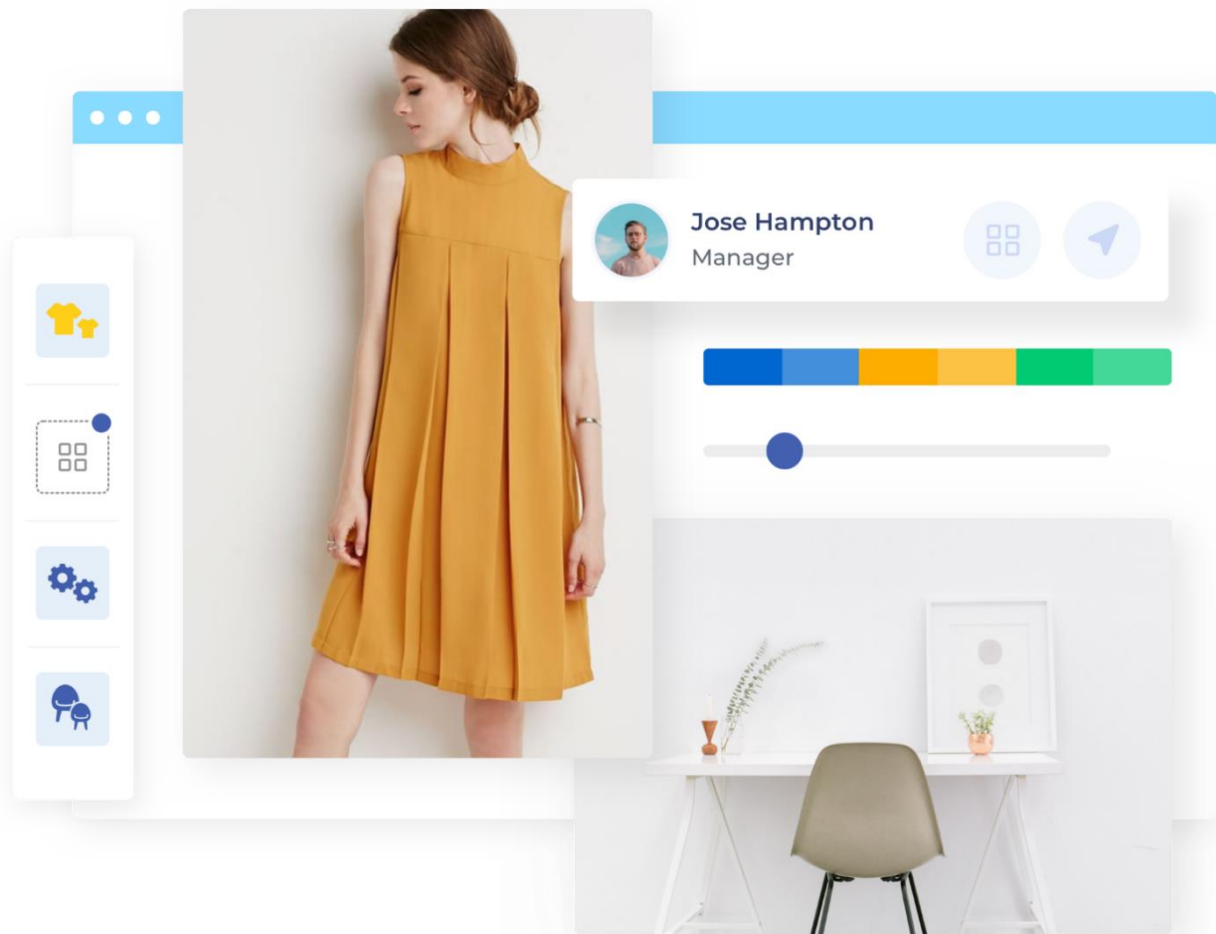


**WHITE PAPER**

TRIMIT SALES PRICES AND DISCOUNTS 21.2

This document contains information regarding the Sales Prices and Discounts functionality in

Version: 21.2
Date: 13-12-2021

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INTRODUCTION

Sale Prices and Sales Discounts can be determined in very many ways and on many levels.

In this White Paper, we want to give you an overview of the specific TRIMIT functionality we added to determine a Sales Price and a Sales Line Discount on a Sales Line.

You can enter Sales Prices per Master and Item but also additional Sales Prices Adjustments for specific values of VarDim Types and specific Dimension related Sales Prices.

There are also specific TRIMIT Reports regarding Sales Prices that can help you when you need to change Sales Prices for many Masters/Items at the same time.

NOTE

The Price Group Parameters, and especially setting up Campaign Prices is described in a separate **White Paper – TRIMIT Price Group Parameters and Campaigns**

The functionality described is the functionality in **TRIMIT 21.2 for Business Central W1 BC19.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 21.2**, which is based on Microsoft Dynamics 365 Business Central 2021 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

We are also exploring the new Price Lists functionality of Microsoft, which will also influence the way TRIMIT Sales Prices and Discounts will work in future.

For now, **DO NOT** enable the Feature **New sales pricing experience** feature, because you will lose the ability to have Sales Prices based on Search Expressions or Formula's

Feature Management							
Search Edit List							
Feature		Automatically enabled from	Enabled for	Get started	Current Company Status	Update Start Date/Time	
Advance payments localization for the Czech versi...	Learn more	Update 20.0 (Q2 2022)	None	—	Disabled		
Feature Update: Currency symbol mapping in a D...	Learn more	Update 22.0 (Q2 2023)	None	—	Disabled		
Feature Update: Enhanced email capabilities	Learn more	Update 20.0 (Q2 2022)	All Users	—	Enabled		
Feature: Decimal separator on numeric keypad m...	Learn more	Update 20.0 (Q2 2022)	All Users	—	Enabled		
Feature Update: New time sheet experience	Learn more	Update 21.0 (Q4 2022)	All Users	—	Enabled		
Feature Update: Use tracking by package number ...	Learn more	Update 20.0 (Q2 2022)	None	—	Disabled		
→ Feature Update: New sales pricing experience	Learn more	Update 22.0 (Q2 2023)	None	—	Disabled		
Feature Update: Multiple Units of Measure Synchr...	Learn more	Update 21.0 (Q4 2022)	None	—	Disabled		

COMPONENTS

TRIMIT Sales Prices and Discounts contains the following objects:

The tables	7002	<i>Sales Prices</i>
	7004	<i>Sales Line Discounts</i>
	7023	<i>Sales Price Worksheet</i>
	6036386	<i>trm Call Find Unit Price</i>
	6036490	<i>trm API Unit Price</i>
	6036654	<i>trm Dimension Sales Price</i>
	6036655	<i>trm VarDim Sales Price</i>
	6036656	<i>trm Price Group Parameters</i>
	6036657	<i>trm Sales Line Discount Type</i>
	6036658	<i>trm Sales Line Disc Comb Order</i>
	6036659	<i>trm Sales Line Disc Comb Entry</i>
	6036661	<i>trm Campaign Discount Header</i>
	6036662	<i>trm Campaign Discount Entry</i>
	6036663	<i>trm Sales Line Disc Comb Rate</i>
	6036670	<i>trm Cust/Salesperson Relation</i>
	6037054	<i>trm Calculation Sales Price</i>
	6037203	<i>trm Search Table Header</i>
	6037204	<i>trm Search Table Line</i>
	6037205	<i>trm Formula Header</i>
	6037206	<i>trm Formula Line</i>
The pages	7	<i>Customer Price Groups</i>
	7002	<i>Sales Prices</i>
	7004	<i>Sales Line Discounts</i>
	7023	<i>Sales Price Worksheet</i>
	6036490	<i>trm API Service Unit Prices</i>
	6036670	<i>trm Sales Line Disc Comb</i>
	6036671	<i>trm Posted Sales Line Disc Comb</i>
	6036672	<i>trm Sales Line Disc Types List</i>
	6036673	<i>trm Sales Line Discount Card</i>
	6036674	<i>trm Campaign Discount Card</i>
	6036675	<i>trm Campaign Discount Entries</i>
	6036676	<i>trm Cust/Salesp/Prod Rel Card</i>
	6036677	<i>trm Campaign Discount List</i>
	6037004	<i>trm Price Group Param Card</i>
	6037006	<i>trm Price Groups Param List</i>
	6037008	<i>trm Component Unit Price Buf</i>
	6037070	<i>trm Calculation Sales Prices</i>

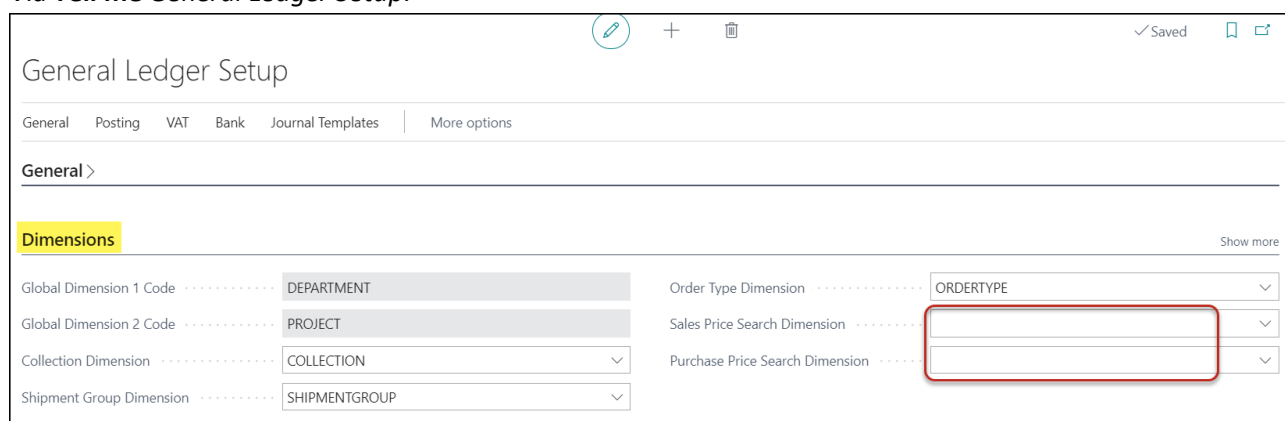
The reports	7051	<i>Suggest Item Price on Wksh.</i>
	7052	<i>Suggest Sales Price on Wksh.</i>
	7053	<i>Implement Price Change</i>
The codeunits	60	<i>Sales-Calc. Discount</i>
	7000	<i>Sales Price Calc. Mgt.</i>
	6036696	<i>trm Line Discount Combin Hand</i>

SETUP

This chapter contains information about the setups that are important regarding Sales Prices and Discounts.

GENERAL LEDGER SETUP

Via **Tell me General Ledger Setup:**



DESCRIPTION OF THE PARAMETERS:

SALES PRICE SEARCH DIMENSION

In this Parameter, you can select a Dimension for which the search of a Sales Price should start with.

I.e.: If you select the Dimension *COLLECTION*, it presumes that you will set up Sales Prices per Dimension *COLLECTION*, and that you want the price search to consider the Sales Prices that have been entered for the Dimension *COLLECTION* based on the Dimension *COLLECTION* of a Sales Line.

If you did setup Sales Prices for Dimension *COLLECTION* but have not filled this Dimension in this Parameter – or in the corresponding field in the Order Type of the Sales Order – any *COLLECTION* Dimension related Sales Prices will be ignored.

PURCHASE PRICE SEARCH DIMENSION

In this Parameter, you can select a Dimension for which the search of a Purchase Price should start with.

I.e.: If you select the Dimension *COLLECTION*, it presumes that you will set up Purchase Prices per Dimension *COLLECTION*, and that you want the price search to consider the Purchase Prices that have been entered for the Dimension *COLLECTION* based on the Dimension *COLLECTION* of a Purchase Line.

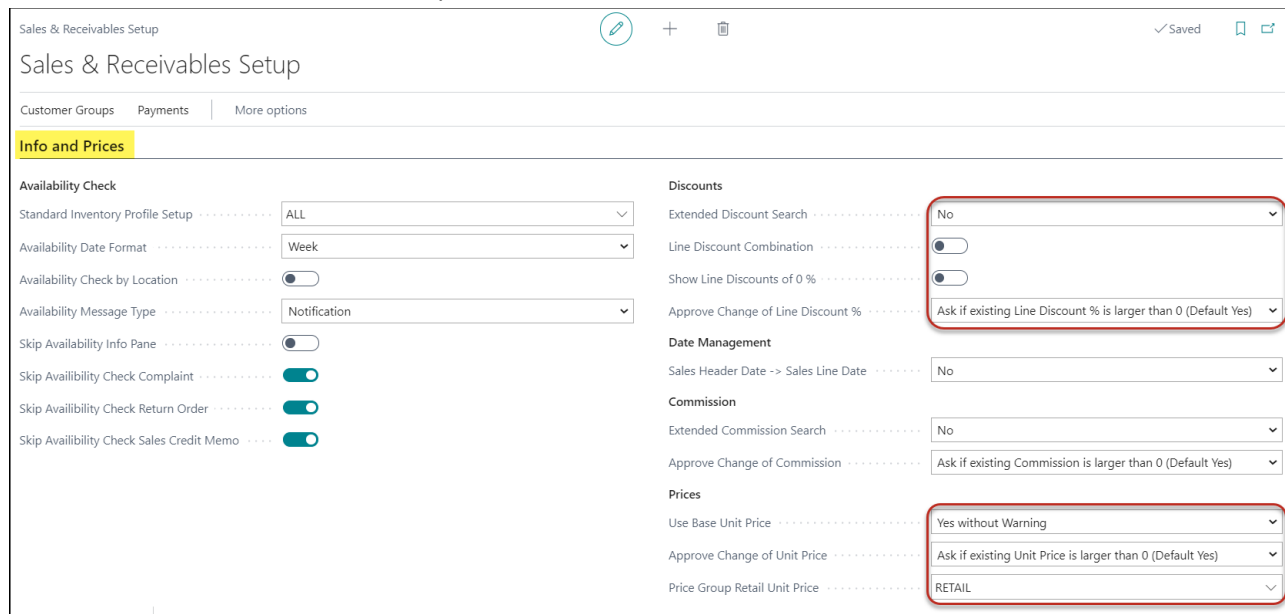
If you did setup Purchase Prices for Dimension *COLLECTION* but have not filled this Dimension in this Parameter – or in the corresponding field in the Order Type of the Purchase Order – any *COLLECTION* Dimension related Purchase Prices will be ignored.

NOTE

If you – in general - use Sales-/Purchase Prices per *COLLECTION*, you should enter the Parameters in the General Ledger Setup. If you enter the corresponding fields in the Order Types, this will overrule the Parameters in the General Ledger Setup.

SALES & RECEIVABLES SETUP

Via **Tell me Sales & Receivables Setup**:



DESCRIPTION OF THE PARAMETERS:

EXTENDED DISCOUNT SEARCH

If you want to use the TRIMIT Extended Discount Search or TRIMIT Line Discount Combinations this Parameter must be set to a value different from **No**

You can choose between the following six options:

No	You will not use the TRIMIT Discount possibilities.
Automatically per Line	The Extended Discount Search will automatically be carried out when you change a value at the Sales Line that influences the Discount Calculation.
By Demand	The Extended Discount Search will be carried out on demand using an update tool.

NOTE

When set to **No** you can still use the standard Microsoft Dynamics 365 Business Central possibilities of Sales Line Discounts based on Item Discount Group, Customer Discount Group, Minimum Quantities and Starting-/Ending Date. You must keep in mind however that the Minimum Quantities will be checked per Sales Line (per Item could mean per Master/Color/Size).

LINE DISCOUNT COMBINATION

If you want to use the TRIMIT Line Discount Combinations, this Parameter must be set to **Yes**. In that case, you also need to select an option <> **No** for the **Extended Discount Search**.

NOTE

In TRIMIT, it is possible to have an extended way of handling Line Discounts, not only based on the specific Sales Line, but also i.e., based on Amounts/Quantities in the whole Sales Order, per Master or on other levels. Please look for the setup of these Line Discount Combinations in **Tell me Sales Line Discount Types**.

SHOW LINE DISCOUNTS OF 0%

Normally a line of the **Sales Line Discount Combination** table is only visible if the **Line Discount %** is different from 0 (zero). However, if this Parameter is **Yes**, all lines will be shown.

APPROVE CHANGE OF LINE DISCOUNT%

If you make a change at a Sales Line that might influence the **Line Discount %**, the Line Discount % will be recalculated. With this Parameter, you can determine when to accomplish a change of the Line Discount %.

You can choose between the following six options:

Ask if existing Line Discount % is larger than 0 (Default Yes)	The Line Discount % will be recalculated and changed automatically if the recalculated Line Discount % differs from the existing Line Discount %, if you accept the change. You will be asked to accept the change only if the existing Line Discount % is larger than 0 (zero). The default answer is Yes .
Ask if existing Line Discount % is larger than 0 (Default No)	The Line Discount % will be recalculated and changed automatically if the recalculated Line Discount % differs from the existing Line Discount %, if you accept the change. You will be asked to accept the change only if the existing Line Discount % is larger than 0 (zero). The default answer is No .
Always Ask (Default Yes)	The Line Discount % will always be recalculated and changed automatically if the recalculated Line Discount % differs from the existing Line Discount %, if you accept the change. The default answer is Yes .
Always Ask (Default No)	The Line Discount % will always be recalculated and changed automatically if the recalculated Line Discount % differs from the existing Line Discount %, if you accept the change. The default answer is No .
Change without Acceptance	The Line Discount % will always be recalculated and changed automatically if the recalculated Line Discount % differs from the existing Line Discount %.
Line Discount % is Never Changed	The Line Discount % will never be calculated, recalculated or changed automatically. If you want to calculate or change the Line Discount %, it must be done manually.

NOTE

For the first four options, you will get a question that must be answered every time the Line Discount % may change. Keep in mind that when you are using a Matrix this means that after every entered quantity you will get a question.

USE BASE UNIT PRICE

The setting of this Parameter determines whether and how the **Unit Price** of the Item Card can be used if no Unit Price is found in the Sales Price Table.

You can choose between the following three options:

No	The Unit Price of the Item Card is not used, and a Unit Price cannot be entered manually onto the Sales Line.
Yes with Warning	If you work interactively, the Unit Price of the Item Card will be used only if you accept it. In a Batch Job, the Unit Price of the Item Card will be used automatically.
Yes without Warning	The Unit Price of the Item Card will automatically be used (this is standard Microsoft Dynamics 365 Business Central)

APPROVE CHANGE OF UNIT PRICE

If you make a change at a Sales Line that might influence the calculation of **Unit Price**, the Unit Price will be recalculated. With this Parameter, you can determine when to accomplish a change of Unit Price.

You can choose between the following seven options:

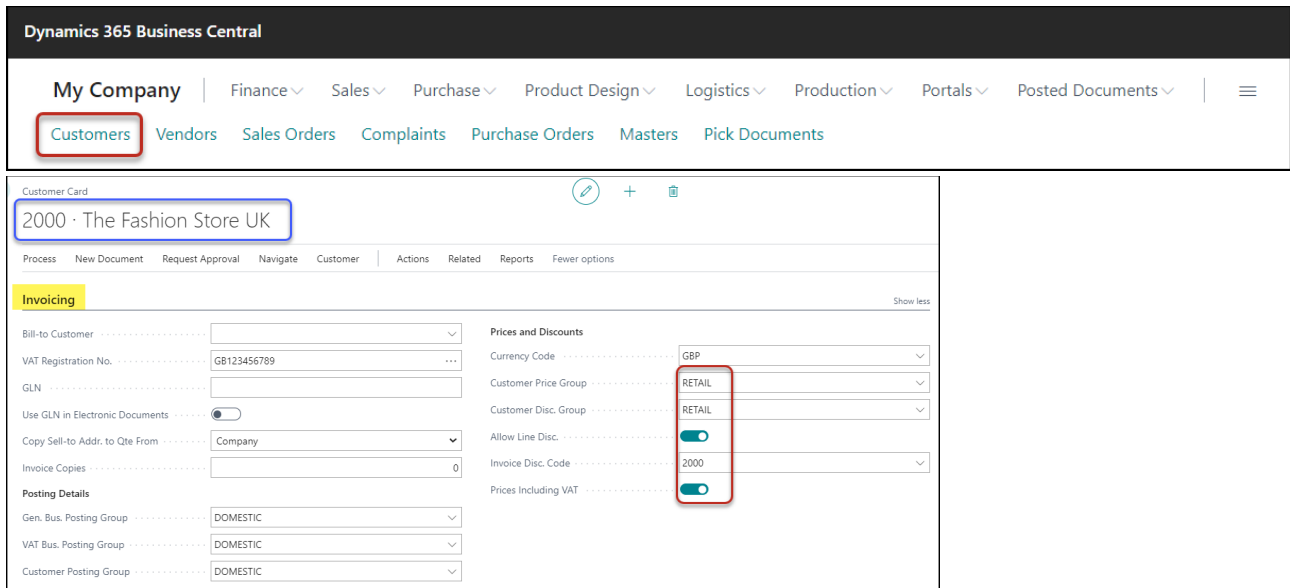
Ask if Existing Unit Price is larger than 0 (Default Yes)	The Unit Price will be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price, if you accept the change. You will be asked to accept the change only if the existing Unit Price is larger than 0 (zero). The default answer is <i>Yes</i> .
Ask if Existing Unit Price is larger than 0 (Default No)	The Unit Price will be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price, if you accept the change. You will be asked to accept the change only if the existing Unit Price is larger than 0 (zero). The default answer is <i>No</i> .
Always Ask (Default Yes)	The Unit Price will always be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price, if you accept the change. The default answer is <i>Yes</i> .
Always Ask (Default No)	The Unit Price will always be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price, if you accept the change. The default answer is <i>No</i> .
Change without Acceptance	The Unit Price will always be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price.
Unit Price is never changed	The Unit Price will never be calculated, recalculated or changed automatically. If you want to calculate or change the Unit Price, it must be done manually.

PRICE GROUP RETAIL UNIT PRICE

In this field, you can enter the code for the **Customer Price Group** where you have created the Retail Unit Prices. This information is used in some of the Sales Reports.

CUSTOMER

Via **Customers** in the *TRIMIT Small Business* Role Center or via **Tell me Customers**



DESCRIPTION OF THE FIELDS:

CUSTOMER PRICE GROUP

In this field, you can enter a **Customer Price Group**

ALLOW LINE DISC.

A checkmark in this field to allow Sales Line Discounts, can be overruled if there is no checkmark in the applicable Sales Price.

The **Allow Line Disc.** in the Sales Prices can come from the **Customer Price Group**.

If no checkmark is entered in this field, no Line Discounts will be calculated in a Sales Order – regardless the content of the **Allow Line Disc.** in the applicable Sales Price.

PRICES INCLUDING VAT

A checkmark in this field will make sure that the Sales Prices shown in the Sales Lines will be including VAT. Even if the field in a chosen **Customer Price Group** might not include VAT; it will be calculated on the Sales Line.

MASTER/ITEM

Via **Masters** in the *TRIMIT Small Business* Role Center or via **Tell me Masters**

Dynamics 365 Business Central

My Company | Finance | Sales | Purchase | Product Design | Logistics | Production | Portals | Posted Documents |

Customers | Vendors | Sales Orders | Complaints | Purchase Orders | **Masters** | Pick Documents

Master Card

2000 · Olivia Trousers

New | Process | Reports | Actions | Related | Reports | Fewer options

Prices & Sales

General

Unit Price 0,00

Price Includes VAT ☐

Unit List Price 0,00

Price Calculation

Unit Price Calculation Method Price List

Management Level Unit Price 0

VarDim Addition to Unit Price No

Price/Profit Calculation Profit=Price-Cost

Profit % 0

Commission / Bonus

Item Commission Group

Item Bonus Group

Via **Product Design, Items** in the *TRIMIT Small Business* Role Center or via **Tell me Items**

Dynamics 365 Business Central

My Company | Finance | Sales | Purchase | **Product Design** | Logistics | Production | Portals | Posted Documents |

Masters | **Items** | Collections | Shipment Groups | Matrix Limitation Setup | Pictures | VarDim Types | Calculations | Supplier Portal Messages

Item Card

20002036 · Olivia Trousers

Process | Item | Prices & Discounts | Request Approval | Actions | Related | Fewer options

Prices & Sales

Unit Price 0,00

Unit Price Excl. VAT 0,00

Price Includes VAT ☐

Price/Profit Calculation Profit=Price-Cost

Profit % 0,00

Sales Prices & Discounts Create New...

Sale

Unit List Price 0,00

Private Label ☐

Master Private Label ☐

Price Calculation

Unit Price Calculation Method Price List

Management Level Unit Price 0

VarDim Addition to Unit Price No

Allow Invoice Disc. ☒

Item Disc. Group

Sales Unit of Measure PCS

Sales Blocked ☒

VAT Bus. Posting Gr. (Price)

Commission / Bonus

Item Commission Group

Item Bonus Group

DESCRIPTION OF THE FIELDS:

UNIT PRICE

You can enter an overall **Unit Price** for the Master/Item.

Only if the system cannot find a Sales Price according to the **Unit Price Calculation Method** on the Master or the Item, this **Unit Price** will be taken – keep in mind that this Amount is always in the Local Currency.

PRICE INCLUDES VAT

You can enter a checkmark to indicate that the **Unit Price** entered is including VAT.

UNIT LIST PRICE

You can enter a **Unit List Price** for the Master/Item: a Retail Price.

In TRIMIT we don't use this field. Instead, we can enter a **Customer Price Group** that represents the Retail Prices in the parameter **Price Group Retail Unit Price** in the Sales & Receivables Setup.

UNIT PRICE CALCULATION METHOD

This field determines how the Unit Price (Sales Price) should be calculated for a specific Master/Item.

You can choose between the following five options:

Price List	The Unit Price is found by searching in the Sales Price table.
Unit Cost + CM	The Unit Price is calculated based on the Unit Cost and the Contribution Ratio indicated by the Contribution Ratio Group .
Sum Total of Component Unit Prices	The Unit Price is calculated as the summation of the Component Unit Prices of the BOM at the level indicated by the Management Level Unit Price .
Related Order No.	The Unit Price is calculated as the summation of the Unit Price (LCY) field of the Production Lines of a Related Order.
Items in Assortment	The Unit Price is calculated as a summation of the Item Unit Prices of the BOM at the underlying level in case the Item is an Assortment.

NOTE

Unit Price Calculation Method will automatically be set to *Items in Assortment* in an Item, if it is created via the Assortment Matrix of the Master.

MANAGEMENT LEVEL UNIT PRICE

This field is only applicable if **Unit Price Calculation Method** is set to *Sum Total of Component Unit Prices*.

The table for the **Management Level Unit Price** can be entered by the user. In our demo company we have set it up as follow:

Select - Management Level				   		  	
	Group No. ↑		Description			Translations	
→	1	:	Finished Goods Level			0	
	2		Components Level 1			0	
	3		Components Level 2			0	
	4		Raw Materials Level			0	

Especially if you have BOM's (Bill of Materials) with many levels deep, you can determine to which level the system needs to dig in to, to determine the Sales Prices of all the Components to calculate the Sales Price of the finished product.

VARDIM ADDITION TO UNIT PRICE

If this field is set to *Yes*, the program can automatically add an Amount when calculating the Unit Price based on the values in your VarDim Order.

This additional Amount is calculated based on the VarDim Order as the sum of the **Adjustment Amount Sales** and the **Unit Price * Adjustment Sales in % / 100**.

If this field is set to *No*, no Amount will be added based on the VarDim Order; not even if you have added these VarDim Adjustments in the **VarDim Adjustment Sales Prices**.

For every Line in the **VarDim Master** of a Master you additionally must set the field **Search Unit Price Adjustment** to *Yes*, if you want these additions to be added.

I.e., for Master *2500 Wendy T-Shirt Teamwear*

Edit - VarDim Master List - 2500 - Wendy T-shirt Teamwear						
Search + New Edit List Delete Card Variant Table Copy Open in Excel ...						
Type	VarDim Type	Description	VarDim Type Placement in Item No.	Cons... Inher...	Dimensi... 2	Search Unit Price Adjustment
→ Variant	COLOR_1	Garment/Fabric Colors	Variant 1	☐	No	No
Variant	SIZE_C	Casual Sizes XS - 5XL	Variant 2	☐	No	No
Variant	SLEEVE_COL	Sleeve Color		☐	No	Yes
Variant	POCKET_COL	Pocket Color		☐	No	Yes

PRICE/PROFIT CALCULATION

This field specifies if the **Profit %** field, the **Unit Price** field, or neither field is calculated and filled. The value in the **Profit %** field is what is generally understood as the profit margin.

You can choose between the following three options:

Profit=Price-Cost	The value in the Profit % field is calculated as follows: $100 * (\text{Unit Price} - \text{Unit Cost})$ $\text{Profit \%} = \frac{\text{Unit Price} - \text{Unit Cost}}{\text{Unit Price}} * 100$
Price=Cost+Profit	The value of the Unit Price field is calculated as follows: $100 * \text{Unit Cost}$ $\text{Unit Price} = \frac{\text{Unit Cost}}{100 - \text{Profit \%}}$
No Relationship	Neither the Profit % field nor the Unit Price field are calculated

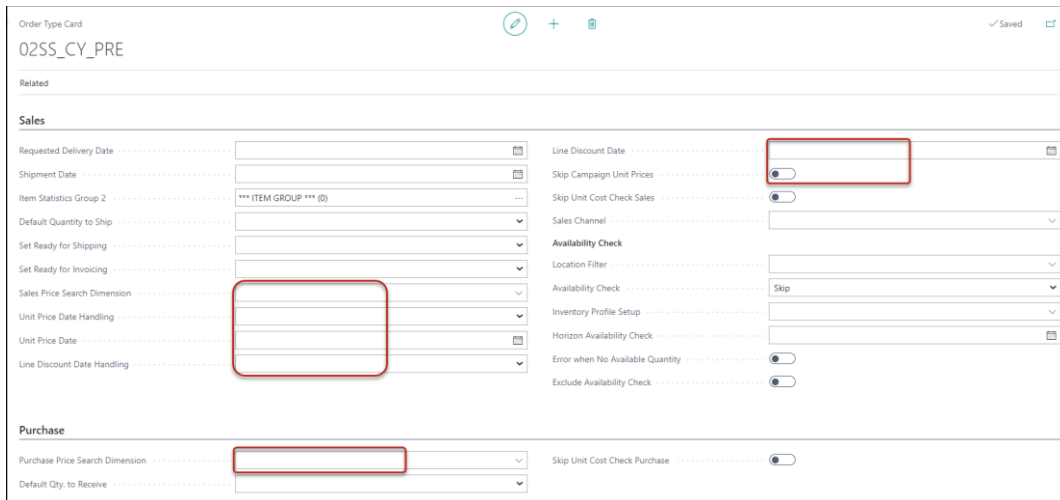
PROFIT %

This field specifies the profit margin that you want to sell the Master/Item at.

You can enter a Profit % manually or have it calculated according to the **Price/Profit Calculation** field.

ORDER TYPE

Via **Tell me Order Types:**



DESCRIPTION OF THE FIELDS:

SALES PRICE SEARCH DIMENSION

In this field, you can select a Dimension for which the search of a Sales Price should start with.

I.e.: If you select the Dimension *COLLECTION*, it presumes that you will set up Sales Prices per Dimension *COLLECTION*, and that you want the price search to consider the Sales Prices that have been entered for the Dimension *COLLECTION* based on the Dimension *COLLECTION* of a Sales Line.

This field will overrule the corresponding Parameter in the **General Ledger Setup**.

UNIT PRICE DATE HANDLING

With this field you can determine which Date should be taken to compare with the **Starting Date** and **Ending Date** of the Sales Price Table. This field will overrule the content of the field **Unit Price Date Handling** in the **Price Group Parameters** of the **Customer Price Group** of the Customer or Sales Header.

You can choose the following three options:

Order Date	The Order Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Price.
Shipment Date	The Shipment Date of the Sales Line will be compared with the Starting-/Ending Date of the Sales Price.
Setup Date	The field Unit Price Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Price.

UNIT PRICE DATE

This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Price Table to determine the right Sales Price.

This field is only applicable if **Unit Price Date Handling** has been set to *Setup Date*.

LINE DISCOUNT DATE HANDLING

With this field you can determine which Date should be taken to compare with the **Starting Date** and **Ending Date** of the Sales Line Discount Table.

This field will overrule the content of the field **Line Discount Date Handling** in the **Price Group Parameters** of the **Customer Price Group** of the Customer or Sales Header.

You can choose the following three options:

Order Date	The Order Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Line Discounts.
Shipment Date	The Shipment Date of the Sales Line will be compared with the Starting-/Ending Date of the Sales Line Discounts.
Setup Date	The field Unit Price Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Line Discounts. This can be set via the Line Discount Date in the Order Type as well.

LINE DISCOUNT DATE

This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Line Discount Price Table to determine the right Sales Line Discount.

This field is only applicable if **Line Discount Date Handling** has been set to *Setup Date*.

SKIP CAMPAIGN UNIT PRICES

The Price Search of TRIMIT will usually first search if there are special **Campaign** Sales Prices available.

For specific Order Types, you can determine, that the Campaign Prices are not applicable; in that case you need to enter a checkmark in this field.

PURCHASE PRICE SEARCH DIMENSION

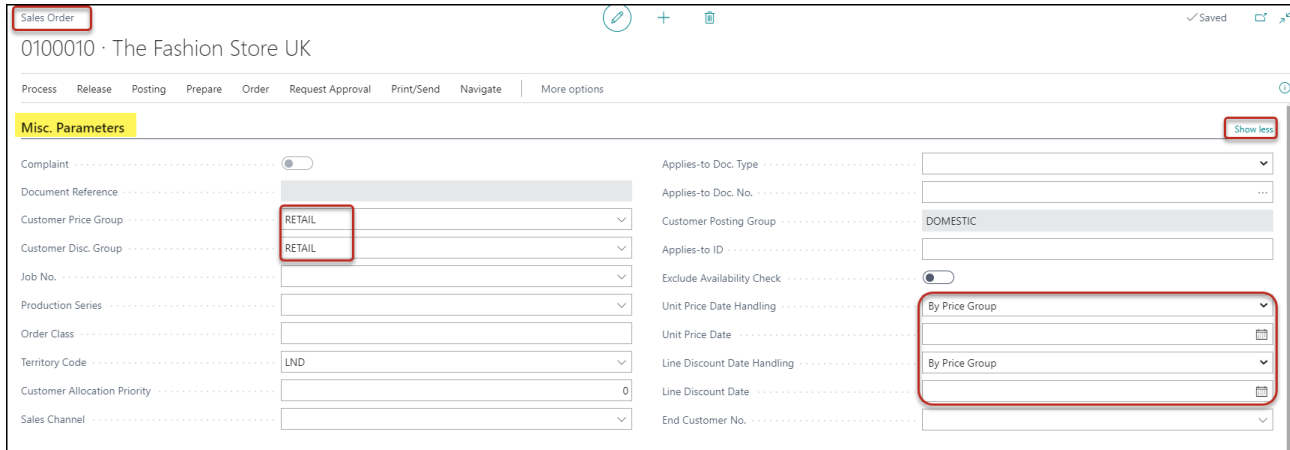
In this field, you can select a Dimension for which the search of a Purchase Price should start with.

I.e.: If you select the Dimension *COLLECTION*, it presumes that you will set up Purchase Prices per Dimension *COLLECTION*, and that you want the price search to consider the Purchase Prices that have been entered for the Dimension *COLLECTION* based on the Dimension *COLLECTION* of a Purchase Line.

This field will overrule the corresponding Parameter in the **General Ledger Setup**.

SALES HEADER

Also, in the header of the Sales Documents (Quote, Order, Blanket Order, Sales Invoice, Sales Credit Memo, Summary Sales Order and Intercompany Sales Order), FastTab **Misc. Parameters**, you can set several fields specifically for this Sales Document that will influence the Sales Prices and Discounts.



NOTE

The fields on the **Misc. Parameters** might differ from the picture above which is from a Sales Order. This depends on the Document Type.

DESCRIPTION OF THE FIELDS:

CUSTOMER PRICE GROUP

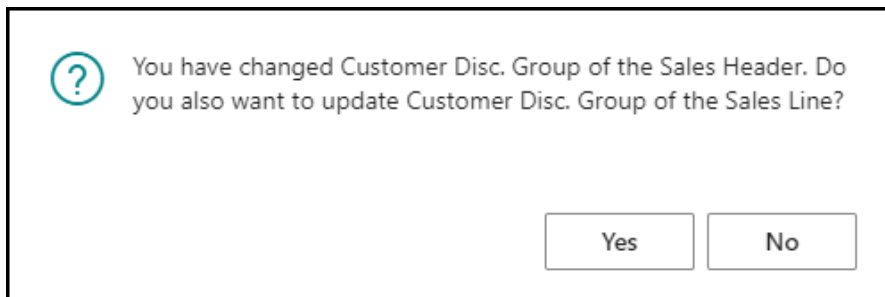
Changing this field – which will be filled based on the Customer - will overrule the **Customer Price Group** that might have been entered in the **Customer**.

If you would change this field after you already entered some Matrix- or Item Lines in the Sales Document, the system will automatically recalculate the Sales Prices based on the changed **Customer Price Group** and its **Price Group Parameters**.

CUSTOMER DISC. GROUP

Changing this field – which will be filled based on the Customer - will overrule the **Customer Discount Group** that might have been entered in the **Customer**.

If you would change this field after you already entered some Matrix- or Item Lines in the Sales Document, the system will show a message, and after confirming this message with **Yes** will recalculate the Line Discounts.



UNIT PRICE DATE HANDLING

You can overrule the **Unit Price Date Handling** that might have come from the **Order Type** or the **Customer Price Group** of the Sales Order.

If you would change the field after you already entered some Matrix- or Item Lines in the Sales Document, the system will recalculate the Sales Prices.

You can choose the following five options:

Order Date	The Order Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Price.
Shipment Date	The Shipment Date of the Sales Line will be compared with the Starting-/Ending Date of the Sales Price.
Setup Date	The field Unit Price Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Price. This can be set via the Unit Price Date in the Order Type as well.
Ready for Invoicing Date	The WORKDATE will be compared with the Starting-/Ending Date of the Sales Price.
By Price Group	The content of the field Unit Price Date Handling in the Price Group Parameters of the Customer Price Group of the Sales Header will determine the Unit Price Date Handling .

UNIT PRICE DATE

This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Price Table to determine the right Sales Price.

This field is only applicable if **Unit Price Date Handling** has been set to *Setup Date*.

If you would change the field after you already entered some Matrix- or Item Lines in the Sales Document, the system will recalculate the Sales Prices.

LINE DISCOUNT DATE HANDLING

You can overrule the **Line Discount Date Handling** that might have come from the **Order Type** or the **Customer Price Group** of the Sales Order.

If you would change the field after you already entered some Matrix- or Item Lines in the Sales Document, the system will recalculate the Line Discounts.

You can choose the following five options:

Order Date	The Order Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Line Discounts.
Shipment Date	The Shipment Date of the Sales Line will be compared with the Starting-/Ending Date of the Sales Line Discounts.
Setup Date	The field Unit Price Date of the Sales Header will be compared with the Starting-/Ending Date of the Sales Line Discounts. This can be set via the Line Discount Date in the Order Type as well.
Ready for Invoicing Date	The WORKDATE will be compared with the Starting-/Ending Date of the Sales Line Discounts.
By Price Group	The content of the field Line Discount Date Handling in the Price Group Parameters of the Customer Price Group of the Sales Header will determine the Unit Price Date Handling .

LINE DISCOUNT DATE

This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Line Discount Price Table to determine the right Sales Line Discount.

This field is only applicable if **Line Discount Date Handling** has been set to *Setup Date*.

If you would change the field after you already entered some Matrix- or Item Lines in the Sales Document, the system will recalculate the Line Discounts.

SALES PRICES

Via the Cards and Lists of **Master**, **Item**, **Customer**, **Customer Price Group** and **Price Group Parameters**, you can enter the Sales Prices Table:

Master Card

2000 · Olivia Trousers

New Process Reports Actions Related Reports Fewer options

Master Data

Statistics

Comments

Portal

Sales Receivables

Purchases

Warehouse

No. 2000

No. System MMMMAABB

Sales Prices

VarDim Adjustment Sales Prices

Item Card

20002036 · Olivia Trousers

Process Item Prices & Discounts Request Approval Actions Related Fewer options

Set Special Prices

Set Special Discounts

Special Prices & Discounts Overview

Purchase Prices

Purcha

Customer Card

2000 · The Fashion Store UK

Process New Document Approve Request Approval Prices & Discounts Navigate Customer

Prices

Line Discounts

Prices & Discounts Overview

Customer Price Groups

Search + New Edit List Delete Price Group Parameters Sales Prices

Code ↑	Description	Allow Line Disc.	Allow Invoice Disc.	Price Includes VAT	VAT Bus. Posting Gr. (Price)
→ B2C_CAMP	campaign Prices for B2C Webshop	☒	☒	☒	DOMESTIC

Price Group Parameters

Customer Price Group · RETAIL

Prices More options

General

Item 2020

Sales Prices Search + New Edit List Delete Dimension Prices Search Table Lines Formula Lines Open in Excel More options

General

Sales Type Filter: None Item/Master No. Filter: 2020

Sales Code Filter: None Starting Date Filter:

Relation Item/Master Filter: None Currency Code Filter:

Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Unit Price	Dimension Prices	Starting Date ↑	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula	Price Incl. VAT	VAT Bus. Posting Gr. (Price)	C. S. #
→ Customer Price Group	RETAIL	2020	PCS	0		65.00	0			SIZE_EU[G0]	ST00014	Default		☒	DOMESTIC	
Customer Price Group	RETAIL	2020	PCS	0	DKK	550.00	0			SIZE_EU[G0]	ST00012	Default		☒	DOMESTIC	
Customer Price Group	RETAIL	2020	PCS	0	EUR	100.00	0			SIZE_EU[G0]	ST00013	Default		☒	DOMESTIC	
Customer Price Group	RETAIL	2020	PCS	0	NOK	590.00	0			SIZE_EU[G0]	ST00015	Default		☒	DOMESTIC	
Customer Price Group	RETAIL	2020	PCS	0	SEK	650.00	0			SIZE_EU[G0]	ST00016	Default		☒	DOMESTIC	
Customer Price Group	RETAIL	2020	PCS	0	USD	105.00	0			SIZE_EU[G0]	ST00017	Default		☒	DOMESTIC	
All Customers		2020	PCS	0		34.00	0			SIZE_EU[G0]	ST00018	Default		☐		

DESCRIPTION OF THE FIELDS IN THE HEADER:

SALES TYPE FILTER

This Filter will determine the Lines that will be shown based on the **Sales Type** of the Lines.

None will show all the Lines, regardless the **Sales Type**

SALES CODE FILTER

This Filter will determine the Lines that will be shown, based on the **Sales Code** of the Lines.

You can only enter a **Sales Code Filter** if the **Sales Type Filter** has been set to *Customer*, *Customer Price Group* or *Campaign*.

RELATION ITEM/MASTER FILTER

This Filter will determine the Lines that will be shown, based on the content of the field **Item No.** and the field **Master Item** (Yes/No) that is related to that **Item No.**

You can choose between the following four options:

Item	The Lines refer to Sales Prices for individual Items – therefore the number in the column Item No. will be Item Nos. with Master Item is <i>No</i> .
Master	The Lines refer to Sales Prices for Masters – therefore the number in the column Item No. will be Master Nos. (Item Nos. with Master Item is <i>Yes</i> .)
None	The Lines can refer to Sales Prices for Items and/or Masters.

NOTE

If you open the Sales Prices via the **Customer** or via the **Customer Price Group** you need to make sure, that you select the right **Relation Item/Master Filter**. The default in these two cases is *Item*.

Based on the **Relation Item/Master Filter** the content of the column **Item No.** will be evaluated differently.

ITEM/MASTER NO. FILTER

This Filter will determine the Lines that will be shown, based on the **Item No.** of the Lines and the **Relation Item/Master Filter**.

If this field will be a **Master**, the **Relation Item/Master Filter** will automatically be changed in to *Master*.

If this field will be an **Item**, the **Relation Item/Master Filter** will automatically be changed in to *Item*.

STARTING DATE FILTER

This Filter will determine the Lines that will be shown, based on the **Starting Date** of the Lines.

CURRENCY CODE FILTER

This Filter will determine the Lines that will be shown, based on the **Currency** of the Lines.

DESCRIPTION OF THE FIELDS IN THE LINES:

NOTE

If the Sales Prices are opened via the Master List/Card the field **trm Master Item** in the Sales Prices will be set to *Yes*. This Sales Price will then be visible for **Relation Item/Master Filter** *Master* and *None* and the content of the **Item No.** will be checked in the Master Table.

If the Sales Prices are opened via the Item List/Card the field **trm Master Item** in the Sales Prices will be set to *No*. This Sales Price will then be visible for **Relation Item/Master Filter** *Item* and *None* and the content of the **Item No.** will be checked in the Item Table.

If the Sales Prices are opened via the Customer List/Card, the Customer Price Group or the Price Group Parameters, the field **trm Master Item** in the Sales Prices will be filled automatically based on the content of the field **Item No.** which will be checked in the Item Table.

SALES TYPE

The **Sales Type** defines for whom this Sales Price will apply.

You can choose between the following four options:

Customer	Will be compared with the Sell-to Customer, Bill-to Customer, Company Group and Chain of a Sales Document
Customer Price Group	Will be compared with the Customer Price Group of a Sales Document which originally comes from the Sell-to Customer of the Sales Document
All Customers	Applicable for all customer
Campaign	This Standard Business Central option will be ignored and has been replaced by the TRIMIT Campaign functionality as described in the FastTab Campaign Setup .

SALES CODE

The **Sales Code** specifies the Sales Type.

If the Sales Type is *Customer*, the Sales Code must be a Customer Number. But it will be interpreted as the **Sell-to Customer, Bill-to Customer, Company Group** and **Chain**.

If the Sales Type is *Customer Price Group*, the Sales Code must be a Customer Price Group

If the Sales Type is *Campaign*, the Sales Code must be a Campaign.

If the Sales Type is *All Customers*, you cannot select a Sales Code.

ITEM NO.

The content of the field **Item No.** in the Lines depends on the **Relation Item/Master Filter**.

If **Relation Item/Master Filter** = *Master* the content of the **Item No.** needs to be Master Nos.

If **Relation Item/Master Filter** = *Item*, the content of the **Item No.** needs to be Item Nos.

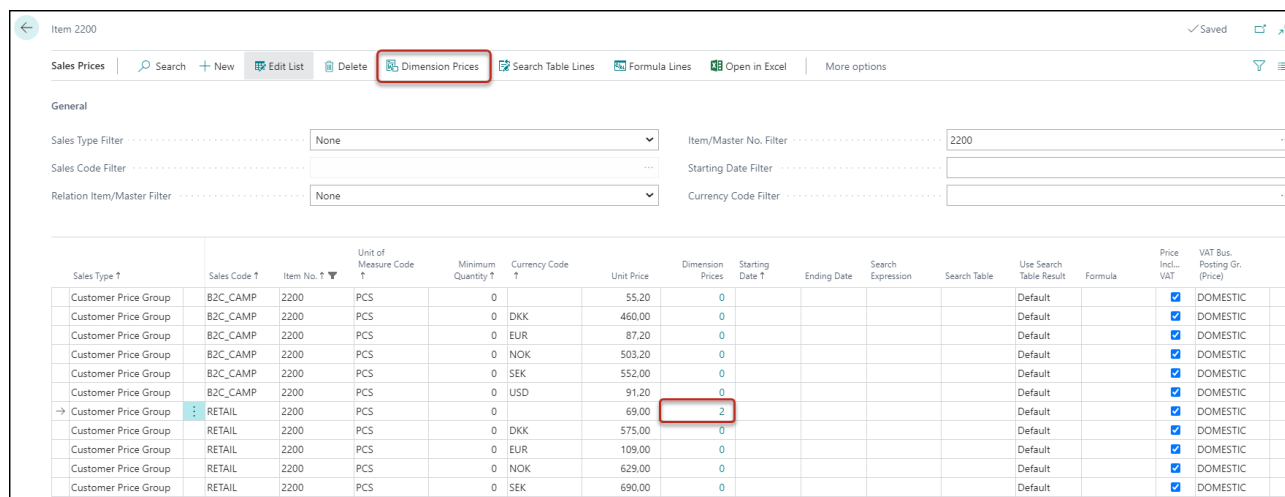
If **Relation Item/Master Filter** = *None* the content of the **Item No.** can be Master Nos. or Item Nos.

MINIMUM QUANTITY

Minimum Quantity will be compared with the **Quantity** of an individual Item Sales Line.

DIMENSION PRICES

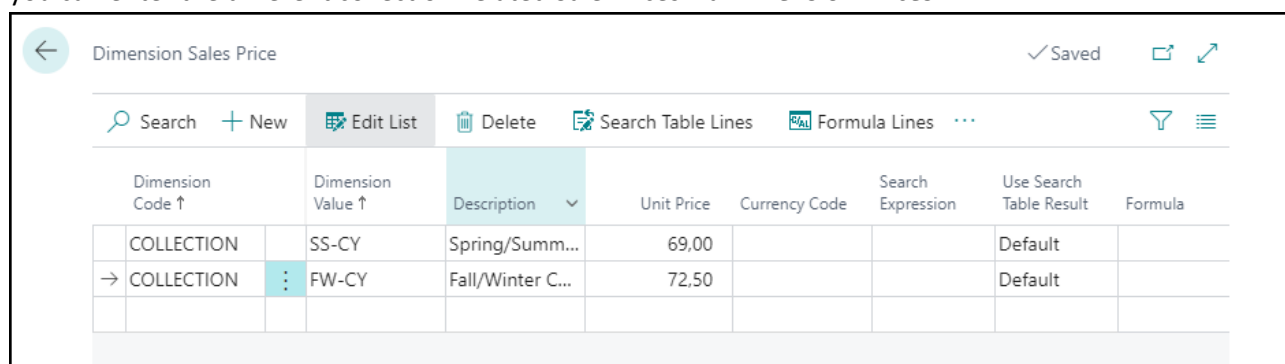
By clicking on the number in this column, you can enter different Sales Prices for specific **Dimensions** and **Dimension Values**. You can also click on **Dimension Prices**.



Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Unit Price	Dimension Prices	Starting Date ↑	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula	Price Incl. VAT	VAT Bus. Posting Gr. (Price)
Customer Price Group	B2C_CAMP	2200	PCS	0		55,20	0					Default		☒	DOMESTIC
Customer Price Group	B2C_CAMP	2200	PCS	0	DKK	460,00	0					Default		☒	DOMESTIC
Customer Price Group	B2C_CAMP	2200	PCS	0	EUR	87,20	0					Default		☒	DOMESTIC
Customer Price Group	B2C_CAMP	2200	PCS	0	NOK	503,20	0					Default		☒	DOMESTIC
Customer Price Group	B2C_CAMP	2200	PCS	0	SEK	552,00	0					Default		☒	DOMESTIC
Customer Price Group	B2C_CAMP	2200	PCS	0	USD	91,20	0					Default		☒	DOMESTIC
→ Customer Price Group	RETAIL	2200	PCS	0		69,00	2					Default		☒	DOMESTIC
Customer Price Group	RETAIL	2200	PCS	0	DKK	575,00	0					Default		☒	DOMESTIC
Customer Price Group	RETAIL	2200	PCS	0	EUR	109,00	0					Default		☒	DOMESTIC
Customer Price Group	RETAIL	2200	PCS	0	NOK	629,00	0					Default		☒	DOMESTIC
Customer Price Group	RETAIL	2200	PCS	0	SEK	690,00	0					Default		☒	DOMESTIC

You can enter a (financial) **Dimension** for which a special Sales Price (based on the current Sales Price Line) will apply. The **Dimension Prices** are a specification of a specific record in the Sales Price Table.

I.e., The **RETAIL** Sales Price in **Currency Code** " for 2200 can be different for the **Dimension COLLECTION**. So, you can enter the different collection-related Sale Prices via **Dimension Prices**.



Dimension Code ↑	Dimension Value ↑	Description	Unit Price	Currency Code	Search Expression	Use Search Table Result	Formula
COLLECTION	SS-CY	Spring/Summ...	69,00			Default	
→ COLLECTION	FW-CY	Fall/Winter C...	72,50			Default	

The **Currency Code** cannot be changed; it comes from the original record in the Sales Price Table.

If you enter a **Search Expression** (with Search Table Lines) or **Formula**, this will overrule the **Search Expression** and **Formula** in the Sales Price Table.

STARTING-/ENDING DATE

Keep in mind that they can be checked with the **Order Date**, **Shipment Date**, **Setup Date** based on the **Unit Price Date Handling** of the Sales Order.

SEARCH EXPRESSION

In the **Search Expression** you can select the VarDim Types that are connected to the Master in the VarDim Master and that have a **VarDim Type Replacement in Item No.** filled:

The VarDim Types that are usually used in the Item Nos. that are related to the Master.

It is used for the Sales Prices with **Relation Item/Master Filter** = *Master* where different prices are applicable for i.e., colors and/or sizes.

You can also choose them by clicking **Look up value** (Alt+Down Arrow) in the field **Search Expression** by entering checkmarks in **Choose VarDim Type**:

Edit - Auto generate Formulas

Search
New
Edit List
Delete
Open in Excel

Choose VarDim Type	Choose VarDim Grouping	Type No.	VarDim Type Name	Variant Table
☒		COLOR_1	Garment/Fabric Colors	10
→ ☒	:	SIZE_EU	European Sizes 36 - 60	21

Or by entering the **VarDim Types** manually – separated by a comma: **COLOR_1,SIZE_EU**

After the **Search Expression** has been filled you can enter the Sales Prices for individual values (like color and/or sizes) by clicking **Search Table Lines**.

Item 2000

Sales Prices
Search
New
Edit List
Delete
Dimension Prices
Search Table Lines
Formula Lines
Open

EXAMPLE – SEARCH EXPRESSION AND SEARCH TABLE LINES FOR SALES PRICES

In that case the **Search Table Lines** might look like as follows where you can enter a **Unit Price** for every **COLOR_1** and **SIZE_EU** value of the Master:

Edit - Search Table Lines

Search
New
Edit List
Delete
Maintain
Open in Excel
More options

Inac...	Not Valid	COLOR_1 ↑	Garment/Fabric Colors	SIZE_EU ↑	European Sizes 36 - 60	Unit Price	
→	☐	:	20	Royal Blue	36	36	37,0
	☐		20	Royal Blue	38	38	37,0
	☐		20	Royal Blue	40	40	39,0
	☐		20	Royal Blue	42	42	39,0
	☐		20	Royal Blue	44	44	41,0
	☐		20	Royal Blue	46	46	41,0
	☐		20	Royal Blue	48	48	43,0
	☐		25	Navy	36	36	37,0
	☐		25	Navy	38	38	37,0
	☐		25	Navy	40	40	39,0
	☐		25	Navy	42	42	39,0
	☐		25	Navy	44	44	41,0
	☐		25	Navy	46	46	41,0

EXAMPLE – SEARCH EXPRESSION WITH GROUPING 0 – 9 AND SEARCH TABLE LINES FOR SALES PRICES

Because this list might be very long, you can also make use of Groupings from the values in a VarDim Type (so called Price Breaks): in the **Search Expression** you can make use of the **Grouping 0 – Grouping 9** of the values within a VarDim Type: i.e., SIZE_C[G0] means that you only need to enter Sales Prices (in the **Search Table Lines**) per defined **Grouping 0** value of the VarDim Type **SIZE_C**.

I.e., In the VarDim Type **SIZE_C** we have defined 2 Groupings:

VarDim Variant Option No. SIZE_C - 20									
Value ↑	Descripti...	Short Descripti...	Hex Code	No Image	Picture	Attribute Value	Grouping 0	Grouping 1	Grouping 3
→ 01	XS	XS		☐	+	XS-M	1		
02	S	S		☐	+	XS-M	1		
03	M	M		☐	+	XS-M	2		
04	L	L		☐	+	L-XXL	2		
05	XL	XL		☐	+	L-XXL	3		
06	XXL	XXL		☐	+	L-XXL	3		
07	3XL	3XL		☐	+	3XL-5XL	4		
08	4XL	4XL		☐	+	3XL-5XL	4		
09	5XL	5XL		☐	+	3XL-5XL	5		
AA	XS-L / 1221	AA		☐	+				

If you select a **VarDim Type** for the **Search Expression** via the **Look up value**, you can choose the Grouping [G0] – [G9] in the **Choose VarDim Grouping** column.

Edit - Auto generate Formulas						
Search	New	Edit List	Delete	Open in Excel		
Choose VarDim Type	Choose VarDim Grouping	Type No.	VarDim Type Name	Variant Table		
☐		COLOR_1	Garment/Fabric Colors	10		
→ ☒		SIZE_C	Casual Sizes XS - 5XL	20		
	[G0] [G1] [G2] [G3] [G4] [G5] [G6] [G7] [G8] [G9]					

If the **Search Expression** = **SIZE_C[G0]** in the Sales Price Line, the **Search Table Lines** will look as follows:

Edit - Search Table Lines						
 Search  New  Edit List  Delete  Maintain  Open in Excel More options						
Inactive	Not Valid	SIZE_C ↑	Casual Sizes XS - 5XL		Unit Price	
→	☐		☐	3XL-5XL		35,99
	☐		☐	L-XXL		35,99
	☐		☐	XS-M		35,99

NOTE

Be aware that the **SIZE_C** values based on Grouping 1 – 9, will be shown in alphabetical order !!

If the **Search Expression** = **SIZE_C[G1]** in the Sales Price Line, the **Search Table Lines** will look as follows:

Edit - Search Table Lines						
 Search  New  Edit List  Delete  Maintain  Open in Excel More options						
Inactive	Not Valid	SIZE_C ↑	Casual Sizes XS - 5XL		Unit Price	
→	☐		☐	1		35,99
	☐		☐	2		35,99
	☐		☐	3		35,99
	☐		☐	4		35,99

SEARCH TABLE

This is the Code for the **Search Table** that has been created based on your **Search Expression**:

I.e., if you have **Search Expression** **COLOR_1,SIZE_EU** the **Search Table** will look like:

(In the field press **Alt+Down Arrow** and click **Select from full list** to open the **Search Table** List; now click **Edit**)

Select - Search Table Header List						
 Search  New  Edit List  Delete  View  Open in Excel More options						
Formula Type	Table ID					
Purchase Line	ST00105					
Purchase Line	ST00106					
→ Sales Line	ST00107					
Sales Line	ST00108					
Sales Line	ST00109					
Sales Line	ST00110					

Search Table Header		
ST00107		
Actions Related		
General		
Table ID ST00107 Formula Type Sales Line Description Allow Blank Value ☐ Formula Calculation Result Direct Search Table Relation Direct Search Return Field Direct Search Search Method Direct Search Find First Method, Direction and Result Type Search Code Search Direction Equal to Date Management Show Date ☐ Filter Date Transaction Empty Search Reaction No Value Returned Use Default Value from Search Header Reaction No Operation Value Returned Return with Zero Value (Code) No Value Returned Value (Decimal) No Value Returned 0,00		
Column Decimal Figures		
Column 1 (Decimal) Name Column 2 (Decimal) Name	Column 3 (Decimal) Name	
Column Code		
Number of Columns (Code) Two Columns Column 1 Column 1 (Code) Name Column 1 (Code) VarDim Type COLOR_1 Table Relation Column 1 VarDim Variant Option (6037102) Column 2 Column 2 (Code) Name Column 2 (Code) VarDim Type SIZE_EU Table Relation Column 2 VarDim Variant Option (6037102)	Column 3 Column 3 (Code) Name Column 3 (Code) VarDim Type Table Relation Column 3 Column 4 Column 4 (Code) Name Column 4 (Code) VarDim Type Table Relation Column 4 Column 5 Column 5 (Code) Name Column 5 (Code) VarDim Type Table Relation Column 5	
Results Decimal Figures		
Result 1 (Decimal) Name Unit Price Result 2 (Decimal) Name Result 3 (Decimal) Name Result 4 (Decimal) Name Result 5 (Decimal) Name Result 6 (Decimal) Name Result 7 (Decimal) Name Result 8 (Decimal) Name Result 9 (Decimal) Name Result 10 (Decimal) Name	Result 11 (Decimal) Name Result 12 (Decimal) Name Result 13 (Decimal) Name Result 14 (Decimal) Name Result 15 (Decimal) Name Result 16 (Decimal) Name Result 17 (Decimal) Name Result 18 (Decimal) Name Result 19 (Decimal) Name Result 20 (Decimal) Name	

Results Code		
Result 1	Result 5	Result 9
Result 1 (Code) Name	Result 5 (Code) Name	Result 9 (Code) Name
Result 1 (Code) VarDim Type	Result 5 (Code) VarDim Type	Result 9 (Code) VarDim Type
Result 1 (Code) Table Relation	Result 5 (Code) Table Relation	Result 9 (Code) Table Relation
Result 2	Result 6	Result 10
Result 2 (Code) Name	Result 6 (Code) Name	Result 10 (Code) Name
Result 2 (Code) VarDim Type	Result 6 (Code) VarDim Type	Result 10 (Code) VarDim Type
Result 2 (Code) Table Relation	Result 6 (Code) Table Relation	Result 10 (Code) Table Relation
Result 3	Result 7	
Result 3 (Code) Name	Result 7 (Code) Name	
Result 3 (Code) VarDim Type	Result 7 (Code) VarDim Type	
Result 3 (Code) Table Relation	Result 7 (Code) Table Relation	
Result 4	Result 8	
Result 4 (Code) Name	Result 8 (Code) Name	
Result 4 (Code) VarDim Type	Result 8 (Code) VarDim Type	
Result 4 (Code) Table Relation	Result 8 (Code) Table Relation	

The **Formula Type** is set to *Sales Line* because it effects the prices on a Sale Line.

The **Search Code** and **Search Direction Equal to** refers to **Column 1** and **Column 2** on the FastTab **Column Code**: with the value of *COLOR_1* and the value of *SIZE_EU* the right price will be searched for.

Result 1 (Decimal) Name Unit Price means that the result of the search will be a decimal figure and will be called **Unit Price** as we can also see in the figure of the previous pages.

This **Search Table** has been created by the system automatically based on entered **Search Expression**.

USE SEARCH TABLE RESULT

This field determines which value of the **Search Table Lines** will be used as the result of the search.

As we can see in the previous picture you can have up to 20 **Results Decimal Figures** and up to 10 **Result Codes**.

For the Sales Prices however you can only choose for *Default*, and *Decimal Figure 1 – 20*.

This **Use Search Table Result** will by default be filled with *Default: Decimal Figure 1*.

FORMULA

If you are not able to use the **Search Expressions** but need more mathematical possibilities to calculate the right Sales Price or the prices depending on VarDim Types that are used in VarDim Orders but are not part of the Items Nos., you can also use a **Formula** with **Formula Type Sales Line**.

Therefore, you first need to create a Formula Header and fill it in the field **Formula**.

After that you can click on **Formula Lines**.

NOTE

More information regarding creating Formulas can be found in the **White Paper – TRIMIT Formulas**.

For the Sales Prices, the **Type** of the Formula needs to be *Sales Line*

EXAMPLE – FORMULAS TO DETERMINE SALES PRICES

I.e., for our Master *5200 Sofa Persephone* we have entered **Formula 5200_SALESPRICE** to determine the Sales Prices:

Item 3200 | Work Date: 6-9-2020

✓ Saved

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | Search Table Lines | **Formula Lines** | Open in Excel | More options

General

Sales Type Filter: None | Item/Master No. Filter: **5200**

Sales Code Filter: | Starting Date Filter: |

Relation Item/Master Filter: None | Currency Code Filter: |

Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Curre... Code	Unit Price	Dimension Prices	Star... Date	Endi... Date	Search Expression	Sear... Table	Use Search Table Result	Formula
→ All Custom...		5200	PCS	0	USD	0,00	0					Default	5200_SALESPRICE
All Custom...		5200	PCS	0	SEK	0,00	0					Default	5200_SALESPRICE
All Custom...		5200	PCS	0	NOK	0,00	0					Default	5200_SALESPRICE
All Custom...		5200	PCS	0	GBP	0,00	0					Default	5200_SALESPRICE
All Custom...		5200	PCS	0	EUR	0,00	0					Default	5200_SALESPRICE

The Sales Price for *All Customers* of the Sofa depends on the Number of Seats (**VarDim Type SOFA_FRAME**) and the Exterior Material (**VarDim Type SOFA_MAT**):

Edit - Formula Header - Sales Line - 5200_SALESPRICE

Manage | More options

General

Formula Type: Sales Line | Description: Sales Prices for Sofa Persephone 5200

Formula No.: 5200_SALESPRICE

Formula Lines | Manage | Functions | Fewer options

Search Table Lines | Test Lines | Comment

Inactive	Action in Formula	Table ID	Use Search Table Result	Expression	Result	Condition	Stop Condition	Stop with	OK
→	Search	5200_SALESPRICE	Decimal Figure 7	SOFA_FRAME*SOFA_MAT	SL_PRICE			Result	
	Calculation		Default	SL_PRICE/0.8	SL_PRICE	(SL_CUR="EUR")		Result	
	Calculation		Default	SL_PRICE/0.7	SL_PRICE	(SL_CUR="USD")		Result	
	Calculation		Default	SL_PRICE/0.12	SL_PRICE	(SL_CUR="DKK")		Result	
	Calculation		Default	SL_PRICE/0.11	SL_PRICE	(SL_CUR="NOK")		Result	
	Calculation		Default	SL_PRICE/0.1	SL_PRICE	(SL_CUR="SEK")		Result	

Edit - Sales Price Table for Sofa Persephone 5200

Search | + New | Edit List | Delete | Maintain | Open in Excel | Actions | Fewer options

Inacti...	Sofa Type 1	Sofa Frame Parts	Box Exterior Material 1	Sofa Box Exterior Material	Retail Price DKK	Retail Price EUR	Retail Price GBP	Retail Price NOK	Retail Price SEK	Retail Price USD	Sales Price GBP
→	52001	Persephone 1 Seater	55	Leather	6.490,0	949,0	749,0	7.090,0	7.490,0	1.499,0	375,0
	52001	Persephone 1 Seater	88	Fabric	4.990,0	749,0	599,0	5.490,0	5.990,0	1.199,0	300,0
	52002	Persephone 2 Seater	88	Fabric	6.990,0	999,0	799,0	7.490,0	7.990,0	1.599,0	400,0
	52003	Persephone 3 Seater	55	Leather	10.990,0	1.499,0	1.199,0	11.490,0	11.990,0	2.399,0	625,0
	52003	Persephone 3 Seater	88	Fabric	8.900,0	1.249,0	999,0	9.490,0	9.990,0	1.999,0	500,0

The **Search Table Lines** can be seen and filled via **Functions/Search Table Lines** or by pressing **Ctrl+F11**, when standing on the Formula Line.

NOTE

More details of how-to setup the Formulas and Search Tables can be found in the **White Paper – TRIMIT Formulas**

The **Formula 5200_RETAILPRICE** for the Retail Prices looks as follows:

Item 5200 | Work Date: 6-9-2020

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | Open in Excel | More options

General

Sales Type Filter: None | Item/Master No. Filter: 5200 | Sales Code Filter: | Starting Date Filter: | Relation Item/Master Filter: None | Currency Code Filter: |

Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Unit Price	Dimension Prices	Starting Date ↑	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
→ Customer Price ...	RETAIL	5200	PCS	0	DKK	0.00	0				Default		5200_RETAILPRICE
Customer Price ...	RETAIL	5200	PCS	0	EUR	0.00	0				Default		5200_RETAILPRICE
Customer Price ...	RETAIL	5200	PCS	0	GBP	0.00	0				Default		5200_RETAILPRICE
Customer Price ...	RETAIL	5200	PCS	0	NOK	0.00	0				Default		5200_RETAILPRICE

I.e., for the DKK Retail Prices:

Edit - Formula Header - Sales Line · 5200_RETAILPRICE

Manage | More options

General

Formula Type: Sales Line | Description: Retail Prices for Sofa Persephone 5200 | Formula No.: 5200_RETAILPRICE

Formula Lines | Manage | Functions | Fewer options

Search Table Lines | Test Lines | Comment

Inactive	Action in Formula	Table ID	Use Search Table Result	Expression	Result	Condition	Stop Condition	Stop with	OK
→	Search	5200_SALESPRICE	Decimal Figure 1	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="DKK"		Result	
	Search	5200_SALESPRICE	Decimal Figure 2	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="EUR"		Result	
	Search	5200_SALESPRICE	Decimal Figure 3	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="GBP"		Result	
	Search	5200_SALESPRICE	Decimal Figure 4	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="NOK"		Result	
	Search	5200_SALESPRICE	Decimal Figure 5	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="SEK"		Result	
	Search	5200_SALESPRICE	Decimal Figure 6	SOFA_FRAME\$SOFA_MAT	SL_PRICE	SL_CUR="USD"		Result	

Edit - Sales Price Table for Sofa Persephone 5200

Search | + New | Edit List | Delete | Maintain | Open in Excel | Actions | Fewer options

Inact...	Sofa Type ↑	Sofa Frame Parts	Box Exterior Material ↑	Sofa Box Exterior Material	Retail Price DKK	Retail Price EUR	Retail Price GBP	Retail Price NOK	Retail Price SEK	Retail Price USD	Sales Price GBP
→	52001	Persephone 1 Seater	55	Leather	6,490.0	949.0	749.0	7,090.0	7,490.0	1,499.0	375.0
	52001	Persephone 1 Seater	88	Fabric	4,990.0	749.0	599.0	5,490.0	5,990.0	1,199.0	300.0
	52002	Persephone 2 Seater	55	Leather	8,990.0	1,249.0	999.0	9,490.0	9,990.0	1,999.0	500.0
	52002	Persephone 2 Seater	88	Fabric	6,990.0	999.0	799.0	7,490.0	7,990.0	1,599.0	400.0
	52003	Persephone 3 Seater	55	Leather	10,990.0	1,499.0	1,199.0	11,490.0	11,990.0	2,399.0	625.0
	52003	Persephone 3 Seater	88	Fabric	8,900.0	1,249.0	999.0	9,490.0	9,990.0	1,999.0	500.0

So, we can use the same **Search Table (Table ID)** for different Sales Prices by using several *Decimal Figures (Use Search Table Result)*.

From the **Search Table Lines**, you can go to the details of the **Search Table Header** of 5200_SALESPRICE via click **Actions, Search Table Lines, Search Table Header**.

Edit - Sales Price Table for Sofa Persephone 5200

Search | + New | Edit List | Delete | Maintain | Open in Excel | Actions | Fewer options

Search Table Lines | Search Table Header

Sofa Type ↑	Sofa Frame Parts	Box Exterior Material ↑	Sofa Box Exterior Material	Retail Price DKK
52001	Persephone 1 Seater	55	Leather	6,490.0
52001	Persephone 1 Seater	88	Fabric	4,990.0
52002	Persephone 2 Seater	55	Leather	8,990.0
52002	Persephone 2 Seater	88	Fabric	6,990.0
52003	Persephone 3 Seater	55	Leather	10,990.0
52003	Persephone 3 Seater	88	Fabric	8,900.0

The details of this **Search Table Header 5200_SALESPRICE** looks like:

Search Table Header | Work Date: 6-9-2020





✓ Saved

5200_SALESPRICE

Actions

Related

General

Table ID

5200_SALESPRICE

Formula Type

Sales Line

Description

Sales Price Table for Sofa Persephone 5200

Allow Blank Value

☐

Formula Calculation Result

Method, Direction and Result Type

Search

Code

Search Direction

Equal to

Date Management

Show Date

☐

Filter Date

Transaction Empty Search

Reaction No Value Returned

Return with Zero

Reaction No Operation Value Returned

Return with Zero

Value (Code) No Value Returned

Value (Decimal) No Value Returned

0,00

Direct Search

Table Relation Direct Search

Return Field Direct Search

Search Method Direct Search

Find First

Column Code

Number of Columns (Code)

Two Columns

Column 1

Column 1 (Code) Name

Sofa Type

Column 1 (Code) VarDim Type

SOFA_FRAME

Table Relation Column 1

VarDim Variant Option (6037102)

Column 2

Column 2 (Code) Name

Box Exterior Material

Column 2 (Code) VarDim Type

SOFA_MAT

Table Relation Column 2

VarDim Variant Option (6037102)

Column 3

Column 3 (Code) Name

Column 3 (Code) VarDim Type

Table Relation Column 3

Column 4

Column 4 (Code) Name

Column 4 (Code) VarDim Type

Table Relation Column 4

Column 5

Column 5 (Code) Name

Column 5 (Code) VarDim Type

Table Relation Column 5

Results Decimal Figures

Result 1 (Decimal) Name

Retail Price DKK

Result 2 (Decimal) Name

Retail Price EUR

Result 3 (Decimal) Name

Retail Price GBP

Result 4 (Decimal) Name

Retail Price NOK

Result 5 (Decimal) Name

Retail Price SEK

Result 6 (Decimal) Name

Retail Price USD

Result 7 (Decimal) Name

Sales Price GBP

Result 8 (Decimal) Name

Result 9 (Decimal) Name

Result 10 (Decimal) Name

Result 11 (Decimal) Name

Result 12 (Decimal) Name

Result 13 (Decimal) Name

Result 14 (Decimal) Name

Result 15 (Decimal) Name

Result 16 (Decimal) Name

Result 17 (Decimal) Name

Result 18 (Decimal) Name

Result 19 (Decimal) Name

Result 20 (Decimal) Name

The following fields can be added as well to the Sales Price Lines:

ALLOW INVOICE DISC.

This field specifies whether the ordinary Invoice Discount calculation will apply to this specific Sales Price.

ALLOW LINE DISC.

If no checkmark is entered in this field, no Line Discounts will be calculated in a Sales Line for this specific Sales Price.

If the Customer has a checkmark in the **Allow Line Disc.** and this field has a checkmark as well, a Sales Line Discount will be calculated.

If the Customer has a checkmark in the **Allow Line Disc.** field and this field has NO checkmark, Sales Line Discount will NOT be calculated.

If the Customer has NO checkmark in the **Allow Line Disc.** field, Sales Line Discount will NOT be calculated, no matter what the value of this field might be.

BONUS ADJUSTMENT

You can enter an Amount/Percentage between 0 and 100, for adjusting the Bonus on a Sales Line if this specific Sales Price will apply.

How this **Bonus Adjustment** Amount/Percentage should be handled is determined by the field [Adjust Bonus](#) in the corresponding **Price Group Parameters** of the Sales Price.

COMMISSION SALESPERSON ADJUSTMENT

You can enter an Amount/Percentage between 0 and 100, for adjusting the Commission of the Salesperson on a Sales Line if this specific Sales Price will apply.

How this **Commission Salesperson Adjustment** Amount/Percentage should be handled is determined by the field [Adjust Commission Salesperson](#) in the corresponding **Price Group Parameters** of the Sales Price.

COMMISSION SALESPERSON 2 ADJUSTMENT

You can enter an Amount/Percentage between 0 and 100, for adjusting the Commission of the Salesperson 2 on a Sales Line if this specific Sales Price will apply.

How this **Commission Salesperson 2 Adjustment** Amount/Percentage should be handled is determined by the field [Adjust Commission Salesperson 2](#) in the corresponding **Price Group Parameters** of the Sales Price.

COMMISSION SALESPERSON 3 ADJUSTMENT

You can enter an Amount/Percentage between 0 and 100, for adjusting the Commission of the Salesperson 3 on a Sales Line if this specific Sales Price will apply.

How this **Commission Salesperson 3 Adjustment** Amount/Percentage should be handled is determined by the field [Adjust Commission Salesperson 3](#) in the corresponding **Price Group Parameters** of the Sales Price.

DESCRIPTION

Description will by default be filled with the Description of the Master/Item.

LINE DISCOUNT ADJUSTMENT

You can enter an Amount/Percentage between 0 and 100, for adjusting the Line Discount on a Sales Line if this specific Sales Price will apply.

How this **Line Discount Adjustment** Amount/Percentage should be handled is determined by the field [Adjust Line Discount](#) in the corresponding **Price Group Parameters** of the Sales Price.

NOTE

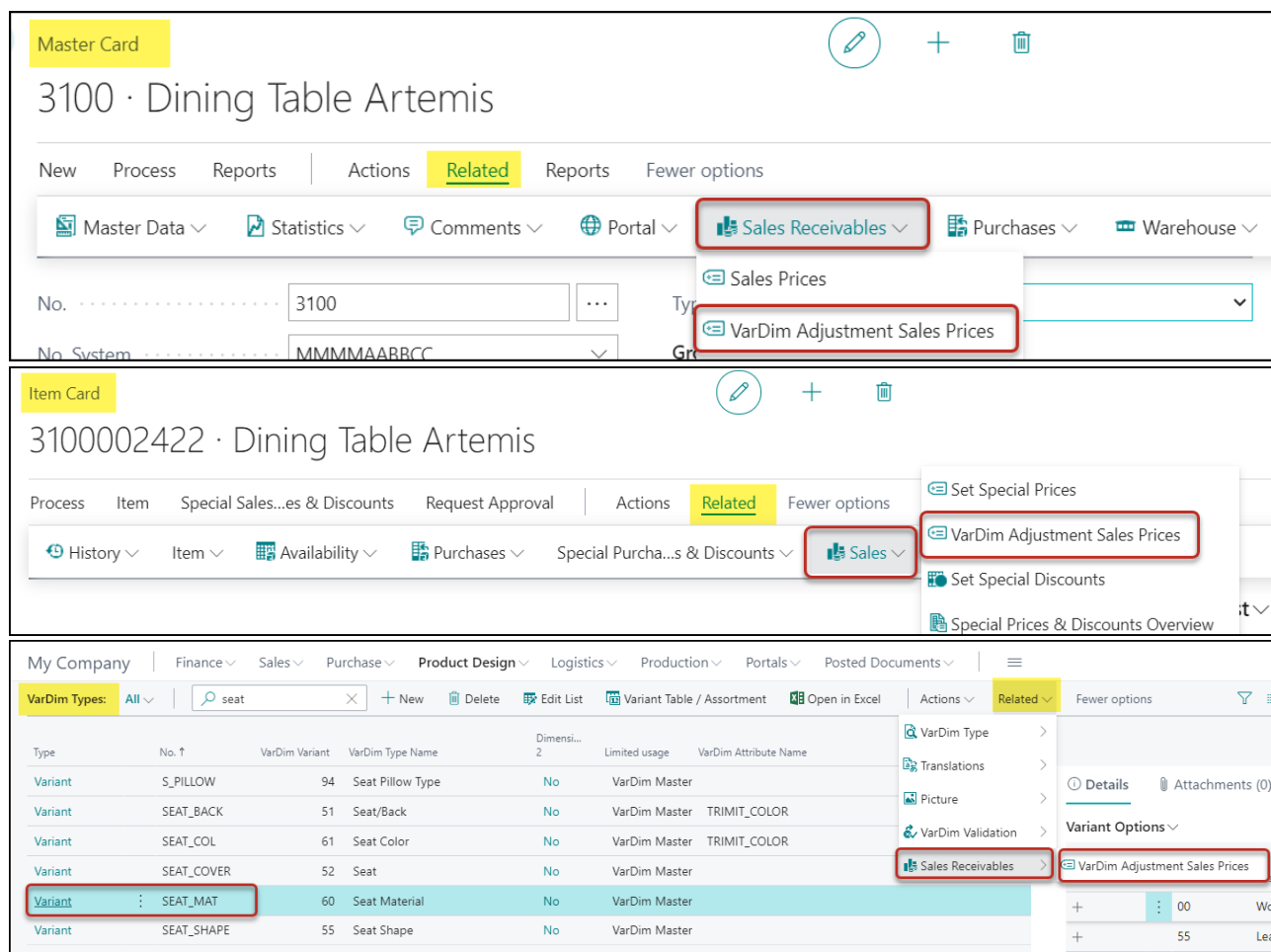
Fields not described have the same function as in standard Business Central

VARDIM ADJUSTMENT SALES PRICES

As we have seen, with [Sales Prices](#), you can enter the (basic) Sales Prices for the Master/Items.

With the **VarDim Adjustment Sales Prices** you can enter adjustments to these (basic) Sales Prices for the Master/Items based on the VarDim Types and Values that usually will be chosen in the VarDim Order.

Via the Cards/Lists of **Master** and **Item** and via the **VarDim Type List**, you can enter the VarDim Adjustment Sales Prices:



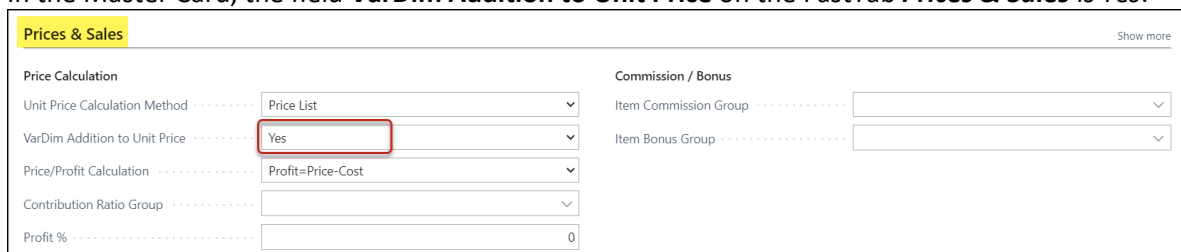
The screenshot displays three main sections of the TRIMIT system interface:

- Master Card:** Shows the card for '3100 · Dining Table Artemis'. The 'Related' menu is open, highlighting 'Sales Receivables' and 'VarDim Adjustment Sales Prices'.
- Item Card:** Shows the card for '3100002422 · Dining Table Artemis'. The 'Related' menu is open, highlighting 'Sales' and 'VarDim Adjustment Sales Prices'.
- VarDim Type List:** A table listing various VarDim types. The 'SEAT_MAT' row is highlighted. The 'Sales Receivables' and 'VarDim Adjustment Sales Prices' options are highlighted in the right-hand menu.

Type	No. ↑	VarDim Variant	VarDim Type Name	Dimensi...	Limited usage	VarDim Attribute Name
Variant	S_PILLOW	94	Seat Pillow Type	No	VarDim Master	
Variant	SEAT_BACK	51	Seat/Back	No	VarDim Master	TRIMIT_COLOR
Variant	SEAT_COL	61	Seat Color	No	VarDim Master	TRIMIT_COLOR
Variant	SEAT_COVER	52	Seat	No	VarDim Master	
Variant	SEAT_MAT	60	Seat Material	No	VarDim Master	
Variant	SEAT_SHAPE	55	Seat Shape	No	VarDim Master	

You need to be aware that the **VarDim Adjustment Sales Prices** will only apply if:

- In the Master Card, the field **VarDim Addition to Unit Price** on the FastTab **Prices & Sales** is **Yes**.



The screenshot shows the 'Prices & Sales' FastTab with the following fields:

- Price Calculation:**
 - Unit Price Calculation Method: Price List
 - VarDim Addition to Unit Price: **Yes**
 - Price/Profit Calculation: Profit=Price-Cost
 - Contribution Ratio Group: [Empty]
 - Profit %: 0
- Commission / Bonus:**
 - Item Commission Group: [Empty]
 - Item Bonus Group: [Empty]

- In the VarDim Master, the field **Search Unit Price Adjustment** of the VarDim Type is **Yes**.

Edit - VarDim Master List - 3100 · Dining Table Artemis

Search + New Edit List Delete Card Variant Table Copy Open in Excel More options

Type	VarDim Type	Description	VarDim Type Placement in Item No.	Consistent Inheritance	Dimension 2	Search Unit Price Adjustment
Variant	COLOR_LAM	Laminate Color	Variant 1	☐	No	No
Variant	LEGS	Legs Material	Variant 2	☐	No	Yes
→ Variant	SIZE_TD	Size Dining Table	Variant 3	☐	No	Yes

Master 3100

Search + New Edit List Delete Formula Lines Open in Excel More options

General

Sales Type Filter: None

Sales Code Filter:

Item Type Filter: Master

Item/Master No. Filter: 3100

VarDim Type No. Filter:

Starting Date Filter:

Currency Code Filter:

Sales Type ↑	Sales Code ↑	Item/Master No. ↑	Description	Currency Code ↑	VarDim Type ↑	Value ↑	Starting Date ↑	Ending Date	Adjustment Amount Sales	Price Includes VAT	Formula
Customer Price ...	RETAIL	3100			LEGS				0.00	☒	SPA_3100_LEGS
Customer Price ...	RETAIL	3100		DKK	LEGS				0.00	☒	SPA_3100_LEGS
Customer Price ...	RETAIL	3100		EUR	LEGS				0.00	☒	SPA_3100_LEGS
Customer Price ...	RETAIL	3100		NOK	LEGS				0.00	☒	SPA_3100_LEGS
Customer Price ...	RETAIL	3100		SEK	LEGS				0.00	☒	SPA_3100_LEGS
Customer Price ...	RETAIL	3100		USD	LEGS				0.00	☒	SPA_3100_LEGS
All Customers		3100			LEGS	24			2.00	☐	
→ Customer Price ...	RETAIL	3100			SIZE_TD	30			4.00	☐	
Customer Price ...	RETAIL	3100		DKK	SIZE_TD				0.00	☒	SPA_3100_SIZE_TD
Customer Price ...	RETAIL	3100		EUR	SIZE_TD				0.00	☒	SPA_3100_SIZE_TD
Customer Price ...	RETAIL	3100		NOK	SIZE_TD				0.00	☒	SPA_3100_SIZE_TD
Customer Price ...	RETAIL	3100		SEK	SIZE_TD				0.00	☒	SPA_3100_SIZE_TD
Customer Price ...	RETAIL	3100		USD	SIZE_TD				0.00	☒	SPA_3100_SIZE_TD

Description of the Fields in the Header:

SALES TYPE FILTER

This Filter will determine the Lines that will be shown based on the **Sales Type** of the Lines.

None will show all the Lines, regardless the **Sales Type**

SALES CODE FILTER

This Filter will determine the Lines that will be shown, based on the **Sales Code** of the Lines.

You can only enter a **Sales Code Filter** if the **Sales Type Filter** has been set to *Customer*, *Customer Price Group* or *Campaign*.

ITEM TYPE FILTER

This Filter will determine the Lines that will be shown, based on the content of the field **Item/Master No.** and the field **Master Item** (Yes/No) that is related to that **Item No.**

You can choose between the following four options:

Item	The Lines refer to VarDim Adjustment Sales Prices for individual Items – therefore the number in the column Item No. will be Item Nos. with Master Item is <i>No</i> .
Master	The Lines refer to VarDim Adjustment Sales Prices for Masters – therefore the number in the column Item No. will be Master Nos. (Item Nos. with Master Item is <i>Yes</i> .)
General	The Lines will be applicable for every Item/Master, so represent a general adjustment for specific VarDim Types/Values.
None	The Lines can refer to VarDim Adjustment Sales Prices for Items and/or Masters.

ITEM/MASTER NO. FILTER

This Filter will determine the Lines that will be shown, based on the **Item/Master No.** of the Lines and the **Relation Item/Master Filter**.

VARDIM TYPE NO. FILTER

This Filter will determine the Lines that will be shown, based on the **VarDim Type** of the Lines.

START DATE FILTER

This Filter will determine the Lines that will be shown, based on the **Starting Date** of the Lines.

CURRENCY CODE FILTER

This Filter will determine the Lines that will be shown, based on the **Currency** of the Lines.

DESCRIPTION OF THE FIELDS IN THE LINES:

NOTE

If the VarDim Adjustment Sales Prices are opened via the Master List/Card the field **trm Master Item** in the Sales Prices will be set to *Yes*. This Sales Price will then be visible for **Relation Item/Master Filter** *Master* and *None* and the content of the **Item/Master No.** will be checked in the Master Table.

If the VarDim Adjustment Sales Prices are opened via the Item List/Card the field **trm Master Item** in the Sales Prices will be set to *No*. This Sales Price will then be visible for **Relation Item/Master Filter** *Item* and *None* and the content of the **Item/Master No.** will be checked in the Item Table.

SALES TYPE

The **Sales Type** defines for whom this VarDim Adjustment Sales Price will apply.

You can choose between the following four options:

Customer	Will be compared with the Sell-to Customer, Bill-to Customer, Company Group and Chain of a Sales Document
Customer Price Group	Will be compared with the Customer Price Group of a Sales Document which originally comes from the Sell-to Customer of the Sales Document
All Customers	Applicable for all customer
Campaign	This Standard Business Central option will be ignored and has been replaced by the TRIMIT Campaign functionality as described in the FastTab Campaign Setup .

SALES CODE

The **Sales Code** specifies the Sales Type.

If the Sales Type is *Customer*, the Sales Code must be a Customer Number. But it will be interpreted as the **Sell-to Customer, Bill-to Customer, Company Group** and **Chain**.

If the Sales Type is *Customer Price Group*, the Sales Code must be a Customer Price Group

If the Sales Type is *Campaign*, the Sales Code must be a Campaign.

If the Sales Type is *All Customers*, you cannot select a Sales Code.

ITEM/MASTER NO.

The content of the field **Item/Master No.** in the Lines depends on the **Relation Item/Master Filter**.

If **Relation Item/Master Filter** = *Master* the content of the **Item No.** needs to be Master Nos.

If **Relation Item/Master Filter** = *Item*, the content of the **Item No.** needs to be Item Nos.

If **Relation Item/Master Filter** = *None* the content of the **Item No.** can be Master Nos. or Item Nos.

VARDIM TYPE

You can choose a **VarDim Type** that is connected to the Master via the **VarDim Master**.

VALUE

You can enter a **Value** of the **VarDim Type** that is connected to the Master via the **VarDim Master**.

ADJUSTMENT AMOUNT SALES

In this field you can enter an Amount that needs to be added per **VarDim Order Quantity** to the basic Sales Price that may have been found based on the [Sales Prices](#).

This Amount is in the **Currency Code** of the VarDim Adjustment Sales Price.

ADJUSTMENT SALES IN %

Instead of a hard value via **Adjustment Amount Sales** you can also add a Percentage to the basic Sales Price that may have been found based on the [Sales Prices](#).

UNIT COST ADJUSTMENT AMOUNT

In this field you can enter an Amount that needs to be added per **VarDim Order Quantity** to the Unit Cost of the Item.

This is an Amount in your **Local Currency**.

UNIT COST ADJUSTMENT IN %

Instead of a hard value via **Unit Cost Adjustment Amount** you can also add a Percentage to the Unit Cost of the Item.

FORMULA

If you want to use a **Formula** to determine the **Adjustment Amount Sales** for a Value, you need to create a Formula with **Formula Type** = *VarDim Sales*.

In that case you would fill the **VarDim Type** but not the **Value** because that would be handled in the Formula.

NOTE

More information regarding creating Formulas can be found in the **White Paper – TRIMIT Formulas**.

For the Sales Prices, the **Type** of the Formula needs to be *VarDim Sales*

EXAMPLE – FORMULA FOR VARDIM ADJUSTMENTS ON SALES PRICES

Master 3100 | Work Date: 6-9-2020

Saved

VarDim Sales Prices

Search
New
Edit List
Delete
Formula Lines
Open in Excel
More options

General

Sales Type Filter
None

Sales Code Filter

Item No. Filter
3100

Start Date Filter

Currency Code Filter

Relation Item/Master Filter
Master

Sales Type ↑	Sales Code ↑	Item/Master No. ↑	Descri...	Currency Code ↑	VarDim Type ↑	Value ↑	Starting Date ↑	Ending Date	Adjustment Amount Sales	Adjustment Sales in %	Unit Cost Adjustment in Amount	Unit Cost Adjustment in %	Price Includes VAT	Formula
→ Customer Price Group	RETAIL	3100		DKK	LEGS				0,00	0,00	0,00	0,00	☒	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		EUR	LEGS				0,00	0,00	0,00	0,00	☒	SPA_3100_LEGS

Edit - Formula Header - VarDim Sales · SPA_3100_LEGS

Manage
More options

General

Formula Type
VarDim Sales

Description
Sales Price Adjustment 3100 for LEGS RETAIL

Formula No.
SPA_3100_LEGS

Formula Lines
Manage
Functions
Fewer options

New Line
Delete Line

Inacti...	Action in Formula	Table ID	Use Search Table Result	Expression	Result	Condition	Stop Condition	Stop with	OK
→ ☐	Calculation		Default	5	LEGS[VDO_PRICE]	((LEGS=24) AND ((SL_CUR="GBP") OR (SL_CUR="EUR") OR (SL_CUR="USD"))		Result	☒
☐	Calculation		Default	50	LEGS[VDO_PRICE]	((LEGS=24) AND ((SL_CUR="DKK") OR (SL_CUR="NOK") OR (SL_CUR="SEK"))		Result	☒
☐	Calculation		Default	10	LEGS[VDO_PRICE]	((LEGS=30) AND ((SL_CUR="GBP") OR (SL_CUR="EUR") OR (SL_CUR="USD"))		Result	☒
☐	Calculation		Default	100	LEGS[VDO_PRICE]	((LEGS=30) AND ((SL_CUR="DKK") OR (SL_CUR="NOK") OR (SL_CUR="SEK"))		Result	☒

The Formula will however only be applicable if the Value for the VarDim Type *LEGS* is 24 or 30 in the VarDim Order of a Sales Line of **Type** is *Item*.

Of course, you can also use the **Table ID** if you want to use Search Tables as described earlier in [Formula](#).

SEARCH DIRECTION SALES PRICES

You have seen that you can enter the Sales Prices in many ways and on different levels.

You also have seen that you can enter the VarDim Adjustment Sales Prices in many ways and on different levels.

To determine the right **Sales Price** for a Sales Line the system will check all the Lines in the Table Sales Prices (7002) and after that in the Table **trm VarDim Sales Price (6036655)** in the following order.

If a Sales Price is found, the search will stop.

Therefore, where Business Central will search for the “best price”, TRIMIT will search for the “first” price – regardless if there might be better prices.

Within a search (1 to 8), the system will first search for the Sales Prices connected to the Item.

If they are not found, the search continues for Sales Prices connected to the Master.

Therefore, a Sales Price on *All Customers* for an Item will not overrule the Sales Price on a *Customer* for a Master.

1. Sales Type = *Campaign*
 - a. Sales Type = *Customer (Sell-to Customer)*
 - b. Sales Type = *Customer (Bill-to Customer)*
 - c. Sales Type = *Customer (Company Group)*
 - d. Sales Type = *Customer (Chain)*
 - e. Sales Type = *Customer Price Group*
 - f. Sales Type = *All Customers*
2. Sales Type = *Customer (Sell-to Customer)*
3. Sales Type = *Customer (Bill-to Customer)*
4. Sales Type = *Customer (Company Group)*
5. Sales Type = *Customer (Chain)*
6. Sales Type = *Customer Price Group*
7. Sales Type = *All Customers*
8. Field **Unit Price** on the Item Card

Besides Search 8. this is also the sorting if the **VarDim Adjustment Sales Price** needs to be found for a VarDim Order.

SUMMARY SALES PRICES

TRIMIT in comparison to Business Central:

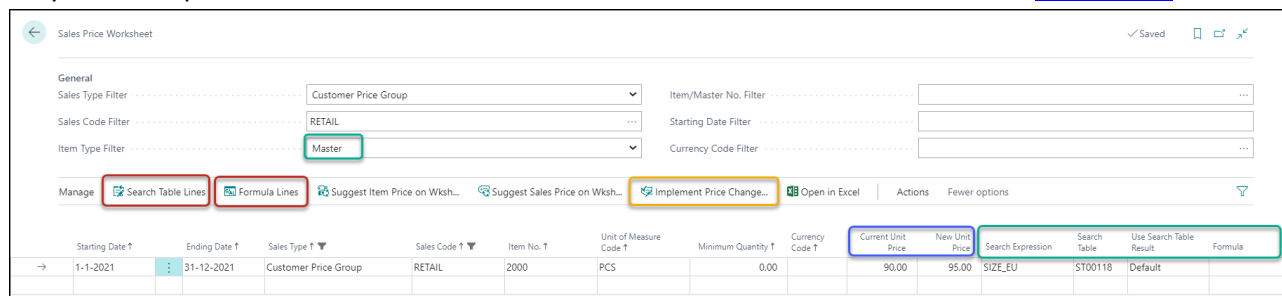
- **Sales Type Customer** is applicable for *Sell-to Customer, Bill-to Customer, Chain, Company Group*
- More functionality based on the **Price Group Parameters** (see separate White Paper)
- **Sales Type Campaign** can be applicable for specific customers or sales persons or customer price groups based on the **Price Group Parameters** (see separate White Paper)
- Prices per Financial **Dimension**
- Prices can be entered on the **Master** by using **Search Expressions** and/or **Formulas**
- More **Date Comparison** options
- Extra **VarDim Adjustments Sales Prices**– especially for VarDim Order Lines – with the same extra options and functionality as for the ‘basic’ Sales Prices

SALES PRICE WORKSHEET

NOTE

At this point, it is not possible to use the **Sales Price Worksheet** for the **Dimension Prices** or the **VarDim Sales Prices**. This will be reconsidered after the changes of Pricing by standard Business Central.

Via **Tell me Sales Price Worksheet** a worksheet will open in which you can enter new Sales Prices before they will be implemented in the Sales Price Table. The columns are the same as in the [Sales Prices](#).



Based on the key-fields you enter, the **Current Unit Price** will be shown.

If the existing Sales Price has any **Search Expressions**, **Search Tables** or **Formulas**, this will also be copied into the **Sales Price Worksheet** if you enter the record manually.

NOTE

If you don't want the original **Search Table Lines** to be overwritten, you need to delete the field **Search Table**. In that case, when clicking **Search Table Lines**, a new **Search Table** will be created. The same is applicable for the original **Formula**.

You can now enter a **New Unit Price**, **Search Expression** and/or **Formula** for the new price and via by clicking **Search Table Lines** add the Prices based on the entered **Search Expression**, or by clicking **Formula Lines** add the Formula Lines the same way as in the normal Sales Prices of a Master.

If you have entered all the Lines, you need to click **Implement Price Change**, to implement these suggestions for prices into the normal Sales Prices.

In that case, you can filter on the Lines of the **Sales Price Worksheet** that needs to be implemented.

Implement Price Change

Filter: Sales Price Worksheet

× Sales Type
Customer Price Group

× Sales Code
RETAIL

× Item No.

× Unit of Measure Code

× Currency Code

+ Filter...

Advanced >

OK Cancel

After clicking **OK** you will get a message if you want to delete the Lines from the **Sales Price Worksheet**, usually you will click **Yes**.


The item prices have now been updated in accordance with the suggested price changes.

Do you want to delete the suggested price changes?

Yes No

EXAMPLE – SALES PRICE WORKSHEET

Sales Price Worksheet

General

Sales Type Filter
Customer Price Group

Sales Code Filter
RETAIL

Item Type Filter
Master

Item/Master No. Filter

Starting Date Filter

Currency Code Filter

Manage
Search Table Lines
Formula Lines
Suggest Item Price on Wksh...
Suggest Sales Price on Wksh...
Implement Price Change...
Open in Excel
Actions
Fewer options

Starting Date ↑	Ending Date ↑	Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Current Unit Price	New Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
1-1-2021	31-12-2021	Customer Price Group	RETAIL	2000	PCS	0.00		90.00	95.00	SIZE_EU	ST00118	Default	

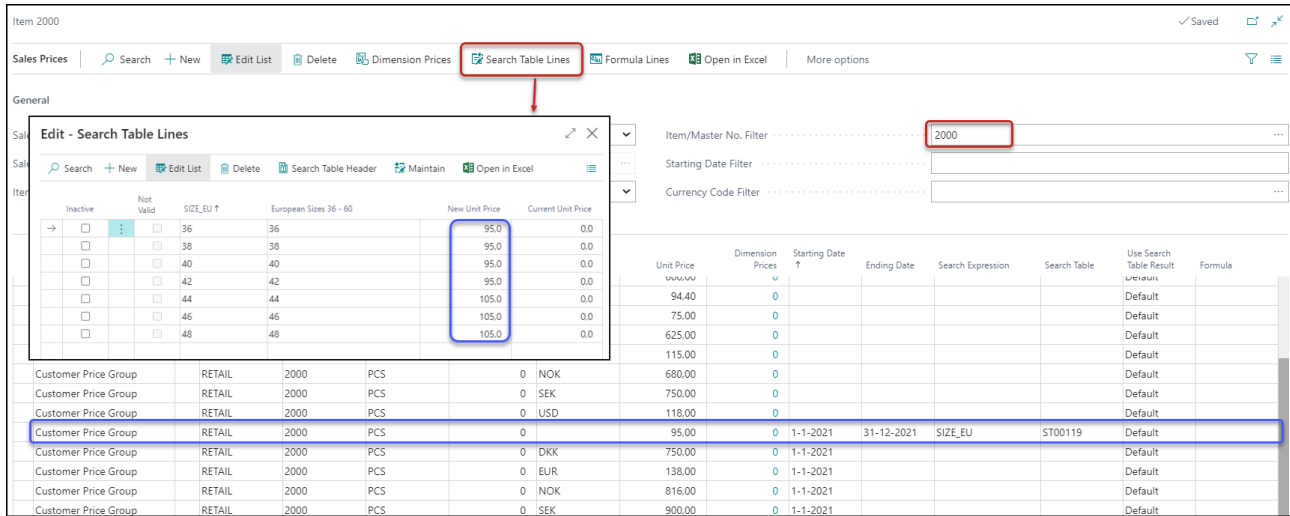
And the **Search Table Lines** was entered as follows:

Edit - Search Table Lines

Search + New Edit List Delete Search Table Header Maintain Open in Excel

Inactive	Not Valid	SIZE_EU ↑	European Sizes 36 - 60	New Unit Price	Current Unit Price
→	☐	36	36	95,0	0,0
	☐	38	38	95,0	0,0
	☐	40	40	95,0	0,0
	☐	42	42	95,0	0,0
	☐	44	44	105,0	0,0
	☐	46	46	105,0	0,0
	☐	48	48	105,0	0,0

The above Suggestion will – after **Implement Price Change** - result in the **Sales Price**:



The screenshot shows the 'Edit - Search Table Lines' dialog box with a table of search table lines. The 'New Unit Price' column is highlighted with a blue box, showing values 95.0, 95.0, 95.0, 95.0, 105.0, 105.0, and 105.0. The 'Current Unit Price' column shows 0.0 for all rows. The main table below the dialog shows various sales price lines with columns for Unit Price, Dimension Prices, Starting Date, Ending Date, Search Expression, Search Table, Use Search Table Result, and Formula. The 'Search Table' column shows 'ST00119' for the highlighted row.

NOTE

If you had created a **Search Table** in the Sales Price Worksheet, a new **Search Table** will be created during the **Implement Price Change** with the same Search Table Lines.

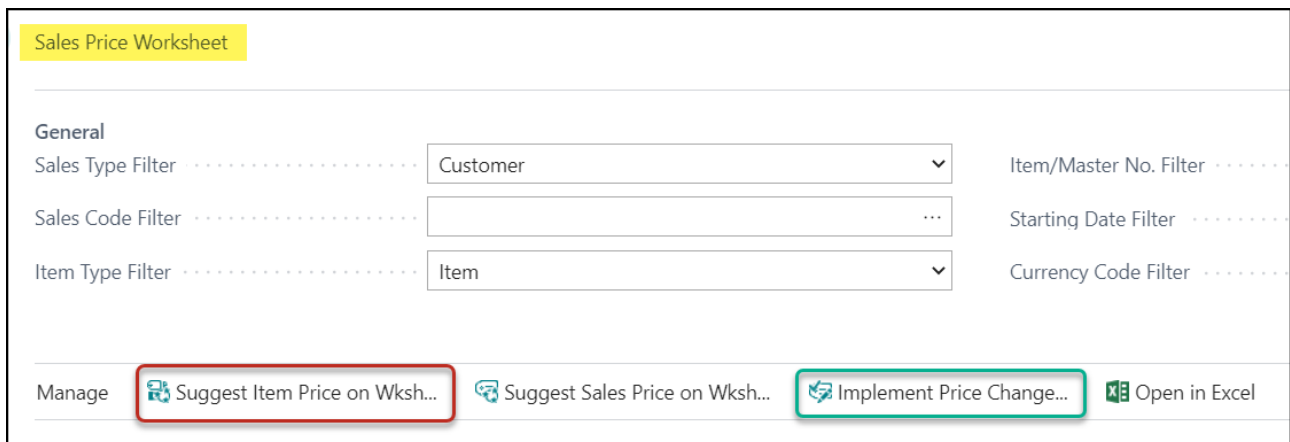
In the picture on the previous page the **Search Table** was **ST00118**, while in the above picture it became **ST00119**.

If the original Sales Price Line would be overwritten and would have had a **Search Table** or **Formula**, they will be overwritten by the **Search Table** or **Formula** from the Sales Price Worksheet.

If you did enter a **Search Expression** in the **Sales Price Worksheet**, but not the **Search Table Lines**, you need to create the appropriate **Search Table Lines** via the normal Sales Prices, after you implemented this Sales Price Suggestion.

SUGGEST ITEM PRICE ON WKSH.

By clicking **Suggest Item Price on Wksh.** in the **Sales Price Worksheet**, you can fill the **Sales Price Worksheet** based on the field **Unit Price** of the Item Card.



The screenshot shows the 'Sales Price Worksheet' interface. It includes filters for Sales Type (Customer), Sales Code, Item Type (Item), Item/Master No. (2000), Starting Date, and Currency Code. At the bottom, there are three buttons: 'Suggest Item Price on Wksh...' (highlighted with a red box), 'Suggest Sales Price on Wksh...', and 'Implement Price Change...' (highlighted with a green box). There is also an 'Open in Excel' button.

This batch job creates suggestions for creating/changing sales prices in the **Sales Price** table based on the **Unit Price** on the Item cards. When the batch job has been completed, you can see the result in the **Sales Price Worksheet** lines.

This batch job only creates suggestions, and it does not implement the suggested changes. If you are satisfied with the suggestions and want to implement them, that is insert them in the **Sales Price** table, you can use the **Implement Price Change** batch job.

EXAMPLE – SUGGEST ITEM PRICE ON WORKSHEET (FROM ITEMS)

If you would have the field **Unit Price** in the Item Cards filled like:

Items: Custom filtered Search + New Delete Process Report Item Prices &					
No. ↑	Item Type	Description	Description 2	Master No.	Unit Price
2410	Master Item	Katie Scarf		2410	0,00
24106501	Finished Goods	Katie Scarf	Lawn Green,150 x 25 cm	2410	6,95
24109901	Finished Goods	Katie Scarf	Black,150 x 25 cm	2410	6,85

You can determine that these **Unit Price** (6,95 and 6,85) should be written in the **Sales Price** table for **Customer Price Group** *RETAIL* by multiplying with 2,5 as follows:

Suggest Item Price on Wksh.

Use default values from

Last used options and filters

Options

Copy to Sales Price Worksheet...

Sales Type

Customer Price Group

Sales Code

RETAIL

Unit of Measure Code

PCS

Currency Code

GBP

Starting Date

1-1-2020

Ending Date

31-12-2020

Only Amounts Above

0,01

Adjustment Factor

2,5

Rounding Method

DECIMAL

Create New Prices

☒

Filter: Item

× No.

2410*

× Vendor No.

× Inventory Posting Group

+ Filter...

Filter totals by:

OK

Cancel

For the **Sales Type** you have the same options as in the normal Sales Price Table.

Because we want to create new Lines in the **Sales Price Worksheet** and not update existing Lines, we have a checkmark in **Create New Prices**.

This would result in three Lines in the **Sales Price Worksheet**:

Sales Price Worksheet

General

Sales Type Filter: Customer Price Group

Sales Code Filter:

Item Type Filter: Item

Item/Master No. Filter:

Starting Date Filter:

Currency Code Filter:

Manage Search Table Lines Formula Lines Suggest Item Price on Wksh... Suggest Sales Price on Wksh... **Implement Price Change...** Open in Excel Actions Fewer options

Starting Date ↑	Ending Date ↑	Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Current Unit Price	New Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
1-1-2020	31-12-2020	Customer Price Group	RETAIL	2410	PCS	0,00	GBP	0,00	0,00			Default	
1-1-2020	31-12-2020	Customer Price Group	RETAIL	24106501	PCS	0,00	GBP	6,95	17,38			Default	
1-1-2020	31-12-2020	Customer Price Group	RETAIL	24109901	PCS	0,00	GBP	6,85	17,13			Default	

Keep in mind, that it is related to Items, therefore the **Item Type Filter** must be set to *Item* to see the suggestions in the **Sales Price Worksheet**.

You can add **Search Expressions** and/or **Formulas** if needed, but that is not probable. We are talking about Sales Prices per Item!!

This batch job can only be used for **Sales Prices** and not for **VarDim Sales Prices**.

The **Sales Price Worksheet** Lines can be implemented the same way as described before: via **Implement Price Change**.

Keep in mind however, that these are prices related to Items – not to the Master!!

Item Card

24106501 Katie Scarf

Process Item Prices & Discounts Request Approval Actions **Set Special Prices** VarDim Adjustment Sales Prices Set Special Discounts Special Prices & Discounts Overview

History Item Availability Purchases **Sales**

Inventory >

Item 24106501

Sales Prices Search + New Edit List Delete Dimension Prices Search Table Lines Formula Lines Open in Excel More options

General

Sales Type Filter: None

Sales Code Filter:

Item Type Filter: Item

Item/Master No. Filter: 24106501

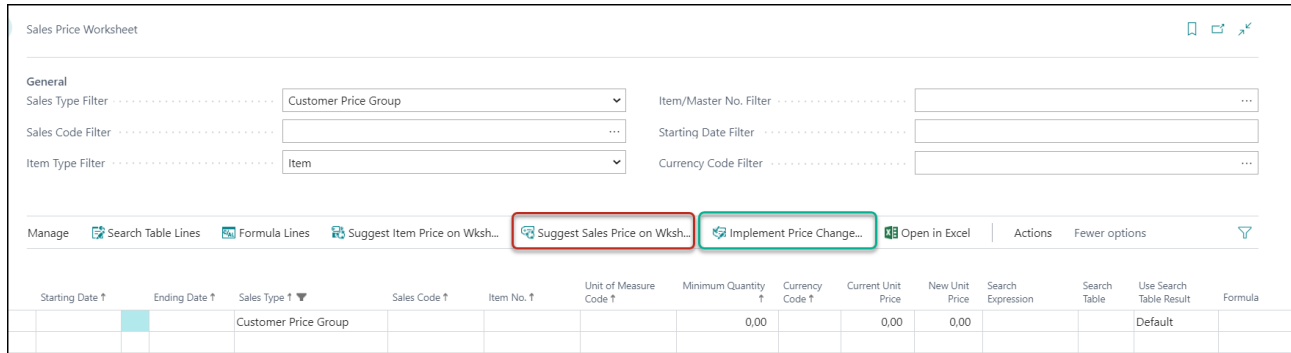
Starting Date Filter:

Currency Code Filter:

Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Unit Price	Dimension Prices	Starting Date ↑	Ending Date	Search Expression	Search Table
Customer Price Group	RETAIL	24106501	PCS	0	GBP	17,38	0	1-1-2020	31-12-2020		

SUGGEST SALES PRICE ON WKSH. (PRICE)

By clicking **Suggest Sales Price on Wksh.** in the **Sales Price Worksheet**, you can fill the **Sales Price Worksheet** based on existing Sales Prices in the Sales Price Table.



Sales Price Worksheet

General

Sales Type Filter Customer Price Group

Sales Code Filter

Item Type Filter Item

Item/Master No. Filter

Starting Date Filter

Currency Code Filter

Manage Search Table Lines Formula Lines Suggest Item Price on Wksh... **Suggest Sales Price on Wksh...** Implement Price Change... Open in Excel Actions Fewer options

Starting Date ↑	Ending Date ↑	Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Current Unit Price	New Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
		Customer Price Group				0,00		0,00	0,00			Default	

This batch job creates suggestions for creating/changing sales prices in the **Sales Price** table based on existing Lines in the **Sales Price** table. When the batch job has been completed, you can see the result in the **Sales Price Worksheet**.

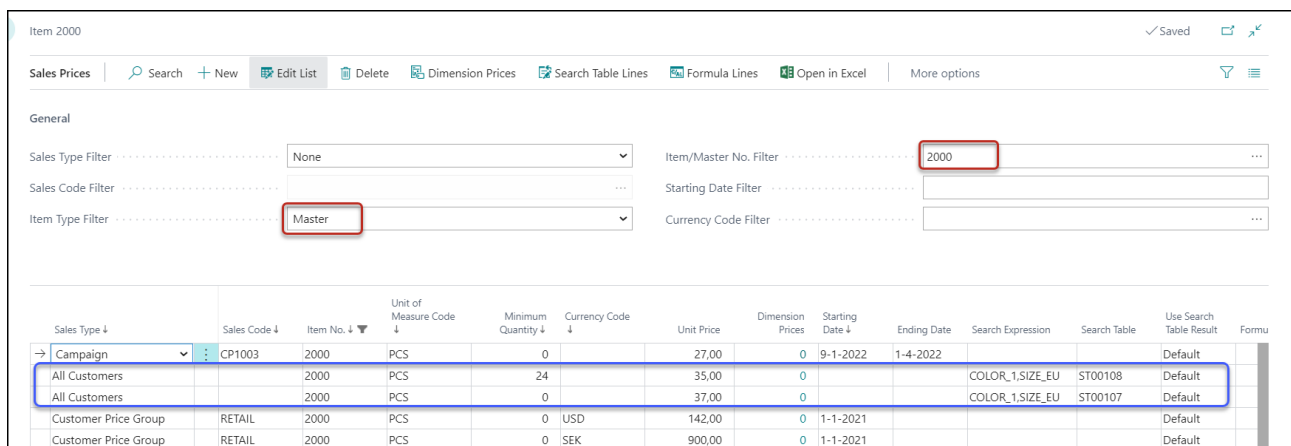
This batch job only creates suggestions, and it does not implement the suggested changes. If you are satisfied with the suggestions and want to implement them, that is insert them in the **Sales Price** table, you can use the **Implement Price Change** batch job.

If the original **Sales Price** also includes **Search Expressions** and **Search Table Lines**, a new **Search Table** with Search Table Lines will be created based on the options for suggesting new Sales Prices as well.

EXAMPLE – SUGGEST SALES PRICES ON WORKSHEET

For a Master **2000** you want to add new prices as of **01-01-21** for All Customers and the Sales Price should be **1,2** of the original prices.

The current Sales Prices look like:



Item 2000

Sales Prices Search + New Edit List Delete Dimension Prices Search Table Lines Formula Lines Open in Excel More options

General

Sales Type Filter None

Sales Code Filter

Item Type Filter Master

Item/Master No. Filter 2000

Starting Date Filter

Currency Code Filter

Sales Type ↓	Sales Code ↓	Item No. ↓	Unit of Measure Code ↓	Minimum Quantity ↓	Currency Code ↓	Unit Price	Dimension Prices	Starting Date ↓	Ending Date	Search Expression	Search Table	Use Search Table Result	Formu
→ Campaign	CP1003	2000	PCS	0		27,00	0	9-1-2022	1-4-2022			Default	
All Customers		2000	PCS	24		35,00	0			COLOR_1,SIZE_EU	ST00108	Default	
All Customers		2000	PCS	0		37,00	0			COLOR_1,SIZE_EU	ST00107	Default	
Customer Price Group	RETAIL	2000	PCS	0	USD	142,00	0	1-1-2021				Default	
Customer Price Group	RETAIL	2000	PCS	0	SEK	900,00	0	1-1-2021				Default	

You enter the following **Options** and **Sales Price** Filters:

Suggest Sales Price on Wksh.

Options

Copy to Sales Price Worksheet...

Sales Type

All Customers

Sales Code

Unit of Measure Code

PCS

Currency Code

Starting Date

1-1-2021

Ending Date

Only Prices Above

0,00

Adjustment Factor

1,2

Rounding Method

WHOLE_UP

Create New Prices

Filter: Sales Price

× Sales Type

All Customers

× Sales Code

× Item No.

2000

× Currency Code

OK

Cancel

This would result in two Lines in the **Sales Price Worksheet**:

Sales Price Worksheet

✓ Saved



General

Sales Type Filter

All Customers

Item/Master No. Filter

...

Sales Code Filter

...

Starting Date Filter

Item Type Filter

Master

Currency Code Filter

...

Manage

 Search Table Lines

 Formula Lines

 Suggest Item Price on Wksh...

 Suggest Sales Price on Wksh...

 Implement Price Change...

 Open in Excel

Actions

Fewer options



Starting Date ↑	Ending Date ↑	Sales Type ↑ ▾	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Currency Code ↑	Current Unit Price	New Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
1-1-2021		All Customers		2000	PCS	0,00		37,00	45,00	COLOR_1,SIZE_EU	ST00122	Default	
1-1-2021		All Customers		2000	PCS	24,00		35,00	42,00	COLOR_1,SIZE_EU	ST00123	Default	

Keep in mind, that it is based on the original Sales Price Lines of **Sales Type All Customers**. Therefore, the **Sales Type Filter** must be set to *All Customers* to see the suggestions in the **Sales Price Worksheet**.

The execution of the Suggestion also created new **Search Table Lines** for you as well.

EXAMPLE – SUGGEST ITEM PRICES CHANGE (BASED ON EXISTING SALES PRICES INCLUDING FORMULAS)

For a Master *5200 Sofa Persephone* you want to add new prices as of *01-01-21* for the **Customer Price Group** *RETAIL* and the Sales Price should be *1,1* of the original prices because of old collection.

The current Sales Prices look like:

Item 5200 | Work Date: 6-9-2020

Sales Prices | Search | + New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | Open in Excel | More options

General

Sales Type Filter: None | Item/Master No. Filter: 5200 | Sales Code Filter: | Starting Date Filter: | Item Type Filter: Master | Currency Code Filter: |

Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Curren... Code ↑	Unit Price	Dimension Prices	Starti... Date ↑	Endi... Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Pri...	RETAIL	5200	PCS	0	DKK	0,00	0					Default	5200_RETAILPRICE
Customer Pri...	RETAIL	5200	PCS	0	EUR	0,00	0					Default	5200_RETAILPRICE
Customer Pri...	RETAIL	5200	PCS	0	GBP	0,00	0					Default	5200_RETAILPRICE
Customer Pri...	RETAIL	5200	PCS	0	NOK	0,00	0					Default	5200_RETAILPRICE
Customer Pri...	RETAIL	5200	PCS	0	SEK	0,00	0					Default	5200_RETAILPRICE
Customer Pri...	RETAIL	5200	PCS	0	USD	0,00	0					Default	5200_RETAILPRICE
All Customers		5200	PCS	0	DKK	0,00	0					Default	5200_SALESPRICE
All Customers		5200	PCS	0	EUR	0,00	0					Default	5200_SALESPRICE
All Customers		5200	PCS	0	GBP	0,00	0					Default	5200_SALESPRICE
All Customers		5200	PCS	0	NOK	0,00	0					Default	5200_SALESPRICE
All Customers		5200	PCS	0	SEK	0,00	0					Default	5200_SALESPRICE
All Customers		5200	PCS	0	USD	0,00	0					Default	5200_SALESPRICE

You enter the following **Options** and **Sales Price** Filters:

Suggest Sales Price on Wksh.

Use default values from: Last used options and filters

Options

Copy to Sales Price Worksheet...

Sales Type: Customer Price Group

Sales Code: RETAIL

Unit of Measure Code: PCS

Currency Code:

Starting Date: 1-1-2021

Ending Date:

Only Prices Above: 0,00

Adjustment Factor: 1,1

Rounding Method: WHOLE_UP

Create New Prices: ☒

Filter: Sales Price

Master Item: Yes

Sales Type: Customer Price Group

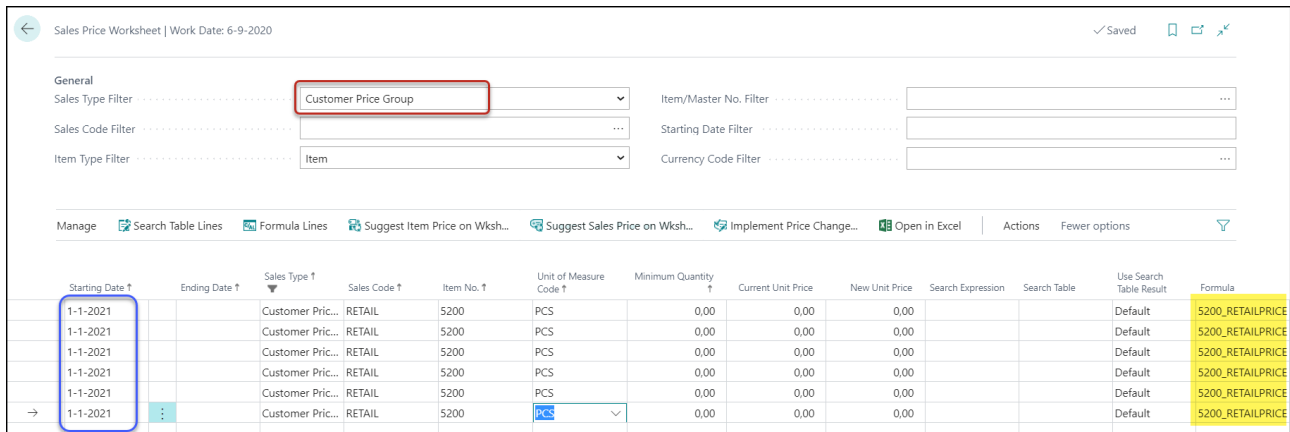
Sales Code: RETAIL

Item No.: 5200

Currency Code:

OK Cancel

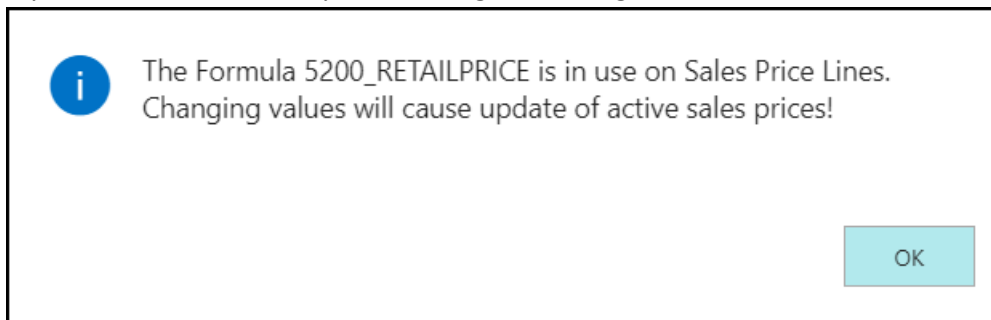
This would result in six Lines in the **Sales Price Worksheet**:



In fact, the Lines in the **Sales Price Worksheet** are almost copies from the original Sales Prices including the same **Formula**.

You now need to create manually new **Formulas**, because changing the current **Formulas** will also have its effect on the current **Sales Prices**!!

If you click **Formula Lines**, you will also get a message. I.e.:



So, entering an **Adjustment Factor** in the batch for **Suggest Sales Price on Wksh.** will have no effect on the actual Formulas; you need to create new Formula's manually, otherwise you will also change the current Sales Prices that use the same Formula.

SALES LINE DISCOUNTS

Not only in the Sales Prices TRIMIT added functionality, but also regarding Sales Line Discounts additional functionality has been added by TRIMIT.

The standard Business Central Sales Line Discounts can be used as well if you want to add Sales Line Discounts in general. However, if you are using a **Minimum Quantity**, you need to realize that it is only based on the **Quantity** on a Sales *Item* Line, not on a Sales *Matrix* Line.

If you want to use the **TRIMIT Sales Line Discounts** which can give you much more possibilities – especially regarding the **Minimum Quantity** -, you need to be aware that the parameter [Extended Discount Search](#) in the Sales & Receivables Setup must be set to a value different from *No*.

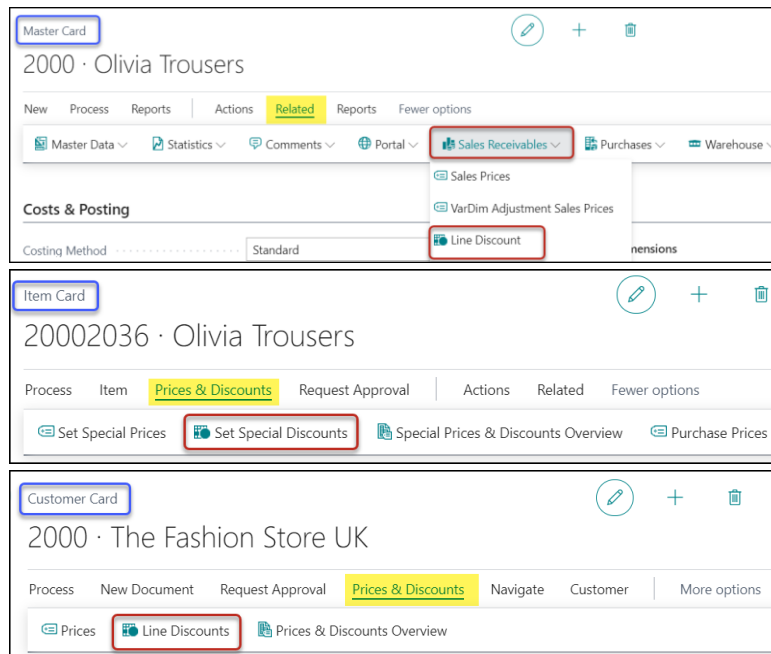
In that case, you can create a **Sales Line Discount Type 0 (zero)** without any special settings for those cases in which you still want to use the regular Business Central possibility of using Sales Line Discounts.

You need to decide up front which type of Sales Line Discounts you want to use:
Standard Business Central Sales Line Discounts OR TRIMIT Sales Line Discounts.

NOTE

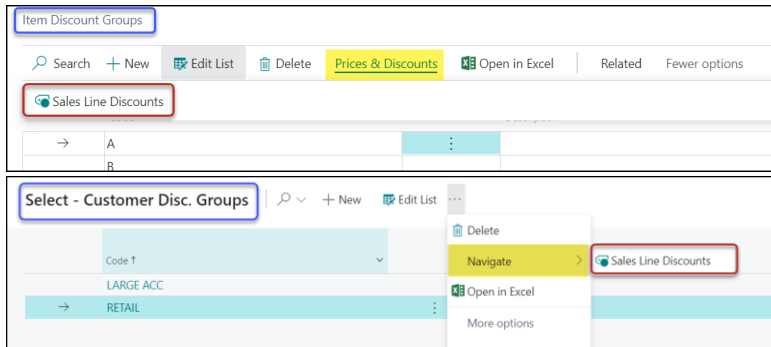
Depending on the **Extended Discount Search** in the Sales & Receivables Setup, the system will only look in the Standard Business Central Discounts (if the value = *No*) or only look in the TRIMIT Sales Line Discounts (if value <> *No*). It will not look in both!!!!

Via the **Master, Item, Customer, Item Discount Group, Customer Discount Group** you can enter the regular Sales Lines Discounts of Business Central.



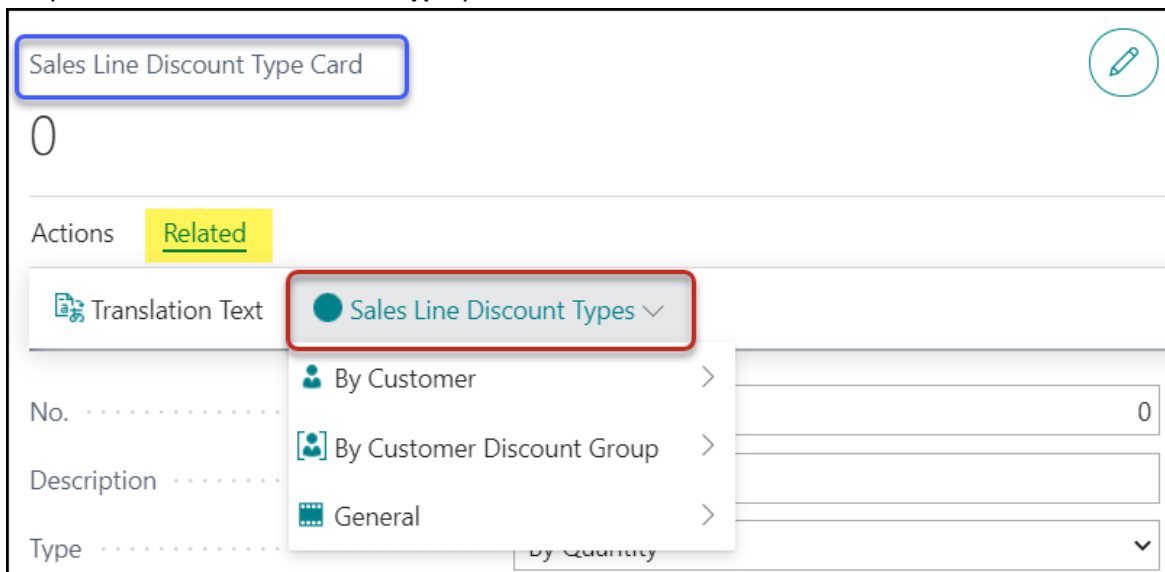
The image displays three screenshots of the Business Central user interface, each showing a different type of card (Master Card, Item Card, and Customer Card) and highlighting the location where Sales Line Discounts can be configured.

- Master Card (2000 · Olivia Trousers):** The 'Related' tab is active. In the 'Sales Receivables' section, the 'Line Discount' option is highlighted with a red box.
- Item Card (20002036 · Olivia Trousers):** The 'Prices & Discounts' tab is active. In the 'Set Special Discounts' section, the 'Set Special Discounts' option is highlighted with a red box.
- Customer Card (2000 · The Fashion Store UK):** The 'Prices & Discounts' tab is active. In the 'Line Discounts' section, the 'Line Discounts' option is highlighted with a red box.



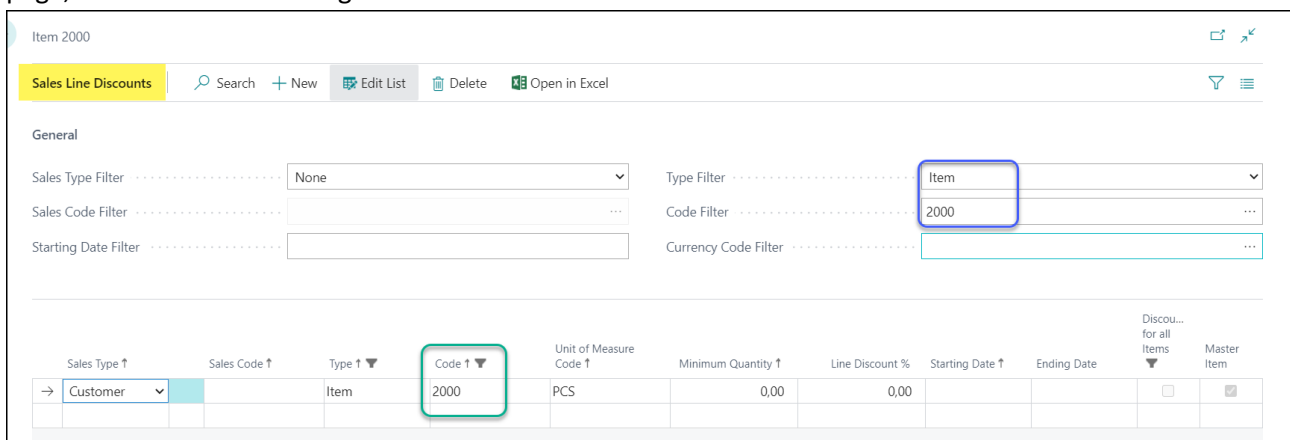
(via field **Customer Discount Group** on a Customer Card)

Only via the **Sales Line Discount Type** you can enter the TRIMIT Sales Line Discounts:



SALES LINE DISCOUNT PAGE OF BUSINESS CENTRAL

Depending on where you open this page (Master, Item, Customer, Item Discount Group, Customer Discount Group), you will see some filters already set by default in the Header of the **Sales Line Discounts** page, and some columns might not be shown.



The **Sales Line Discounts** can only be used if you have Discounts without a **Minimum Quantity** or that will be applicable for a **Minimum Quantity** that relates to Sales Document **Item** Line quantities.

Based on the **Code** in the **Sales Line Discount** it can however be applicable to all Items that are related to a Master, but the **Minimum Quantity** will always be compared with the **Quantity** in a single **Item** Line of the Sales Document.

If you want to have Sales Line Discounts that are related to **MATRIX** Line quantities or even total Order Quantities, you need to use the TRIMIT Sales Line Discount Types.

In that case, you can only enter the actual Sales Line Discounts via the list/page of the **Sales Line Discount Types**. Therefore, you first need to create the **Sales Line Discount Types**.

SALES LINE DISCOUNT TYPE

Via **Tell me Sales Line Discount Type**, you can enter the special **TRIMIT Sales Line Discount Types** that can only be used for the **Sales Line Discounts**.

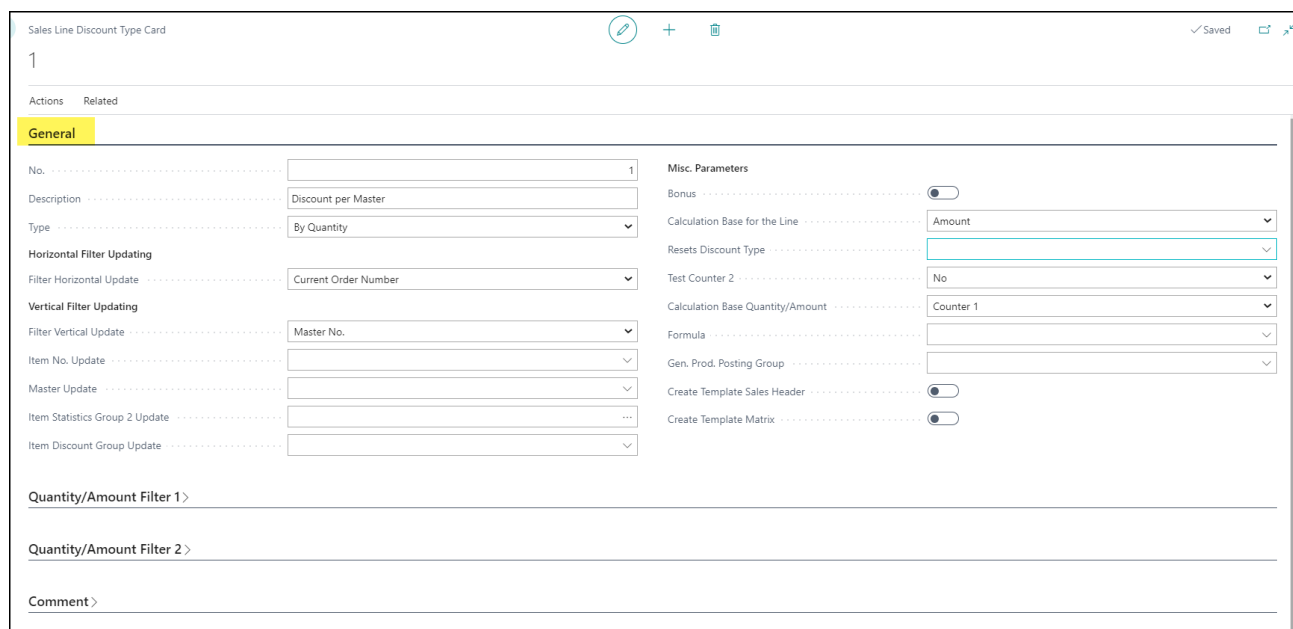
NOTE

When start using the **Sales Line Discount Types**, create a Type with **No.** = 0 (*zero*), and don't change any fields.

This Type can then be used for the regular setup of the Business Central Sales Lines Discounts, instead of doing it via the possibilities described in [Sales Line Discount Page of Business Central](#).

This way all the Sales Line Discounts (regardless if it is the standard Business Central or the TRIMIT Discounts) will be at one place – in one page, instead of at two places in the system.

FASTTAB GENERAL



Sales Line Discount Type Card

1

Actions Related

General

No. 1

Description Discount per Master

Type By Quantity

Horizontal Filter Updating

Filter Horizontal Update Current Order Number

Vertical Filter Updating

Filter Vertical Update Master No.

Item No. Update

Master Update

Item Statistics Group 2 Update

Item Discount Group Update

Quantity/Amount Filter 1 >

Quantity/Amount Filter 2 >

Comment >

Misc. Parameters

Bonus

Calculation Base for the Line Amount

Resets Discount Type

Test Counter 2 No

Calculation Base Quantity/Amount Counter 1

Formula

Gen. Prod. Posting Group

Create Template Sales Header

Create Template Matrix

DESCRIPTION OF THE FIELDS:

NO.

Unique Integer for this specific **Sales Line Discount Type**.

DESCRIPTION

You can enter a Description for this **Sales Line Discount Type**.

TYPE

The **Type** determines with which value the **Minimum Quantity** of the Sales Line Discounts should be compared.

You can choose between the following three options:

By Quantity	Should the Minimum Quantity of the discounts be compared to the Quantity of the Sales Lines
By Amount	Should the Minimum Amount of the discounts be compared to the Amount of the Sales Lines
Campaign Discount	This type determines that the Discount is a special TRIMIT Campaign Discount

FILTER HORIZONTAL UPDATE

This field determines with which level the **Minimum Quantity/Amount** in the Sales Line Discounts should be compared, to recalculate the Discount.

You can choose between the following five options:

Current Order Number	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the current Order?
Orders Current Customer	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Sell-to Customer?
Orders Current Bill-To	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Bill-to Customer?
Orders Current Company Group	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Company Group of the Sell-to Customer?
Orders Current Chain	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Chain of the Sell-to Customer?

FILTER VERTICAL UPDATE

This field determines on which level the **Minimum Quantity/Amount** in the discounts should be compared to within a Sales Document, to recalculate the Discount.

You can choose the following six options:

The Line	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Sales Line?
Item No.	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item?
Master No.	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Master?

Item Statistics Group 2	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item Statistics Group 2?
Item Statistics Group	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item Statistics Group?
All Item Lines	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of all the Item Lines?

NOTE

I.e., if the **Filter Horizontal Update** is set to *Current Order Number* and the **Filter Vertical Update** is set to *Master*, the **Minimum Quantity/Amount** for a discount will be compared to the total of the **Type** (quantity/amount/campaign discount) of the Master within the current order to determine if a discount is applicable.

ITEM NO. UPDATE

In this field you can choose an **Item** for which this specific **Discount Type** is applicable if you want to update (recalculate) the Sales Line Discount.

Usually this will only be used if **Filter Vertical Update** is set to *Item No.*

MASTER UPDATE

In this field you can choose a **Master** for which this specific **Discount Type** is applicable if you want to update (recalculate) the Sales Line Discount.

Usually this will only be used if **Filter Vertical Update** is set to *Master No.*

ITEM STATISTICS GROUP 2 UPDATE

In this field you can choose an **Item Statistics Group 2** for which this specific **Discount Type** is applicable if you want to update (recalculate) the Sales Line Discount.

Usually this will only be used if **Filter Vertical Update** is set to *Item Statistics Group 2.*

ITEM STATISTICS GROUP

In this field you can choose an **Item Statistics Group** for which this specific **Discount Type** is applicable if you want to update (recalculate) the Sales Line Discount.

Usually this will only be used if **Filter Vertical Update** is set to *Item Statistics Group.*

BONUS

This field must have a checkmark if this **Discount** is meant for the Bonus Discount Combination Search Method. See details regarding the Bonus functionality in **White Paper – TRIMIT Provision**

CALCULATION BASE FOR THE LINE

This field determines over which amount the Sales Line the Discount will be calculated.

You can choose between the following three options:

Amount	The Gross Amount of the Sales Line: Quantity * Unit Price
Amount Minus Accumulated Discount. The Discount is included in the Accumulated Discount.	The Net Amount of the Sales Line: Quantity * Unit Price – Line Discount will be 100%.

Amount Minus Accumulated Discount. The Discount is not included in the Accumulated Discount.	The Net Amount of the Sales Line: Quantity * Unit Price – Line Discount will be set as 100 + Discount percentage %.
---	---

RESETS DISCOUNT TYPE

Because you can calculate discounts over discounts, in this field you can choose a **Discount Type** that needs to be excluded from the discount calculation if the current **Discount Type** is applicable.

TEST COUNTER 2

The **Discount Type** has 2 different Counters: FastTab **Qty/Amount Filter 1** and FastTab **Qty/Amount Filter 2**. This gives you the possibility to calculate two times the same Line Discount for different situations: i.e., 5% discount per Master for all dates and 5% discount (extra) in a specific period.

With this field you can determine that the system should also determine the second discount based on the fields of FastTab **Qty/Amount Filter 2**.

You can choose between the following three options:

No	The settings in Qty/Amount Filter 2 will be neglected.
Bigger than Zero	The settings in Qty/Amount Filter 2 will only be applicable if they will result in a Discount.
Equal to Counter 1	The settings in Qty/Amount Filter 2 will only be applicable if they will result in a Discount equal to the Discount based on Qty/Amount Filter 1 .

CALCULATION BASE QUANTITY/AMOUNT

With this field you can determine how the Discount should be determined.

You can choose between the following five options:

Counter 1	Only based on the filters of Qty/Amount Filter 1 the total quantity/amount will be determined to see if a Discount is applicable.
Counter 2	Only based on the filters of Qty/Amount Filter 2 the total quantity/amount will be determined to see if a Discount is applicable.
Lowest Quantity/Amount	If Counter 1 and Counter 2 are applicable only the lowest quantity/amount will be determined to see if a Discount is applicable.
Highest Quantity/Amount	If Counter 1 and Counter 2 are applicable only the highest quantity/amount will be determined to see if a Discount is applicable.
Total Amount	If Counter 1 and Counter 2 are applicable only the total quantity/amount will be determined to see if a Discount is applicable.

FORMULA

In this field you can enter a **Formula** with **Formula Type Discount** can be chosen.

GENERAL PRODUCT POSTING GROUP

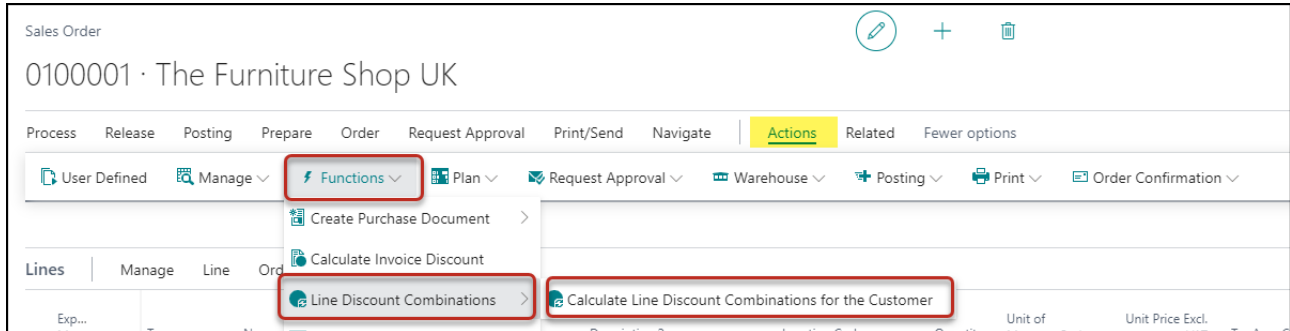
This field is only applicable if the field of **Bonus** is set to Yes.

You can enter a **General Product Posting Group** that will be checked with the **General Business Posting Group** of the Sales Line, before the current Discount is applicable.

CREATE TEMPLATE SALES HEADER

With a checkmark in this field, the system will also create a Line Discount Combination record for all the Matrix Lines in a Sales Document. Otherwise, you will only see Line Discount Combinations on the Item Lines in a Sales Document.

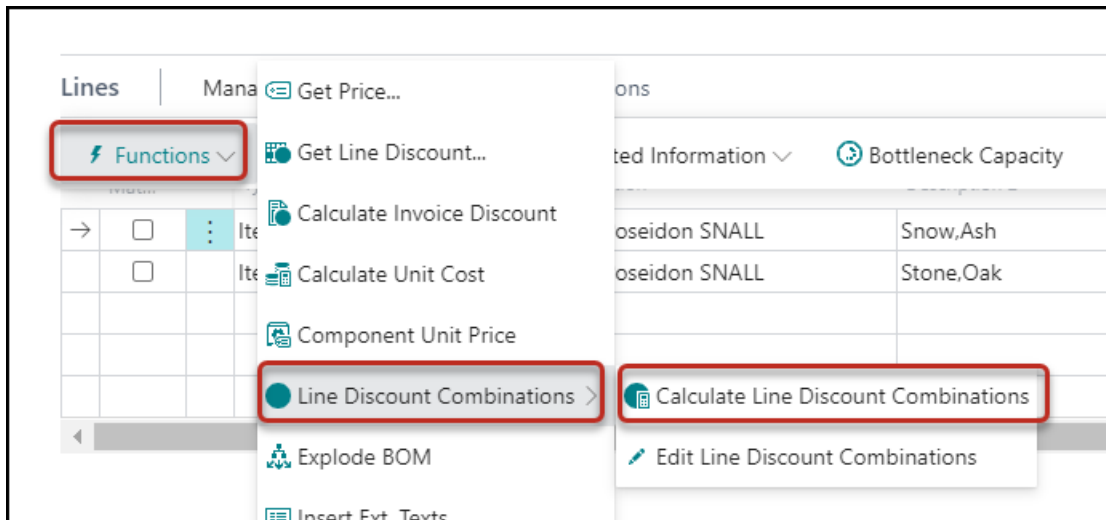
This will happen if you recalculate the Discount Combinations via the Sales Document, by clicking **Actions, Functions, Line Discount Combinations, Calculate Line Discount Combinations for the Customer**.



CREATE TEMPLATE MATRIX

With a checkmark in this field, the system will also create a Line Discount Combination record for all the Matrix Lines in a Sales Document. Otherwise, you will only see Line Discount Combinations on the Item Lines in a Sales Document.

This will happen if you recalculate the Discount Combinations via the Line Actions of a Matrix Line, by clicking **Line, Functions, Line Discount Combinations, Calculate Line Discount Combinations**.



FASTTABS QTY/AMOUNT FILTER 1 AND 2

You can setup two filters within one **Sales Line Discount Type**.

To make it not too complicated for a user, I can advise to use only one filter FastTab within one Type and create another Type for the other filters.

That does mean however that you need to enter two Sales Line Discounts per Item/Master/etc.

Quantity/Amount Filter 1	
Horizontal Filter Quantity/Amount Filter Horizon 1 Current Order Number	Period Filter Quantity/Amount Filter Date Method Floating
Vertical Filter Quantity/Amount Vertical Quantity/Amount 1 Master No.	Horizon 1
Item No. Quantity/Amount 1	Period of Quantity/Amount 1
Master Quantity/Amount 1	Start Date Formula Quantity 1
Item Statistics Group 2 Quantity/Amount 1	End Date Formula Quantity/Amount 1
Item Discount Group Quantity/Amount 1	
Skip Discount Type Quantity/Amount 1	

Quantity/Amount Filter 2	
Horizontal Filter Quantity/Amount Filter Horizon 2 Current Order Number	Period Filter Quantity/Amount Filter Date Method 2 Floating
Vertical Filter Quantity/Amount Vertical Quantity/Amount 2 The Line	Horizon 2
Item No. Quantity/Amount 2	Period of Quantity/Amount 2
Master Quantity/Amount 2	Start Date Formula Quantity 2
Item Statistics Group 2 Quantity/Amount 2	End Date Formula Quantity/Amount 2
Item Discount Group Quantity/Amount 2	
Skip Discount Type Quantity/Amount 2	

DESCRIPTION OF THE FIELDS:

FILTER HORIZON

This field determines with which level the **Minimum Quantity/Amount** in the Sales Line Discounts should be compared, to determine the Discount.

You can choose between the following nine options:

Current Order Number	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the current Order?
Orders Current Customer	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Sell-to Customer?
Orders Current Bill-To	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Bill-to Customer?
Orders Current Company Group	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Company Group of the Sell-to Customer?
Orders Current Chain	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders of the current Chain of the Sell-to Customer?
Orders + Posted Invoices Current Customer	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders and posted Invoices and Credit Memos of the current Sell-to Customer?
Orders + Posted Invoices Current Bill-To	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders and Posted Invoices and Credit Memos of the current Bill-to Customer?

Orders + Posted Invoices Current Company Group	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders and posted Invoices and Credit Memos of the current Company Group of the Sell-to Customer?
Orders + Posted Invoices Current Chain	Should the Minimum Quantity/Amount be compared to the Type (By Quantity, By Amount or Campaign Discount) of the Sales Orders and posted Invoices and Credit Memos of the current Chain of the Sell-to Customer?

I.e., if you want to grant a specific Customer a Discount of 10% if he would buy a **Minimum Quantity** of 500 pieces in an Order – you can choose *Current Order Number*. If you want to grant a specific Customer a Discount of 5% if he would buy a **Minimum Quantity** of 5000 pieces during half a year, you can choose *Orders + Posted Invoices Current Customer*.

VERTICAL QUANTITY/AMOUNT

This field determines on which level the **Minimum Quantity/Amount** in the discounts should be compared to within the **Filter Horizon**, to determine the Discount.

You can choose the following six options:

The Line	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Sales Line?
Item No.	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item?
Master No.	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Master?
Item Statistics Group 2	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item Statistics Group 2?
Item Statistics Group	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of the current Item Statistics Group?
All Item Lines	Should the Minimum Quantity/Amount only be compared with the Type (By Quantity, By Amount or Campaign Discount) of all the Item Lines?

NOTE

I.e., if the **Horizontal Filter** is set to *Current Order Number* and the **Vertical Quantity/Amount** is set to *Master*, the **Minimum Quantity/Amount** for a discount will be compared to the total of the **Type** (quantity/amount/campaign discount) of the Master within the current order to determine if a discount is applicable.

ITEM NO. QUANTITY/AMOUNT

In this field you can enter a filter for **Items** for which this specific **Discount Type** is applicable if you want to determine the Sales Line Discount.

Usually this will only be used if **Vertical Quantity/Amount** is set to *Item No*.

MASTER QUANTITY/AMOUNT

In this field you can enter a filter for **Masters** for which this specific **Discount Type** is applicable if you want to determine the Sales Line Discount.

Usually this will only be used if **Vertical Quantity/Amount** is set to *Master No.*

ITEM STATISTICS GROUP 2 QUANTITY/AMOUNT

In this field you can enter a filter for **Item Statistics Groups 2** for which this specific **Discount Type** is applicable if you want to determine the Sales Line Discount.

Usually this will only be used if **Vertical Quantity/Amount** is set to *Item Statistics Group 2.*

ITEM DISCOUNT GROUP QUANTITY/AMOUNT

In this field you can enter a filter for **Item Statistics Groups** for which this specific **Discount Type** is applicable if you want to determine the Sales Line Discount.

Usually this will only be used if **Vertical Quantity/Amount** is set to *Item Statistics Group.*

SKIP DISCOUNT TYPE QUANTITY/AMOUNT

In this field you can enter a filter for Sales Line **Discount Types** that should be neglected, if current **Sales Line Discount Type** is applicable.

FILTER DATE METHOD

If the **Filter Date Method** is set to *Fixed*, the Date of the Sales Line (depending on the **Line Discount Date Handling** in the Sales Document) will be checked with the **Start Date Formula Quantity** and **End Date Formula Quantity/Amount**.

If the **Filter Date Method** is set to *Floating*, the Date of the Sales Line will be checked with the Start Date of the Discount and the **Horizon** (next field in the Sales Line Discount Type).

HORIZON

You can enter a Date Formula (like *6M*) for the **Horizon** if the **Filter Date Method** has been set to *Floating*. With this **Horizon** and the **Start Date** of a Sales Line Discount the boundaries will be determined for calculating the total Quantity/Amount of the Sales Document that we be checked with the **Minimum Quantity/Amount**.

The Discount itself, however, will only apply if – within this total Horizon – the Quantity/Amount of the Sales Orders/Sales Invoices will exceed the **Minimum Quantity/Amount** within a **Period of Quantity/Amount**.

PERIOD OF QUANTITY/AMOUNT

You can enter a Date Formula (like *1M*) for the Period in which the **Minimum Quantity/Amount** should be checked with the total Quantity/Amount of the Sales Document.

This field does only apply if **Filter Date Method** has been set to *Floating*.

START DATE FORMULA QUANTITY

You can enter a **Start Date** for the calculation of the sold quantity/amount to be compared with the **Minimum Quantity/Amount** of the Sales Line Discount.

This field does only apply if **Filter Date Method** has been set to *Fixed*.

END DATE FORMULA QUANTITY/AMOUNT

You can enter an **End Date** for the calculation of the sold quantity/amount to be compared to the **Minimum Quantity/Amount** of the Sales Line Discount.

This field does only apply if **Filter Date Method** has been set to *Fixed*.

NOTE

So, the above four fields have no influence of when a Sales Line Discount is valid, but to determine which Sales Documents needs to be summarized to determine if the Quantity or Amount will fit the **Minimum Quantity** or **Minimum Amount** of the Sales Line Discount.

FASTTAB COMMENT

Comment			
Comment		Comment 3	
Comment 2			

DESCRIPTION OF THE FIELDS:

COMMENT, 2 AND 3

You can enter a **Comment** of 50 characters.

NOTE

These comments are simply for internal use; to elaborate the settings of the Sales Line Discount Type.

ACTIONS

Sales Line Discount Type Card

1

Actions

Related

Update Line Discounts

Regenerate Line Discount Lines

Calculate All Line Discounts

REGENERATE LINE DISCOUNT LINES



The function will run through all sales lines for the customers and recalculate all line discount combinations. Do you want to continue?

Yes

No

With this function, the **Line Discount Lines**, connected to the Sales Lines will be regenerated.

This might be necessary if you change the boundaries in a **Sales Line Discount Type** or created a new **Sales Line Discount Type** that should also still apply to the current Sales Documents.

For this Action, the user needs to have a checkmark in **System Responsible Sales** in the User Setup.

CALCULATE ALL LINE DISCOUNTS



The function will run through all sales lines for the customers and recalculate all line discount combinations. Do you want to continue?

Yes
No

With this function, the Line Discounts itself will be recalculated.

For this Action, the user needs to have a checkmark in **System Responsible Sales** in the User Setup.

RELATED

The Discounts can be setup for two levels: the **Sales Type** and the (Item) **Type** as you could have seen in [Sales Line Discount Page](#).

Via *Related*, you can create all the **Sales Line Discounts** you want. In that case, the **Sales Line Discount Type** will be filled automatically.

Sales Line Discount Type Card
1

Actions
Related

Translation Text

Sales Line Discount Types
By Customer
By Customer Discount Group
General

Quantity/Amount
Horizontal Filter Quant

TRANSLATION TEXT

You can enter translations for different Languages for this specific **Sales Line Discount Type**.

BY CUSTOMER

And then per **Item, Master, Item Discount Group, Sell-To Customer** or **Customer Campaign**.

If you enter a Discount via **By Customer**, it will be compared with the *Sell-to Customer, Bill-to Customer, Company Group* and *Chain*.

BY CUSTOMER DISCOUNT GROUP

And then per **Item, Master, Item Discount Group, Customer Discount Group** or **Customer Discount Group Campaign**

GENERAL

And then per **Item, Master, Item Discount Group** or **General Campaign**

SALES LINE COMBINATION DISCOUNTS

All Customers
✓ Saved

Sales Line Combination Discounts
Search
+ New
Edit List
Delete
Open in Excel

General

Sales Type Filter: All Customers
Code Filter:
Sales Code Filter:
Currency Code Filter:
Starting Date Filter:
Discount Type Filter: Line Discount Type
Type Filter: Item
Discount Type: 1

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Minimum Amount (LCY) ↑	Currency Code ↑	Line Discount %	Starting Date ↑	Ending Date	Discount for all Items ↑	Master Item ↑	Freeze
→ All Customers		Item	2000	PCS	100,00	0,00		2,00			☐	☒	☐
All Customers		Item	2001	PCS	100,00	0,00		2,00			☐	☒	☐
All Customers		Item	2010	PCS	100,00	0,00		2,00			☐	☒	☐
All Customers		Item	2020	PCS	100,00	0,00		2,00			☐	☒	☐
All Customers		Item	2030	PCS	100,00	0,00		2,00			☐	☒	☐

DESCRIPTION OF THE FIELDS IN THE HEADER:

The Filters relate to the fields on the Lines:

Sales Type Filter	Sales Type <i>None</i> means: no Filter so all Sales Types will be shown in the Lines.
Sales Code Filter	Sales Code
Starting Date Filter	Starting Date
Type Filter	Type <i>None</i> means: no Filter so all Types will be shown.
Code Filter	Code – based on the Type Filter
Currency Code Filter	Currency Code
Discount Type Filter	<i>None</i> means: no Filter so all Discount Types will be shown. The option <i>Line Discount Type</i> sets a Filter on Discount Type for which you can enter a value in the next field in the Header Discount Type .
Discount Type	Filter on Sales Line Discount Type if Discount Type Filter <> <i>None</i>

Setting these filters will have its impact on the Columns that will be shown in the Lines.

DESCRIPTION OF THE FIELDS IN THE LINES:

SALES LINE DISCOUNT TYPE

Here you can enter a **Sales Line Discount Type** to determine how the Discounts should be calculated. I.e., **Minimum Quantity** needs to be checked based on an individual Item Sales Line or based on the total quantity of a Master in a specific Sales Document.
See [Sales Line Discount Type](#) for the possibilities.

NOTE

This field will only be shown if the **Discount Type Filter** is set to *None*.

SALES TYPE

Specifies the Type of Customer that the Sales Discount Line is valid for.

This field is related to the Customers of the Sales Documents.

You can choose between the following four options:

Customer	Will be compared with the Sell-to Customer, Bill-to Customer, Company Group and Chain of a Sales Document
Customer Discount Group	Will be compared with the Customer Discount Group of a Sales Document which originally comes from the Sell-to Customer of the Sales Document
All Customers	Applicable for all customer
Campaign	This Standard BC option will be ignored and has been replaced by the TRIMIT Campaign Price List functionality.

NOTE

This fields will by default be filled with the **Sales Type Filter**.

SALES CODE

The **Sales Code** specifies the **Sales Type**.

If the Sales Type is *Customer*, the Sales Code must be Customer Number.

If the Sales Type is *Customer Discount Group*, the Sales Code must be a Customer Discount Group.

If the Sales Type is *All Customers*, you cannot select a Sales Code.

TYPE

Specifies the Type of Item that the Sales Discount Line is valid for.

This field is related to Item/Master of the Sales Lines.

You can choose between the following four options:

Item	Will be compared with the Item No. on the Sales Lines
Item Disc. Group	Will be compared with the Item Discount Group of the Sales Line (which comes from the Item No.)
All	Is applicable for all Sales Lines (within the filters of the Sales Type/Sales Code).

NOTE

If the Item is a of Type **Master Item**, the discount will be applicable for all Items related to the Master Item that you enter in the field **Code**.

CODE

The **Code** specifies the **Type**.

If the **Type** is *Item*, the **Code** must be an Item Number.

If the **Type** is *Item Disc. Group*, the **Code** must be an Item Discount Group.

It the **Type** is *All*, you cannot select a Code.

MINIMUM QUANTITY

You can enter a **Minimum Quantity** hat will be checked with the quantity of the Sales Line – or Sales Order or within a Season, etc. – based on the settings in the **Discount Type**

MINIMUM AMOUNT (LCY)

You can enter a **Minimum Amount in Local Currency** that will be checked with the amount of the Sales Line – or Sales Order or within a Season, etc. – based on the settings in the **Discount Type**.

DISCOUNT FOR ALL ITEM

This field will be set automatically to Yes, if the **Type Filter** is set to *All* and therefore the **Code** is empty.

MASTER ITEM

This field will be set automatically to Yes, if the **Code** is a Master Item.

FREEZE

A checkmark in this field, will freeze the **Line Discount %** on the Sales Line, which can be overwritten after a message based on the parameter **Approve Change of Line Discount %** in the Sales & Receivables Setup.

NOTE

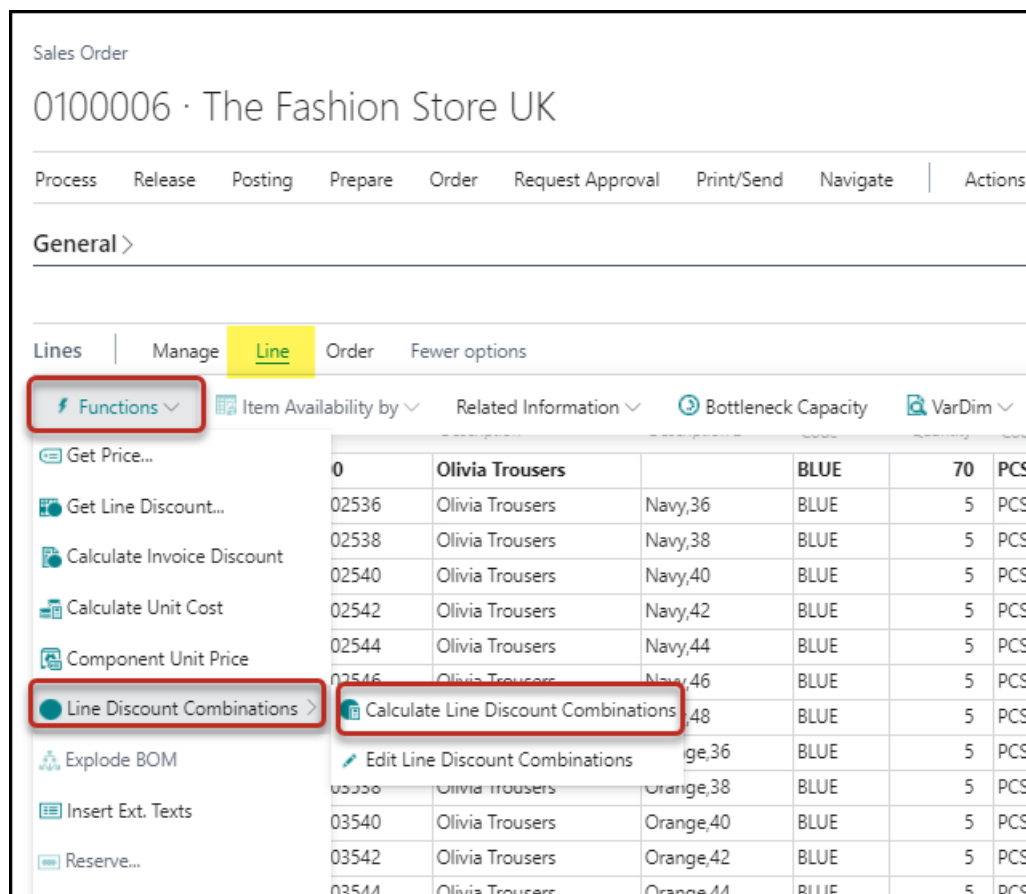
The rest of the Fields of the Sales Discount Lines are standard Business Central fields and will not be discussed.

LINE DISCOUNT UPDATES OR CHANGES

Especially if you would setup **Sales Line Discount Types** that would be across Sales Orders – and not only related to one Sales Order, but the Sales Lines Discounts also sometimes needs to be recalculated or you want to change the **Line Discount** manually; this can be done in several ways:

CALCULATE LINE DISCOUNT COMBINATIONS VIA THE SALES LINE

Via the Lines Actions, click **Line, Functions, Line Discount Combinations, Calculate Line Discount Combinations**



The screenshot shows the 'Sales Order' interface for '0100006 · The Fashion Store UK'. The 'General' tab is selected. Under the 'Lines' section, the 'Line' sub-tab is active. The 'Functions' dropdown menu is open, and the 'Line Discount Combinations' option is highlighted. The 'Calculate Line Discount Combinations' option is also highlighted. The background table shows a list of sales lines for 'Olivia Trousers' in 'Navy' and 'Orange' colors, with quantities and prices.

Line	Description	Color	Size	Unit	Price
0	Olivia Trousers	BLUE	70	PCS	
02536	Olivia Trousers	BLUE	Navy,36	PCS	5
02538	Olivia Trousers	BLUE	Navy,38	PCS	5
02540	Olivia Trousers	BLUE	Navy,40	PCS	5
02542	Olivia Trousers	BLUE	Navy,42	PCS	5
02544	Olivia Trousers	BLUE	Navy,44	PCS	5
02546	Olivia Trousers	BLUE	Navy,46	PCS	5
02548	Olivia Trousers	BLUE	Navy,48	PCS	5
03536	Olivia Trousers	BLUE	Orange,36	PCS	5
03540	Olivia Trousers	BLUE	Orange,40	PCS	5
03542	Olivia Trousers	BLUE	Orange,42	PCS	5
03544	Olivia Trousers	BLUE	Orange,44	PCS	5

This will calculate the **Line Discounts** for the current Sales Line; this can take some time, because it might have to check quantities/amounts in all Sales Orders.

MANUAL CHANGING LINE DISCOUNT %

If you are using the Parameter [Line Discount Combination](#) set to Yes in the Sales & Receivables Setup, it is not possible simply changing the **Line Discount %** on a Sales Line. You will even get an error message:

Sales Order

0100006 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions Related Fewer options

✖ The page has an error. Correct the error or try to revert the change.

General >

Lines | Manage Line Order Fewer options

Exp... Mat...	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measu... Code	Unit Price Excl. VAT	Line Discount %	Line Discount Amount	Line Amount Excl. VAT	Qty. to Ship
✖ ✔ ⋮	Matrix	2000	Olivia Trousers		BLUE	70	PCS	25,00	✖ 3	35,00	1.715,00	70
☐	Item	20002536	Olivia Trousers	Navy,36	BLUE	5	PCS	25,00				5
☐	Item	20002538	Olivia Trousers	Navy,38	BLUE	5	PCS	25,00				5
☐	Item	20002540	Olivia Trousers	Navy,40	BLUE	5	PCS	25,00				5
☐	Item	20002542	Olivia Trousers	Navy,42	BLUE	5	PCS	25,00	2	2,50	122,50	5
☐	Item	20002544	Olivia Trousers	Navy,44	BLUE	5	PCS	25,00	2	2,50	122,50	5
☐	Item	20002546	Olivia Trousers	Navy,46	BLUE	5	PCS	25,00	2	2,50	122,50	5

Validation Results
Line Discount % cannot be changed by use of Line Discount Combination.

You can see the applicable **Line Discount %** via the Lines Actions, click **Line, Functions, Line Discount Combinations, Edit Line Discount Combinations**. This is also the page, in which you can change the **Line Discount %** for your Sales Item Line – it is not possible yet to change it on a Sales Matrix Line.

Sales Order

0100006 · The Fashion Store UK

Process Release Posting Prepare Order Request Approval Print/Send Navigate Actions

General >

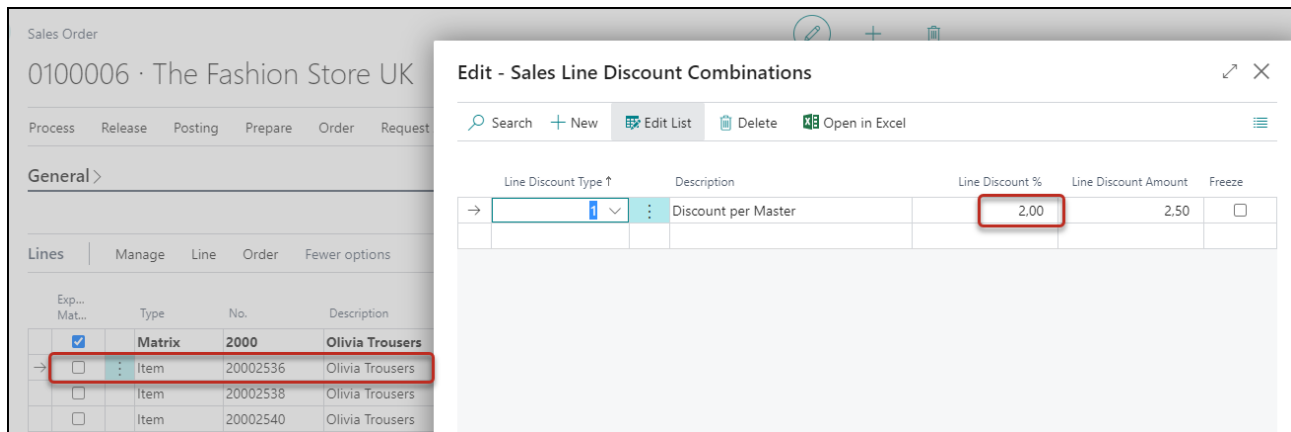
Lines | Manage **Line** Order Fewer options

⚡ Functions 📅 Item Availability by 📊 Related Information 🕒 Bottleneck Capacity 🔍 VarDim

Get Price...
Get Line Discount...
Calculate Invoice Discount
Calculate Unit Cost
Component Unit Price
Line Discount Combinations
Explode BOM
Insert Ext. Texts
Reserve...

Calculate Line Discount Combinations
Edit Line Discount Combinations

No.	Description	Description 2	Location Code	Quantity	Unit of Measu... Code
0	Olivia Trousers		BLUE	70	PCS
02536	Olivia Trousers	Navy,36	BLUE	5	PCS
02538	Olivia Trousers	Navy,38	BLUE	5	PCS
02540	Olivia Trousers	Navy,40	BLUE	5	PCS
02542	Olivia Trousers	Navy,42	BLUE	5	PCS
02544	Olivia Trousers	Navy,44	BLUE	5	PCS
02546	Olivia Trousers	Navy,46	BLUE	5	PCS
02548	Olivia Trousers	Navy,48	BLUE	5	PCS
03536	Olivia Trousers	Orange,36	BLUE	5	PCS
03538	Olivia Trousers	Orange,38	BLUE	5	PCS
03540	Olivia Trousers	Orange,40	BLUE	5	PCS
03542	Olivia Trousers	Orange,42	BLUE	5	PCS
03544	Olivia Trousers	Orange,44	BLUE	5	PCS



In this page you can change the actual **Line Discount %** for your Sales Item Line.

NOTE

You are also able to update and/or regenerate the **Line Discount %** via the **Sales Line Discount Type** as described in [Actions](#)

SEARCH DIRECTION SALES LINE DISCOUNTS

You have seen that you can enter the Sales Line Discounts in many ways and levels – especially when you make use of the **TRIMIT Sales Line Discount Type**.

To determine the right **Sales Line Discount** for a Sales Line the system will check all the Lines in the Table Sales Line Discounts (7004) in the following order.

If a Sales Line Discount is found, the search will stop.

Therefore, where Business Central will search for the “best discount”, TRIMIT will search for the “first” discount – regardless if there might be better discounts.

Within a search (1-8) on **Sales Type**, there is also a special order for the (Item) **Types** (a-h).

1. Sales Type = *Campaign*
 - a. Type = *Customer (Sell-to Customer)*
 - b. Type = *Customer (Bill-to Customer)*
 - c. Type = *Customer (Company Group)*
 - d. Type = *Customer (Chain)*
 - e. Type = *Customer Discount Group*
 - f. Type = *Country (Bill-to Country/Region Code)*
 - g. Type = *Item*
 - h. Type = *Master*
2. Sales Type = *Customer (Sell-to Customer)*
 - a. Type = *Item*
 - b. Type = *Master*
 - c. Type = *Item Discount Group*
 - d. Type = *All*
3. Sales Type = *Customer (Bill-to Customer)*
 - a. Type = *Item*
 - b. Type = *Master*

- c. Type = *Item Discount Group*
 - d. Type = *All*
- 4. Sales Type = *Customer (Company Group)*
 - a. Type = *Item*
 - b. Type = *Master*
 - c. Type = *Item Discount Group*
 - d. Type = *All*
- 5. Sales Type = *Customer (Chain)*
 - a. Type = *Item*
 - b. Type = *Master*
 - c. Type = *Item Discount Group*
 - d. Type = *All*
- 6. Sales Type = *Customer Discount Group*
 - a. Type = *Item*
 - b. Type = *Master*
 - c. Type = *Item Discount Group*
 - d. Type = *All*
- 7. Sales Type = *All Customers*
 - a. Type = *Item*
 - b. Type = *Master*
 - c. Type = *Item Discount Group*
 - d. Type = *All*

SUMMARY SALES LINE DISCOUNTS

TRIMIT in comparison to Business Central:

- More **Sales Types**: *Customer* will be checked with the *Sell-to Customer*, *Bill-to Customer*, *Company Group* and *Chain*
- Sales Line Discounts per Master or Item
- If you want to work with combinations of discounts: don't forget to set the parameters in the Sales & Receivables Setup.
- Discounts per Item Line, Matrix Line, Order, Item Statistics Group 2, etc. via **Sales Line Discount Types**
- There are so many extra possibilities when Combining Discounts, that you might get lost; keep it simple.

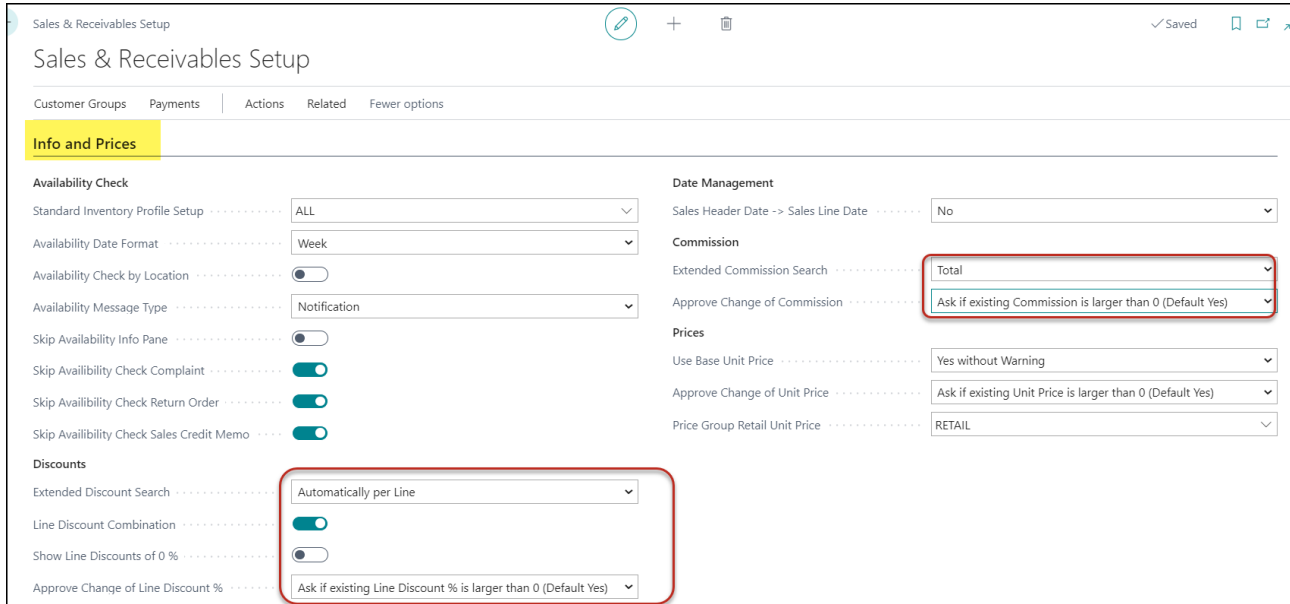
NOTE

Multi-line Discounts will NOT be calculated in the B2B Webshop, B2C Webshop and Sales Agent Portal before the order is submitted from the Portal – meaning the customer may achieve a larger discount after submitting the Order to TRIMIT ERP.

EXAMPLES SALES LINE DISCOUNTS

As mentioned earlier: to work with the **TRIMIT Sales Line Discounts** you need to set the Parameter **Extended Discount Search** to a value $\neq$ *None* and you need to create a **Sales Line Discount Type 0** for the regular Business Central Sales Line Discounts.

We have set the Parameters in the **Sales & Receivables Setup** as follows:



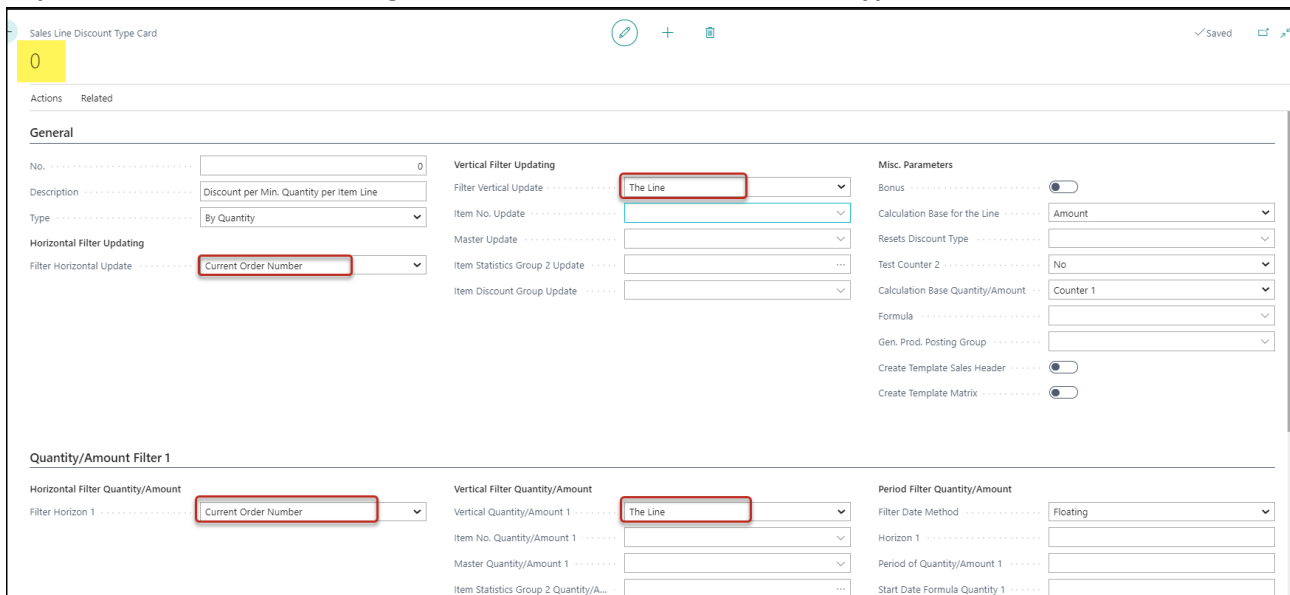
The screenshot shows the 'Sales & Receivables Setup' form. The 'Info and Prices' tab is selected. The 'Discounts' section is highlighted with a red box, showing the following settings:

- Extended Discount Search: Automatically per Line
- Line Discount Combination: On
- Show Line Discounts of 0 %: Off
- Approve Change of Line Discount %: Ask if existing Line Discount % is larger than 0 (Default Yes)

The 'Commission' section is also highlighted with a red box, showing the following settings:

- Extended Commission Search: Total
- Approve Change of Commission: Ask if existing Commission is larger than 0 (Default Yes)

We have created a **Sales Line Discount Type 0 (Zero)** for the regular Business Central Sales Line Discounts: **Departments/Sales & Marketing/Administration/Sales Line Discount Types**



The screenshot shows the 'Sales Line Discount Type Card' form for '0'. The 'General' section is highlighted with a red box, showing the following settings:

- No.: 0
- Description: Discount per Min. Quantity per item Line
- Type: By Quantity
- Horizontal Filter Updating: Current Order Number
- Vertical Filter Updating: The Line
- Filter Vertical Update: The Line
- Item No. Update: The Line
- Master Update: The Line
- Item Statistics Group 2 Update: The Line
- Item Discount Group Update: The Line

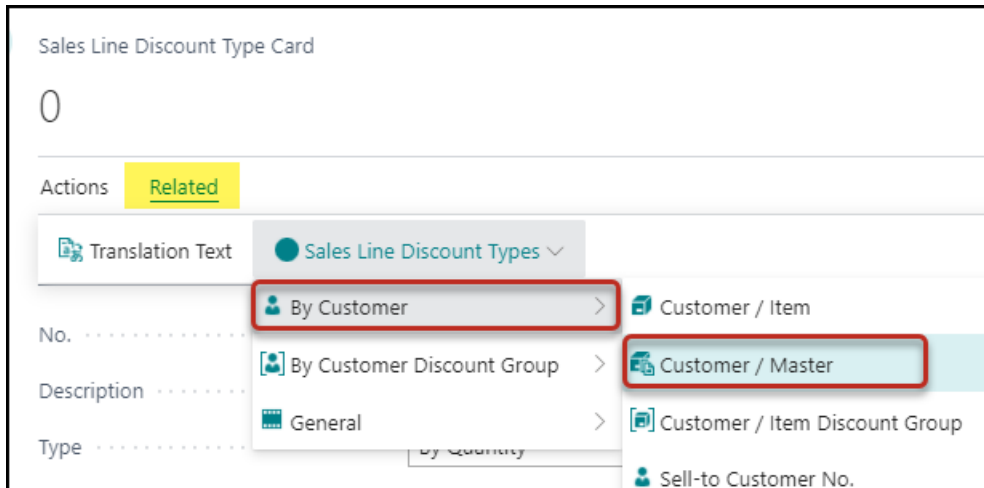
The 'Quantity/Amount Filter 1' section is also highlighted with a red box, showing the following settings:

- Horizontal Filter Quantity/Amount: Current Order Number
- Vertical Filter Quantity/Amount: The Line
- Filter Date Method: Floating

EXAMPLE 1 – REGULAR BUSINESS CENTRAL SALES LINE DISCOUNT VIA TRIMIT SALES LINE DISCOUNTS

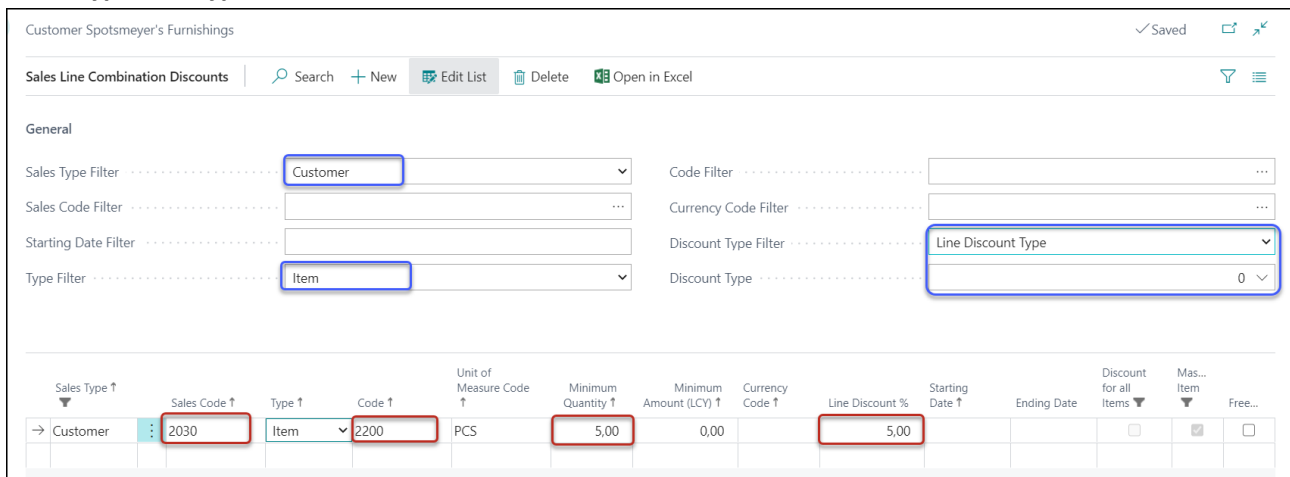
Customer 2030 will get a Discount of 5 % if he buys at least 5 Pieces of an individual Item from the Master 2200 in one Sales Order.

In the **Sales Line Discount Type** by clicking **Related, Sales Line Discount Type, Customer, Customer / Master** we entered the Discount:



The screenshot shows the 'Sales Line Discount Type Card' interface. The 'Related' tab is selected. A dropdown menu for 'Sales Line Discount Types' is open, showing options: 'By Customer', 'By Customer Discount Group', and 'General'. The 'By Customer' option is selected, leading to a sub-menu with 'Customer / Item', 'Customer / Master', and 'Customer / Item Discount Group'. The 'Customer / Master' option is highlighted.

Based on the route I choose while clicking, the **Filter** fields will automatically be filled already, as well as the **Sales Type** and **Type** on the Lines.



The screenshot shows the 'Customer Spotsmeyer's Furnishings' interface. The 'Sales Line Combination Discounts' section is active. Filter fields are populated: 'Sales Type Filter' is 'Customer', 'Type Filter' is 'Item', 'Discount Type Filter' is 'Line Discount Type', and 'Discount Type' is '0'. Below the filters is a table of sales line combination discounts.

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Minimum Amount (LCV) ↑	Currency Code ↑	Line Discount %	Starting Date ↑	Ending Date	Discount for all Items ▼	Mas... Item ▼	Free...
→ Customer	2030	Item	2200	PCS	5,00	0,00		5,00			☐	☒	☐

In a Sales Order, I have the following quantities: per size I don't have the **Minimum Quantity** of 5 although I have a total of 6 for 2600: so still no discount.

Sales Order

0100013 · The Surf Shop Ltd.

ProcessReleasePostingPrepareOrderRequest ApprovalPrint/SendNavigateActionsRelatedFewer options

General >

7-1-20217-1-202128-1-2021Open

LinesManageLineOrderFewer options

Exp... Mat...	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measu... Code	Unit Price Excl. VAT	Line Discount %	Line Discount Amount	Line Amount Excl. VAT	Qty. to Ship
→ Matrix 2200 Grace Bomber 2030 6 PCS 35,99 0,00 215,94 6	Item 22000104 Grace Bomber White,4 2030 1 PCS 35,99 0,00 35,99 1	Item 22000106 Grace Bomber White,6 2030 2 PCS 35,99 0,00 71,98 2	Item 22000108 Grace Bomber White,8 2030 2 PCS 35,99 0,00 71,98 2	Item 22000110 Grace Bomber White,10 2030 1 PCS 35,99 0,00 35,99 1								

If I now change the quantity for 22000104 to 6, then only this size will get the **Line Discount** %:

Lines													Manage		Line	Order	Fewer options		
Exp... Mat...	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measu... Code	Unit Price Excl. VAT	Line Discount %	Line Discount Amount	Line Amount Excl. VAT	Qty. to Ship							
	☒	Matrix	2200	Grace Bomber		2030	11	PCS	35,99	2,72803	10,80	385,09	11						
→	☐	:	Item	22000104	Grace Bomber	White,4	6	PCS	35,99	5,00139	10,80	205,14	6						
	☐		Item	22000106	Grace Bomber	White,6	2	PCS	35,99		0,00	71,98	2						
	☐		Item	22000108	Grace Bomber	White,8	2	PCS	35,99		0,00	71,98	2						
	☐		Item	22000110	Grace Bomber	White,10	1	PCS	35,99		0,00	35,99	1						

Because of rounding the **Line Discount** % is not exactly 5% but 5,00139 %

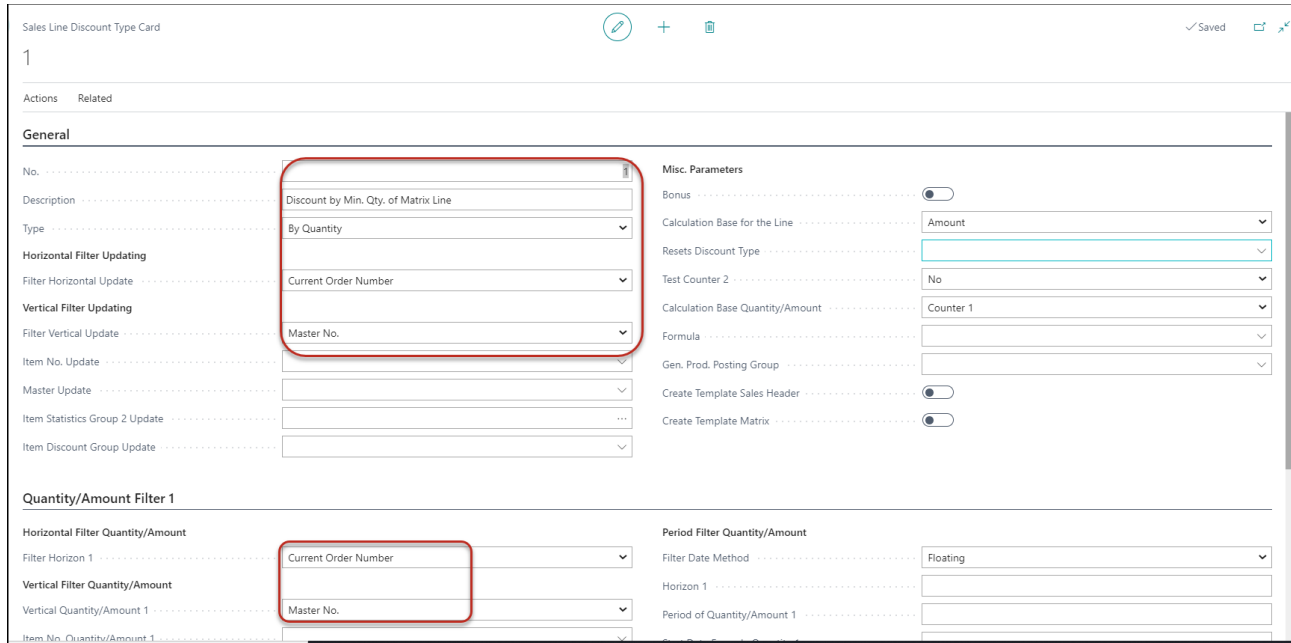
$35,99 \times 0,05 = 1,7995 \times 6 = 10,797 \rightarrow 10,80$

$10,80 / 6 / 35,99 \times 100 = 5,001389274798555 \rightarrow 5,00139 \%$

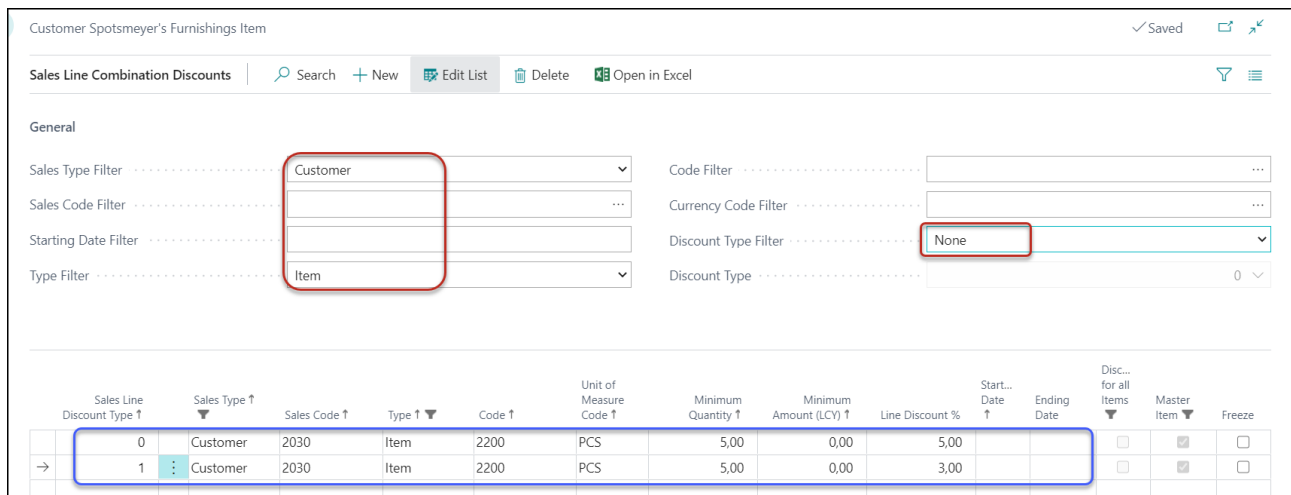
EXAMPLE 2 – SALES LINE DISCOUNT PER MASTER IN ONE SALES ORDER

Customer 2030 will get a Discount of 4 % if he buys at least 5 pieces of the Master 2200 within one Sales Order.

We first create a new **Sales Line Discount Type** to support this.



In the **Sales Line Discount Type** by clicking **Related, Sales Line Discount Type, Customer, Customer / Master** we entered the Discount:



Sales Line Discount Type ↑	Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Minimum Amount (LCY) ↑	Line Discount %	Start... Date ↑	Ending Date	Disc... for all Items	Master Item	Freeze
0	Customer	2030	Item	2200	PCS	5,00	0,00	5,00					
1	Customer	2030	Item	2200	PCS	5,00	0,00	3,00					

In a Sales Order for Customer 2030, I have the following quantities: the total quantity on the **Matrix Line**, does not exceed the **Minimum Quantity** of 5: so, no discount.

Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→	☒ Matrix	2200	Grace Bomber		26-2-2021	2030	4	PCS	35,99		143,96	4
	☐ Item	22000104	Grace Bomber	White,4	26-2-2021	2030	1	PCS	35,99		35,99	1
	☐ Item	22000106	Grace Bomber	White,6	26-2-2021	2030	1	PCS	35,99		35,99	1
	☐ Item	22000108	Grace Bomber	White,8	26-2-2021	2030	1	PCS	35,99		35,99	1
	☐ Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS	35,99		35,99	1

If I now change the quantities so the total of the **Matrix Line** will exceed the **Minimum Quantity** of 5, I will get a **Line Discount %** for all the Item Lines:

Lines Manage Line Order Fewer options 													
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship	
☒	Matrix	2200	Grace Bomber		26-2-2021	2030	6	PCS	35,99	3,00083	209,46	6	
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	2030	1	PCS	35,99	3,00083	34,91	1	
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2	
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2	
→ ☐	 Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS 	35,99	3,00083	34,91	1	

EXAMPLE 3 - SALES LINE DISCOUNT PER MASTER IN ONE SALES ORDER

Comparable with **Example 2** but now with two Matrix Lines:

Same **Sales Line Discount Type** apply: 3 % Discount if I buy more than 5 Pair of 2600 on a Sales Order.

In a Sales Order, I have the following quantities: the total quantity on the **Matrix** Line, does not exceed the **Minimum Quantity** of 5: so, no discount.

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→	☒	☒	Matrix	2200	Grace Bomber					26-2-2021	2030	4	PCS	35,99		143,96	4
	☐		Item	22000104	Grace Bomber	White,4	26-2-2021	2030				1	PCS	35,99		35,99	1
	☐		Item	22000106	Grace Bomber	White,6	26-2-2021	2030				1	PCS	35,99		35,99	1
	☐		Item	22000108	Grace Bomber	White,8	26-2-2021	2030				1	PCS	35,99		35,99	1
	☐		Item	22000110	Grace Bomber	White,10	26-2-2021	2030				1	PCS	35,99		35,99	1

If I now change the Order and add a **Matrix** Line so the total Quantity for 2600 will exceed the **Minimum Quantity** of 5, I will get a **Line Discount %** for all the Item Lines:

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
	☒	☒	Matrix	2200	Grace Bomber					26-2-2021	2030	4	PCS	35,99	3,00083	139,64	4
	☐		Item	22000104	Grace Bomber	White,4	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22000106	Grace Bomber	White,6	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22000108	Grace Bomber	White,8	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22000110	Grace Bomber	White,10	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
→	☒	☒	Matrix	2200	Grace Bomber					26-2-2021	2030	4	PCS	35,99	3,00083	139,64	4
	☐		Item	22003004	Grace Bomber	Yellow,4	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22003006	Grace Bomber	Yellow,6	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22003008	Grace Bomber	Yellow,8	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22003010	Grace Bomber	Yellow,10	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1

Problem occurs if I would delete the second Matrix Line again:

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
	☒	☒	Matrix	2200	Grace Bomber					26-2-2021	2030	4	PCS	35,99	3,00083	139,64	4
	☐		Item	22000104	Grace Bomber	White,4	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22000106	Grace Bomber	White,6	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
	☐		Item	22000108	Grace Bomber	White,8	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1
→	☐	☐	Item	22000110	Grace Bomber	White,10	26-2-2021	2030				1	PCS	35,99	3,00083	34,91	1

In that case I need to click **Actions, Functions, Line Discount Combinations, Calculate Line Discount Combinations for the Customer** in the Sales Order:

Sales Order

0100014 · The Surf Shop Ltd.

Process

Release

Posting

Prepare

Order

Request Approval

Print/Send

Navigate

Actions

Related

Fewer options

User Defined

Manage

Functions

Plan

Request Approval

Warehouse

Posting

Print

Order

Create Purchase Document

Calculate Invoice Discount

Line Discount Combinations

Get Recurring Sales Lines...

Calculate Line Discount Combinations for the Customer

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
-------	--------	------	-------	---------------	---------------	------	-----	-------------	---------------	---------------	---------------	----------	----------------------	----------------------	-----------------	-----------------------	--------------

You will get a message:



The function will run through all sales lines for the customers and recalculate all line discount combinations. Do you want to continue?

Yes

No

Click **Yes**.

This would change the **Lines Discount %** of the first Matrix Line again to *empty*:

Lines Manage Line Order Fewer options												
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→ ☒	Matrix	2200	Grace Bomber		26-2-2021	2030	4	PCS	35,99		143,96	4
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	2030	1	PCS	35,99		35,99	1
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	2030	1	PCS	35,99		35,99	1
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	2030	1	PCS	35,99		35,99	1
☐	Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS	35,99		35,99	1

So, using the **TRIMIT Sales Line Discount Types** for Discounts on other levels as simply the individual Item Line within a Sales Order, might ask strict procedures regarding updating the **Line Discounts %** in several scenarios.

Otherwise, the **Line Discount %** will not be correct!

EXAMPLE 4 – SALES LINE DISCOUNT PER ITEM AND MASTER

We still have the same **Sales Line Discount Type 0** with regular Business Central Discount per Item and **Sales Line Discount 1** for Discount per Master. And on Master 2200 we have the **Sales Line Discounts**:

Customer Spotsmeyer's Furnishings Item

Sales Line Combination Discounts | Search + New Edit List Delete Open in Excel

General

Sales Type Filter: Customer
Sales Code Filter:
Starting Date Filter:
Type Filter: Item
Code Filter:
Currency Code Filter:
Discount Type Filter: None
Discount Type: 0

Sales Line Discount Type	Sales Type	Sales Code	Type	Code	Unit of Measure	Minimum Quantity	Minimum Amount (LCY)	Line Discount %	Start Date	Ending Date	Disc. for all Items	Master Item	Freeze
0	Customer	2030	Item	2200	PCS	5,00	0,00	5,00					
1	Customer	2030	Item	2200	PCS	5,00	0,00	3,00					

We start with a total Matrix Quantity of 6, so get 3,00 % Sales Line Discount:

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
☒		Matrix	2200			Matrix	2200	Grace Bomber		26-2-2021	2030	6	PCS	35,99	3,00083	209,46	6
☐		Item	22000104			Item	22000104	Grace Bomber	White,4	26-2-2021	2030	1	PCS	35,99	3,00083	34,91	1
☐		Item	22000106			Item	22000106	Grace Bomber	White,6	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐		Item	22000108			Item	22000108	Grace Bomber	White,8	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐		Item	22000110			Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS	35,99	3,00083	34,91	1

If I now change the quantity for 22000104 to 6, I will get an accumulated **Sales Line Discount** of 8,00 %.

Lines	Manage	Line	Order	Fewer options	Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
☒		Matrix	2200			Matrix	2200	Grace Bomber		26-2-2021	2030	11	PCS	35,99	5,72886	373,21	11
☐		Item	22000104			Item	22000104	Grace Bomber	White,4	26-2-2021	2030	6	PCS	35,99	8,00222	198,66	6
☐		Item	22000106			Item	22000106	Grace Bomber	White,6	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐		Item	22000108			Item	22000108	Grace Bomber	White,8	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐		Item	22000110			Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS	35,99	3,00083	34,91	1

But if I would have changed my **Sales Line Discount Type 1** into:

Sales Line Discount Type Card

1

Actions Related

General

No.: 1
Description: Discount by Min. Qty. of Matrix Line
Type: By Quantity
Horizontal Filter Updating: Current Order Number
Misc. Parameters: Bonus:
Calculation Base for the Line: Amount Minus Accumulated Discount. The Discount is Included in the Accumulated Discount
Res: Amount Minus Accumulated Discount. The Discount is Included in the Accumulated Discount
Amount Minus Accumulated Discount. The Discount is Not Included in the Accumulated Discount
Test Counter 2: No

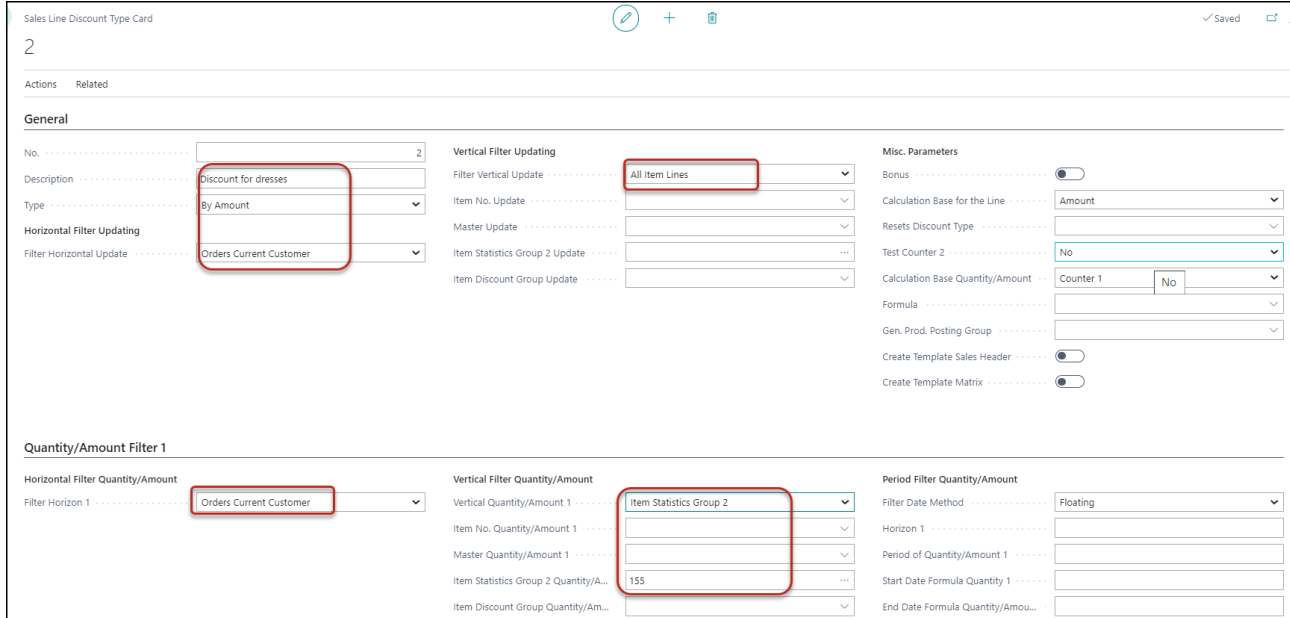
The **Sales Line Discount** would not be $3 + 5 = 8$ but $3 + (5\% \text{ of } 97\%) = 7,85\%$: so, Discount over Discount:

Lines Manage Line Order Fewer options 												
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
☒	Matrix	2200	Grace Bomber		26-2-2021	2030	11	PCS	35,99	5,64551	373,54	11
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	2030	6	PCS	35,99	7,8494	198,99	6
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	2030	2	PCS	35,99	3,00083	69,82	2
☐	Item	22000110	Grace Bomber	White,10	26-2-2021	2030	1	PCS	35,99	3,00083	34,91	1
→ ☐	Matrix											

EXAMPLE 5 – CUSTOMER 2020 GETS 10 % DISCOUNT OVER ALL THEIR DRESSES

Customer 2010 will get 10 % Discount if they buy more than an amount of 1000 on *Dresses*.

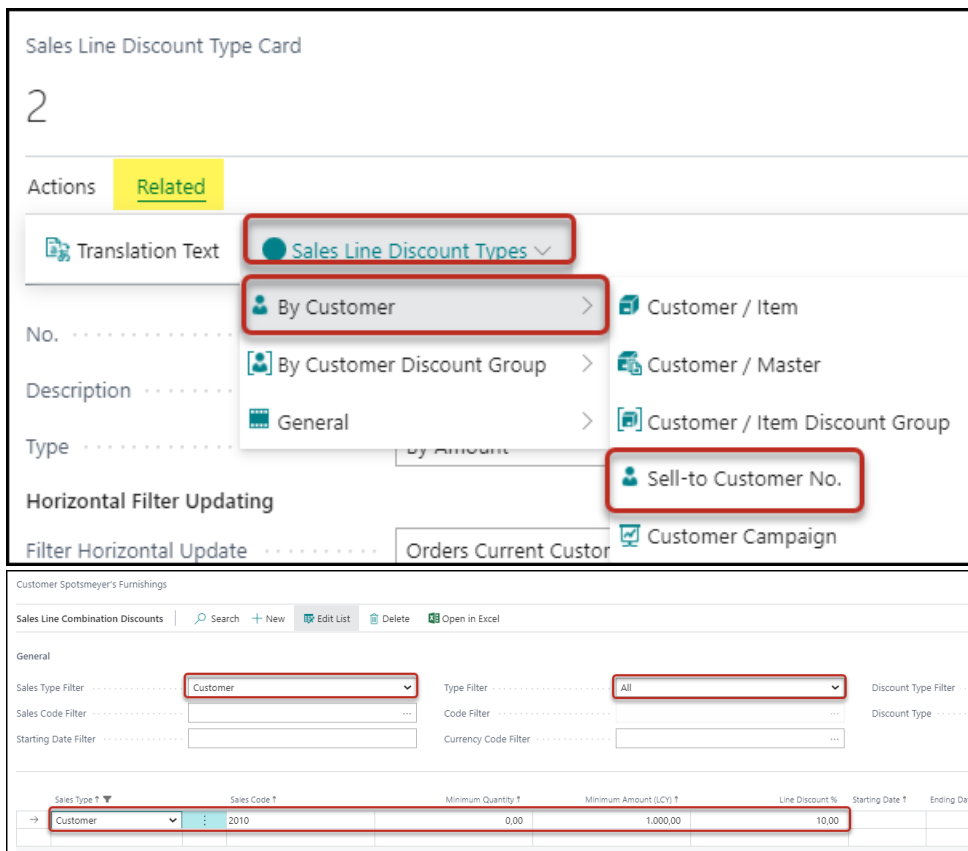
For this we created a **Sales Line Discount Type**:



The screenshot shows the 'Sales Line Discount Type Card' for 'Discount for dresses'. Key configurations include:

- General:** No. 2, Description 'Discount for dresses', Type 'By Amount', Horizontal Filter Updating 'Orders Current Customer', Vertical Filter Updating 'All Item Lines'.
- Quantity/Amount Filter 1:** Horizontal Filter Quantity/Amount 'Orders Current Customer', Vertical Filter Quantity/Amount 'Item Statistics Group 2'.
- Misc. Parameters:** Bonus 'No', Calculation Base for the Line 'Amount', Resets Discount Type 'No', Test Counter 2 'No', Calculation Base Quantity/Amount 'Counter 1', Formula 'No', Gen. Prod. Posting Group 'No', Create Template Sales Header 'No', Create Template Matrix 'No'.

And via



The screenshot shows the 'Sales Line Discount Type Card' for 'Customer'. Key configurations include:

- General:** No. 2, Description 'Customer', Type 'By Amount', Horizontal Filter Updating 'Orders Current Customer', Vertical Filter Updating 'All Item Lines'.
- Quantity/Amount Filter 1:** Horizontal Filter Quantity/Amount 'Orders Current Customer', Vertical Filter Quantity/Amount 'Item Statistics Group 2'.
- Misc. Parameters:** Bonus 'No', Calculation Base for the Line 'Amount', Resets Discount Type 'No', Test Counter 2 'No', Calculation Base Quantity/Amount 'Counter 1', Formula 'No', Gen. Prod. Posting Group 'No', Create Template Sales Header 'No', Create Template Matrix 'No'.

So, if we have a Sales Order with an Amount less than 1000 on the dresses, we won't see a **Line Discount %**:

Lines	Manage	Line	Order	Fewer options											
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT				
→ ☒	Matrix	2300	Daisy Dress		26-2-2021	SHOEPROD	10	PCS	85,166		851,66				
☐	Item	23002036	Daisy Dress	Royal Blue,36	26-2-2021	SHOEPROD	2	PCS	85,166		170,33				
☐	Item	23002038	Daisy Dress	Royal Blue,38	26-2-2021	SHOEPROD	3	PCS	85,166		255,50				
☐	Item	23002040	Daisy Dress	Royal Blue,40	26-2-2021	SHOEPROD	3	PCS	85,166		255,50				
☐	Item	23002042	Daisy Dress	Royal Blue,42	26-2-2021	SHOEPROD	2	PCS	85,166		170,33				

If we would get another Dress, so the total Amount on Dresses would exceed the 1000,
I would get the **10 % Line Discount** for all Dresses.

Lines	Manage	Line	Order	Fewer options											
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT				
☒	Matrix	2300	Daisy Dress		26-2-2021	SHOEPROD	10	PCS	85,166	9,999	766,50				
☐	Item	23002036	Daisy Dress	Royal Blue,36	26-2-2021	SHOEPROD	2	PCS	85,166	9,99812	153,30				
☐	Item	23002038	Daisy Dress	Royal Blue,38	26-2-2021	SHOEPROD	3	PCS	85,166	10,00008	229,95				
☐	Item	23002040	Daisy Dress	Royal Blue,40	26-2-2021	SHOEPROD	3	PCS	85,166	10,00008	229,95				
☐	Item	23002042	Daisy Dress	Royal Blue,42	26-2-2021	SHOEPROD	2	PCS	85,166	9,99812	153,30				
☒	Matrix	2310	Freya Dress		26-2-2021	SHOEPROD	11	PCS	85,166	10	843,15				
☐	Item	23106036	Freya Dress	Forest Green,36	26-2-2021	SHOEPROD	3	PCS	85,166	10,00008	229,95				
☐	Item	23106038	Freya Dress	Forest Green,38	26-2-2021	SHOEPROD	3	PCS	85,166	10,00008	229,95				
☐	Item	23106040	Freya Dress	Forest Green,40	26-2-2021	SHOEPROD	3	PCS	85,166	10,00008	229,95				
☐	Item	23106042	Freya Dress	Forest Green,42	26-2-2021	SHOEPROD	2	PCS	85,166	9,99812	153,30				
→ ☐	Matrix														

EXAMPLE 6 – BONUS BASED SALES LINE DISCOUNT TYPE

There is a special type of **Sales Line Discount Type**: the *Bonus*.

A Customer 2000 should get 5 % *Bonus* for every Master 2200 he buys.

Therefore, besides the Parameters for the **Line Discounts**, you also need to set the Parameter for **Extended Commission Search** in the **Sales & Receivables Setup** to *Bonus* or *Total*:

Info and Prices	
Availability Check Standard Inventory Profile Setup ALL Availability Date Format Week Availability Check by Location ☐ Availability Message Type Notification Skip Availability Info Pane ☐ Skip Availability Check Complaint ☒ Skip Availability Check Return Order ☒ Skip Availability Check Sales Credit Memo ☒	
Discounts Extended Discount Search Automatically per Line Line Discount Combination ☒ Show Line Discounts of 0 % ☐ Approve Change of Line Discount % Ask if existing Line Discount % is larger than 0 (Default Yes)	
Date Management Sales Header Date -> Sales Line Date No	
Commission Extended Commission Search Bonus Approve Change of Commission ☐	
Prices Use Base Unit Price Bonus Approve Change of Unit Price ☐	
Price Group Retail Unit Price RETAIL	

For this Example 3, we need to create a **Sales Type Line Discount Type** as follows:

3	
General No.: 3 Description: Customer 2000 Bonus 5% Type: By Quantity Horizontal Filter Updating Filter Horizontal Update: Current Order Number Vertical Filter Updating Filter Vertical Update: The Line Item No. Update: Master Update: Item Statistics Group 2 Update: Item Discount Group Update:	
Miscellaneous Parameters Bonus: ☒ Calculation Base for the Line: Amount Resets Discount Type: Test Counter 2: Calculation Base Quantity/Amount: Counter 1 Formula: Gen. Prod. Posting Group: RETAIL Create Template Sales Header: Create Template Matrix:	
Quantity/Amount Filter 1 Horizontal Filter Quantity/Amount Filter Horizon 1: Current Order Number Vertical Filter Quantity/Amount Vertical Quantity/Amount 1: The Line Item No. Quantity/Amount 1: Master Quantity/Amount 1: Item Statistics Group 2 Quantity/Amount 1: Item Discount Group Quantity/Amount 1: Skip Discount Type Quantity/Amount 1:	
Period Filter Quantity/Amount Filter Date Method: Floating Horizon 1: Period of Quantity/Amount 1: Start Date Formula Quantity 1: End Date Formula Quantity/Amount 1:	

In the **Discount Type 3**, click **Relations, Sales Line Discount Type, By Customer, Customer/Master**
Now we will enter the **Sales Code (Customer)**, **Code (Master)** and the **Line Discount %**.

Customer Spotsmeyer's Furnishings Item

Sales Line Combination Discounts

General

Sales Type Filter: Customer

Sales Code Filter: 2000

Starting Date Filter: 26-2-2021

Type Filter: Item

Code Filter: 2200

Currency Code Filter: USD

Discount Type Filter: Line Discount Type

Discount Type: 3

Sales Type	Sales Code	Type	Code	Unit of Measure	Minimum Quantity	Minimum Amount (LCY)	Line Discount %	Starting Date	Ending Date	Discount for all Items	Master Item	Freeze
Customer	2000	Item	2200	PCS	0,00	0,00	5,00			☐	☒	☐

If you now enter a Sales Order for Customer 2000 and Master 2200:

Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Bonus	Qty. to Ship
→ ☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	60	PCS	35,99		2.159,40		60
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	BLUE	10	PCS	35,99		359,90	18,00	10
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	BLUE	20	PCS	35,99		719,80	35,99	20
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	BLUE	20	PCS	35,99		719,80	35,99	20
☐	Item	22000110	Grace Bomber	White,10	26-2-2021	BLUE	10	PCS	35,99		359,90	18,00	10

The field for **Line Discount %** on the Sales Line will be empty, but the field for **Bonus** will be filled based on the calculated discount.

If you now post this Sales Order, based on **TRIMIT Provision Sales** settings in the TRIMIT Demo Company, the G/L entries will look like:

6907 Bonus, accrued +

General Ledger Entries

Posting Date	Document Type	Document No.	G/L Account No.	G/L Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. # Type
→ 26-2-2021	Invoice	103032	6907	Bonus, accrued +	Order 0100016				107,98	G/L
26-2-2021	Invoice	103032	5457	Bonus, to be paid +	Order 0100016				-107,98	G/L
26-2-2021	Invoice	103032	6110	Sales, Retail - Dom.	Order 0100016	Sale	DOMESTIC	RETAIL	-2.159,40	G/L
26-2-2021	Invoice	103032	5610	Sales VAT 25 %	Order 0100016				-539,85	G/L
26-2-2021	Invoice	103032	2310	Customers Domestic	The Fashion Store UK				2.699,25	G/L

The G/L Account Nos. 6907 and 5457 came from the settings in **TRIMIT Provision Sales**.

EXAMPLE 7 – BONUS RELATED TO MINIMUM QUANTITY

Customer 2020 will get a Bonus of 2,5 % if the total quantity for Master 2200 will exceed 50 Pairs within 1 Sales Order and will get a Bonus of 5 % if the total quantity for Master 2200 will exceed 100 Pairs within 1 Sales Order.

For this Example, we need to create a **Sales Type Line Discount Type** as follows:

Sales Line Discount Type Card

4

Actions Related

General

No.

Description Customer 2020 Bonus

Type By Quantity

Horizontal Filter Updating

Filter Horizontal Update Current Order Number

Vertical Filter Updating

Filter Vertical Update Master No.

Item No. Update

Master Update

Item Statistics Group 2 Update

Item Discount Group Update

Misc. Parameters

Bonus ☒

Calculation Base for the Line Amount

Resets Discount Type

Test Counter 2 No

Calculation Base Quantity/Amount Counter 1

Formula

Gen. Prod. Posting Group RETAIL

Create Template Sales Header ☐

Create Template Matrix ☐

Quantity/Amount Filter 1

Horizontal Filter Quantity/Amount

Filter Horizon 1 Current Order Number

Vertical Filter Quantity/Amount

Filter Vertical Update Master No.

Period Filter Quantity/Amount

Filter Date Method Floating

Horizon 1

Period of Quantity/Amount 1

In the **Discount Type 4**, click **Relations, Sales Line Discount Type, By Customer, Customer/Master**

Now we will enter the **Sales Code** (Customer), **Code** (Master) and the **Line Discount %**.

Customer Spotsmeyer's Furnishings Item

Not saved

Sales Line Combination Discounts

Search + New Edit List Delete Open in Excel

General

Sales Type Filter Customer

Sales Code Filter

Starting Date Filter

Type Filter Item

Code Filter

Currency Code Filter

Discount Type Filter Line Discount Type

Discount Type 4

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Minimum Amount (LCY) ↑	Line Discount %	Starti... Date ↑	Ending Date	Disco... for all Items	Master Item	Freeze
Customer	2020	Item	2200	PCS	50,00	0,00	2,50			☐	☒	☐
Customer	2020	Item	2200	PCS	100,00	0,00	5,00			☐	☒	☐

If I now enter a Sales Order for **Sell-to Customer 2020** and **Master 2200**:

Lines														Manage	Line	Order	Fewer options		
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Bonus	Qty. to Ship						
→	☒		Matrix	2200	Grace Bomber		26-2-2021	BLUE	40	PCS	55,729		2,229,16		40				
	☐		Item	22000104	Grace Bomber	White,4	26-2-2021	BLUE	10	PCS	55,729		557,29		10				
	☐		Item	22000106	Grace Bomber	White,6	26-2-2021	BLUE	10	PCS	55,729		557,29		10				
	☐		Item	22000108	Grace Bomber	White,8	26-2-2021	BLUE	10	PCS	55,729		557,29		10				
	☐		Item	22000110	Grace Bomber	White,10	26-2-2021	BLUE	10	PCS	55,729		557,29		10				

The quantity on the Master does not exceed the **50 PAIRS** of the 2,5 %; so, no **Bonus** yet.

If I now would add another Matrix line with **30 PAIR**, the **Bonus** for all the lines of this Order will change based on the 2,5 %:

Lines	Manage	Line	Order	Fewer options									
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Bonus	Qty. t
☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	40	PCS	55,729		2,229,16		
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
☐	Item	22000110	Grace Bomber	White,10	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
→ ☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	30	PCS	55,729		1,671,87		
☐	Item	22003004	Grace Bomber	Yellow,4	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
☐	Item	22003006	Grace Bomber	Yellow,6	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	
☐	Item	22003008	Grace Bomber	Yellow,8	26-2-2021	BLUE	10	PCS	55,729		557,29	13,93	

Adding extra quantities so the total quantity will exceed the **100 PAIRS** of the 5 %:

Lines	Manage	Line	Order	Fewer options									
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Bonus %	
☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	40	PCS	55,729		2,229,16		
☐	Item	22000104	Grace Bomber	White,4	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22000106	Grace Bomber	White,6	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22000108	Grace Bomber	White,8	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22000110	Grace Bomber	White,10	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	30	PCS	55,729		1,671,87		
☐	Item	22003004	Grace Bomber	Yellow,4	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22003006	Grace Bomber	Yellow,6	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22003008	Grace Bomber	Yellow,8	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
→ ☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	40	PCS	55,729		2,229,16		
☐	Item	22000112	Grace Bomber	White,12	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22000114	Grace Bomber	White,14	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22003012	Grace Bomber	Yellow,12	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	
☐	Item	22003014	Grace Bomber	Yellow,14	26-2-2021	BLUE	10	PCS	55,729		557,29	27,86	

If you would delete two Item Lines again, the Bonus will again be based on the 2,5 %.

If you however might delete complete **Matrix Lines** from the Sales Order, it might be necessary to recalculate the Bonus for the total Sales Order via **Actions, Line Discount Combinations, Calculate Line Discount Combinations for the Customer**.

Sales Order

+

0100017 · Sportswear A/S

Process
Release
Posting
Prepare
Order
Request Approval
Print/Send
Navigate

Actions

Related
Fewer options

User Defined

Manage

Functions

Plan

Request Approval

Warehouse

Posting

Print

Create Purchase Document

Calculate Invoice Discount

Line Discount Combinations

Calculate Line Discount Combinations for the Customer

Get Recurring Sales Lines...

Lines

Manage

Line

Order

Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT
☒	Matrix	2200	Grace Bomber		26-2-2021	BLUE	40	PCS	55,729