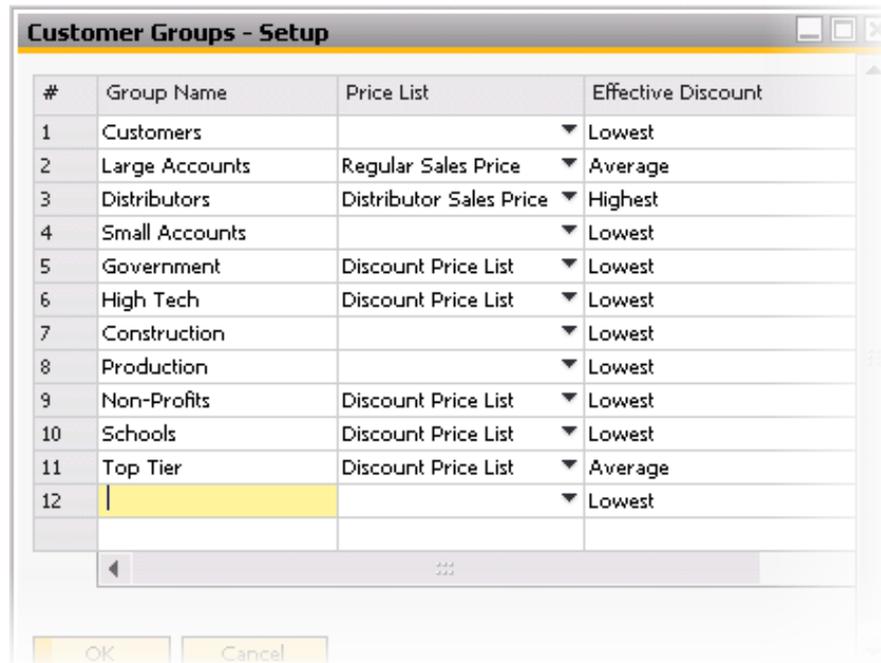
| # | Group Name | Price List | Effective Discount |
|----|----------------|-------------------------|--------------------|
| 1 | Customers | | Lowest |
| 2 | Large Accounts | Regular Sales Price | Average |
| 3 | Distributors | Distributor Sales Price | Highest |
| 4 | Small Accounts | | Lowest |
| 5 | Government | Discount Price List | Lowest |
| 6 | High Tech | Discount Price List | Lowest |
| 7 | Construction | | Lowest |
| 8 | Production | | Lowest |
| 9 | Non-Profits | Discount Price List | Lowest |
| 10 | Schools | Discount Price List | Low |
| 11 | Top Tier | Discount Price List | Ave |
| 12 | | | Low |

- 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



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

| | |
|---------------------------------------|---------------------------|
| 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

The screenshot displays the 'Customer Groups - Setup' dialog box. It features a table with columns for '#', 'Group Name', and 'Price List'. The table lists various business partner groups and their associated price lists. A yellow arrow points from the 'Non-Profits' group in the table to the 'Business Partner Master Data' dialog box. This dialog box contains fields for Code, Name, Foreign Name, Currency, and Federal Tax ID. A 'Non-Profits' dropdown menu is highlighted. Below this, a 'Business Partner Master Data' dialog box asks: 'Do you want to replace the price list and effective discount according to the selected business partner group?' with 'Field: Group' and 'Yes'/'No' buttons.

| # | Group Name | Price List |
|----|----------------|-------------------------|
| 1 | Customers | |
| 2 | Large Accounts | Regular Sales Price |
| 3 | Distributors | Distributor Sales Price |
| 4 | Small Accounts | |
| 5 | Government | Discount Price List |
| 6 | High Tech | Discount Price List |
| 7 | Construction | |
| 8 | Production | |
| 9 | Non-Profits | Discount Price List |
| 10 | Schools | Discount Price List |
| 11 | Top Tier | Discount Price List |
| 12 | | |

Business Partner Master Data

Code: Manual C65300 Customer
Name: Healing Arts
Foreign Name:
Currency: US Dollar
Federal Tax ID:
Non-Profits

Business Partner Master Data

Do you want to replace the price list and effective discount according to the selected business partner group?
Field: Group
Yes No

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

The screenshot shows a window titled "New Price List01" with a search bar and a table of price list items. The table has columns for Item No., Item Description, Primary Currency (Base Price, Unit Price), Additional Currency 1 (Base Price, Unit Price), Additional Currency 2 (Base Price, Unit Price), and Inventory UoM. The first row is highlighted with a yellow box, and a callout box points to it with the text "Item price defined in exact foreign currency prices".

| # | Item No. | Item Description | Primary Currency | | Additional Currency 1 | | Additional Currency 2 | | Inventory UoM |
|----|----------|------------------------------|------------------|------------|-----------------------|------------|-----------------------|------------|---------------|
| | | | Base Price | Unit Price | Base Price | Unit Price | Base Price | Unit Price | |
| 1 | 999-010 | Basic laptop | 100.00 \$ | 100.00 \$ | 80.00 EUR | 80.00 EUR | 79.00 CAN | 79.00 CAN | Manual |
| 2 | 999-015 | Int Laptop | | | | | | | Manual |
| 3 | 999-020 | Advanced laptop | | | | | | | Manual |
| 4 | 999-040 | Toner - black | | | | | | | Manual |
| 5 | A00001 | J.B. Officeprint 1420 | | | | | | | Manual |
| 6 | A00002 | J.B. Officeprint 1111 | | | | | | | Manual |
| 7 | A00003 | J.B. Officeprint 1186 | | | | | | | Manual |
| 8 | A00004 | Rainbow Color Printer 5.0 | | | | | | | Manual |
| 9 | A00005 | Rainbow Color Printer 7.5 | | | | | | | Manual |
| 10 | A00006 | Rainbow Color Printer Series | | | | | | | Manual |

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

Seasonal Sales Price

Find

| # | Item No. | Item Description | Factor | Primary Currency | | | Additional Currency 1 | | | Additional Currency 2 | | |
|---|-----------|---------------------------|--------|------------------|------------|--------------------------|-----------------------|------------|-------------------------------------|-----------------------|------------|-------------------------------------|
| | | | | Base Price | Unit Price | Ma... | Base Price | Unit Price | Manual | Base Price | Unit Price | Manual |
| 1 | ➔ 999-010 | Basic laptop | 0.800 | 100.00 \$ | 80.00 \$ | <input type="checkbox"/> | 80.00 EUR | 80.00 EUR | <input checked="" type="checkbox"/> | 79.00 CAN | 79.00 CAN | <input checked="" type="checkbox"/> |
| 2 | ➔ 999-015 | Int Laptop | 0.800 | 100.00 \$ | 80.00 \$ | <input type="checkbox"/> | 85.00 EUR | 68.00 EUR | <input type="checkbox"/> | 85.00 CAN | 68.00 CAN | <input type="checkbox"/> |
| 3 | ➔ 999-020 | Advanced laptop | 0.800 | 299.00 \$ | 239.20 \$ | <input type="checkbox"/> | 30.00 EUR | 184.00 EUR | <input type="checkbox"/> | 96.00 CAN | 36.80 CAN | <input type="checkbox"/> |
| 4 | ➔ 999-040 | Toner - black | 0.800 | 17.00 \$ | 13.60 \$ | <input type="checkbox"/> | 15.00 EUR | 12.00 EUR | <input type="checkbox"/> | 15.00 CAN | 12.00 CAN | <input type="checkbox"/> |
| 5 | ➔ A00001 | J.B. Officeprint 1420 | 0.800 | 400.00 \$ | 320.00 \$ | <input type="checkbox"/> | | | <input type="checkbox"/> | | | <input type="checkbox"/> |
| 6 | ➔ A00002 | J.B. Officeprint 1111 | 0.800 | 200.00 \$ | 160.00 \$ | <input type="checkbox"/> | | | <input type="checkbox"/> | | | <input type="checkbox"/> |
| 7 | ➔ A00003 | J.B. Officeprint 1186 | 0.800 | 300.00 \$ | 240.00 \$ | <input type="checkbox"/> | | | <input type="checkbox"/> | | | <input type="checkbox"/> |
| 8 | ➔ A00004 | Rainbow Color Printer 5.0 | 0.800 | 500.00 \$ | 400.00 \$ | <input type="checkbox"/> | | | <input type="checkbox"/> | | | <input type="checkbox"/> |
| 9 | ➔ A00005 | Rainbow Color Printer 7.5 | 0.800 | 400.00 \$ | 320.00 \$ | <input type="checkbox"/> | | | <input type="checkbox"/> | | | <input type="checkbox"/> |

Using Additional Currencies in a Document

| Item Description | Primary Currency | | Additional Currency 1 | | Additional Currency 2 | |
|------------------|------------------|------------|-----------------------|------------|-----------------------|------------|
| | Base Price | Unit Price | Base Price | Unit Price | Base Price | Unit Price |
| Basic laptop | 100.00 \$ | 100.00 \$ | 80.00 EUR | 80.00 EUR | 79.00 CAN | 79.00 CAN |

Customer A:
BP Currency EUR

Customer B:
BP Currency CAN

Customer C:
BP Currency GBP

Unit Price
80.00 EUR

Unit Price
79.00 CAN

Unit Price
100.00 \$

Additional Currencies for Special Prices

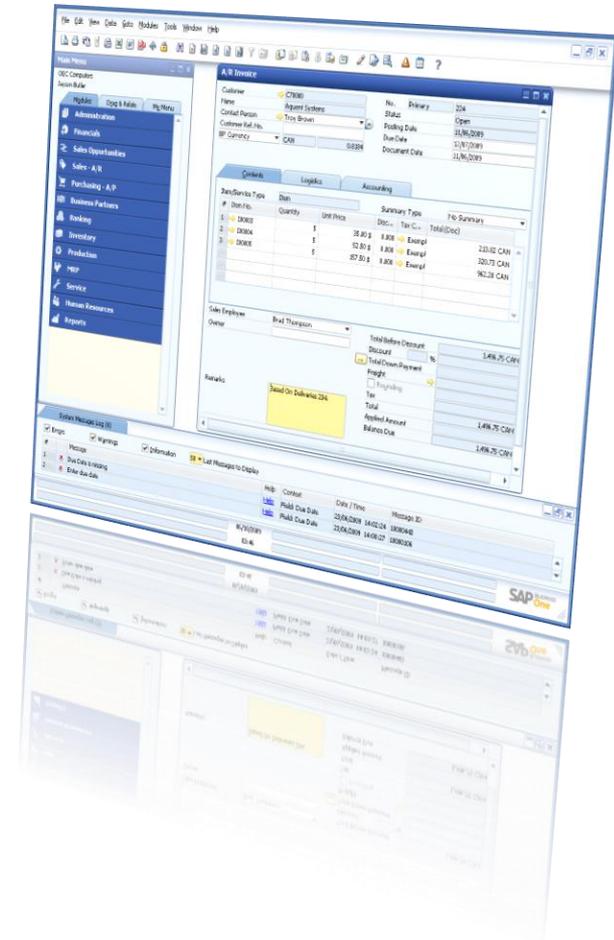
Inventory > Price Lists > Period and Volume Discounts

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

- New source price field is base for special price calculation

The screenshot shows two SAP windows. The top window, 'Special Prices for Business Partners', has fields for BP Code (C30000), BP Name (Microchips), BP Type (Customer), Price List (Base Price), and Discount Percentage (5.000). Below these is a table with columns: #, Item No., Item Description, Price List, Primary Cu..., Additional Cu..., Additional Cu..., Disc..., Source Price, and Price after Disc... The bottom window, 'Period and Volume Discounts', has a Price List dropdown set to 'Base Price' and a table with columns: #, Item Description, Primary Currency, Additional Currency 1, Additional Cu..., and Source Price. The table contains one row for 'Basic laptop' with Primary Currency 100.00 \$, Additional Currency 1 80.00 EUR, and Additional Currency 2 79.00 CAN. The Source Price dropdown is open, showing options: 'Unit Price -', 'Unit Price - Pri. Curr.', 'Unit Price - Add. Curr. 1', and 'Unit Price - Add. Curr. 2'. A yellow callout box points to the 'Unit Price - Add. Curr. 1' option with the text: 'Can select a currency as base for special price calculation'. At the bottom of the 'Period and Volume Discounts' window are buttons for 'Update', 'Cancel', and 'Add Items'.

Demo: New Price List Functionality



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

Pricing by Unit of Measure (UoM)

Inventory > Price Lists > Price Lists

- Can set item price for each Unit of Measure



| Item Master Data | |
|------------------|-------------------|
| Item No. | Manual B00320 |
| Description | Copy Paper - bulk |
| Foreign Name | |
| Item Type | Items |
| Item Group | Items |
| UoM Group | Bulk Paper |
| Price List | Bulk Paper |
| | Manual |
| | Paper |
| Bar Code | |
| Unit Price | |

General Purchasing Inventory Data Planning

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

Item Master Data

Item No. Manual B00320
 Description Copy Paper - bulk
 Foreign Name
 Item Type Items
 Item Group Items
 UoM Group Bulk Paper
 Price List Bulk Paper
 Manual
 Paper

Bar Code
 Unit Price

General Purchasing Inventory Data Planning

Base Price

Find

| # | Item No. | Item Description | Base Price | Unit Price |
|----|----------|-------------------------|------------|------------|
| 6 | ➔ A00002 | J.B. Officeprint 1111 | 200.00 \$ | 200.00 \$ |
| 7 | ➔ A00003 | J.B. Officeprint 1186 | 300.00 \$ | 300.00 \$ |
| 8 | ➔ A00004 | Rainbow Color Printer 5 | 500.00 \$ | 500.00 \$ |
| 9 | ➔ A00005 | Rainbow Color Printer 7 | 400.00 \$ | 400.00 \$ |
| 10 | ➔ A00006 | Rainbow 1200 Laser Se | | |
| 11 | ➔ B00320 | Copy Paper - bulk | | |
| 12 | ➔ B10000 | Printer Label | | |
| 13 | ➔ C00001 | Motherboard BTX | 400.00 \$ | 400.00 \$ |
| 14 | ➔ C00002 | Motherboard MicroATX | 300.00 \$ | 300.00 \$ |
| 15 | ➔ C00003 | Quadcore CPU 3.4 GHz | 130.00 \$ | 130.00 \$ |
| 16 | ➔ C00004 | Tower Case with Power | 35.00 \$ | 35.00 \$ |

Base Price - UoM Prices

Item B00320

| # | UoM Code | UoM Name | Base Price | Reduce By % | Unit Price | Auto |
|---|----------|----------|------------|-------------|------------|-------------------------------------|
| 1 | Ream | Ream | 5.00 \$ | | 5.00 \$ | <input type="checkbox"/> |
| | Pallet | Pallet | 240.00 \$ | 20.000 | 192.00 \$ | <input checked="" type="checkbox"/> |
| | Case | Case | 60.00 \$ | 0.000 | 60.00 \$ | <input checked="" type="checkbox"/> |
| | | | | 0.000 | | <input checked="" type="checkbox"/> |

OK Cancel

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

The screenshot shows the 'Price Lists' window with the 'Base Price' sub-window active. The 'Base Price - UoM Prices' dialog is open, displaying a table for item B00320. The table has columns for Item, UoM Code, UoM Name, Base Price, Reduce By %, Unit Price, and two columns for Additional Currency 1 and Additional Currency 2. A yellow callout box highlights the 'Additional Currency 1' and 'Additional Currency 2' columns, with a text box stating 'Exact price and optional discount for each additional currency'.

| # | UoM Code | UoM Name | Primary Currency | | | Additional Currency 1 | | Additional Currency 2 | | | |
|---|----------|----------|------------------|-------------|------------|-----------------------|-------------|-----------------------|------------|-------------|-----------|
| | | | Base Price | Reduce By % | Unit Price | Base Price | Reduce By % | Unit Price | Base Price | Reduce By % | Unit P... |
| 1 | Ream | Ream | 5.00 \$ | | 5.00 \$ | 4.00 EUR | | 4.00 EUR | 4.00 CAN | 4.00 CAN | |
| 2 | Pallet | Pallet | 240.00 \$ | 20.000 | 192.00 \$ | 192.00 EUR | 15.000 | 163.20 EUR | 192.00 CAN | 20.000 | 153.60 CA |
| 3 | Case | Case | 60.00 \$ | 0.000 | 60.00 \$ | 48.00 EUR | 0.000 | 48.00 EUR | 48.00 CAN | 0.000 | 48.00 CAN |
| 4 | | | | 0.000 | | | | | | | |

Volume Discounts by UoM

Inventory > Price Lists > Period and Volume Discounts

The screenshot shows the 'Period and Volume Discounts' dialog box in SAP. The 'Price List' is set to 'Base Price'. The 'Period Discounts' table shows a discount of 0.000 for the 'Base Price' starting from 12/13/2012. The 'Volume Discounts for Price List' sub-dialog is open, showing a table with the following data:

| | UoM Code | UoM Name | Quantity | Discount | Special Price |
|---|----------|----------|----------|----------|---------------|
| 1 | Case | Case | 3.000 | 25.000 | 45.00 \$ |
| 2 | Ream | Ream | 12.000 | 20.000 | 4.00 \$ |
| 3 | Ream | Ream | 0.000 | 0.000 | 5.00 \$ |

A yellow callout bubble points to the sub-dialog with the text: "Volume discount for each UoM".

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

Inventory Unit of Measure (UoM)

- Can view unit of measure pricing from the item master data

The screenshot shows two SAP dialog boxes. The top one is 'Item Master Data' for item B00320, 'Copy Paper - bulk'. The 'UoM Group' is set to 'Bulk Paper'. The 'Unit Price' is 5.00 \$ Ream. The bottom dialog is 'Base Price - UoM Prices' for item B00320, showing a table of prices for different units of measure.

| # | UoM Code | UoM Name | Primary Currency | | | Additional Currency 1 | | | Additional Currency 2 | |
|---|----------|----------|------------------|-------------|------------|-----------------------|-------------|------------|-----------------------|-------------|
| | | | Base Price | Reduce By % | Unit Price | Base Price | Reduce By % | Unit Price | Base Price | Reduce By % |
| 1 | Ream | Ream | 5.00 \$ | | 5.00 \$ | 4.00 EUR | | 4.00 EUR | 4.00 CAN | |
| 2 | Pallet | Pallet | 240.00 \$ | 20.000 | 192.00 \$ | 192.00 EUR | 15.000 | 163.20 EUR | 192.00 CAN | 20.000 |
| 3 | Case | Case | 60.00 \$ | 0.000 | 60.00 \$ | 48.00 EUR | 0.000 | 48.00 EUR | 48.00 CAN | 0.000 |
| 4 | | | | 0.000 | | | 0.000 | | | 0.000 |

Unit of Measure (UoM) Pricing in Documents

Sales Order

Customer: C30000
Name: Microchips
Contact Person: Judy Brown
Customer Ref. No.:
BP Currency: \$

No.: Primary 273
Status: Open
Posting Date: 11/30/2012
Delivery Date: 11/30/2012
Document Date: 11/30/2012

Contents | Logistics | Accounting | Attachments

Item/Service Type: Item Summary Type: No Summary

| # | Item No. | Item Description | Quantity | Unit Price | Disc... | Tax C... | Total (LC | UoM Code | UoM Group |
|---|----------|-------------------|----------|------------|---------|----------|-----------|----------|------------|
| 1 | B00320 | Copy Paper - bulk | 1 | 6.25 \$ | 0.000 | NY | 6.25 \$ | Ream | Bulk Paper |
| 2 | B00320 | Copy Paper - bulk | 1 | 75.00 \$ | 0.000 | NY | 75.00 \$ | Case | Bulk Paper |
| 3 | | | | | 0.000 | | | | |

- 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

Sales Order

Customer: C30000 No. Primary 273
 Name: Microchips Status: Open
 Contact Person: Judy Brown Posting Date: 11/30/2012
 Customer Ref. No.: Delivery Date: 11/30/2012
 BP Currency: \$ Document Date: 11/30/2012

Contents Logistics Accounting Attachments

Item/Service Type: Item Summary Type: No Summary

| # | Item No. | Item Description | Quantity | Unit Price | Disc... | Tax C... | Total (LC) | UoM Code | UoM Group |
|---|----------|-------------------|----------|------------|---------|----------|------------|-----------|------------|
| 1 | B00320 | Copy Paper - bulk | 1 | 6.25 \$ | 0.000 | NY | 6.25 \$ | Ream | Bulk Paper |
| 2 | B00320 | Copy Paper - bulk | 1 | 75.00 \$ | 0.000 | NY | 75.00 \$ | Case | Bulk Paper |
| 3 | B00320 | Copy Paper - bulk | 1 | 37.50 \$ | 0.000 | NY | 37.50 \$ | Half case | Bulk Paper |
| 4 | | | | | 0.000 | | | | |

- 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

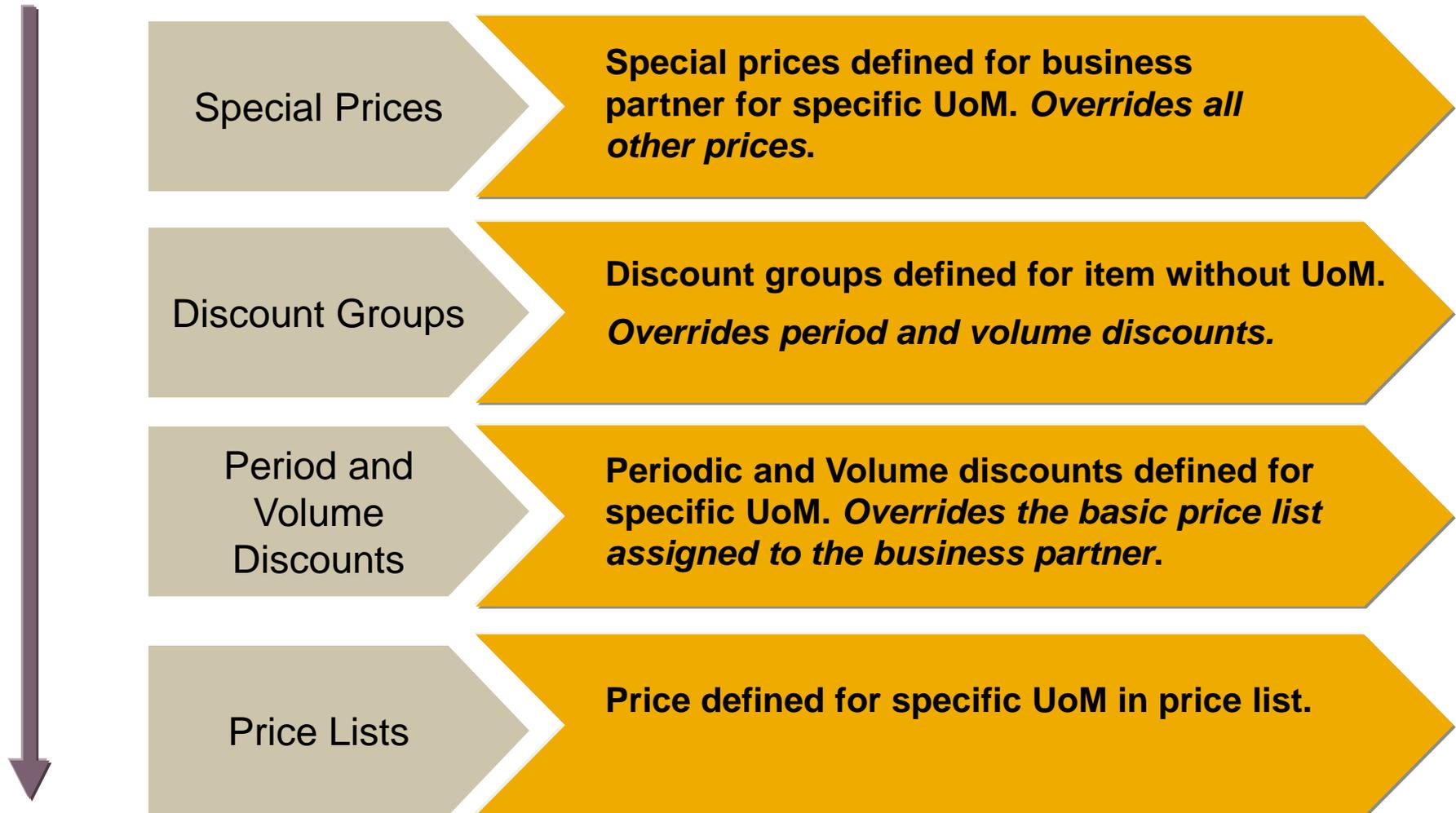
Group Definition - Bulk Paper - Setup

| # | Alt. Qty | Alt. UoM | = | Base Qty | Base UoM |
|---|----------|-----------|---|----------|----------|
| 1 | 1 | Ream | = | 1 | Ream |
| 2 | 1 | Half case | = | 6 | Ream |
| 3 | 1 | Case | = | 12 | Ream |
| 4 | 1 | Palet | = | 48 | Ream |

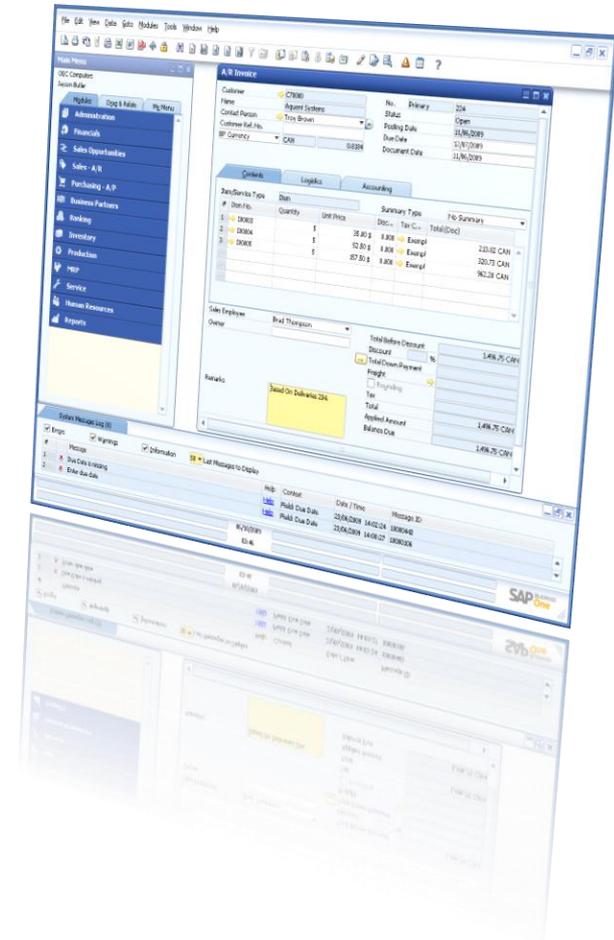
Ream = \$6.25

Half case = 6 * \$6.25 = \$37.50

Pricing Hierarchy for UoM Pricing



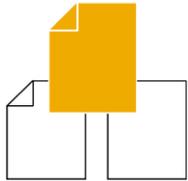
Demo: Pricing by UoM



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

Business Example



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

Excluding BPs from Discount Groups

Business Partner Master Data

Code: Manual C00080 Customer
Name: Susan's Boutique
Foreign Name:
Group: Small Accounts
Currency: US Dollar
Federal Tax ID:
Account Balance
Deliveries
Orders
Opportunities

General Contact Persons Addresses **Payment Terms** Payment Run

Payment Terms: 2P10Net30
Interest on Arrears %:
Price List: Small Account Sales Price
Total Discount %:
Credit Limit: 0.00
Commitment Limit: 0.00
Dunning Term: Standard
Automatic Posting: No
 Do Not Apply Discount Groups
Effective Discount: Lowest
Business Partner Bank
Bank Country:
Credit Card Type
Credit Card No.
Expiration Date
ID Number
Average Delay
Priority
Default IBAN
Holidays
Payment Dates
Allow Partial Delivery
Allow Partial Delivery

- 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

The screenshot shows the SAP Item Master Data form for item 999-010. The 'General' tab is active. The 'Do Not Apply Discount Groups' checkbox is highlighted with a yellow box. Other visible fields include 'Tax Liable' (checked), 'Manufacturer' (OEC), and 'Additional Identifier'. The 'Production Data' section shows 'Phantom Item' (unchecked) and 'Issue Method' (Manual). The 'Service Attributes' section shows 'Warranty Template' (empty).

| Item Master Data | |
|------------------|----------------------|
| Item No. | Manual 999-010 |
| Description | Basic laptop |
| Foreign Name | |
| Item Type | Items |
| Item Group | Items |
| UoM Group | Manual |
| Price List | Base Price |
| Bar Code | |
| Unit Price | Primary Curre 100.00 |

General | Purchasing Data | Sales Data | Inventory Data | Planning Data | Properties

Tax Liabile

Do Not Apply Discount Groups

Manufacturer: OEC

Additional Identifier:

Production Data

Phantom Item

Issue Method: Manual

Service Attributes

Warranty Template:

- 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

The screenshot shows the 'Discount Groups' dialog box in SAP. The 'Type' is 'Specific BP', 'BP Code' is 'C107', and 'BP Name' is 'Hillsdale School'. The 'Item Groups' tab is selected, showing a table with the following data:

| # | Group | Discount % |
|---|--------------|------------|
| 1 | Accessories | 0.000 |
| 2 | HP Printers | 15.000 |
| 3 | IBM Printers | 15.000 |
| 4 | Items | 0.000 |
| 5 | PC | 15.000 |
| 6 | Servers | 0.000 |

At the bottom of the dialog, the 'Active' checkbox is checked, and the date range is set from '11/01/2012' to '03/30/2013'. The 'Active' checkbox and date range fields are highlighted with a yellow box. Other buttons include 'New Group', 'Reset', 'OK', 'Cancel', and 'Copy To'.

Discount Calculation for Multiple Quantity

| Item # | Paid Qty | Free Qty | Max. Free Qty |
|--------|----------|----------|---------------|
| I00031 | 2 | 1 | 4 |

| Quantity Purchased | Discount % | Total (LC) | Comments |
|--------------------|------------|----------------|---------------------------|
| 2 | 0 | Unit Price * 2 | No discount |
| 3 | 33.33 | Unit Price * 2 | Pay for 2 and get 1 free |
| 4 | 25 | Unit Price * 3 | Pay for 3 and get 1 free |
| 5 | 20 | Unit Price * 4 | Pay for 4 and get 1 free |
| 6 | 33.33 | Unit Price * 4 | Pay for 4 and get 2 free |
| 12 | 33.33 | Unit Price * 8 | Pay for 8 and get 4 free |
| 15 | 26.67 | Unit Price * 8 | Pay for 11 and get 4 free |

Discount According to Quantity Purchased

Sales Order

Customer: C23900
Name: Parameter Technology
Contact Person: Daniel Brown
Customer Ref. No.:
BP Currency: \$

No.: Primary 275
Status: Open
Posting Date: 12/06/2012
Delivery Date:
Document Date: 12/06/2012

| # | Item No. | Quantity | Unit Price | Disc... | Tax C... | Total (LC) |
|---|----------|----------|------------|---------|----------|------------|
| 1 | I00031 | 3 | 40.00 \$ | 33.733 | PA | 80.00 \$ |
| 2 | | | | 0.00 | | |

When quantity is changed to 3...

Discount is automatically applied based on purchased quantity

Sales Employee: Brad Thompson
Owner:
Freight:
 Rounding: 0.00 \$
Tax: 4.80 \$
Total: 84.80 \$

- 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

Discount According to Quantity Purchased

Inventory > Price Lists > Special Prices > Discount Groups

Discount Groups

Type
All BPs

| # | Item Code | Item Description | Discount... | Paid Qty | Free Qty | Max. Free Qty |
|---|-----------|-----------------------|-------------|----------|----------|---------------|
| 1 | I00031 | Ink Cartridge - Black | 0.000 | 3.000 | 1.000 | 2.000 |
| 2 | I00032 | Ink Cartridge - Color | 0.000 | 4.000 | 2.000 | 8.000 |

Active From: 12/01/2011 To: 12/31/2012

Update Cancel

Mutually exclusive discounts:

- Fixed discount by percentage
- Variable discount according to purchased quantity

Effective Discount for BPs and BP Groups

Business Partner Master Data

Code Manual C00079 Customer

Name JB Enterprises

Foreign Name

Group Construction

Currency US Dollar

Federal Tax ID

Account B...

Deliveries

Orders

Opportunit...

General Contact Persons Addresses Payment Terms

Payment Terms 2P10Net30

Interest on Arrears %

Price List Small Account Sales Price

Total Discount %

Credit Limit 0.00

Commitment Limit 0.00

Dunning Term Standard

Automatic Posting No

Do Not Apply Discount Groups

Effective Discount **Lowest**

Business Partner Bank

Bank Country

Bank Name Average

Bank Code

Account

BIC/SWIFT Code

Multiplied

Bank Account Name

Branch

Ctrl Int. ID

IBAN

- Effective Discount:
 - Lowest (default)
 - Highest
 - Average
 - Total
 - Multiplied

Customer Groups - Setup

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

System Message

Do you want to replace the price lists for all business partners in the groups?

Yes No

Update Cancel

Discount Relations for Discount Group Properties

Inventory > Price Lists > Special Prices > Discount Groups

- New option added to list of discount relations - Multiplied

Discount Groups

Type: All BPs

Item Groups | **Properties** | Manufacturers | Items

| # | Properties | Discount % | Paid Qty | Free Qty | Max. Fre... |
|----|-------------------|------------|----------|----------|-------------|
| 1 | Items Property 1 | 25.000 | 0.000 | 0.000 | 0.000 |
| 2 | Items Property 10 | 0.000 | 0.000 | 0.000 | 0.000 |
| 3 | Items Property 11 | 0.000 | 0.000 | 0.000 | 0.000 |
| 4 | Items Property 12 | 0.000 | 0.000 | 0.000 | 0.000 |
| 5 | Items Property 13 | 0.000 | 0.000 | 0.000 | 0.000 |
| 6 | Items Property 14 | 0.000 | 0.000 | 0.000 | 0.000 |
| 7 | Items Property 15 | 0.000 | 0.000 | 0.000 | 0.000 |
| 8 | Items Property 16 | 0.000 | 0.000 | 0.000 | 0.000 |
| 9 | Items Property 17 | 0.000 | 0.000 | 0.000 | 0.000 |
| 10 | Items Property 18 | 0.000 | 0.000 | 0.000 | 0.000 |
| 11 | Items Property 19 | 0.000 | 0.000 | 0.000 | 0.000 |

Disc. Relations: **Lowest** (dropdown menu open showing: Lowest, Highest, Average, Total, Multiplied)

Active From: 12/01/2012 To: 12/31/2012

Update Cancel Copy To Reset

Price Report

Inventory > Inventory Reports > Price Report

Price Report

| Source of Price | Item No | Base Price List | Factor | Primary Currency | Addit. Currency | Discount % | UoM | Quantity | |
|----------------------------|---------|-----------------|--------|------------------|-----------------|------------|--------|----------|------|
| Base Price | B1000 | Base Price | 1 | 1.00 \$ | 1.00 EUR | | Manual | | |
| Period and Volume discount | B1000 | Base Price | | 0.75 \$ | | 25 | Manual | 50 | |
| Discount Purchase Price | | | 0.5 | 0.50 \$ | | | | | |
| ... | | | | | | | | | |

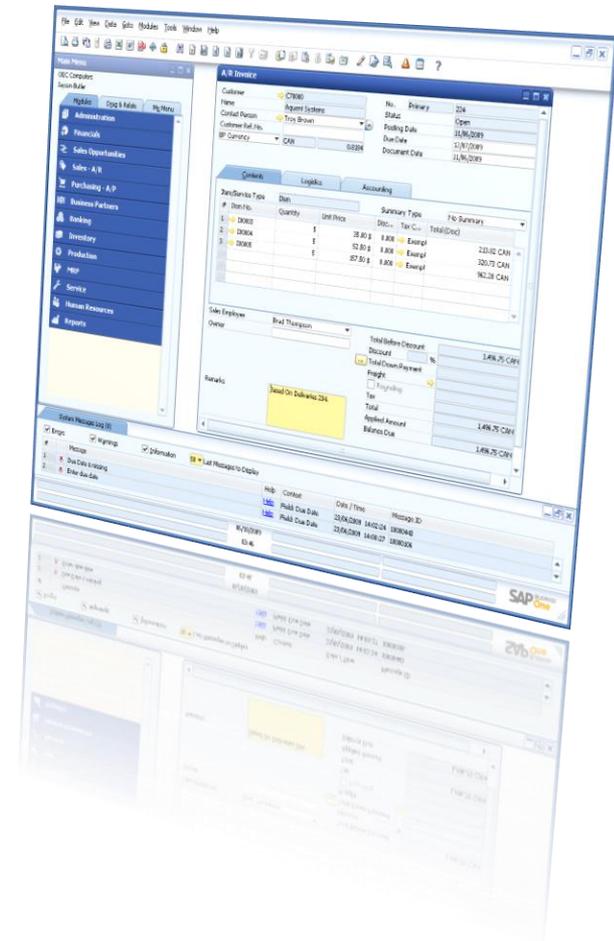
Discount Group Report

Inventory > Inventory Reports > Discount Group Report

Discount Group Report

| Discount Type | BP Code/Group | Discount Group Type | Discount Group | Discount % | Paid Qty | Free Qty | |
|---------------|---------------|---------------------|----------------|------------|----------|----------|------|
| All BPs | | Items | I00031 | | 2 | 1 | |
| All BPs | | Item Groups | Accessories | 15 | | | |
| Specific BP | C107 | Item Groups | HP Printers | 15 | | | |
| ... | | | | | | | |

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

The screenshot shows the 'General Settings' window for 'Inventory'. The 'Items' sub-tab is active. Under the 'Serial Numbers and Batches' section, the 'Management Method' is set to 'On Every Transaction'. Under 'Item Defaults', the 'Remove Unpriced Items from Price List in Database' checkbox is highlighted with a yellow border and is currently unchecked.

| Section | Field | Value |
|---|---|-------------------------------------|
| Serial Numbers and Batches | Management Method | On Every Transaction |
| | Issue Primarily By | Serial and Batch Numbers |
| | Unique Serial Numbers by | Serial Number |
| | Auto. Create Customer Equipment Card | <input checked="" type="checkbox"/> |
| Basic Setting for Batch Status | Basic Setting for Batch Status | Released |
| | Item Defaults | |
| Item Defaults | Default Warehouse | General Warehouse |
| | Set G/L Accounts By | Warehouse |
| | Auto. Add All Warehouses to New and Existing Items | <input checked="" type="checkbox"/> |
| | Display Inactive Items in Reports | <input checked="" type="checkbox"/> |
| | Display Inactive Items in Marketing Documents | <input checked="" type="checkbox"/> |
| | Auto. Add All UoM Group Definitions to New and Existing Items | <input checked="" type="checkbox"/> |
| | Auto. Add All Package Definitions to New and Existing Items | <input checked="" type="checkbox"/> |
| Remove Unpriced Items from Price List in Database | <input type="checkbox"/> | |

- 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

The screenshot shows the 'Base Price' dialog box in SAP. It contains a table with columns for Item No., Item Description, Primary Currency (Base Price, Unit Price), Additional Currency 1 (Base Price, Unit Price), and Additional Currency 2 (Base Price, Unit Price). The table lists items like 'Basic laptop' and 'Int Laptop'. Overlaid on this is the 'Price List - Selection Criteria' dialog box, which has fields for 'Vendor Code From', 'Item No. From', and 'Group' (set to 'All'). A checkbox labeled 'Hide Unpriced Items' is checked and highlighted with a red box. At the bottom of the 'Price List - Selection Criteria' dialog are 'OK' and 'Cancel' buttons. At the bottom of the 'Base Price' dialog are 'Clear' and 'Selection Criteria' buttons.

| # | Item No. | Item Description | Primary Currency Base Price | Primary Currency Unit Price | Additional Currency 1 Base Price | Additional Currency 1 Unit Price | Additional Currency 2 Base Price | Additional Currency 2 Unit Price | Inventor ... |
|----|----------|------------------|-----------------------------|-----------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------------|--------------|
| 1 | 999-010 | Basic laptop | 100.00 \$ | 100.00 \$ | 80.00 EUR | 80.00 EUR | 79.00 CAN | 9.00 CAN | Manual |
| 2 | 999-015 | Int Laptop | 100.00 \$ | 100.00 \$ | 85.00 EUR | 85.00 EUR | 85.00 CAN | 5.00 CAN | Manual |
| 3 | 999-020 | Advanced laptop | 200.00 \$ | 200.00 \$ | 20.00 EUR | 220.00 EUR | 195.00 CAN | 16.00 CAN | Manual |
| 4 | | | | | | | | | Manual |
| 5 | | | | | | | | | Manual |
| 6 | | | | | | | | | Manual |
| 7 | | | | | | | | | Manual |
| 8 | | | | | | | | | Manual |
| 9 | | | | | | | | | Manual |
| 10 | | | | | | | | | Manual |
| 11 | | | | | | | 0.00 CAN | 4.00 CAN | Ream |

Summary



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