WHITE PAPER

TRIMIT SALES PRICES AND DISCOUNTS 24.1

This document contains information about the Sales Prices and Discounts functionality in TRIMIT 24.1 for Microsoft Dynamics 365 Business Central 2024, Wave 1 (W1).

Version: 24.1
Date: 02-08-2024

CONTENTS

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.

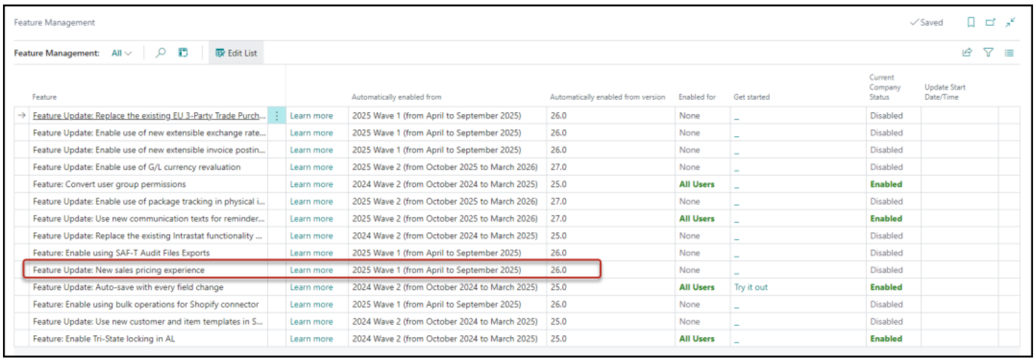
> **NOTE**
> Fields not specifically described have the same function as in standard Business Central

The audience for this document is the Consultant or very skilled User.
It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality.
Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

> **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 as of **TRIMIT 24.1 for Business Central W1 BC24.X**.
The pictures in this White Paper are based on the demo database for **TRIMIT 24.1,** which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 1, 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**, because you will lose the ability to have Sales Prices based on Search Expressions or Formula’s, and will get errors.
We will be ready when Microsoft will enable it.



Feature		Automatically enabled from	Automatically enabled from version	Enabled for	Get started	Current Company Status	Update Start Date/Time
Feature Update: Replace the existing EU 3-Party Trade Purch...	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: Enable use of new extensible exchange rate...	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: Enable use of new extensible invoice postin...	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: Enable use of G/L currency revaluation	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	None	_	Disabled	
Feature: Convert user group permissions	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	_	Enabled	
Feature Update: Enable use of package tracking in physical i...	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	None	_	Disabled	
Feature Update: Use new communication texts for reminder...	Learn more	2025 Wave 2 (from October 2025 to March 2026)	27.0	All Users	_	Enabled	
Feature Update: Replace the existing Intrastat functionality ...	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	None	_	Disabled	
Feature: Enable using SAF-T Audit Files Exports	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: New sales pricing experience	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: Auto-save with every field change	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	Try it out	Enabled	
Feature: Enable using bulk operations for Shopify connector	Learn more	2025 Wave 1 (from April to September 2025)	26.0	None	_	Disabled	
Feature Update: Use new customer and item templates in S...	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	None	_	Disabled	
Feature: Enable Tri-State locking in AL	Learn more	2024 Wave 2 (from October 2024 to March 2025)	25.0	All Users	_	Enabled	

COMPONENTS

TRIMIT Sales Prices and Discounts contains the following objects:

The tables	***7002***	***Sales Prices***
	7004	***Sales Line Discounts***
	7023	***Sales Price Worksheet***
	6036386	***trm Call Find Unit Price***
	6036490	***trm API Unit Price***
	6036654	***trm Dimension Sales Price***
	6036655	***trm VarDim Sales Price***
	6036656	***trm Price Group Parameters***
	6036657	***trm Sales Line Discount Type***
	6036658	***trm Sales Line Disc Comb Order***
	6036659	***trm Sales Line Disc Comb Entry***
	6036661	***trm Campaign Discount Header***
	6036662	***trm Campaign Discount Entry***
	6036663	***trm Sales Line Disc Comb Rate***
	6036670	***trm Cust/Salesperson Relation***
	6037054	***trm Calculation Sales Price***
	6037203	***trm Search Table Header***
	6037204	***trm Search Table Line***
	6037205	***trm Formula Header***
	6037206	***trm Formula Line***

The pages	***7***	***Customer Price Groups***
	7002	***Sales Prices***
	7004	***Sales Line Discounts***
	7023	***Sales Price Worksheet***
	6036490	***trm API Service Unit Prices***
	6036670	***trm Sales Line Disc Comb***
	6036671	***trm Posted Sales Line Disc Comb***
	6036672	***trm Sales Line Disc Types List***
	6036673	***trm Sales Line Discount Card***
	6036674	***trm Campaign Discount Card***
	6036675	***trm Campaign Discount Entries***
	6036676	***trm Cust/Salesp/Prod Rel Card***
	6036677	***trm Campaign Discount List***
	6037004	***trm Price Group Param Card***
	6037006	***trm Price Groups Param List***
	6037008	***trm Component Unit Price Buf***
	6037070	***trm Calculation Sales Prices***

The reports	***7051***	***Suggest Item Price on Wksh.***
	7052	***Suggest Sales Price on Wksh.***
	7053	***Implement Price Change***

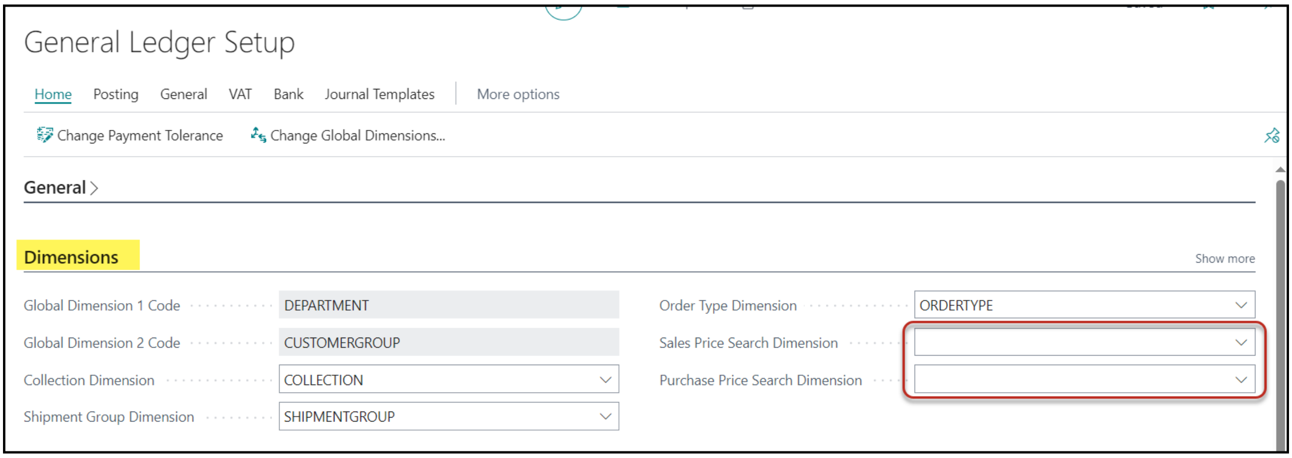
The codeunits	***60***	***Sales-Calc. Discount***
	7000	***Sales Price Calc. Mgt.***
	6036696	***trm Line Discount Combin Hand***

SETUP

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

GENERAL LEDGER SETUP

Via **Search** *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.

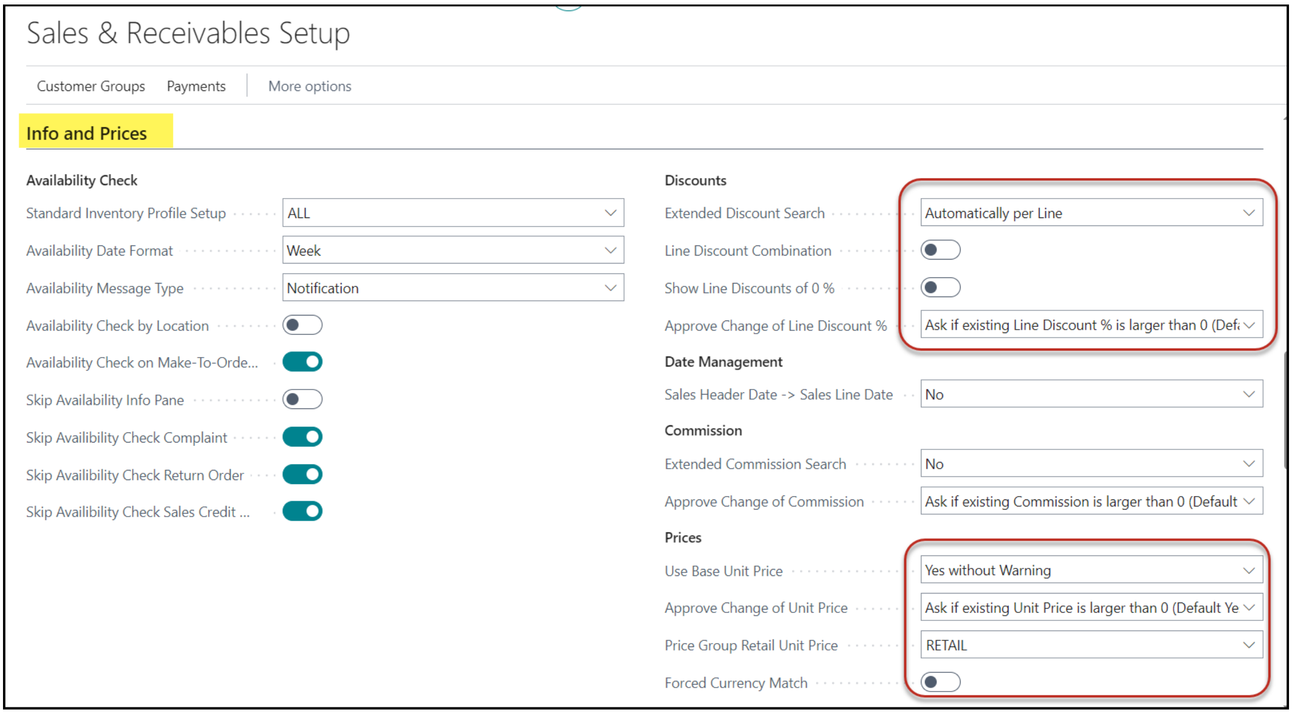
PURCHASE PRICE SEARCH DIMENSION

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 and choose the Order Type in the Sales-/Purchase Documents, it will overrule the Parameters in the General Ledger Setup.

SALES & RECEIVABLES SETUP

Via **Search** *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 three options:

No	You will not use the TRIMIT Discount possibilities, but only the standard BC possibilities, where **Min. Quantity** is always related to the Item Line itself; not to any Matrix Quantities.
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 a Function in the Sales Line itself or by 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 (being able to have Line Discount over Line Discount), 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 Sales Line Discounts, not only based on the specific Sales Line, but also i.e., based on Amounts/Quantities in the whole Sales Document or on other levels.
Please look for the setup of these Sales Line Discount Combinations via **Search** *Sales Line Discount Type*.

If any of the **Customer Price Groups** have the field **Adjust Line Discount** set to a value different from *Never* in the corresponding ***Price Group Parameters***, it is not possible to use the **Line Discount Combination**; an error will be shown.

For more information see ***White Paper – TRIMIT Price Group Parameters and Campaigns***.

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 in a cell of the Matrix, 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

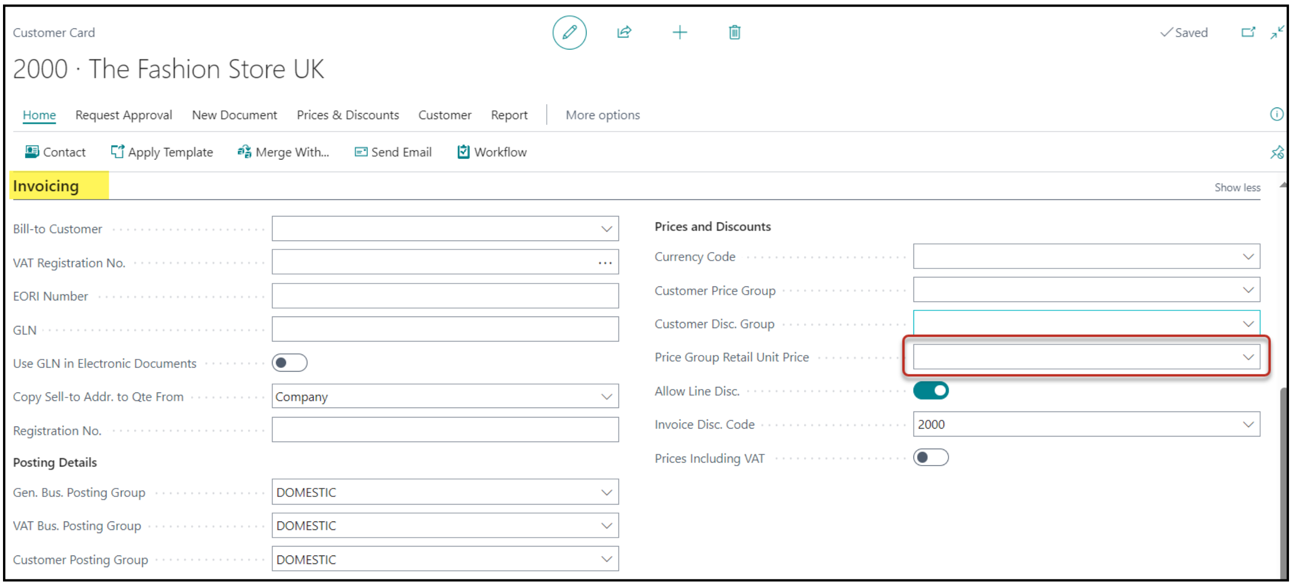
If you make a change at a Sales Line that might influence the calculation of the **Unit Price**, the Unit Price will be recalculated. With this Parameter, you can determine when to accomplish a change of Unit Price.
You can choose between the following six options:

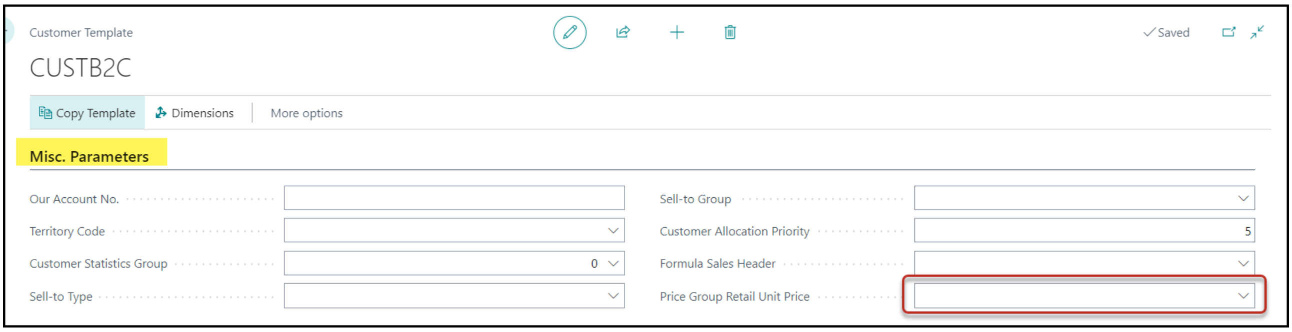
Ask if Existing Unit Price is larger than 0 (Default Yes)	The **Unit Price** will be recalculated and changed automatically if the recalculated Unit Price differs from the existing Unit Price if you accept the change. You will be asked to accept the change only if the existing Unit Price is larger than *0* (zero). The default answer is *Yes*.
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 *No*.
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 *Yes*.
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 *No*.
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** in which you have filled the Retail Unit Prices. This information is used in some of the Sales Reports.

It is also possible to set the **Price Group Retail Unit Price** on the **Customer Card** and in the **Customer Templates**. This will overrule the content of this Parameter in the **Sales & Receivables Setup**.
This is applicable for the Retail Prices (RRP) on the TRIMIT Sales Document Reports - Quote, Order, Credit Memo, Invoice -, the Pick Document per Order Report and on the TRIMIT Portals.



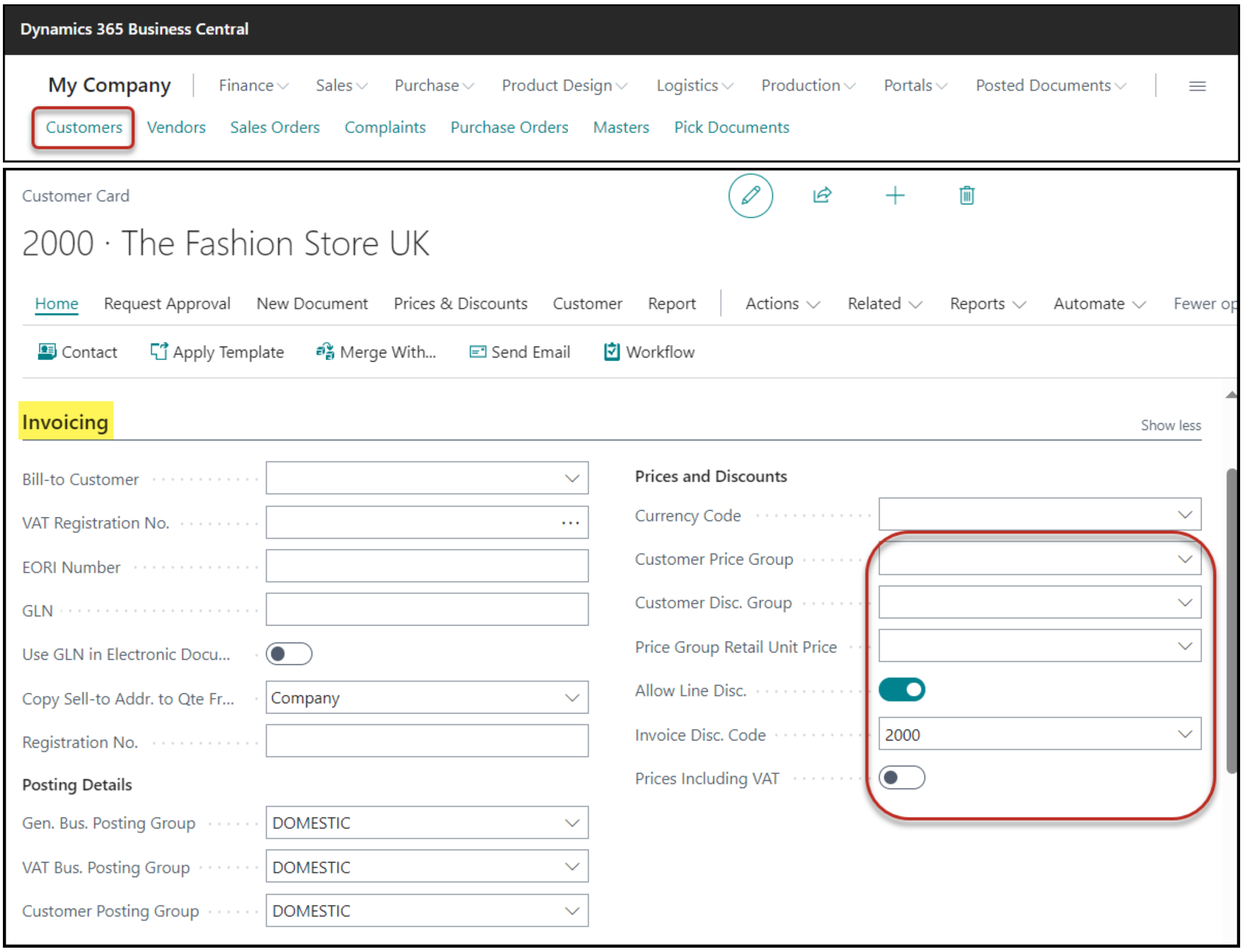


FORCED CURRENCY MATCH

A checkmark in this Parameter makes sure that a Sales Price including a **Currency Code** (based on the Currency Code in a Sales Header) will always overrule a Sales Price excluding a Currency Code, even if the **Start Date** of the Price with Currency Code is earlier as the **Start Date** of the Price without Currency Code.

CUSTOMER

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



DESCRIPTION OF THE FIELDS:

CUSTOMER PRICE GROUP

In this field, you can enter a **Customer Price Group** to determine the Sales Prices.

CUSTOMER DISCOUNT GROUP

In this field, you can enter a **Customer Discount Group** to determine the Sales Prices.

PRICE GROUP RETAIL UNIT PRICE

In this field, you can enter a specific **Customer Price Group** that will be used for the **Recommended Retail Prices** (RRP in the TRIMIT External Reports like Sales Order, Sales Quote, Sales Credit Memo, Posted Sales Invoice) for this Customer. If not filled, it will be based on the corresponding parameter in the Sales & Receivables Setup.

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.**

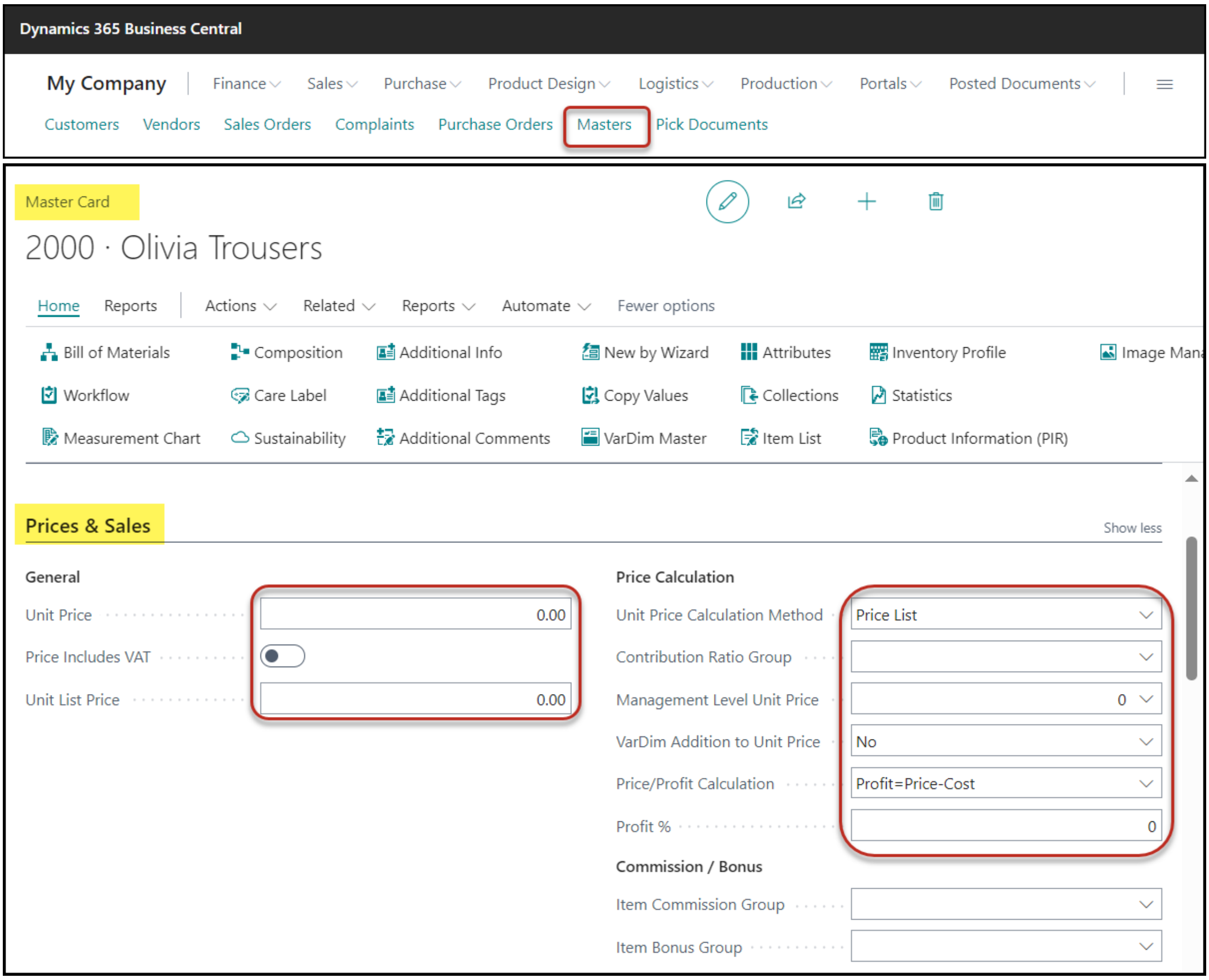
If no checkmark is entered in this field, no Line Discounts will be calculated in a Sales Order – regardless, the content of the **Allow Line Disc.** in the applicable Sales Price.

PRICES INCLUDING VAT

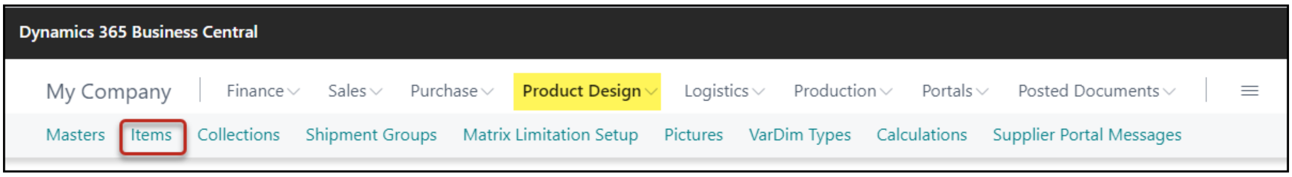
A checkmark in this field will make sure that the Sales Prices shown in the Sales Lines will be including VAT. Even if the field in a chosen **Customer Price Group** might not include VAT; it will be calculated on the Sales Line.

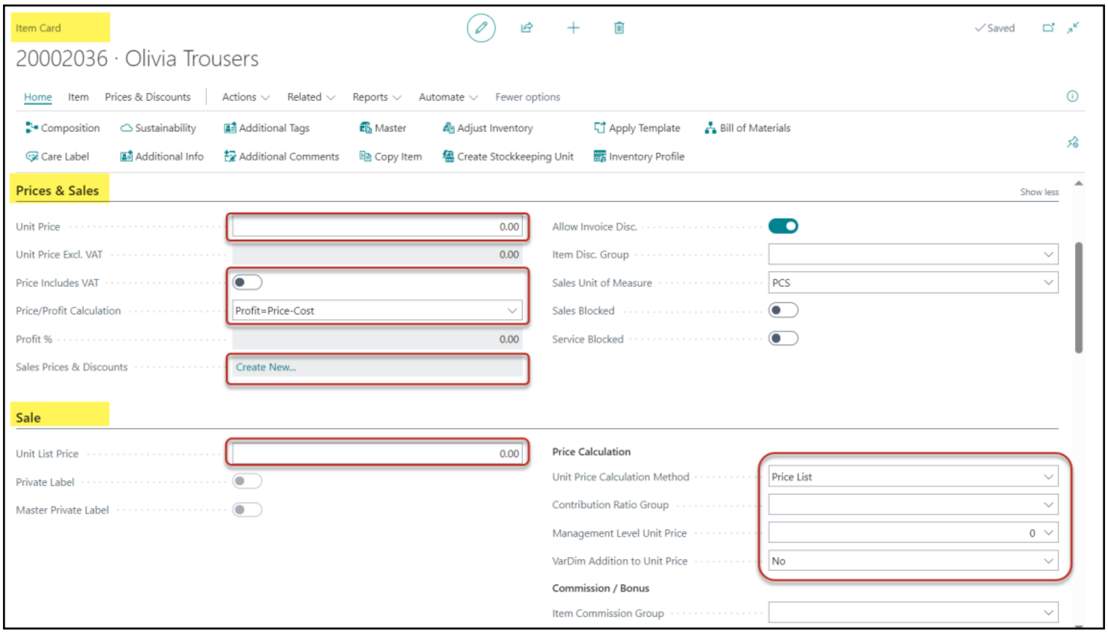
MASTER/ITEM

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



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





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 do not 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 which can be overruled by the **Price Group Retail Unit Price** in the Customer Card.

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 in an Item will automatically be set to *Items in Assortment* if the Item is an Assortment Item.
For more details: ***White Paper – TRIMIT Assortments.***

CONTRIBUTION RATIO GROUP

This field is not in the Card of the Master or Item by default; you need to add it via ***Personalize***.
This field is only applicable if **Unit Price Calculation Method** is set to *Unit Cost + CM* (*Contribution Margin).*
You can determine the **Contribution Margin** in diverse ways. I.e.:

Select - Contribution Margin BOM Components | New | Edit List

Contribution Ratio/Contribution Margin Group	Contribution Ratio	CM % Material	CM % Time	CM % Machine Cost	CM % Overhead	Contribution Margin (LCY)	Rounding	Description
10GBP	0.00	0.00	0.00	0.00	0.00	10.00		Contribution is 10 GBP
40%	40.00	0.00	0.00	0.00	0.00	0.00	WHOLE	Contribution Ratio is 40%
COMP	0.00	180.00	150.00	120.00	0.00	0.00	WHOLE	Contribution based on Components

It can be found via **Search** *Contribution Margin* or via the lookup in this Field on the Master or Item Card.

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 | New | Edit List

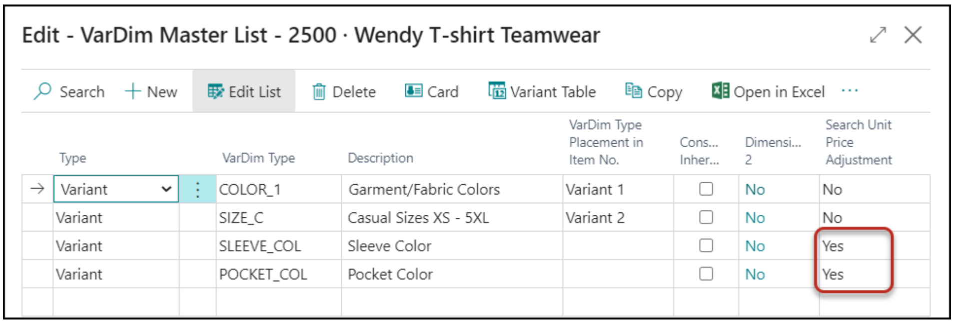
Group No.	Description	Translations
1	Finished Goods Level	0
2	Components Level 1	0
3	Components Level 2	0
4	Raw Materials Level	0

Especially if you have BOMs (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.
Therefore, you need to fill the **Management Level** in all the Components that are in the BOMs of a finished product, so the system knows to which level it needs to calculate the Sales Prices of the Components to determine the Sales Price for 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*



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:

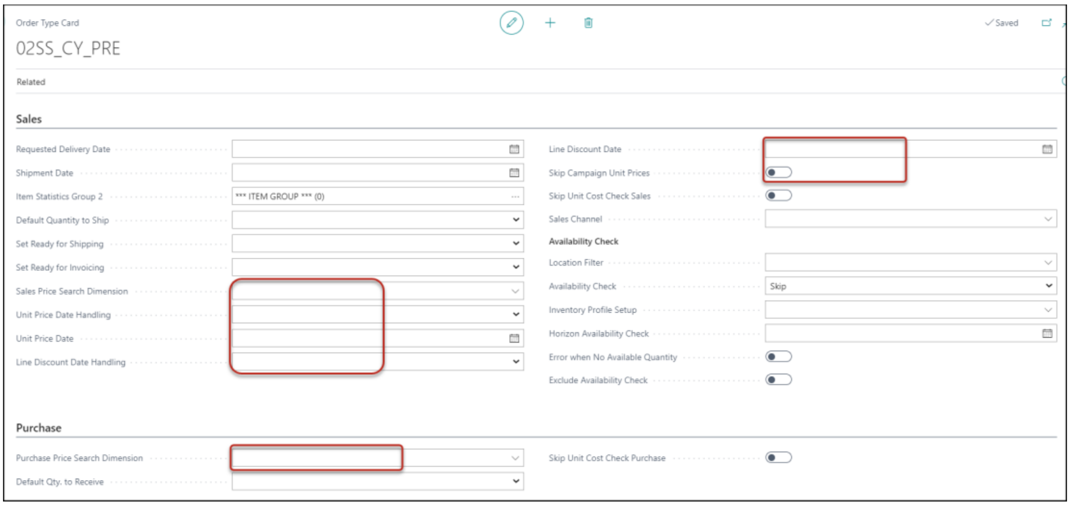
Profit=Price-Cost	The value in the **Profit %** field is calculated as follows: $$\textit{Profit \%} = \frac{100 * (\textit{Unit Price} - \textit{Unit Cost})}{\textit{Unit Price}}$$
Price=Cost+Profit	The value of the **Unit Price** field is calculated as follows: $$\textit{Unit Price} = \frac{100 * \textit{Unit Cost}}{100 - \textit{Profit \%}}$$
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 **Search** *Order Types:*



DESCRIPTION OF THE FIELDS:

SALES PRICE SEARCH DIMENSION

In this field, you can select a (Financial) 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 field is only applicable if **Unit Price Date Handling** has been set to *Setup 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.

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 (7004 for regular BC Line Discounts) or the trm Sales Line Disc Comb Rate Table (6036663 for the specific TRIMIT Line Discounts).

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 field is only applicable if **Line Discount Date Handling** has been set to *Setup Date.*
This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Line Discount from Table 7004 or 6036663, to determine the right Sales Line Discount.

SKIP CAMPAIGN UNIT PRICES

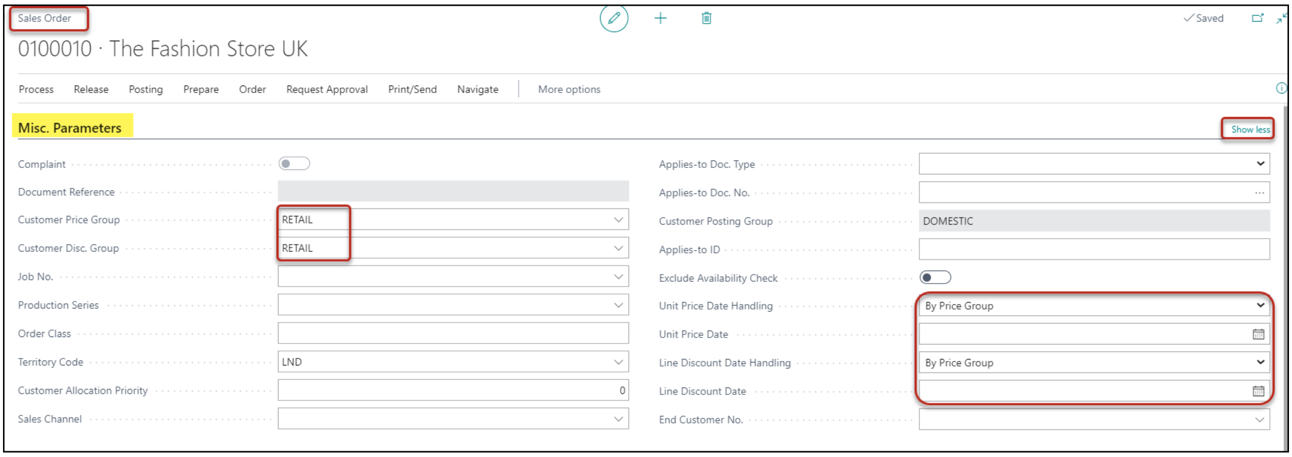
The Price Search of TRIMIT will usually first search if there are special **Campaign** Sales Prices available.
For specific Order Types, you can determine, that the Campaign Prices are not applicable; in that case you need to enter a checkmark in this field.

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

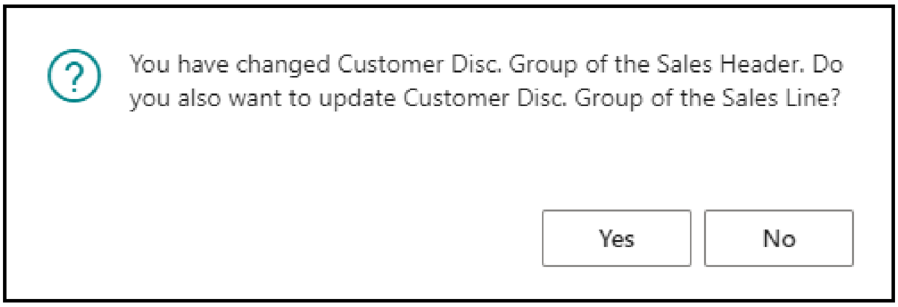
Changing this field – which will be filled based on the Customer - will overrule the **Customer Price Group** that might have been entered in the **Customer.**

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,** it 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 **Price Group Parameters** of the **Customer Price Group** of the Sales Header.
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 **Price Group Parameters** of the **Customer Price Group** of the Sales Header.
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 (7004 for regular BC Line Discounts) or the trm Sales Line Disc Comb Rate Table (6036663 for the specific TRIMIT Line Discounts).
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.

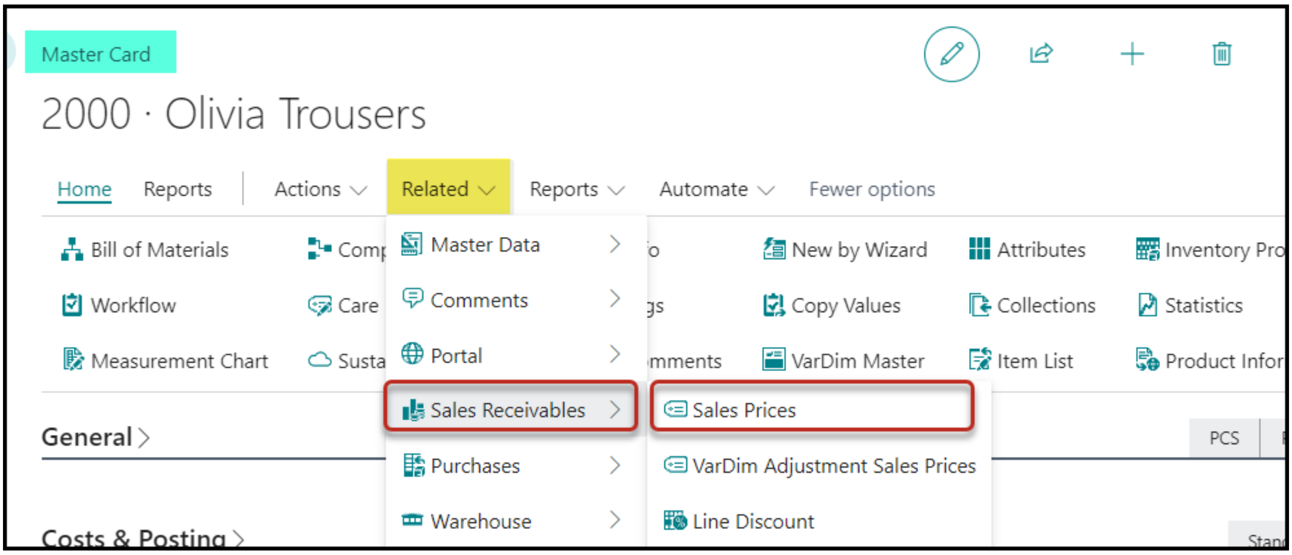
By Price Group	The content of the field **Line Discount Date Handling** in the **Price Group Parameters** of the **Customer Price Group** of the Sales Header will determine the **Unit Price Date Handling.**

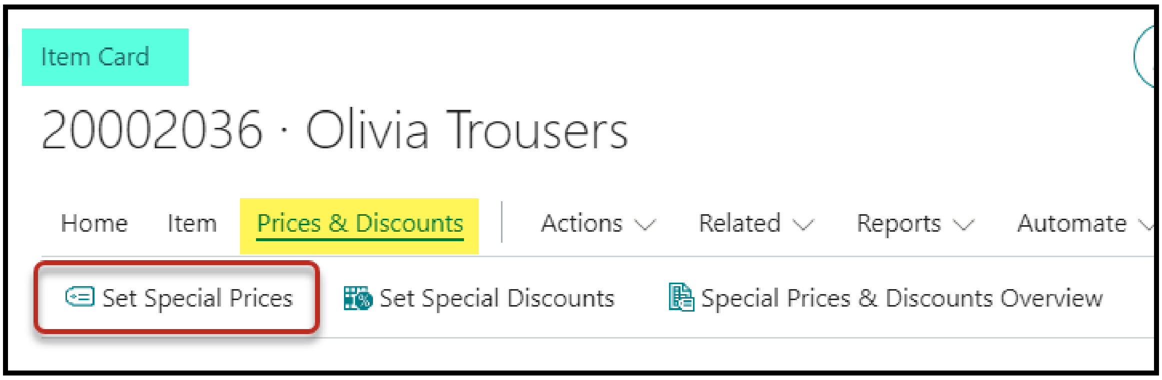
LINE DISCOUNT DATE

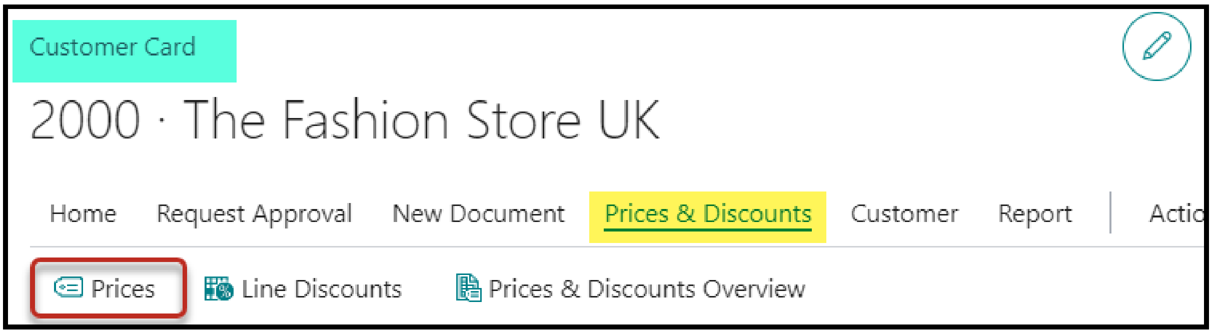
This field is only applicable if **Line Discount Date Handling** has been set to *Setup Date.*
This is the actual Date that will be compared with the **Starting Date** and **Ending Date** of the Sales Line Discount from Table 7004 or 6036663, to determine the right Sales Line Discount.
If you would change the field after you already entered some Matrix- or Item Lines in the Sales Document, the system will recalculate the Line Discounts.

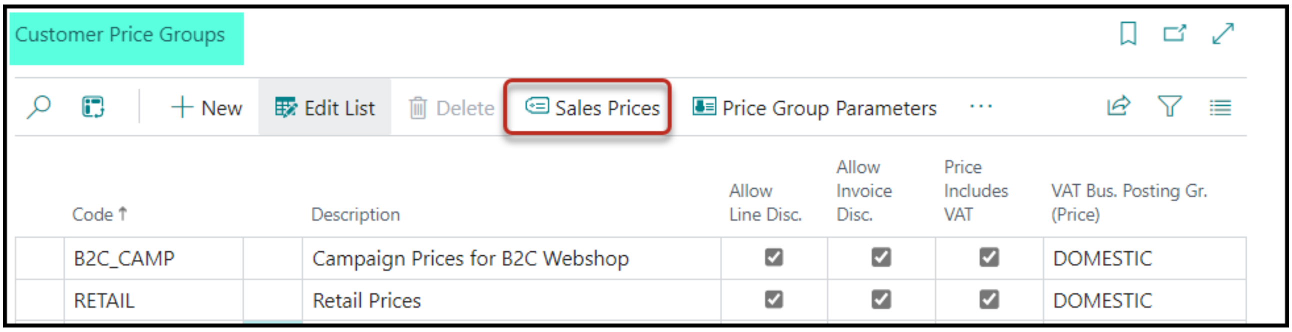
SALES PRICES

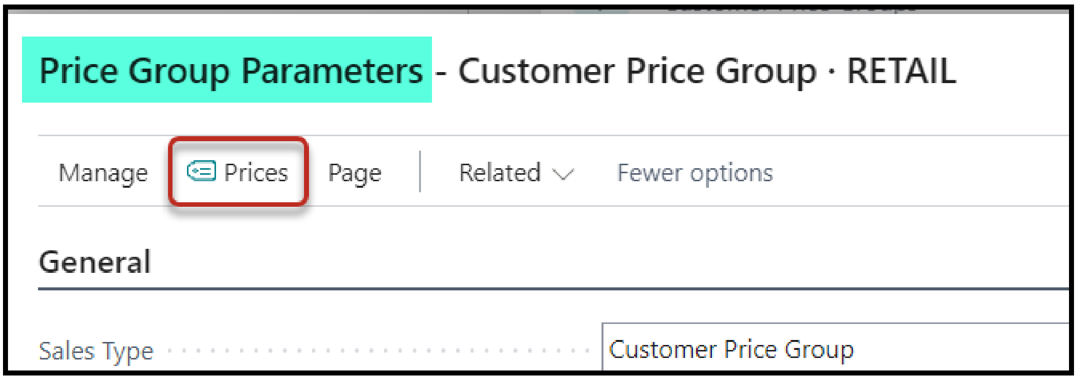
Via the Cards and Lists of **Master, Item, Customer, Customer Price Group** and **Price Group Parameters,** you can enter the Sales Prices Table:

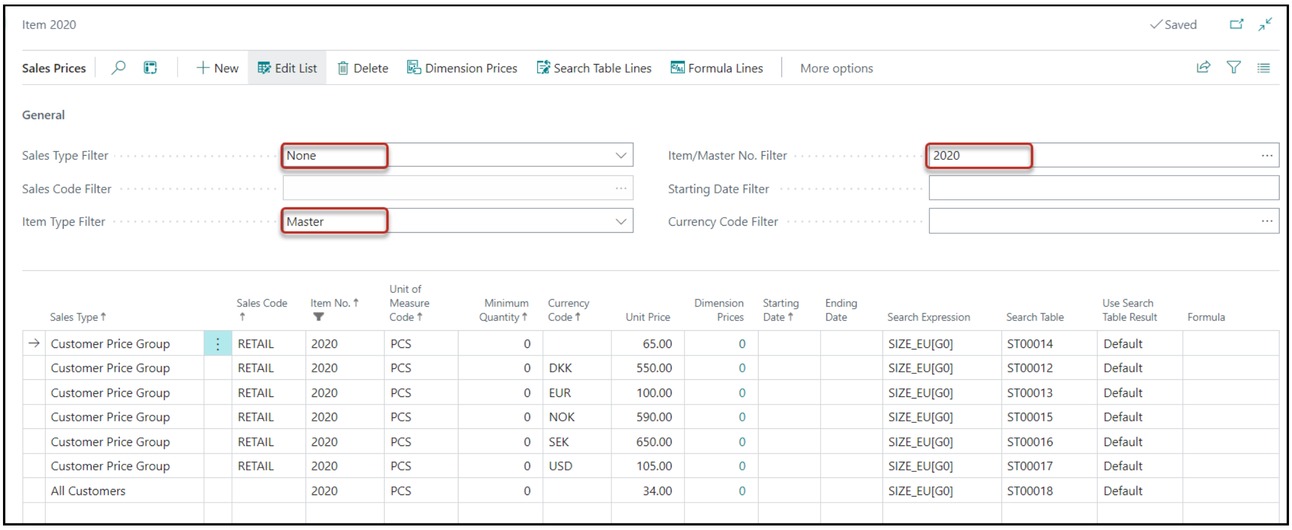












Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	RETAIL	2020	PCS	0		65.00	0			SIZE_EU[G0]	ST00014	Default	
Customer Price Group	RETAIL	2020	PCS	0	DKK	550.00	0			SIZE_EU[G0]	ST00012	Default	
Customer Price Group	RETAIL	2020	PCS	0	EUR	100.00	0			SIZE_EU[G0]	ST00013	Default	
Customer Price Group	RETAIL	2020	PCS	0	NOK	590.00	0			SIZE_EU[G0]	ST00015	Default	
Customer Price Group	RETAIL	2020	PCS	0	SEK	650.00	0			SIZE_EU[G0]	ST00016	Default	
Customer Price Group	RETAIL	2020	PCS	0	USD	105.00	0			SIZE_EU[G0]	ST00017	Default	
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.
The options are *Customer, Customer Price Group, All Customers, Campaign* and *None.*
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 No.** and the field **trm Master Item** (*Yes/No*) that is related to that **Item No.** The **trm Master Item** is not in the page, but it is in the table, and it can not be added to the page by personalization.
You can choose between the following three options:

Item	The Lines refer to Sales Prices for individual Items – therefore the number in the column **Item No.** will be Item Nos. with **trm Master Item** is *No*.
Master	The Lines refer to Sales Prices for Masters – therefore the number in the column **Item No.** will be Master Nos. (Item Nos. with **trm Master Item** is *Yes.*)
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 **Item Type Filter.** The default in these two cases is *Item.*
> Based on the **Item Type 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 **Item Type Filter** will automatically be changed in to *Master*.

If this field will be an **Item**, the **Item Type Filter** will automatically be changed into *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 **Item Type 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 **Item Type 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. For more details, see ***White Paper – TRIMIT Price Group Parameters and Campaigns.***

> **NOTE**
> Keep in mind, that when copying a Master by Wizard, the Sales Price Lines with **Sales Type** *Campaign* will not be copied.

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 checked with the **Sell-to Customer**, **Bill-to Customer**, **Company Group** and **Chain** of the Sales Header.

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 **Item Type Filter**.

If **Item Type Filter** = *Master,* the content of the **Item No.** needs to be a Master No.

If **Item Type Filter** = *Item,* the content of the **Item No.** needs to be an Item No.

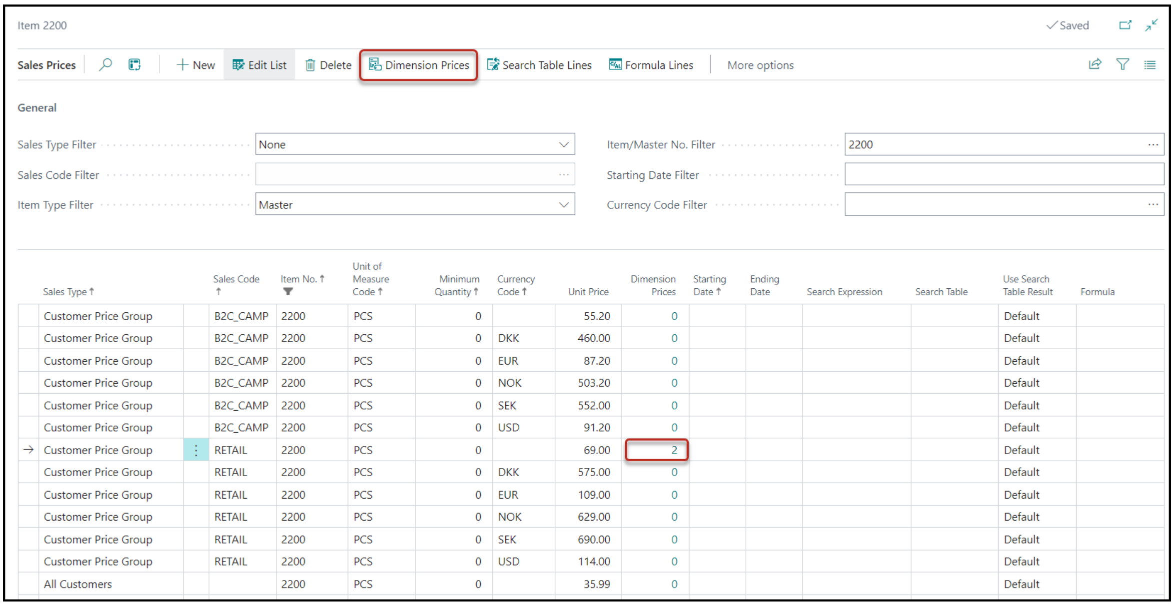
If **Item Type Filter** = *None* the content of the **Item No.** can be a Master No. or an Item No.

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*.**

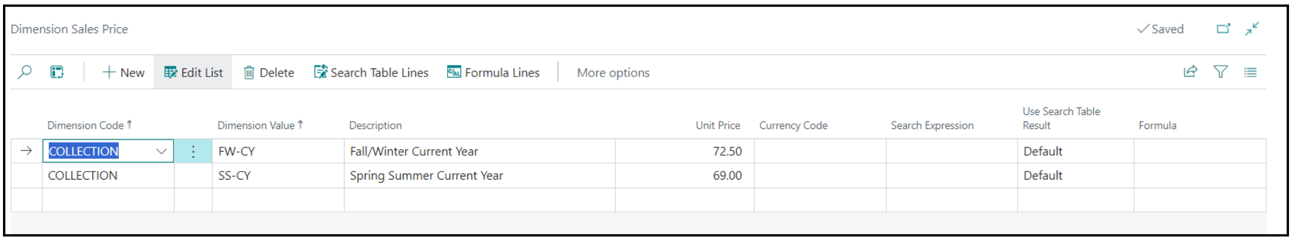


Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	B2C_CAMP	2200	PCS	0		55.20	0					Default	
Customer Price Group	B2C_CAMP	2200	PCS	0	DKK	460.00	0					Default	
Customer Price Group	B2C_CAMP	2200	PCS	0	EUR	87.20	0					Default	
Customer Price Group	B2C_CAMP	2200	PCS	0	NOK	503.20	0					Default	
Customer Price Group	B2C_CAMP	2200	PCS	0	SEK	552.00	0					Default	
Customer Price Group	B2C_CAMP	2200	PCS	0	USD	91.20	0					Default	
Customer Price Group	RETAIL	2200	PCS	0		69.00	2					Default	
Customer Price Group	RETAIL	2200	PCS	0	DKK	575.00	0					Default	
Customer Price Group	RETAIL	2200	PCS	0	EUR	109.00	0					Default	
Customer Price Group	RETAIL	2200	PCS	0	NOK	629.00	0					Default	
Customer Price Group	RETAIL	2200	PCS	0	SEK	690.00	0					Default	
Customer Price Group	RETAIL	2200	PCS	0	USD	114.00	0					Default	
All Customers		2200	PCS	0		35.99	0					Default	

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	FW-CY	Fall/Winter Current Year	72.50			Default	
COLLECTION	SS-CY	Spring Summer Current Year	69.00			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.

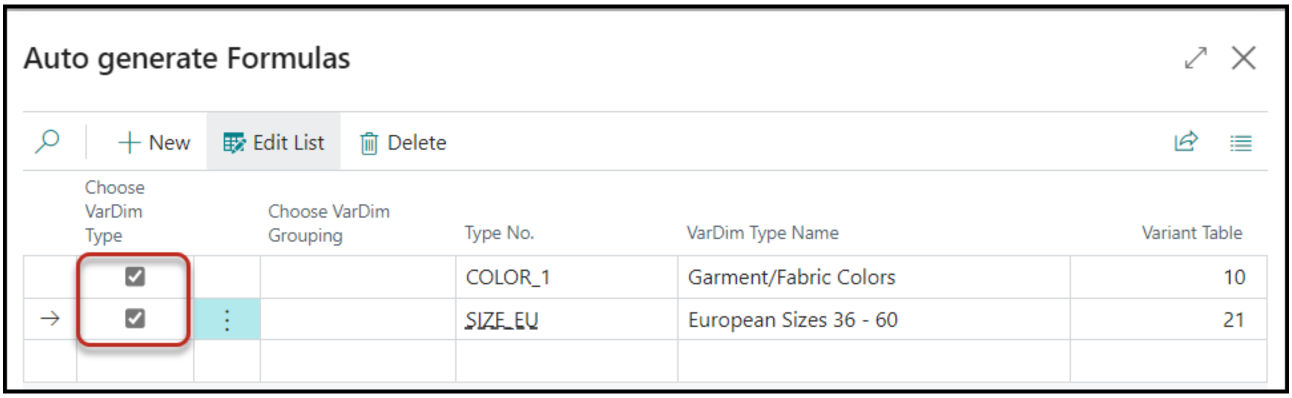
NOTE
Keep in mind that special **Dimension Prices** will only be applicable if the **Sales Price Search Dimension** in the General Ledger Setup or in the Order Type of the Sales Document is filled.

STARTING-/ENDING DATE

You can enter a **Starting Date** and/or **Ending Date** for which this Sales Price is applicable.
Keep in mind that they can be checked with the **Order Date, Shipment Date** or **Setup Date** based on the **Unit Price Date Handling** of the Sales Header or Order Type of the Sales Document.

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 for which the Values become part of the Item Nos. related to the Master.
It is used for the Sales Prices with **Item Type Filter** = *Master* where different prices are applicable for i.e., Colors, Sizes, Wood Types, etc.
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**:

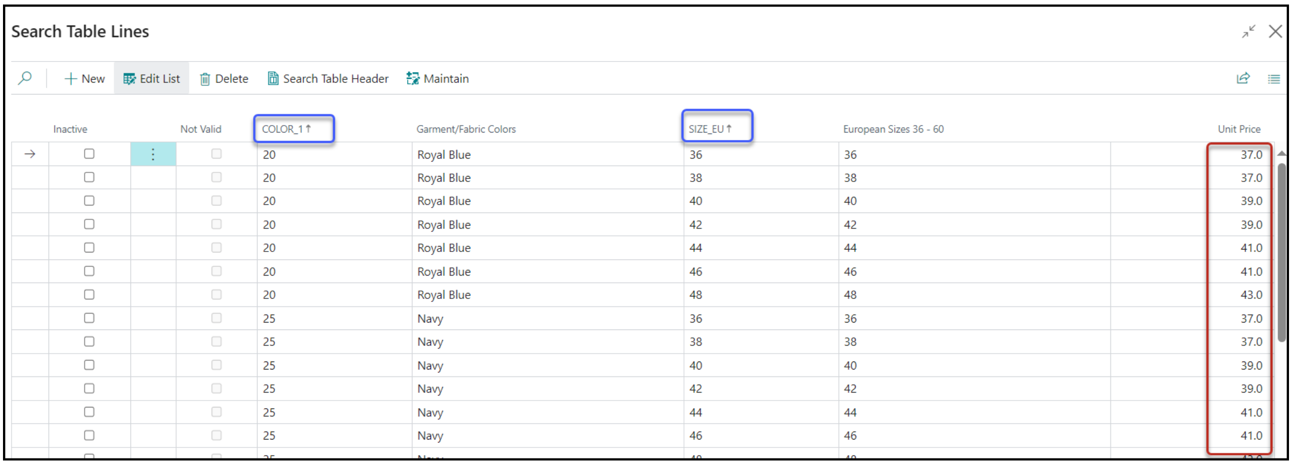


Or by entering the **VarDim Types** manually – separated by a comma: *COLOR_1,SIZE_EU*

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***.

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 combination of a COLOR_1 and SIZE_EU value of the Master:



Search Table Lines

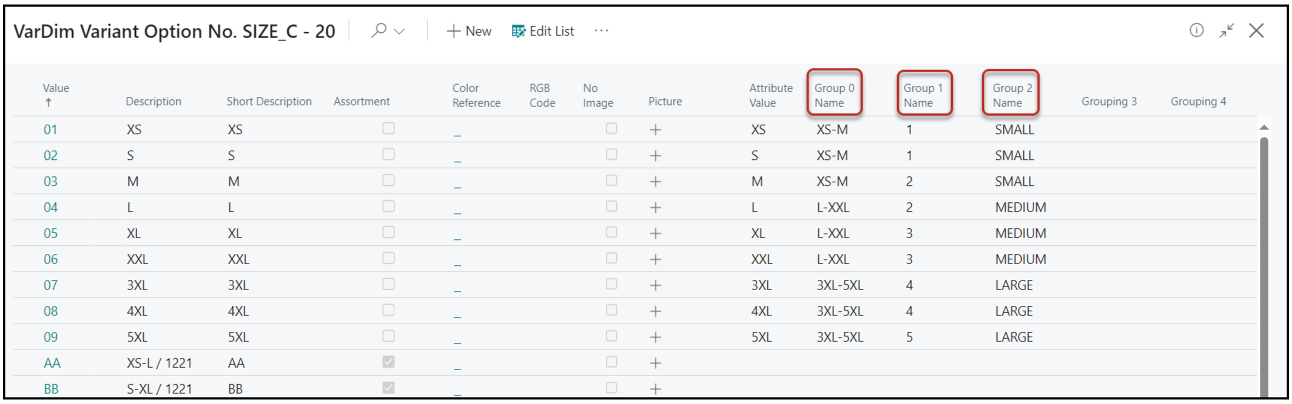
Inactive	Not Valid	COLOR_1 ↑	Garment/Fabric Colors	SIZE_EU ↑	European Sizes 36 - 60	Unit Price
		20	Royal Blue	36	36	37.0
		20	Royal Blue	38	38	37.0
		20	Royal Blue	40	40	39.0
		20	Royal Blue	42	42	39.0
		20	Royal Blue	44	44	41.0
		20	Royal Blue	46	46	41.0
		20	Royal Blue	48	48	43.0
		25	Navy	36	36	37.0
		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 for the Values in a VarDim Type (so called Price Breaks): in the **Search Expression** you can make use of the **Grouping 0** – **Grouping 19** 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.*

The Groupings need to be setup in the Values of a VarDim Type itself.

I.e., In the VarDim **Type** *SIZE_C* we have defined 3 Groupings:

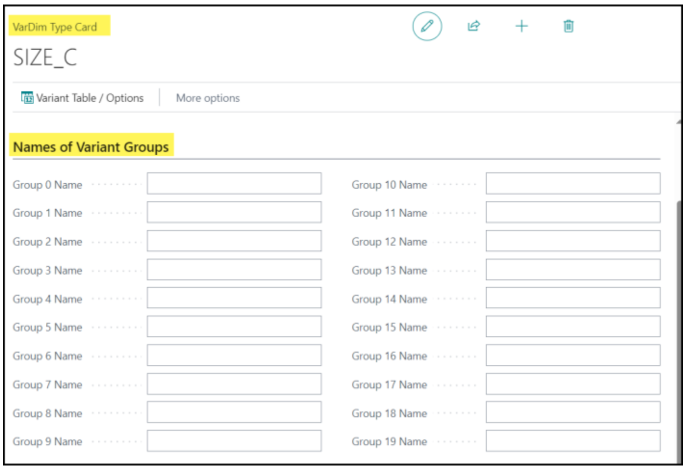


VarDim Variant Option No. SIZE_C - 20

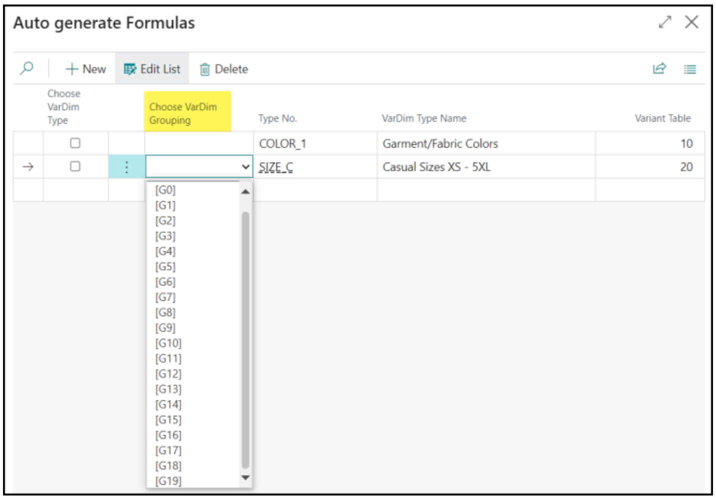
Value ↑	Description	Short Description	Assortment	Color Reference	RGB Code	No Image	Picture	Attribute Value	Group 0 Name	Group 1 Name	Group 2 Name	Grouping 3	Grouping 4
01	XS	XS						XS	XS-M	1	SMALL		
02	S	S						S	XS-M	1	SMALL		
03	M	M						M	XS-M	2	SMALL		
04	L	L						L	L-XXL	2	MEDIUM		
05	XL	XL						XL	L-XXL	3	MEDIUM		
06	XXL	XXL						XXL	L-XXL	3	MEDIUM		
07	3XL	3XL						3XL	3XL-5XL	4	LARGE		
08	4XL	4XL						4XL	3XL-5XL	4	LARGE		
09	5XL	5XL						5XL	3XL-5XL	5	LARGE		
AA	XS-L / 1221	AA	☑										
BB	S-XL / 1221	BB	☑										

NOTE

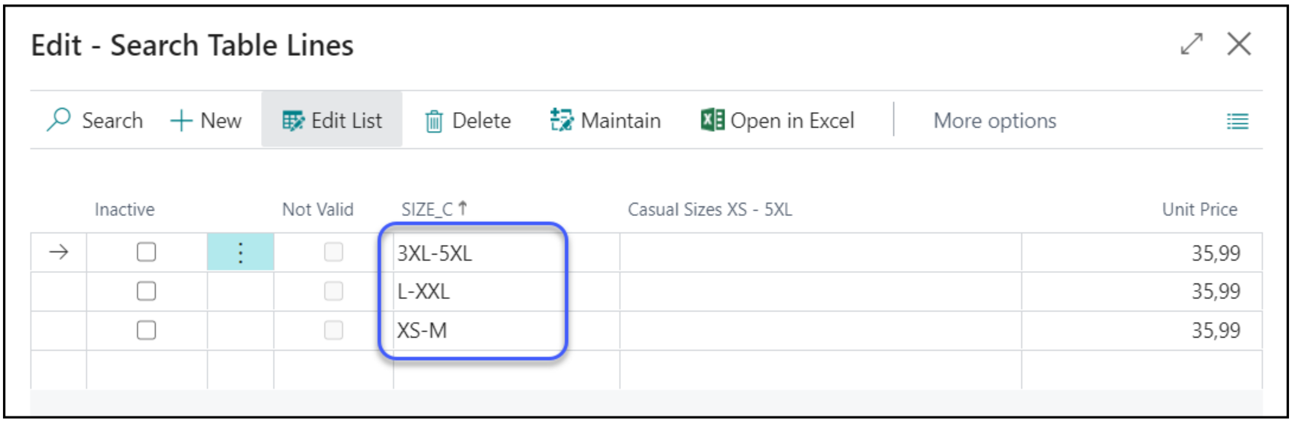
The names of the Columns for the Groupings 0 - 19 can be set in the VarDim Type Card.



If you select a **VarDim Type** for the **Search Expression** via the **Look up value**, you can choose the Grouping [G0] – [G19] in the **Choose VarDim Grouping** column.

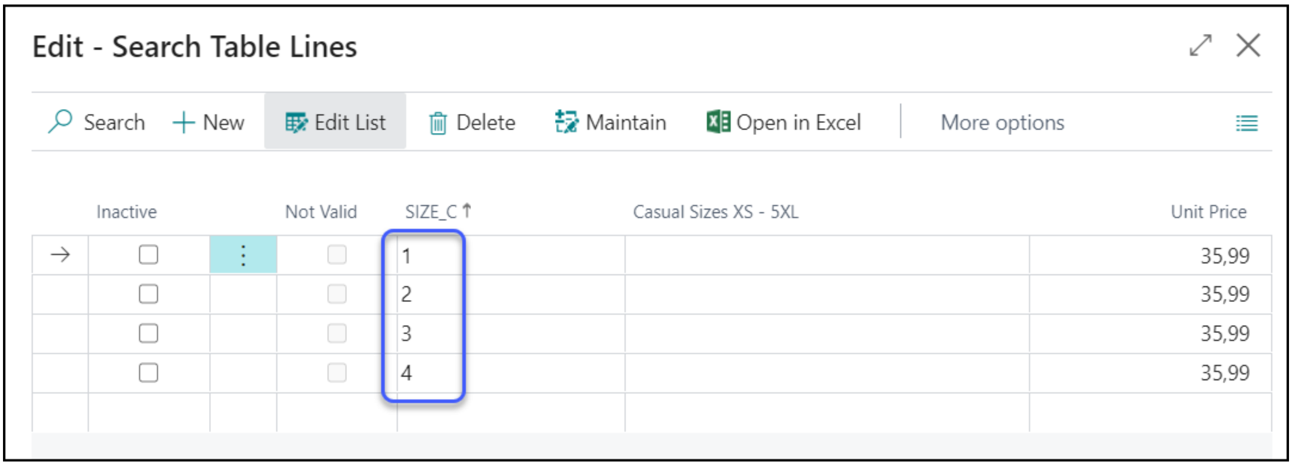


If the **Search Expression** = *SIZE_C[G0]* in the Sales Price Line, the **Search Table Lines** will look as follows:



NOTE
Be aware that the **SIZE_C** values based on Grouping 1 – 19, 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:

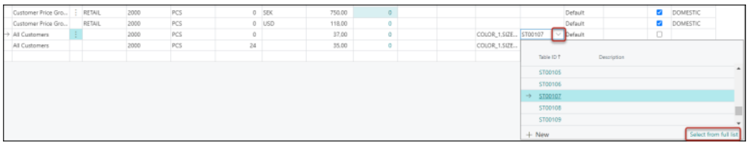


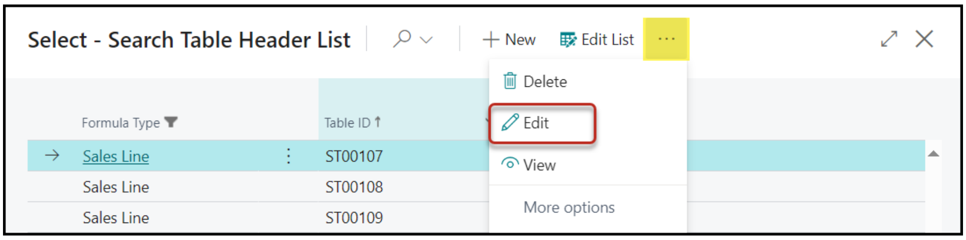
SEARCH TABLE

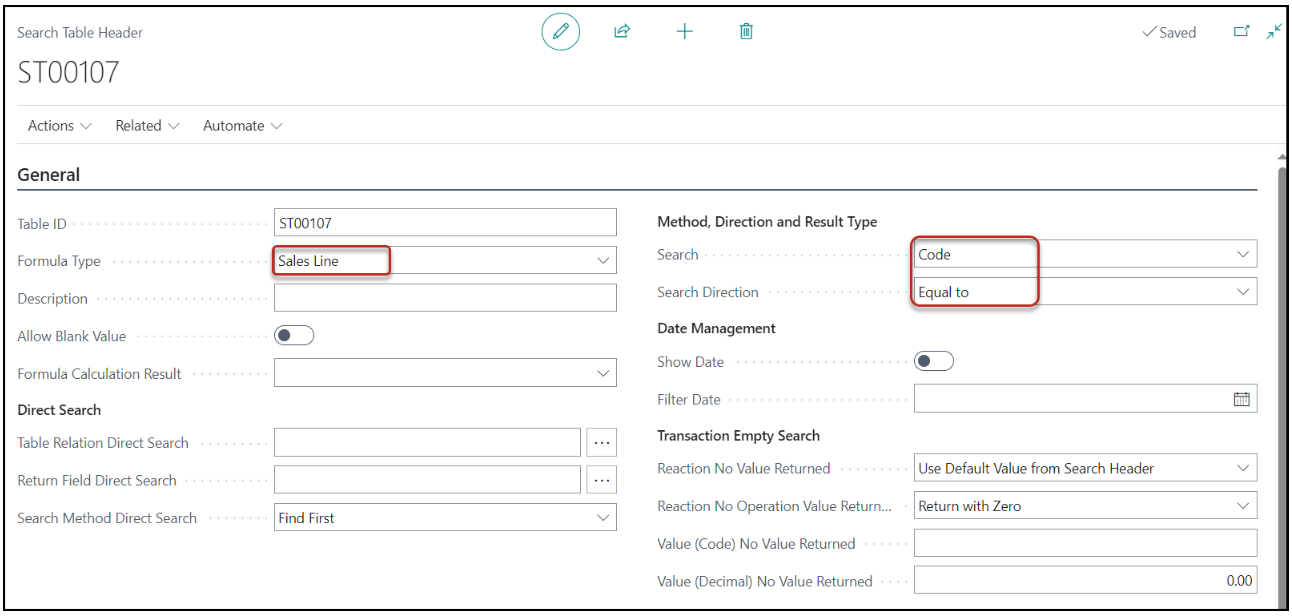
This is the Code for the **Search Table** that has been created based on your **Search Expression**:

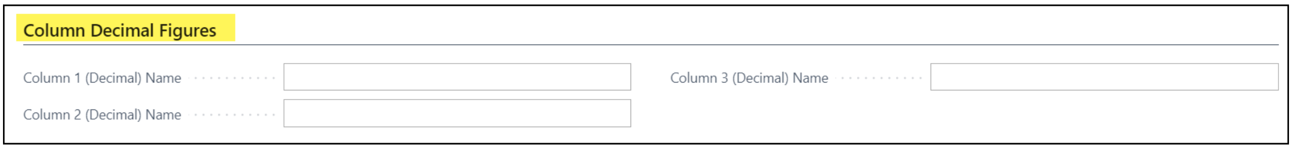
I.e., if you have **Search Expression** *COLOR_1,SIZE_EU* the **Search Table** will look like:

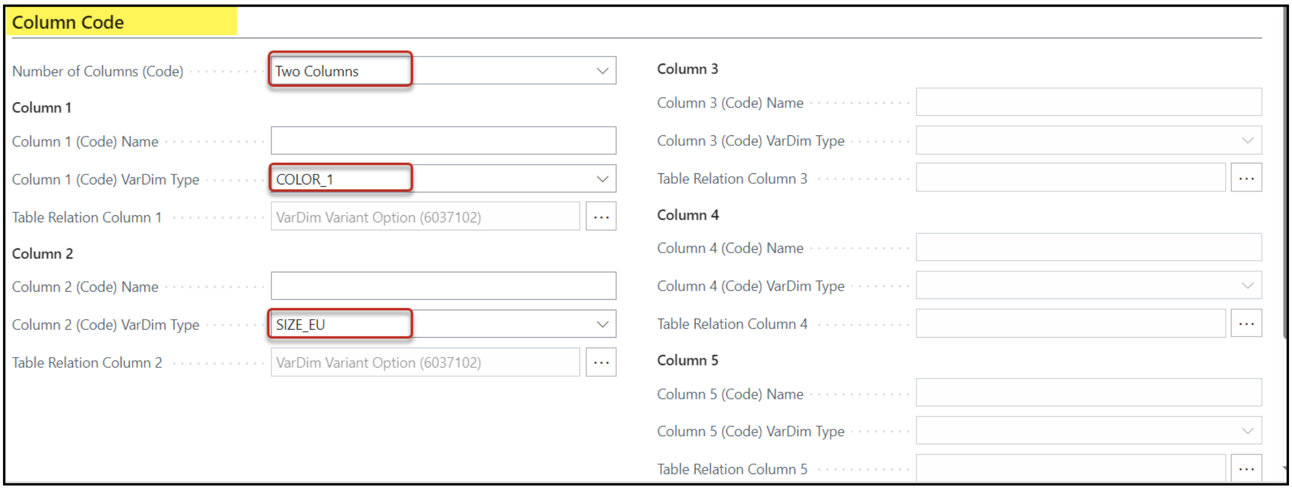
(In the field **Search Table** press **Alt+Down Arrow** and click **Select from full list** to open the **Search Table** List; now click ***Edit)***

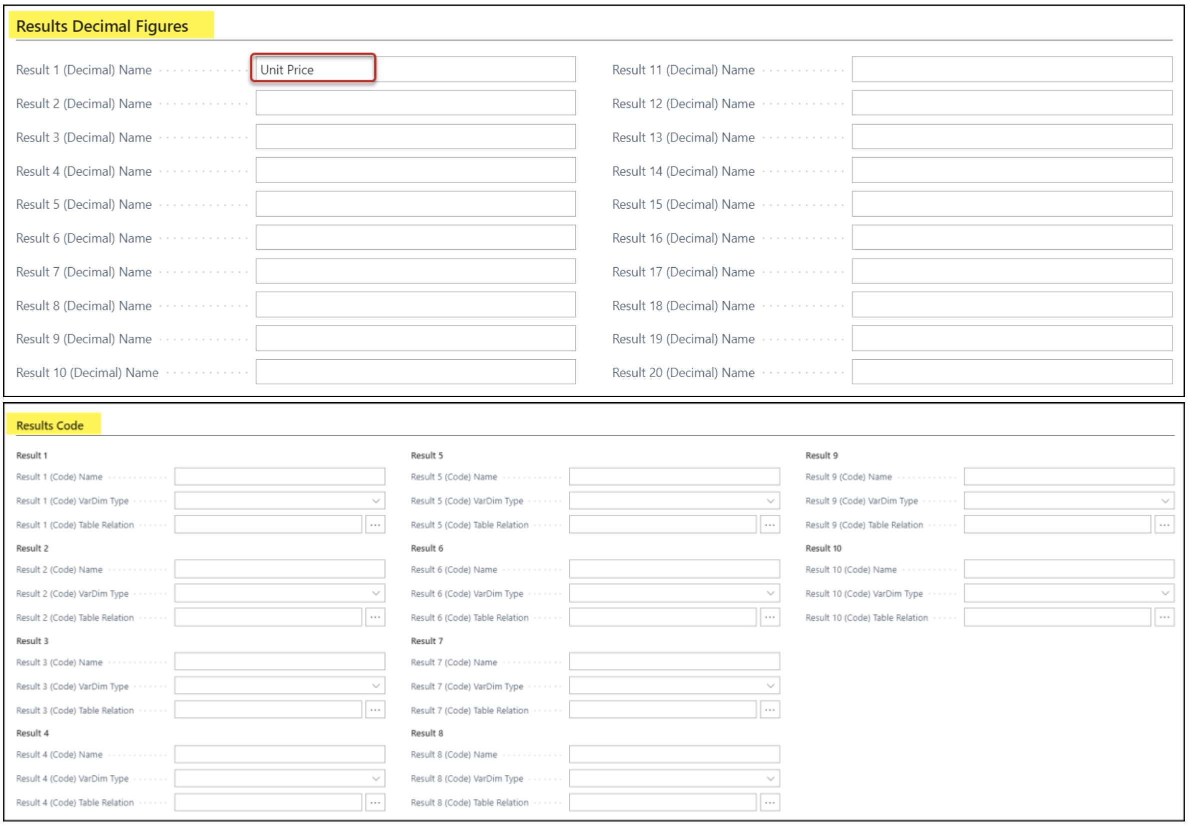












The **Formula Type** is set to *Sales Line* because it effects the Prices on a Sale Line.
The **Search** *Code* and **Search Direction** *Equal to* refers to **Column 1** and **Column 2** on the FastTab ***Column Code***: with the Values of *COLOR_1* and the Values of *SIZE_EU* the right Price will be 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 pictures on 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.*

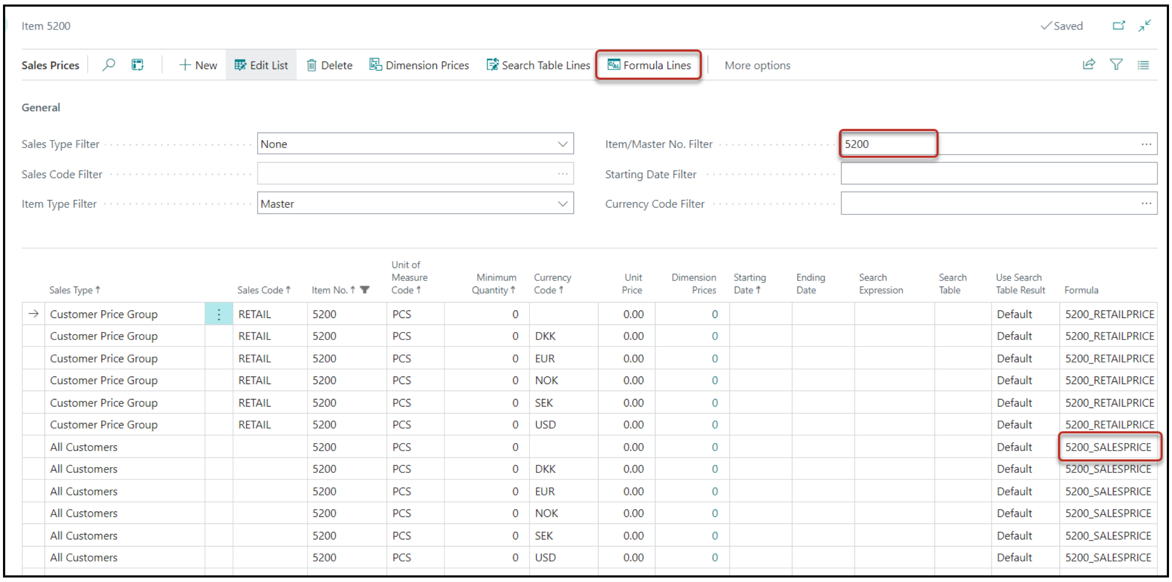
FORMULA

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.***

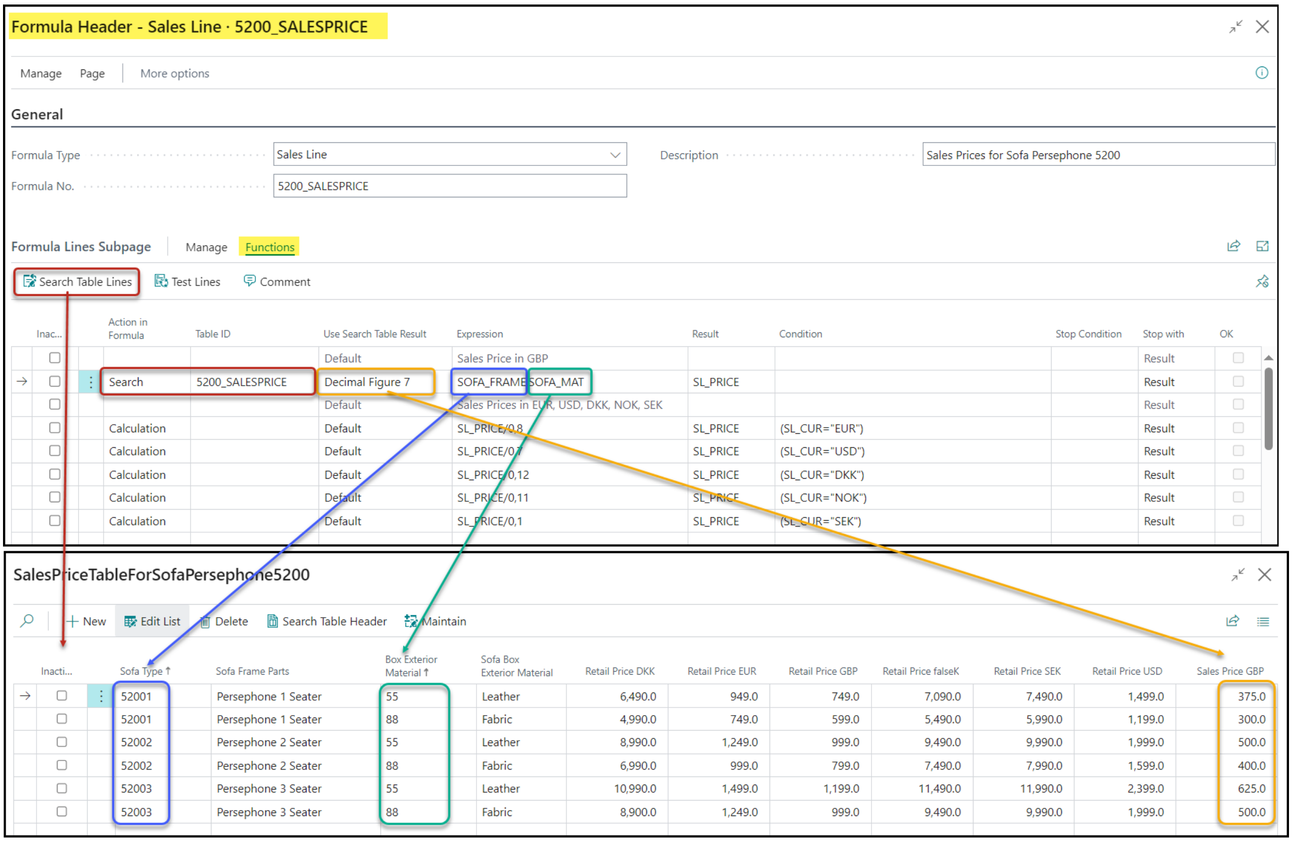
> **NOTE**
> More information regarding creating Formulas can be found in the ***White Paper – TRIMIT Formulas.***
> For the Sales Prices, the **Type** of the Formula needs to be *Sales Line*

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:



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*):

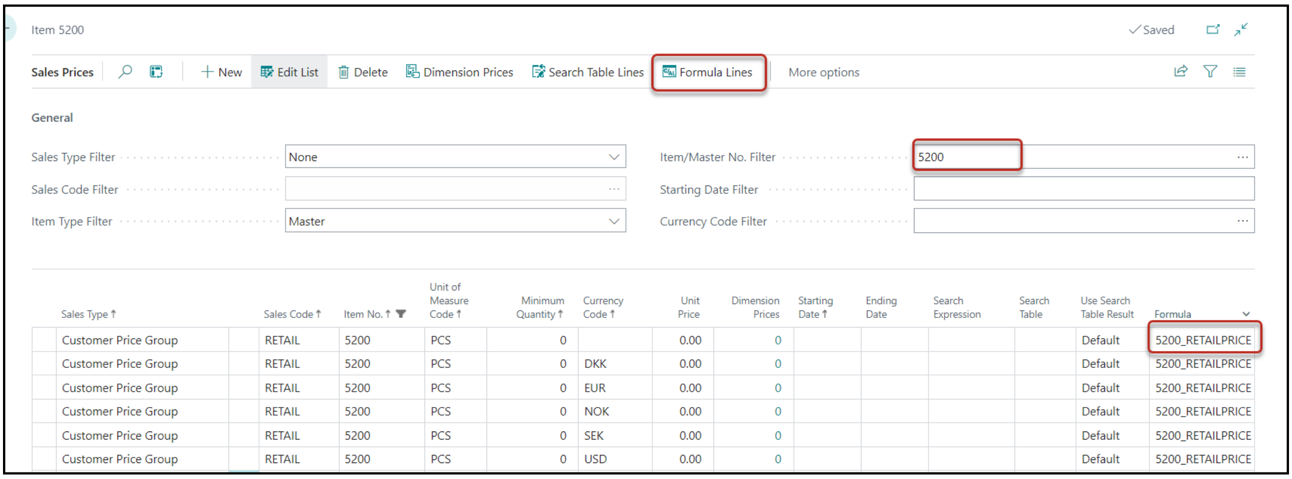


The **Search Table Lines** can be seen and filled via ***Functions/Search Table Lines*** or by pressing **Ctrl+F11**, when standing on the Formula Line.

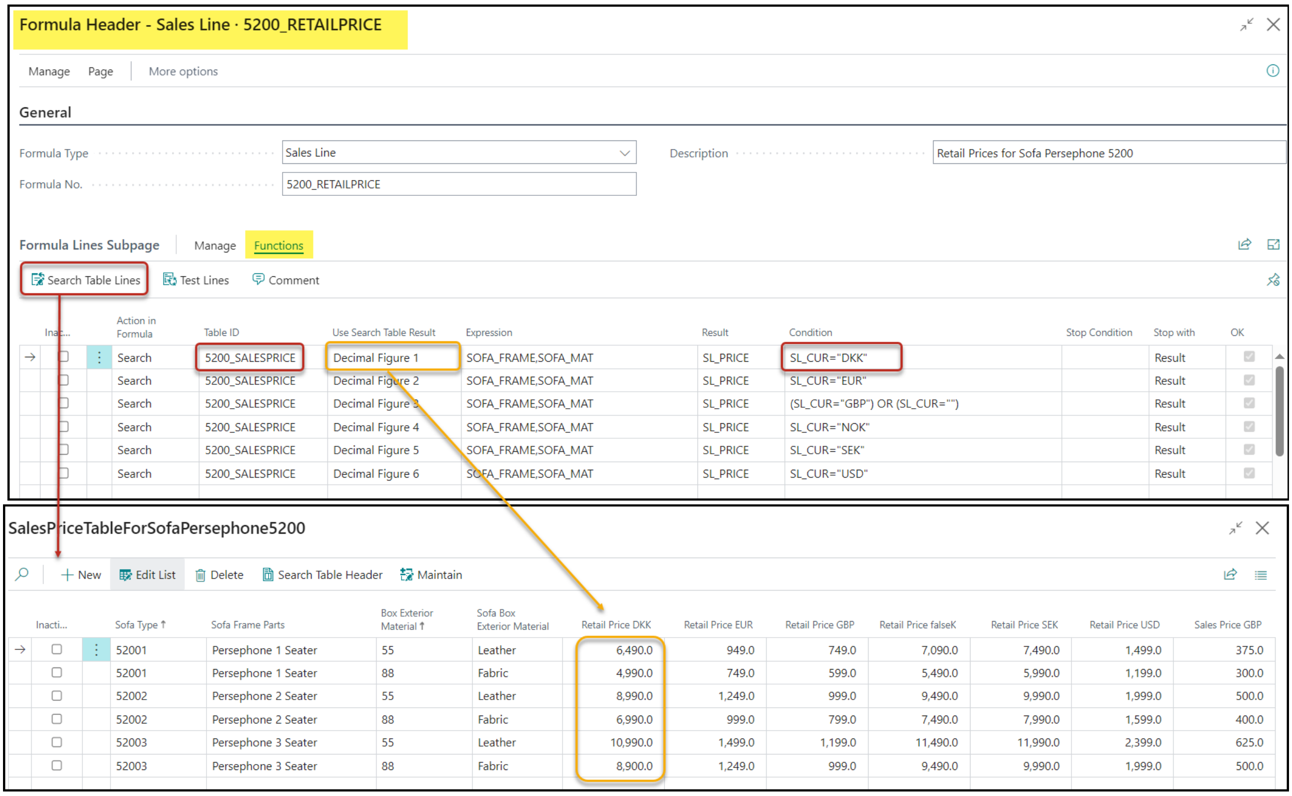
NOTE

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:

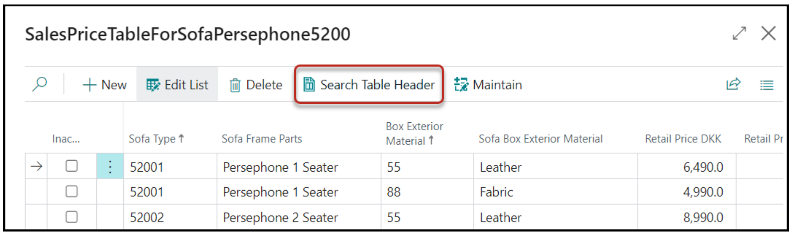


I.e., for the DKK Retail Prices:

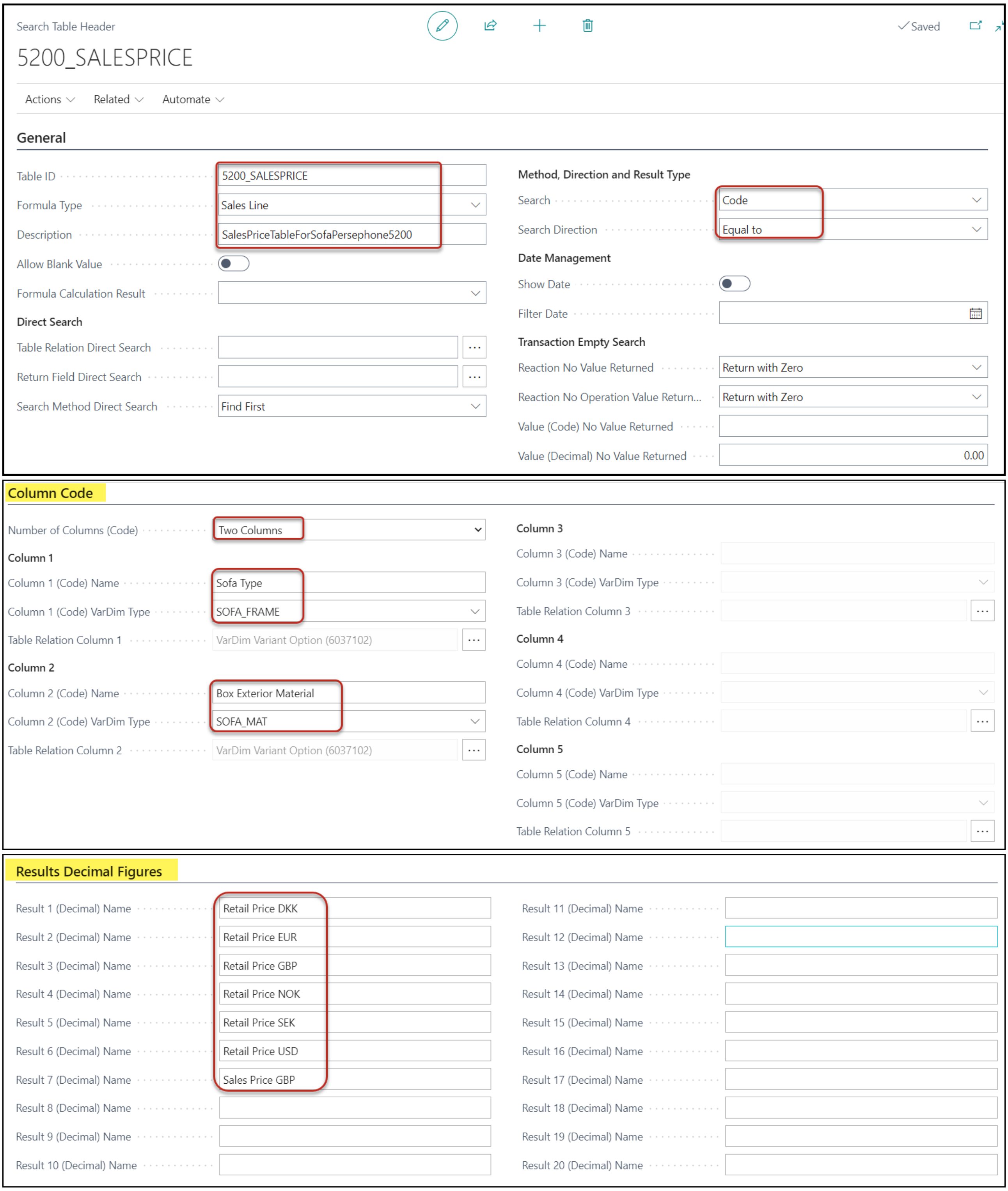


So, we can use the same **Search Table** (**Table ID**) for different Sales Prices by using several *Decimal Figures* (**Use Search Table Result**).

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



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



Search Table Header

5200_SALESPRICE

Actions Related Automate ✓Saved

General

Table ID	5200_SALESPRICE
Formula Type	Sales Line
Description	SalesPriceTableForSofaPersephone5200
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	Return with Zero
Reaction No Operation Value Return...	Return with Zero
Value (Code) No Value Returned	
Value (Decimal) No Value Returned	0.00

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 11 (Decimal) Name	
Result 2 (Decimal) Name	Retail Price EUR	Result 12 (Decimal) Name	
Result 3 (Decimal) Name	Retail Price GBP	Result 13 (Decimal) Name	
Result 4 (Decimal) Name	Retail Price NOK	Result 14 (Decimal) Name	
Result 5 (Decimal) Name	Retail Price SEK	Result 15 (Decimal) Name	
Result 6 (Decimal) Name	Retail Price USD	Result 16 (Decimal) Name	
Result 7 (Decimal) Name	Sales Price GBP	Result 17 (Decimal) Name	
Result 8 (Decimal) Name		Result 18 (Decimal) Name	
Result 9 (Decimal) Name		Result 19 (Decimal) Name	
Result 10 (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

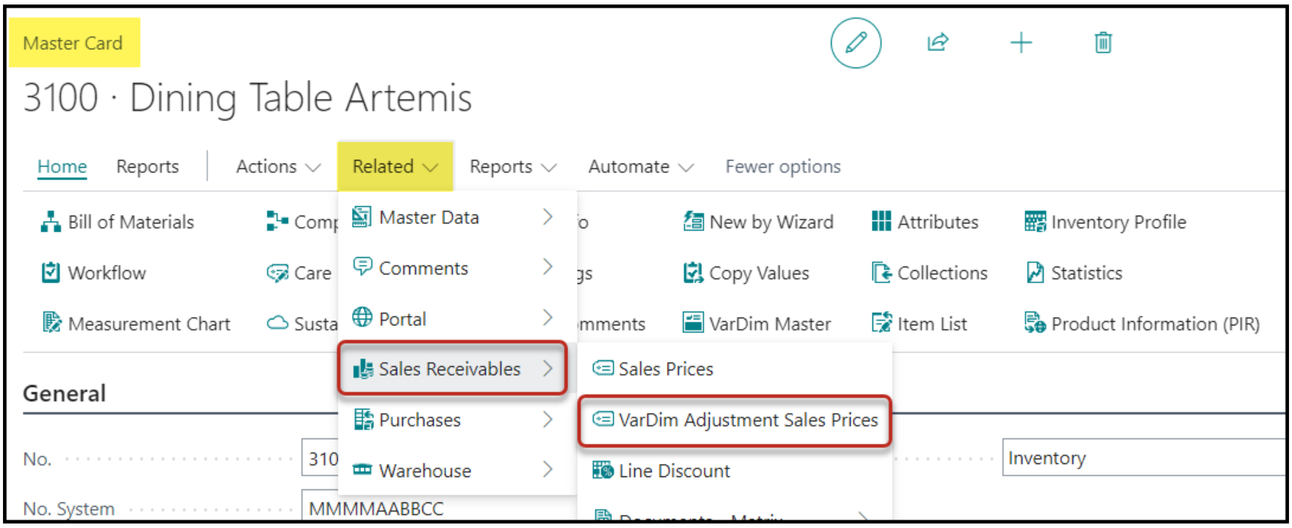
Description will by default be filled with the Description of the Master/Item.

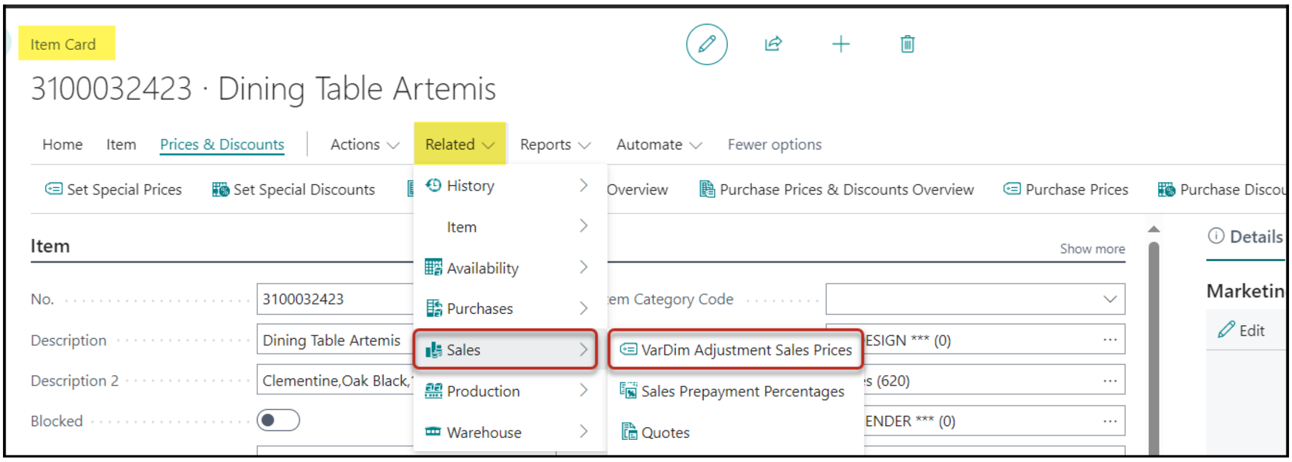
LINE DISCOUNT ADJUSTMENT

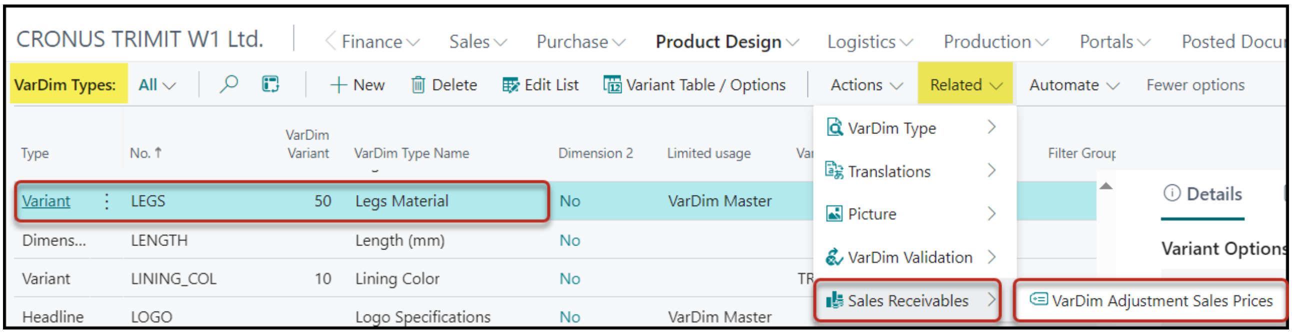
You can enter an Amount/Percentage between *0* and *100,* for adjusting the Line Discount on a Sales Line if this specific Sales Price will apply.
How this **Line Discount Adjustment** Amount/Percentage should be handled is determined by the field Adjust Line Discount in the corresponding **Price Group Parameters** of the Sales Price.

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:

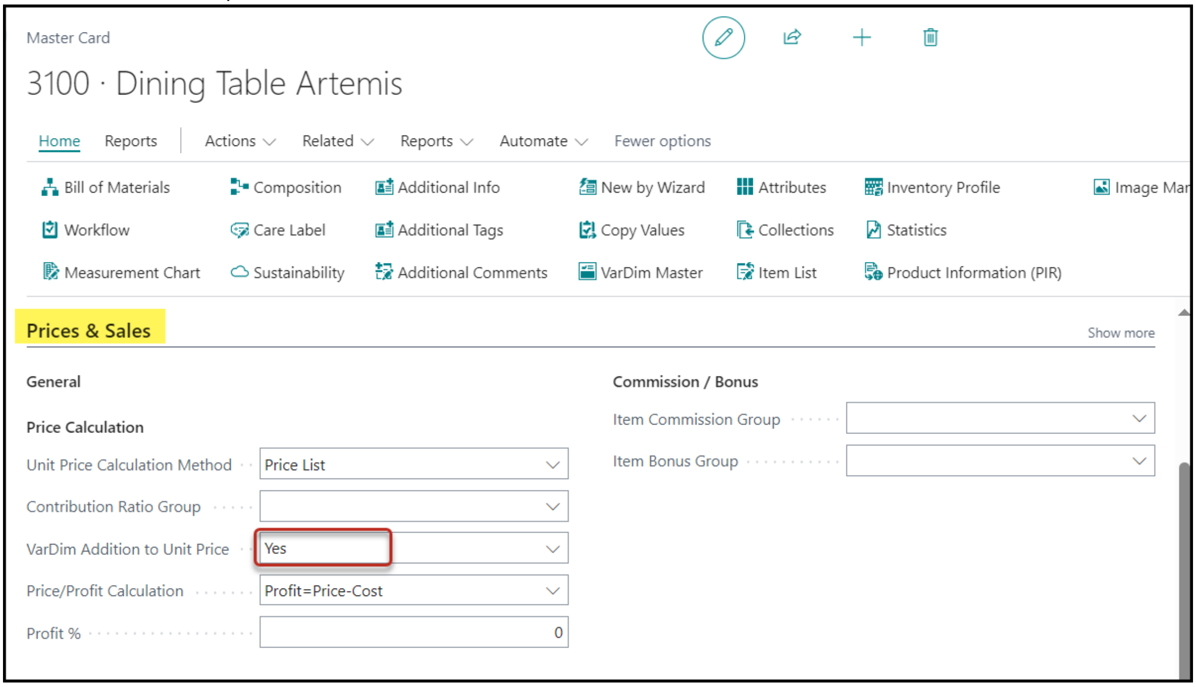






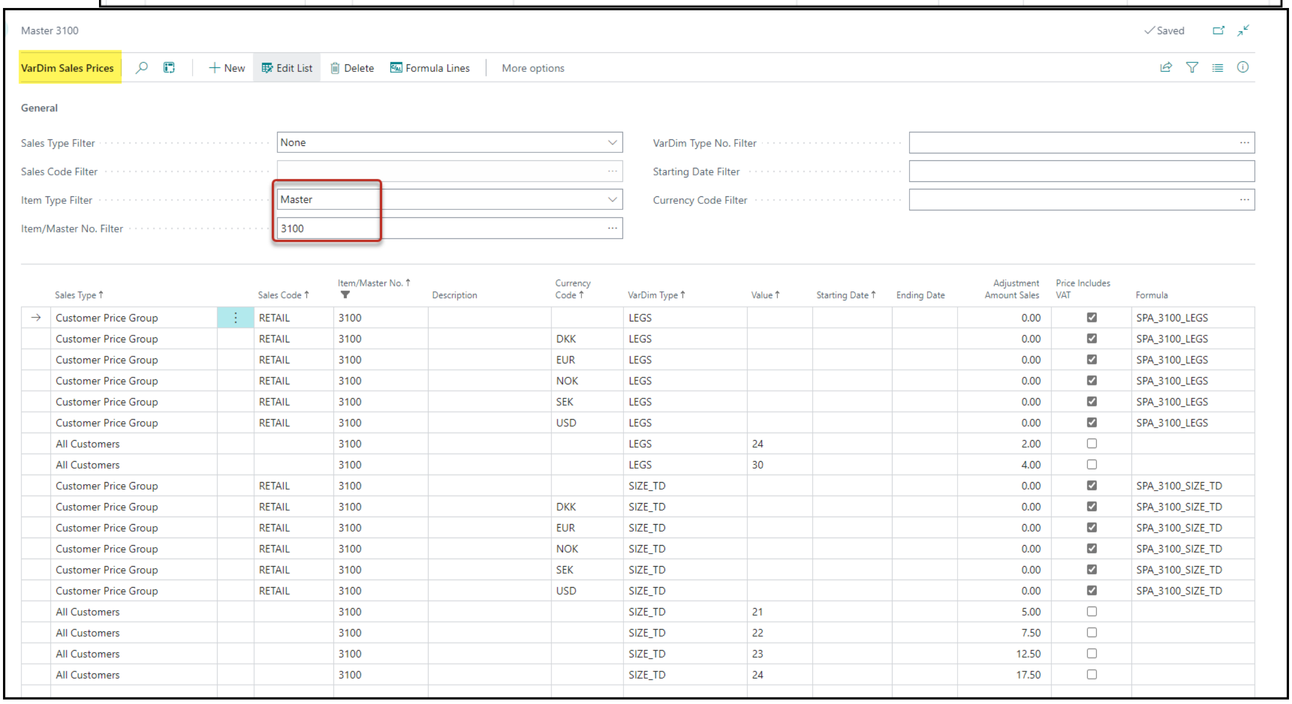
You need to be aware that the **VarDim Adjustment Sales Prices** will only apply if:

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



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

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



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 Group	RETAIL	3100			LEGS				0.00	☑	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		DKK	LEGS				0.00	☑	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		EUR	LEGS				0.00	☑	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		NOK	LEGS				0.00	☑	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		SEK	LEGS				0.00	☑	SPA_3100_LEGS
Customer Price Group	RETAIL	3100		USD	LEGS				0.00	☑	SPA_3100_LEGS
All Customers		3100			LEGS	24			2.00	☐	
All Customers		3100			LEGS	30			4.00	☐	
Customer Price Group	RETAIL	3100			SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
Customer Price Group	RETAIL	3100		DKK	SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
Customer Price Group	RETAIL	3100		EUR	SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
Customer Price Group	RETAIL	3100		NOK	SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
Customer Price Group	RETAIL	3100		SEK	SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
Customer Price Group	RETAIL	3100		USD	SIZE_TD				0.00	☑	SPA_3100_SIZE_TD
All Customers		3100			SIZE_TD	21			5.00	☐	
All Customers		3100			SIZE_TD	22			7.50	☐	
All Customers		3100			SIZE_TD	23			12.50	☐	
All Customers		3100			SIZE_TD	24			17.50	☐	

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 **trm Master Item** (*Yes/No*) that is related to that **Item No.** The **trm Master Item** is not in the page, but it is in the table, and it cannot be added to the page by personalization.
You can choose between the following four options:

Item	The Lines refer to VarDim Sales Prices for individual Items – therefore the number in the column **Item/Master No.** will be Item Nos. with **trm Master Item** is *No*.
Master	The Lines refer to VarDim Sales Prices for Masters – therefore the number in the column **Item/Master No.** will be a Master No. (Item Nos. with **trm Master Item** is *Yes.*)
General	The Lines will be applicable for every Item/Master, so represent a general adjustment for specific VarDim Types/Values. This option can only be chosen, if you go via the VarDim Types, not if you go via the Masters or Items.
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 **Item Type 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 **Item Type 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 **Item Type 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. And in the ***White Paper – TRIMIT Price Group Parameters and Campaigns.***

> **NOTE**
> Keep in mind, that when copying a Master by Wizard, the VarDim Sales Price Lines with **Sales Type** *Campaign* will not be copied.

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 checked with the **Sell-to Customer**, **Bill-to Customer**, **Company Group** and **Chain** of the Sales Header.
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 **Item Type Filter**.
If **Item Type Filter** = *Master,* the content of the **Item No.** needs to be a Master No.
If **Item Type Filter** = *Item,* the content of the **Item No.** needs to be an Item No.
If **Item Type Filter** = *None* the content of the **Item No.** can be a Master No. or an Item No.

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.

PRICE INCLUDES VAT

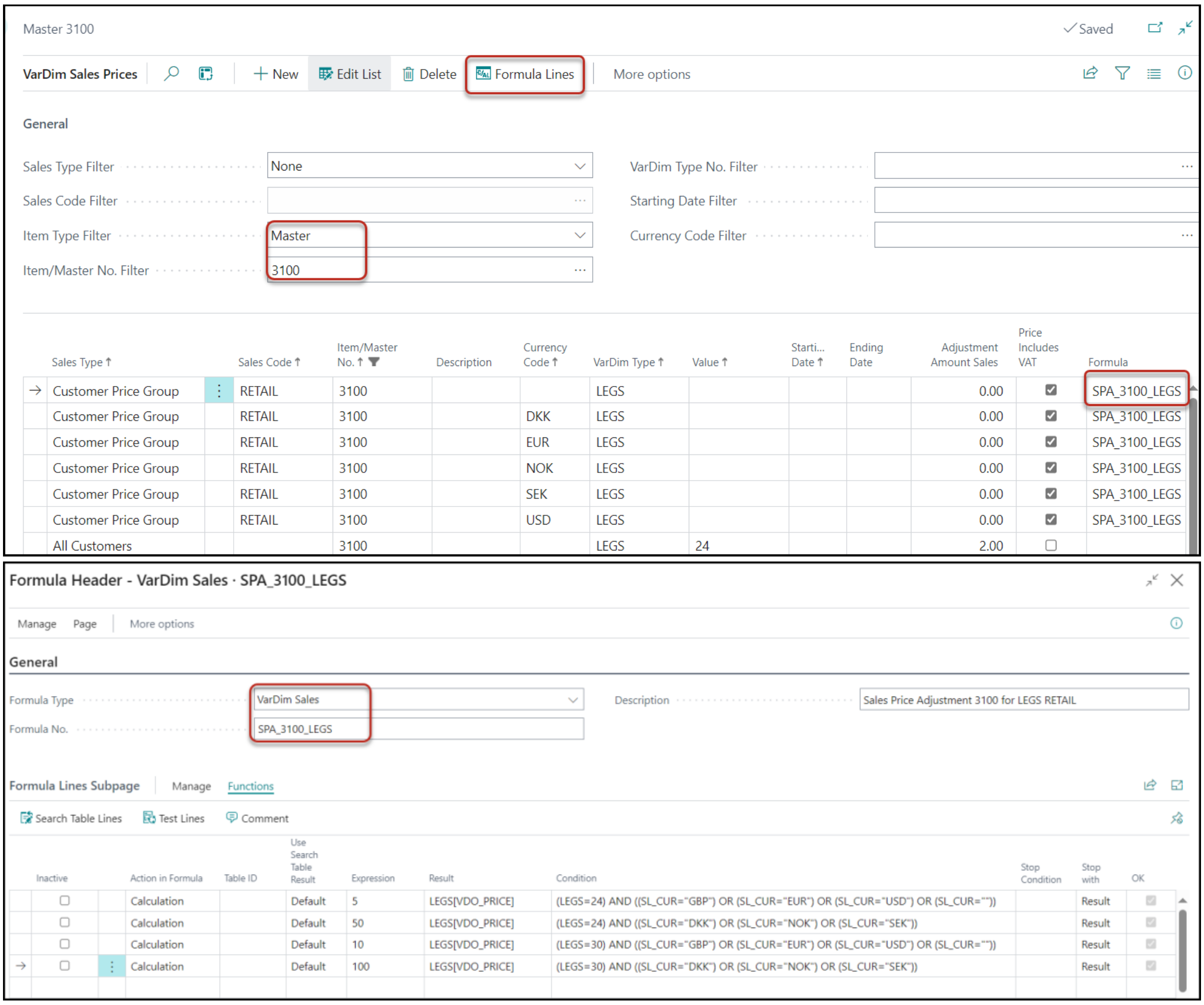
You can enter a checkmark to indicate that the **Unit Price** entered is including VAT.
This will be filled automatically with the corresponding field of the **Sales Code** if the **Sales Type** is *Customer Price Gorup.*

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

EXAMPLE – FORMULA FOR VARDIM ADJUSTMENTS ON SALES PRICES



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.

The following fields can be added as well to the VarDim Sales Prices via ***Personalize***:

ADJUSTMENT SALES IN %

Instead of a concrete 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.

SEARCH DIRECTION SALES PRICES

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

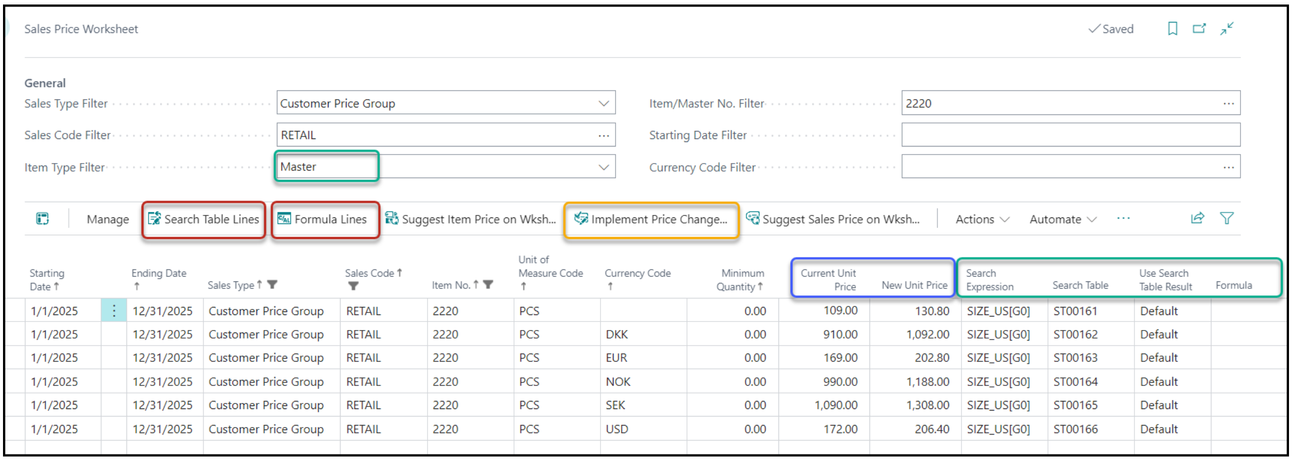
TRIMIT in comparison to Business Central:

- **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 Salespersons or Customer Price Groups based on the Filters in 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 **Search** *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.



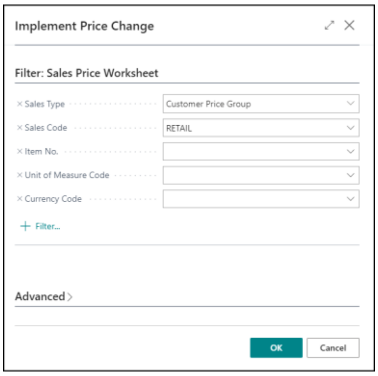
Starting Date	Ending Date	Sales Type	Sales Code	Item No.	Unit of Measure Code	Currency Code	Minimum Quantity	Current Unit Price	New Unit Price	Search Expression	Search Table	Use Search Table Result	Formula
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS		0.00	109.00	130.80	SIZE_US[G0]	ST00161	Default	
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS	DKK	0.00	910.00	1,092.00	SIZE_US[G0]	ST00162	Default	
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS	EUR	0.00	169.00	202.80	SIZE_US[G0]	ST00163	Default	
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS	NOK	0.00	990.00	1,188.00	SIZE_US[G0]	ST00164	Default	
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS	SEK	0.00	1,090.00	1,308.00	SIZE_US[G0]	ST00165	Default	
1/1/2025	12/31/2025	Customer Price Group	RETAIL	2220	PCS	USD	0.00	172.00	206.40	SIZE_US[G0]	ST00166	Default	

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**.**

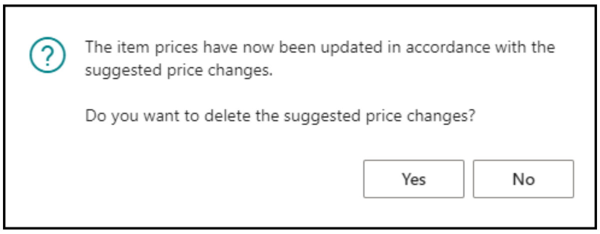
NOTE
If you do not want the original **Search Table Lines** to be overwritten, you need to delete the field **Search Table**.
In that case, when clicking ***Search Table Lines***, a new **Search Table** will be created.
The same is applicable for the original **Formula.**

You can now enter a **New Unit Price, Search Expression,** and/or **Formula** for the new price and 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.

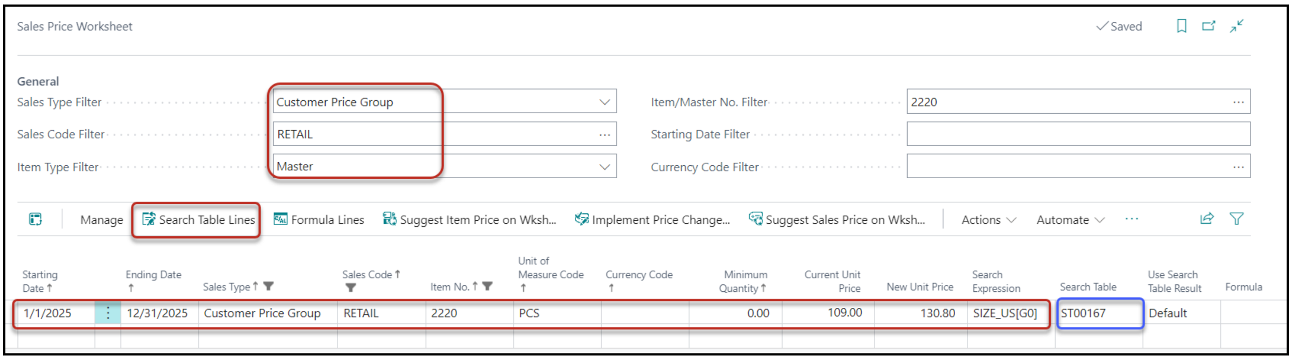
If you have entered all the Lines, you need to click ***Implement Price Change,*** to implement these suggestions for prices into the normal Sales Prices.
In that case, you can filter on the Lines of the **Sales Price Worksheet** that needs to be implemented.



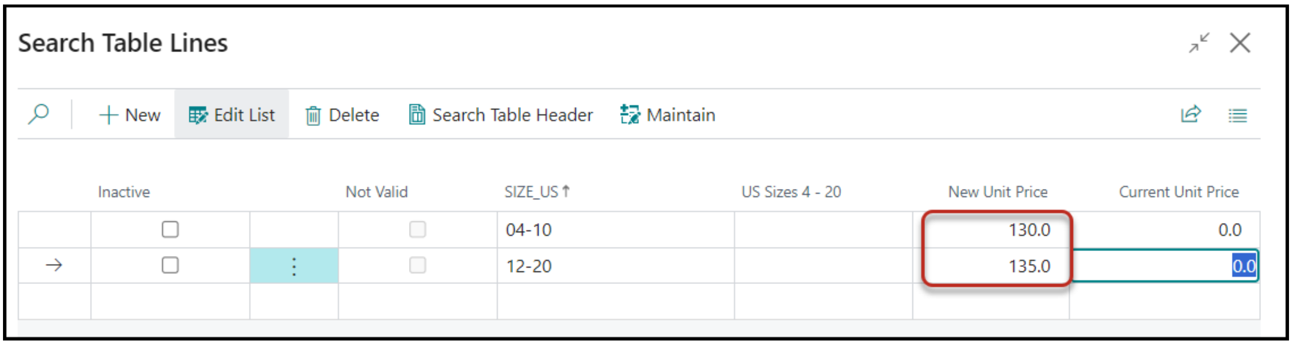
After clicking **OK** you will get a message if you want to delete the Lines from the **Sales Price Worksheet,** usually you will click **Yes.**



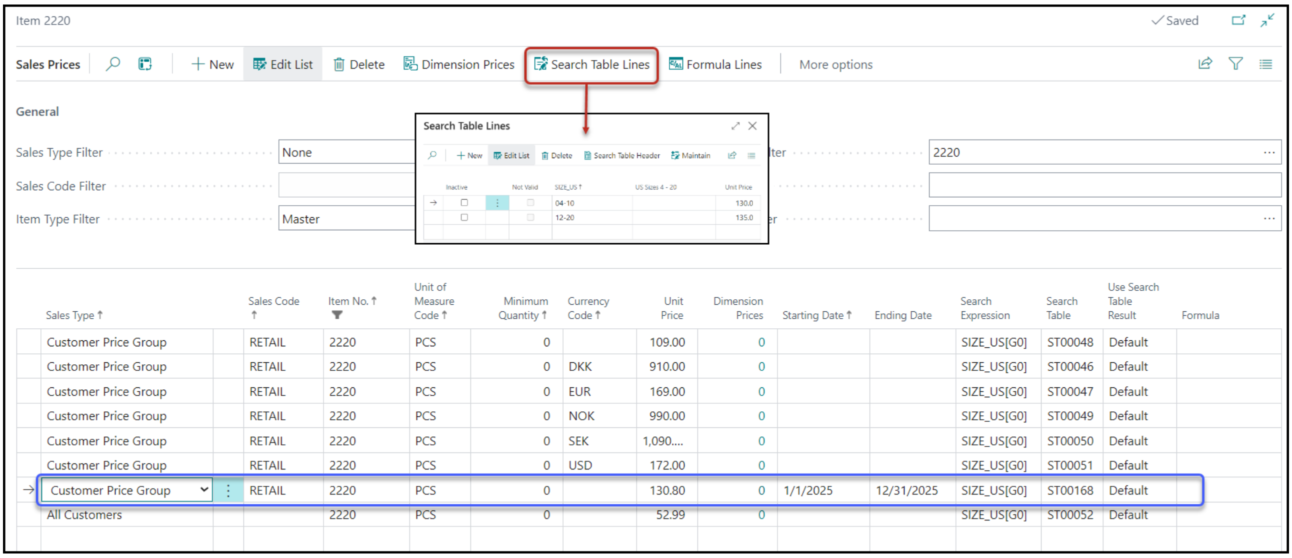
EXAMPLE – SALES PRICE WORKSHEET



And a new **Search Table Lines** was entered as follows:



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



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 *ST00167*, while in the above picture it became *ST00168.*

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

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.

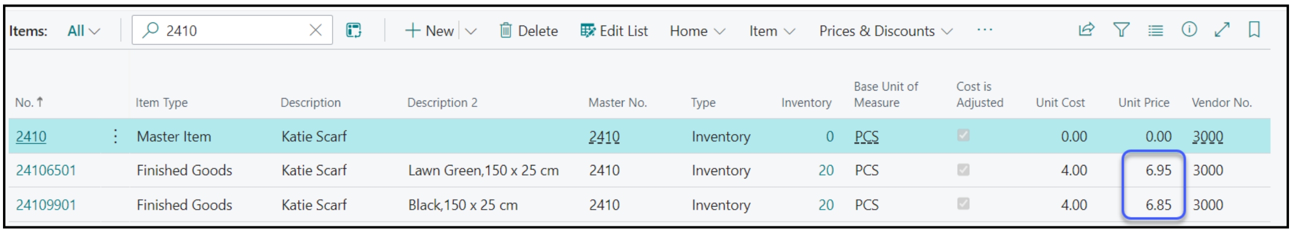
SUGGEST ITEM PRICE ON WKSH.

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.

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.

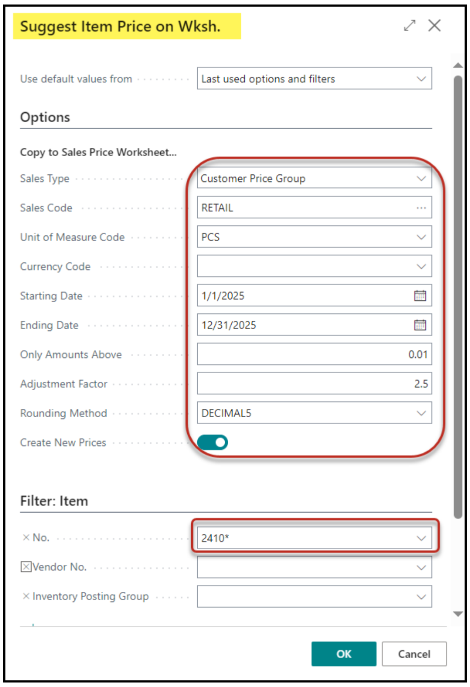
EXAMPLE – SUGGEST ITEM PRICE ON WORKSHEET (FROM ITEMS)

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

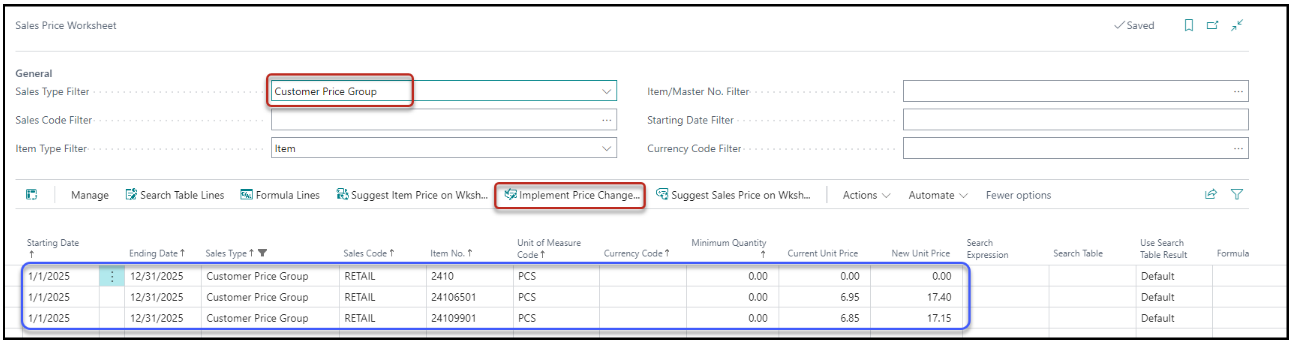


No. ↑	Item Type	Description	Description 2	Master No.	Type	Inventory	Base Unit of Measure	Cost is Adjusted	Unit Cost	Unit Price	Vendor No.
2410	Master Item	Katie Scarf		2410	Inventory	0	PCS		0.00	0.00	3000
24106501	Finished Goods	Katie Scarf	Lawn Green,150 x 25 cm	2410	Inventory	20	PCS		4.00	6.95	3000
24109901	Finished Goods	Katie Scarf	Black,150 x 25 cm	2410	Inventory	20	PCS		4.00	6.85	3000

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:



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:**

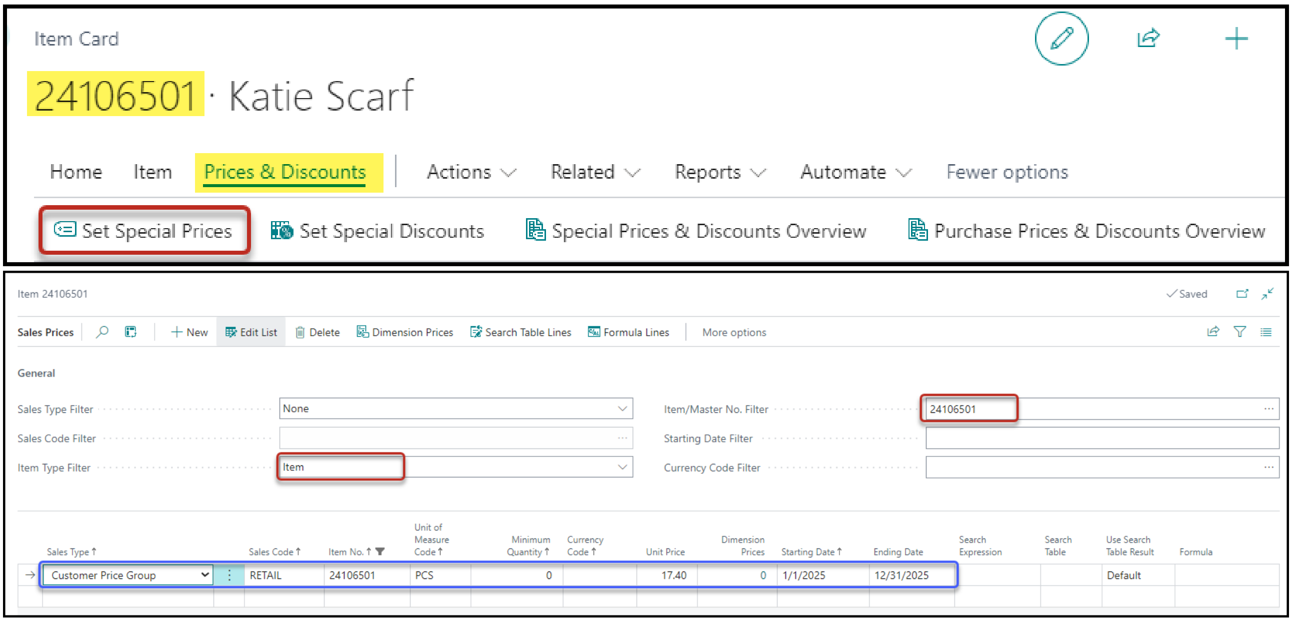


Keep in mind, that it is related to Items, therefore the **Item Type Filter** must be set to *Item* to see the suggestions in the **Sales Price Worksheet.**

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

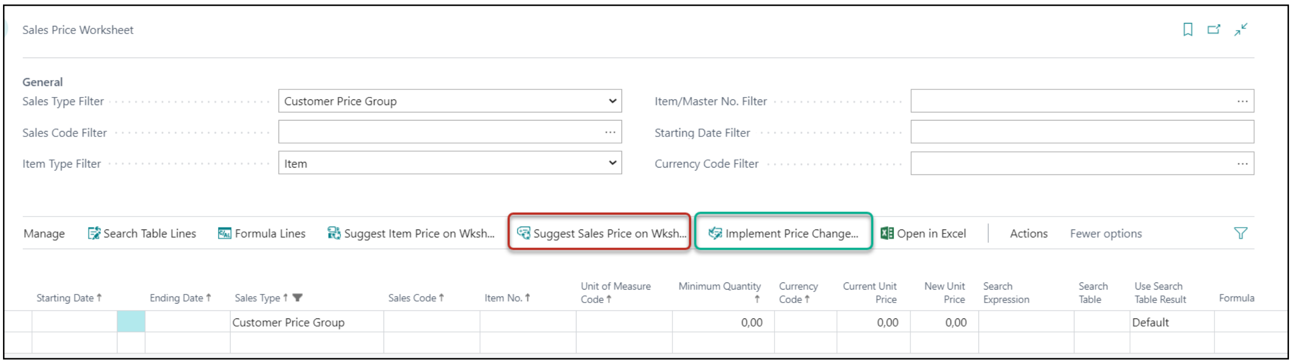
This batch job can only be used for **Sales Prices** and not for **VarDim Sales Prices.**

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 Sales Prices related to Items – not to the Master!!



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.

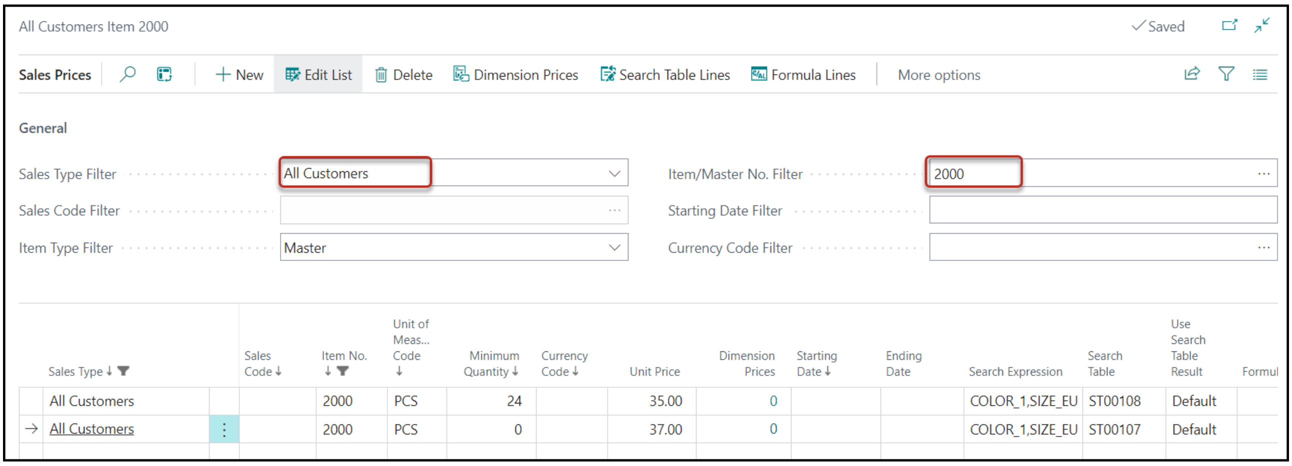


This batch job creates suggestions for creating/changing sales prices in the **Sales Price** table based on existing Lines in the **Sales Price** table. When the batch job has been completed, you can see the result in the **Sales Price Worksheet.**
This batch job only creates suggestions, and it does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

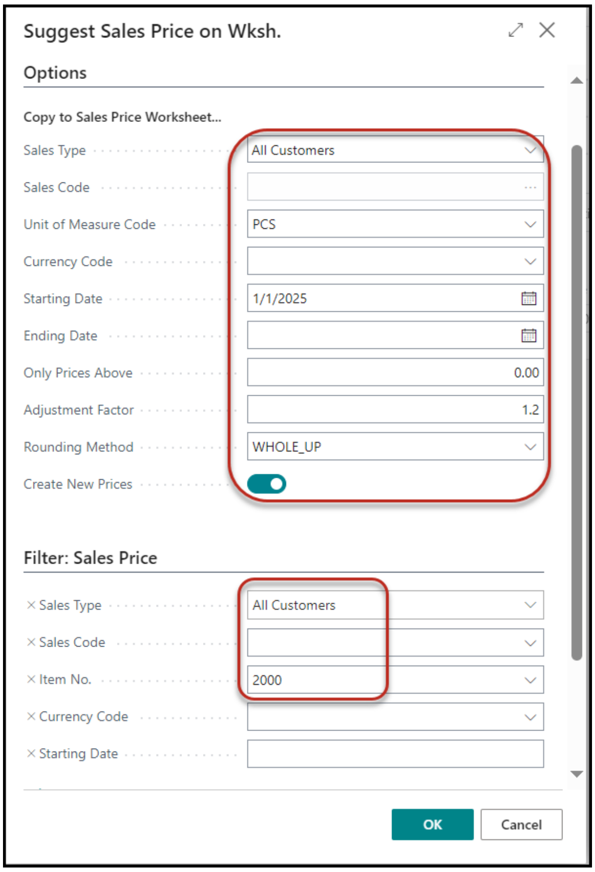
If the original **Sales Price** also includes **Search Expressions** and **Search Table Lines**, a new **Search Table** with Search Table Lines will be created based on the options for suggesting new Sales Prices as well.

EXAMPLE – SUGGEST SALES PRICES ON WORKSHEET

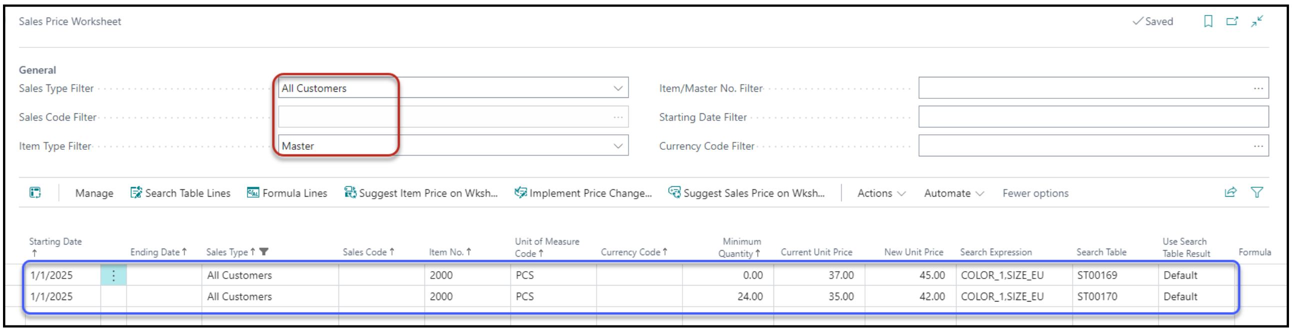
For a Master *2000* you want to add new prices as of *01/01/25* (January 1, 2025) for *All Customers* and the Sales Price should be *1.2* of the original Sales Prices.
The current Sales Prices look like:



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



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



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.

After you clicked ***Implement Price Change,*** you can see the end-result in the **Sales Prices** of the Master *2000.*

All Customers Item 2000 ✓Saved

Sales Prices | New | Edit List | Delete | Dimension Prices | Search Table Lines | Formula Lines | More options

General

Sales Type Filter: All Customers
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	Formula
All Customers		2000	PCS	0		37.00	0			COLOR_1,SIZE_EU	ST00107	Default	
All Customers		2000	PCS	24		35.00	0			COLOR_1,SIZE_EU	ST00108	Default	
All Customers		2000	PCS	0		45.00	0	1/1/2025		COLOR_1,SIZE_EU	ST00171	Default	
All Customers		2000	PCS	24		42.00	0	1/1/2025		COLOR_1,SIZE_EU	ST00172	Default	

And if we now compare the Search Tables *ST00108 (before price change)* and *ST00172 (after price change):*

Edit - Search Table Lines **Before Price Change (ST00108)**

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

Inac...	Not Valid	COLOR_1 ↑	Garment/Fabric Colors	SIZE_EU ↑	European Sizes 36 - 60	Unit Price
☐	☐	20	Royal Blue	36	36	35,0
☐	☐	20	Royal Blue	38	38	35,0
☐	☐	20	Royal Blue	40	40	37,0
☐	☐	20	Royal Blue	42	42	37,0
☐	☐	20	Royal Blue	44	44	39,0
☐	☐	20	Royal Blue	46	46	39,0
☐	☐	20	Royal Blue	48	48	41,0
☐	☐	25	Navy	36	36	35,0
☐	☐	25	Navy	38	38	35,0
☐	☐	25	Navy	40	40	37,0
☐	☐	25	Navy	42	42	37,0
☐	☐	25	Navy	44	44	39,0
☐	☐	25	Navy	46	46	39,0

Search Table Lines **After Price Change (ST00172)**

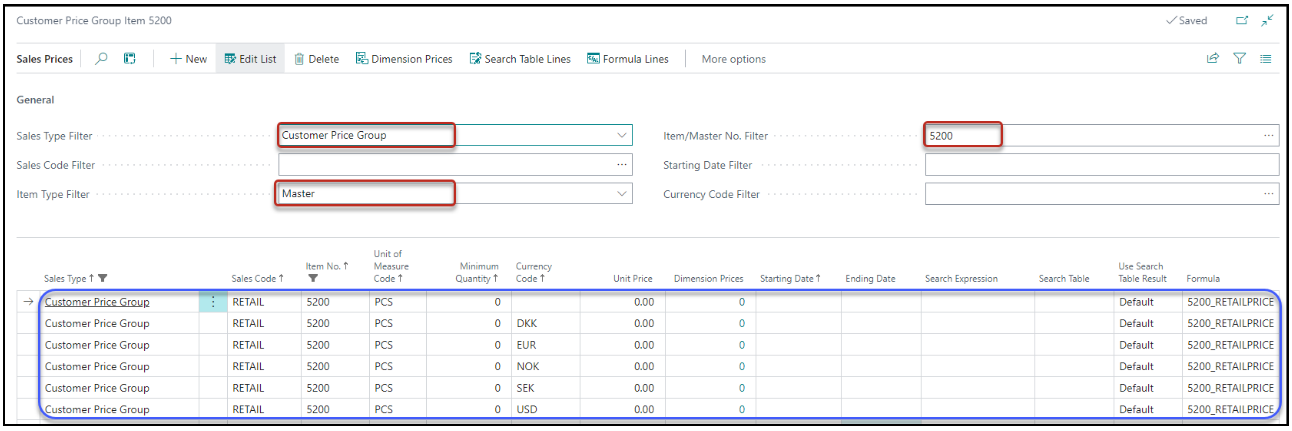
New | Edit List | Delete | Search Table Header | Maintain

Inact...	Not Valid	COLOR_1 ↑	Garment/Fabric Colors	SIZE_EU ↑	European Sizes 36 - 60	Unit Price
☐	☐	20	Royal Blue	36	36	42.0
☐	☐	20	Royal Blue	38	38	42.0
☐	☐	20	Royal Blue	40	40	45.0
☐	☐	20	Royal Blue	42	42	45.0
☐	☐	20	Royal Blue	44	44	47.0
☐	☐	20	Royal Blue	46	46	47.0
☐	☐	20	Royal Blue	48	48	50.0
☐	☐	25	Navy	36	36	42.0
☐	☐	25	Navy	38	38	42.0
☐	☐	25	Navy	40	40	45.0
☐	☐	25	Navy	42	42	45.0
☐	☐	25	Navy	44	44	47.0
☐	☐	25	Navy	46	46	47.0

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

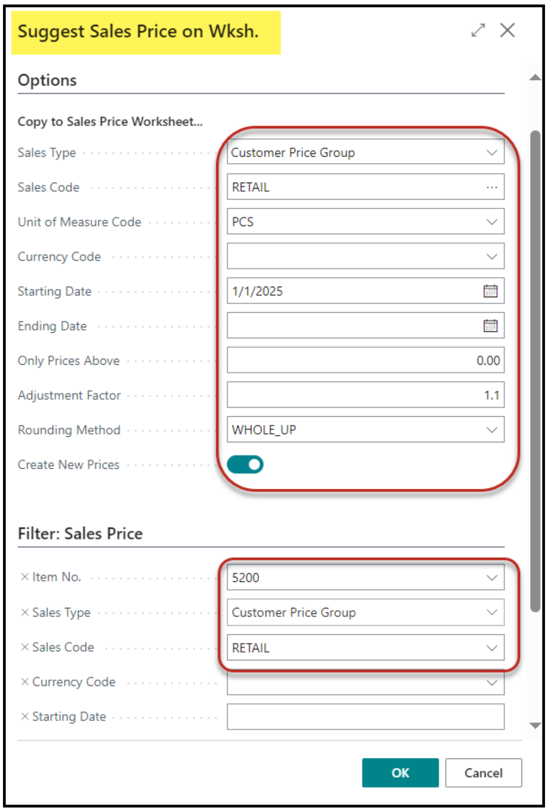
For a Master *5200 Sofa Persephone* you want to add new prices as of *01/01/25* (January 1, 2025) for the **Customer Price Group** *RETAIL* and the Sales Price should be *1.1* of the original Sales Prices because of old collection.

The current Sales Prices look like:

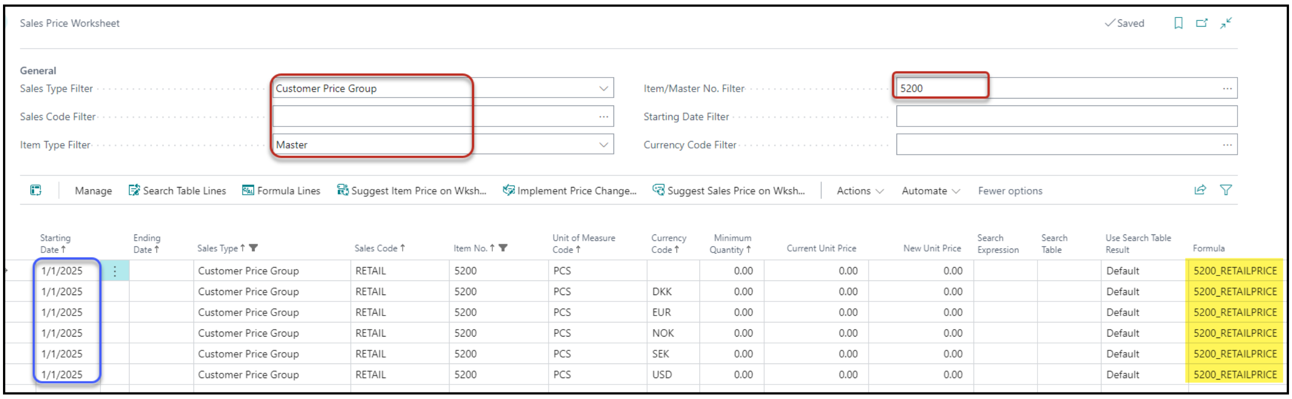


Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Currency Code	Unit Price	Dimension Prices	Starting Date	Ending Date	Search Expression	Search Table	Use Search Table Result	Formula
Customer Price Group	RETAIL	5200	PCS	0		0.00	0					Default	5200_RETAILPRICE
Customer Price Group	RETAIL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

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



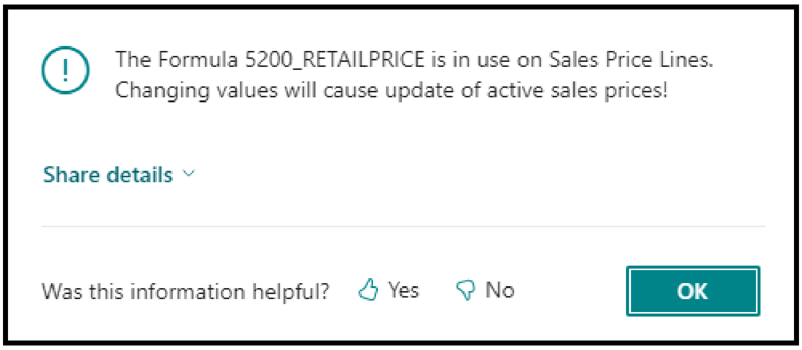
This would result in six Lines in the **Sales Price Worksheet:**



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.

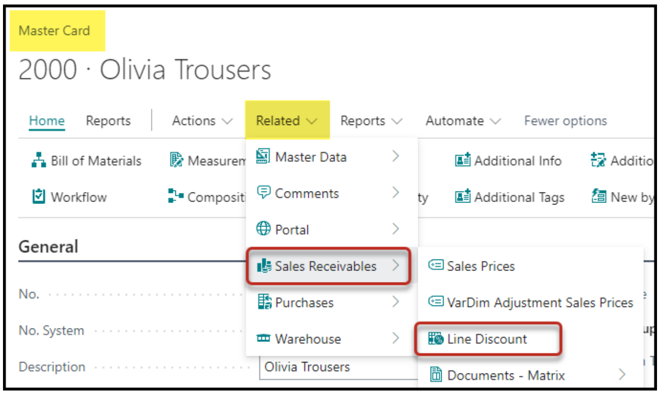
The standard Business Central Sales Line Discounts can be used as well if you want to add Sales Line Discounts in general. However, if you are using a **Minimum Quantity**, you need to realize that it is only based on the **Quantity** on a Sales *Item* Line, not on a Sales *Matrix* Line.

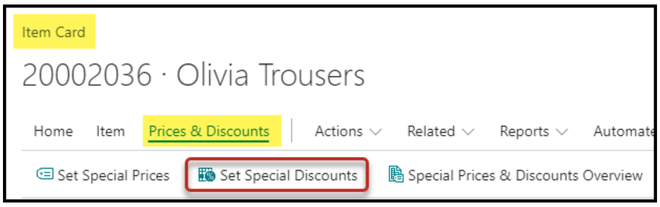
If you want to use the **TRIMIT Sales Line Discounts** which can give you much more possibilities – especially regarding the **Minimum Quantity -** you need to be aware that the parameter Extended Discount Search in the Sales & Receivables Setup must be set to a value different from *No.*
In that case,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

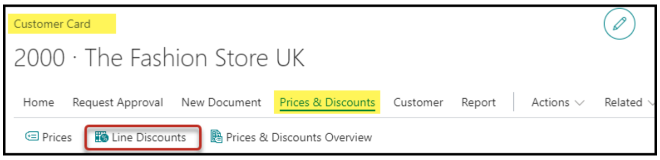
You need to decide up front which type of Sales Line Discounts you want to use:
Standard Business Central Sales Line Discounts **OR** TRIMIT Sales Line Discounts.

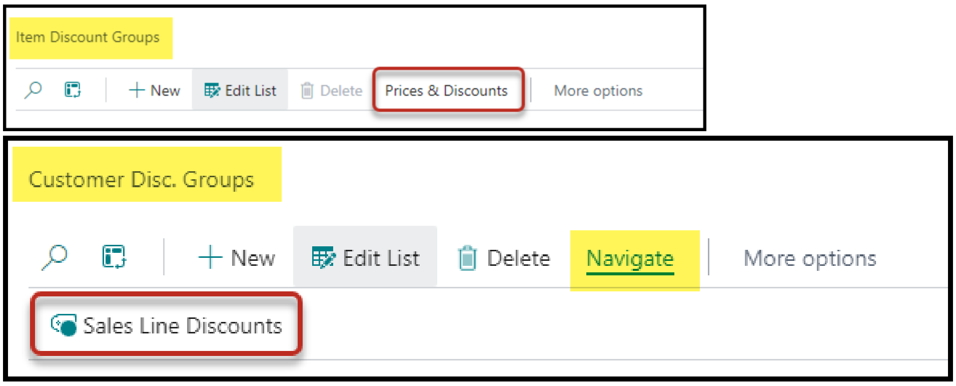
NOTE
Depending on the **Extended Discount Search** in the Sales & Receivables Setup, the system will only look in the Standard Business Central Discounts (if the value = *No*) or only look in the TRIMIT Sales Line Discounts (if value <> *No*). It will not look in both!!!!!

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

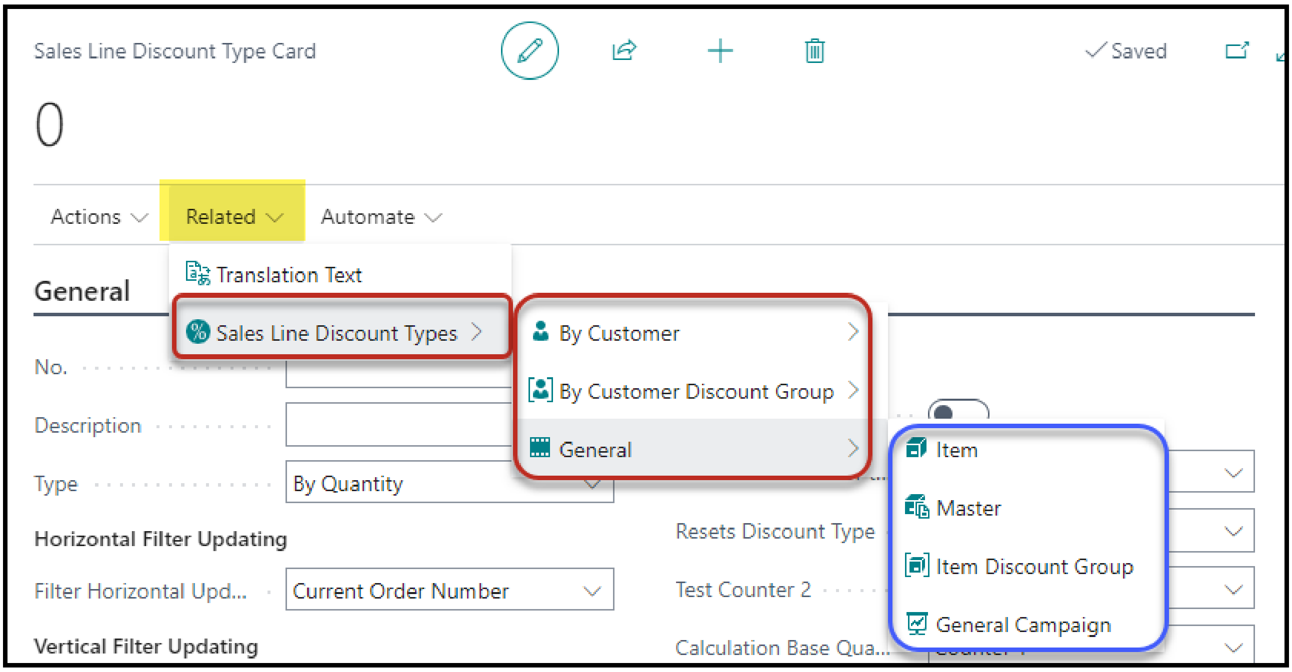






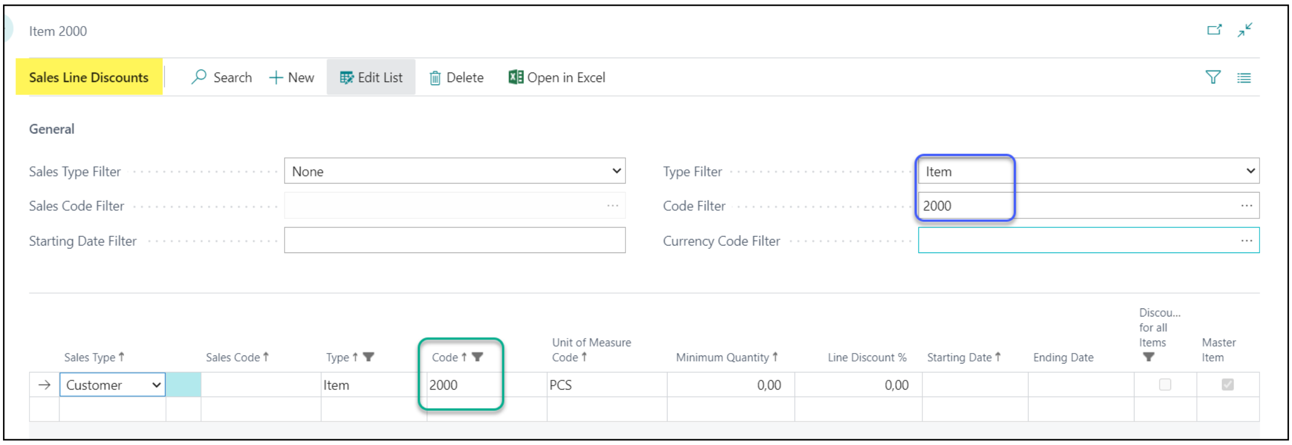


Only via the **Sales Line Discount Type** you can enter the TRIMIT Sales Line Discounts:



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.

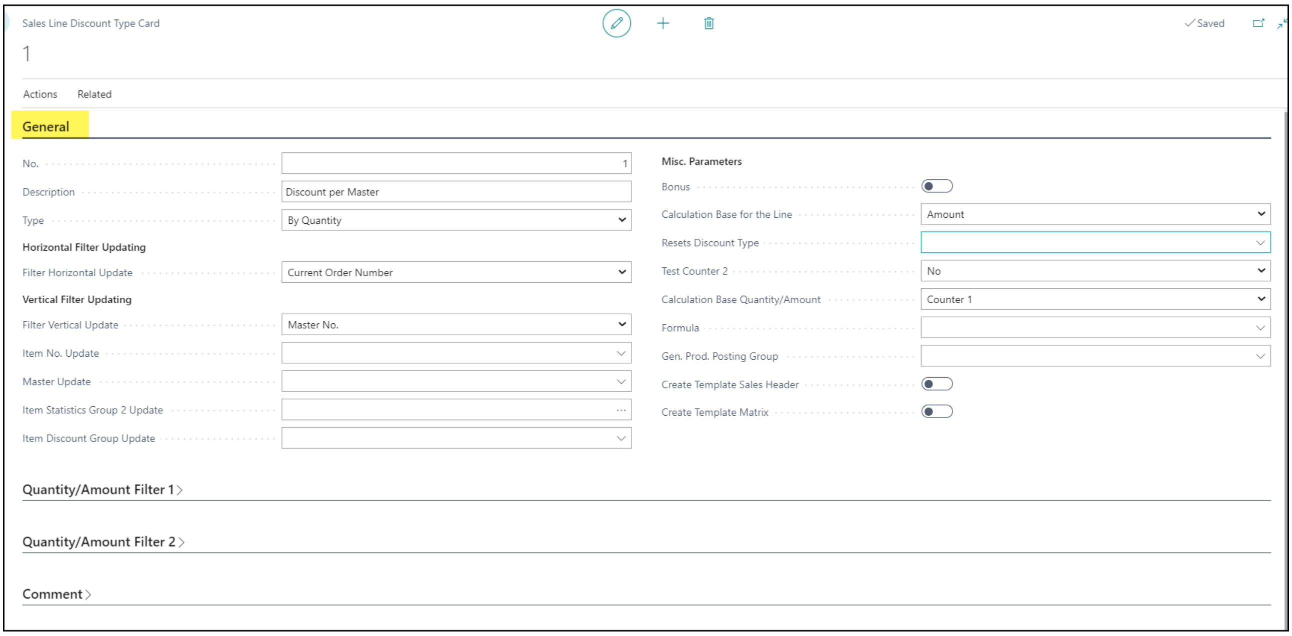
If you want to have Sales Line Discounts that are related to **MATRIX** Line quantities or even total Order Quantities, you need to use the TRIMIT Sales Line Discount Types.
In that case, you can only enter the actual Sales Line Discounts via the list/page of the **Sales Line Discount Types.** Therefore, you first need to create the **Sales Line Discount Types**.

SALES LINE DISCOUNT TYPE

Via **Search** *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 do not 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



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

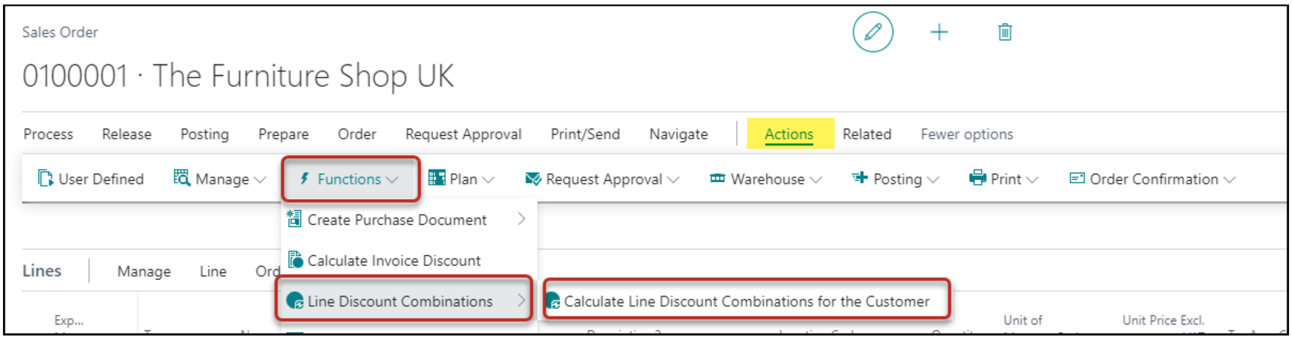
In this field you can enter a **Formula** with **Formula Type** *Discount* can be chosen.

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.

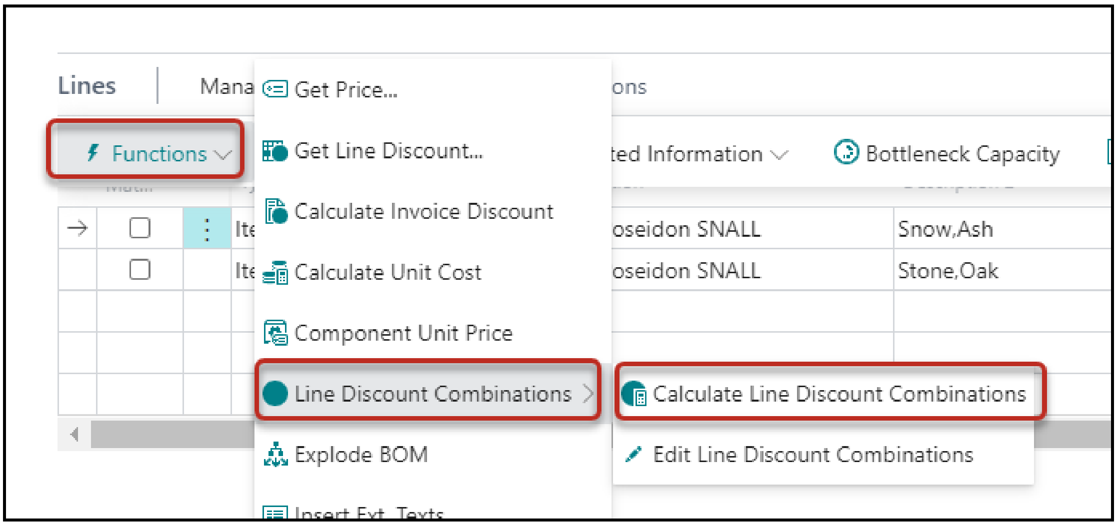
CREATE TEMPLATE SALES HEADER

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***.



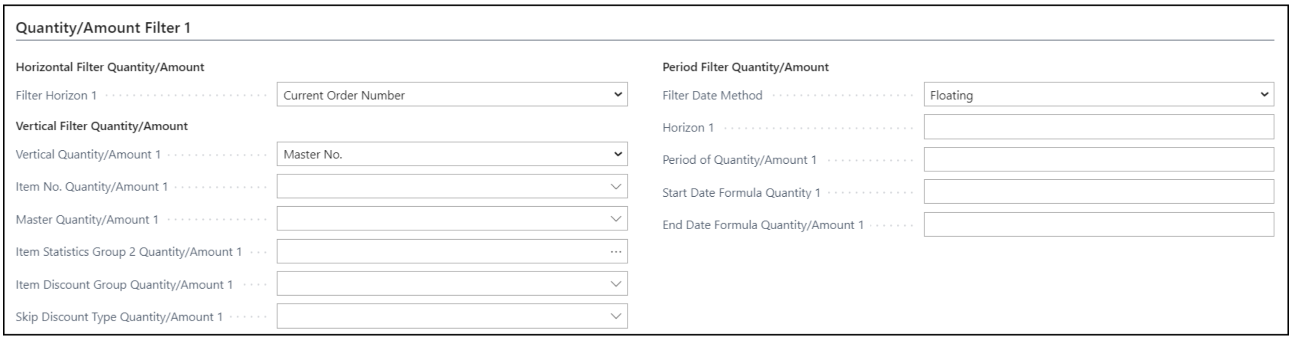
CREATE TEMPLATE MATRIX

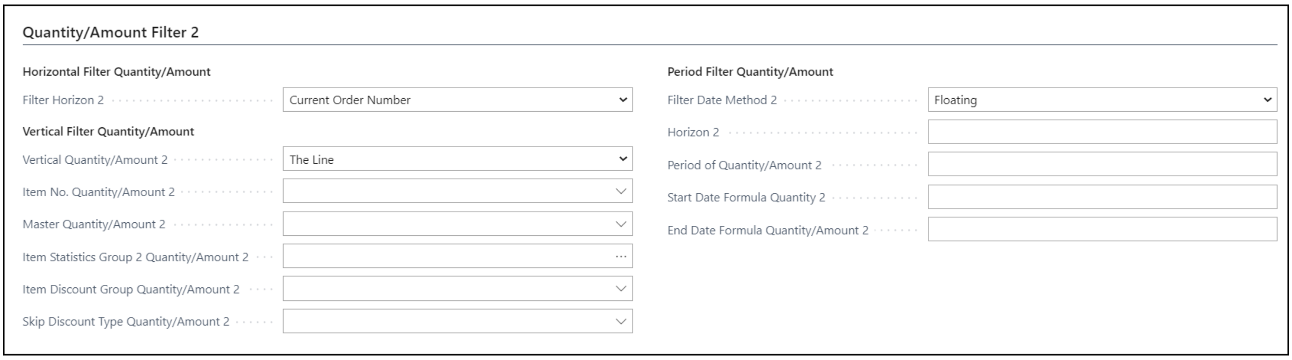
With a checkmark in this field, the system will also create a Line Discount Combination record for all the Matrix Lines in a Sales Document. Otherwise, you will only see Line Discount Combinations on the Item Lines in a Sales Document.
This will happen if you recalculate the Discount Combinations via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





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 grand 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 grand 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

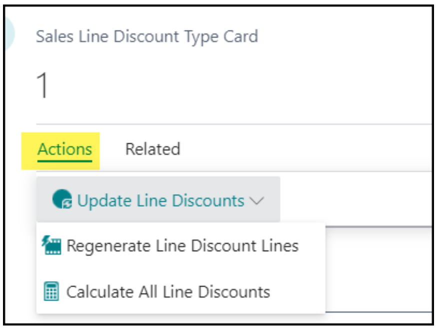
DESCRIPTION OF THE FIELDS:

COMMENT, 2 AND 3

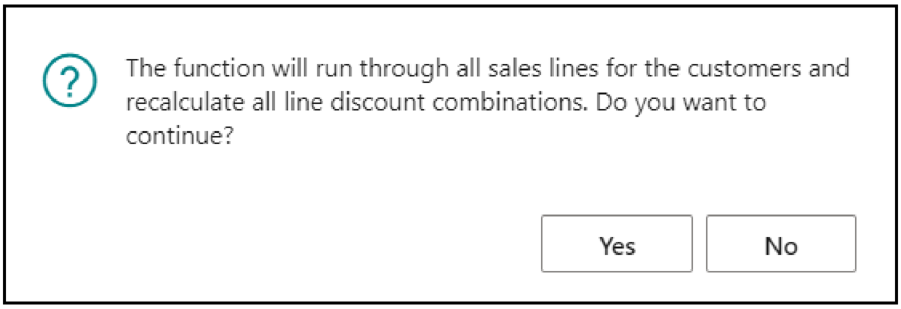
You can enter a **Comment** of 50 characters.

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

ACTIONS

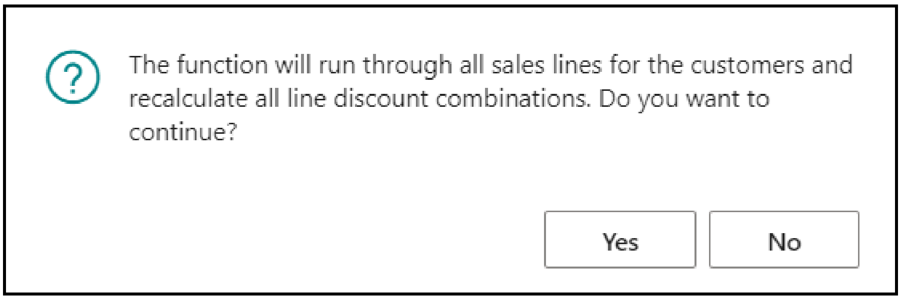


REGENERATE LINE DISCOUNT LINES



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.

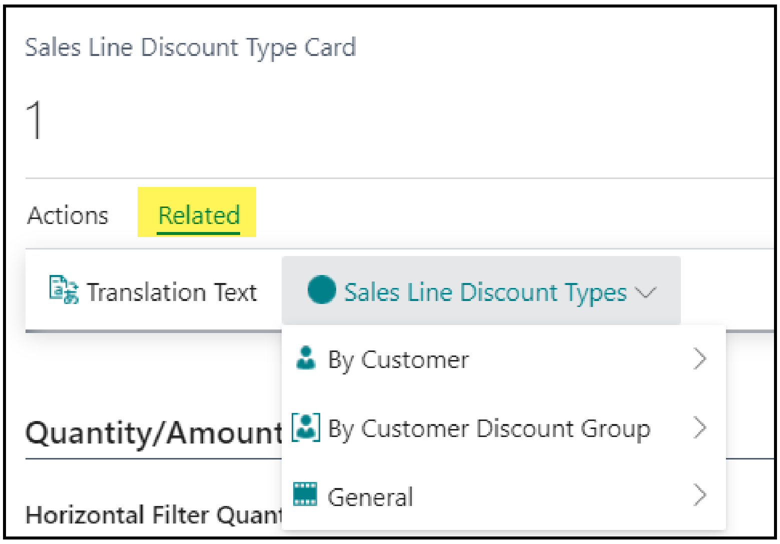
CALCULATE ALL LINE DISCOUNTS



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.



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*.

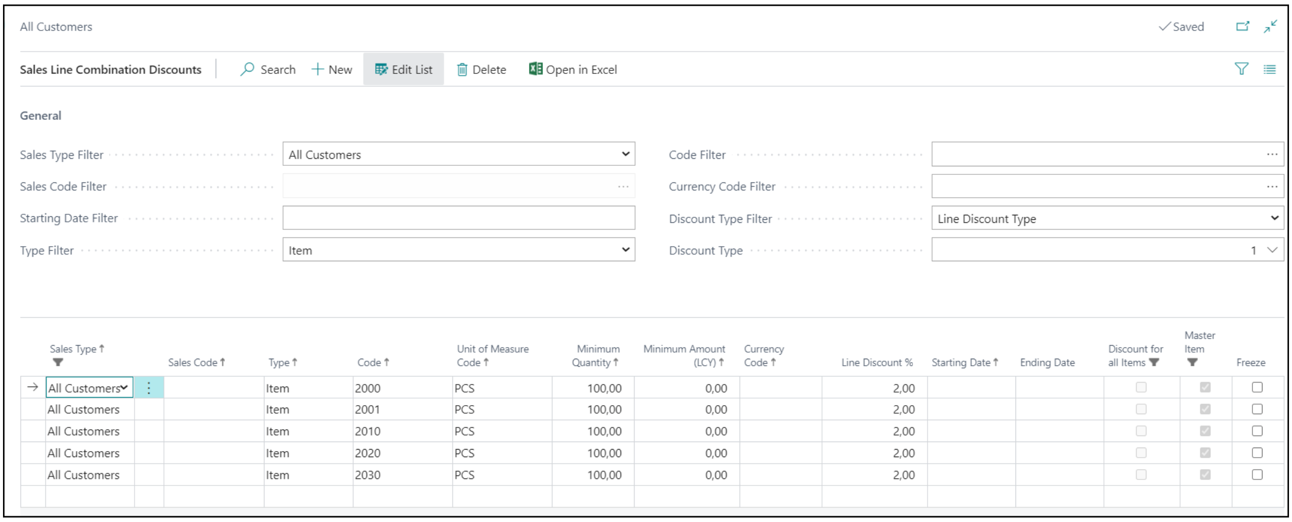
BY CUSTOMER DISCOUNT GROUP

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



DESCRIPTION OF THE FIELDS IN THE HEADER:

The Filters relate to the fields on the Lines:

Sales Type Filter	Sales Type *None* 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 *None* 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	*None* means: no Filter so all **Discount Types** will be shown. The option *Line Discount Type* 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** <> *None.*

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 QUANITITY

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.

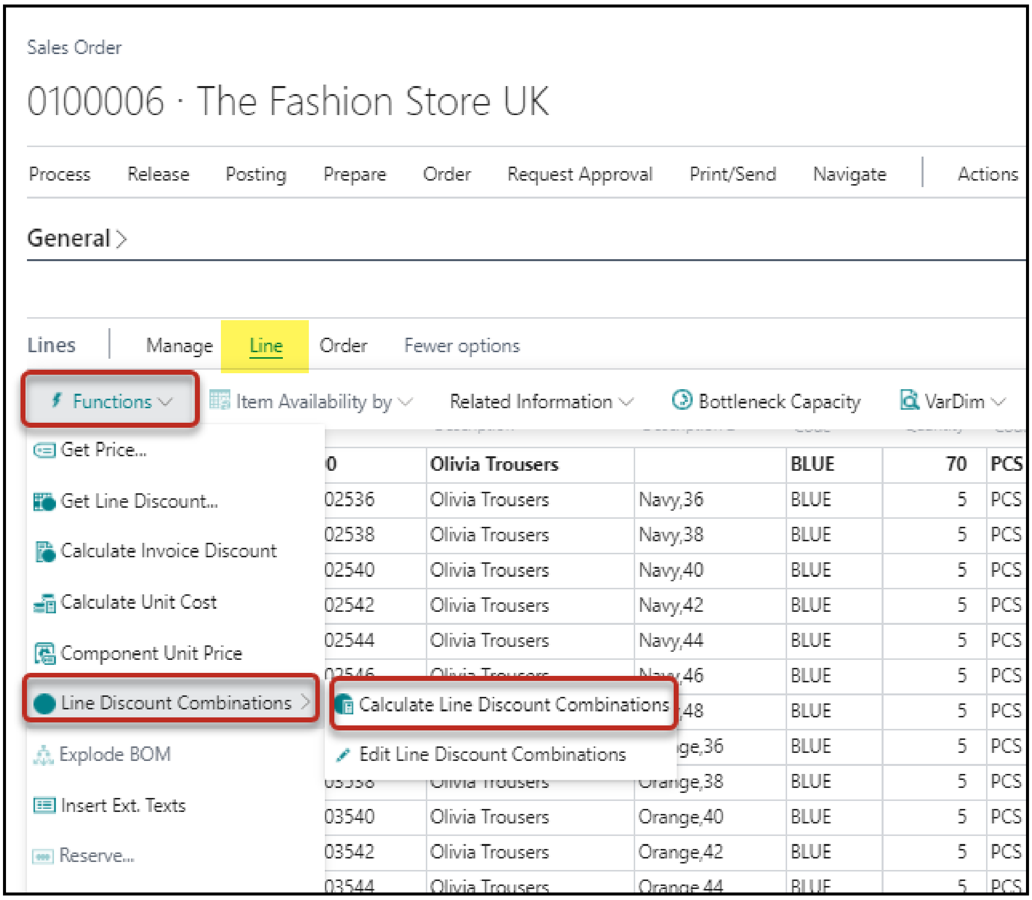
NOTE
The rest of the Fields of the Sales Discount Lines are standard Business Central fields and will not be discussed.

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

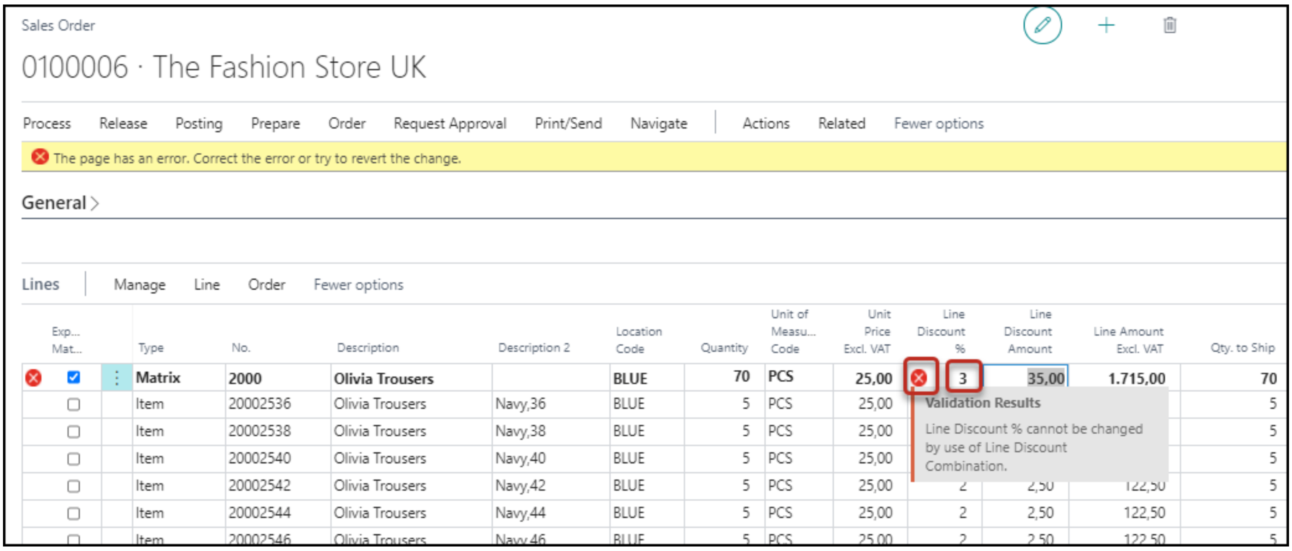
Via the Lines Actions, click ***Line, Functions, Line Discount Combinations, Calculate Line Discount Combinations***



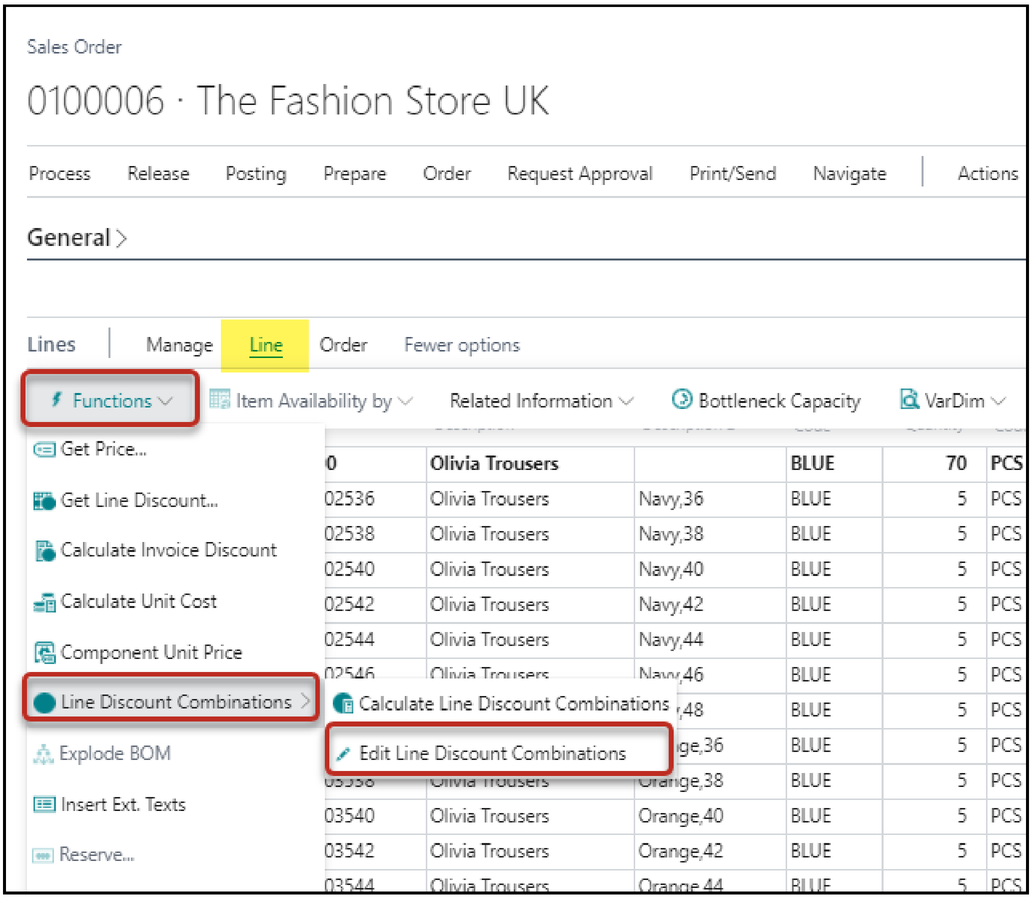
This will calculate the **Line Discounts** for the current Sales Line; this can take some time, because it might have to check quantities/amounts in all Sales Orders.

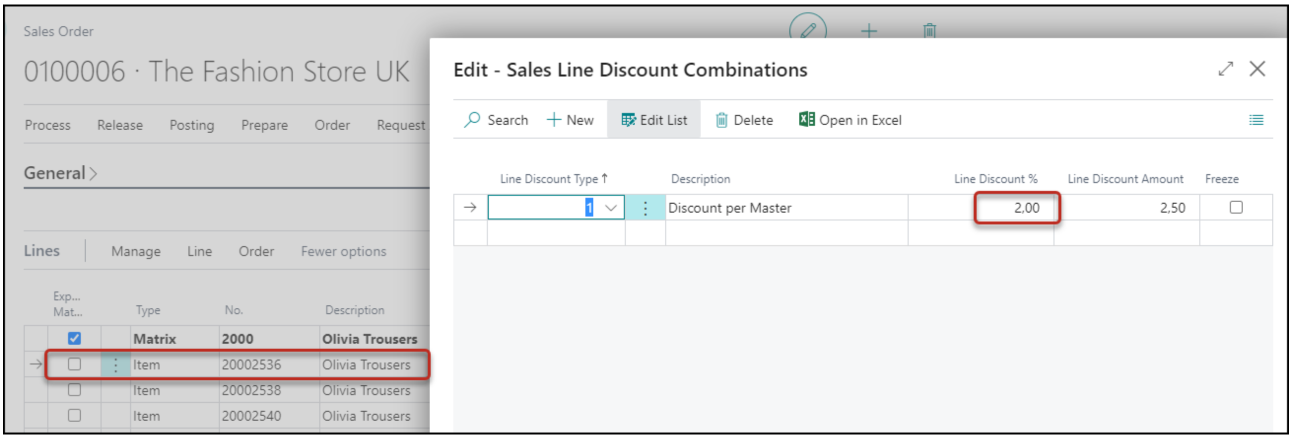
MANUAL CHANGING LINE DISCOUNT %

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:



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.





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: do not 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.

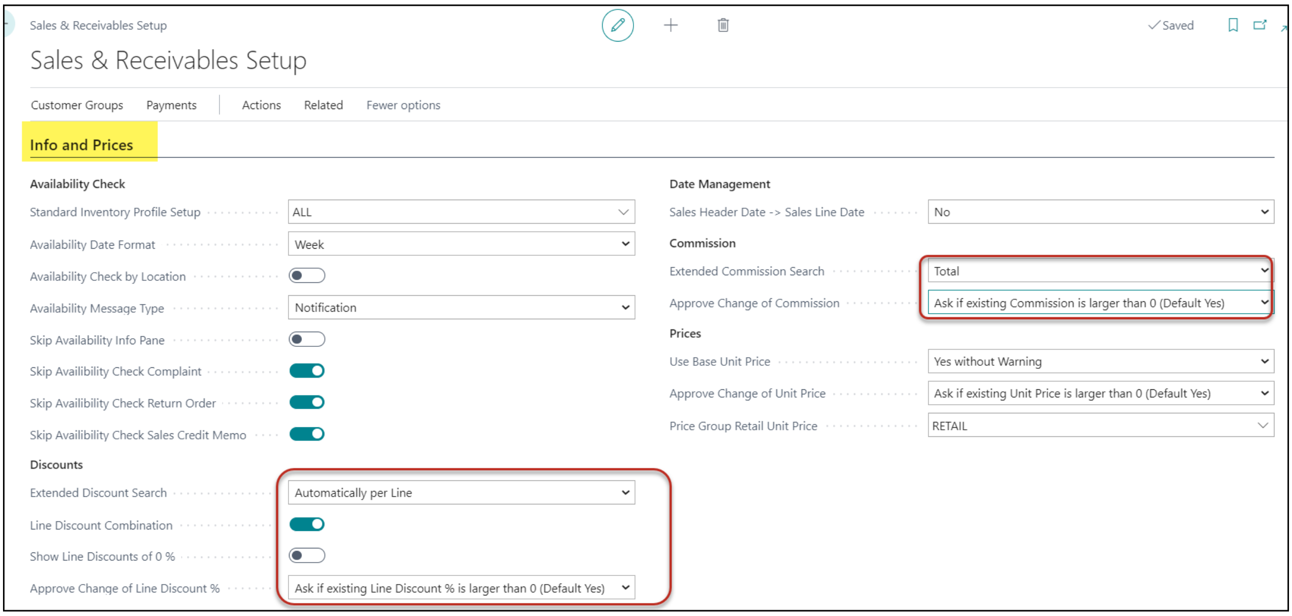
NOTE

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.

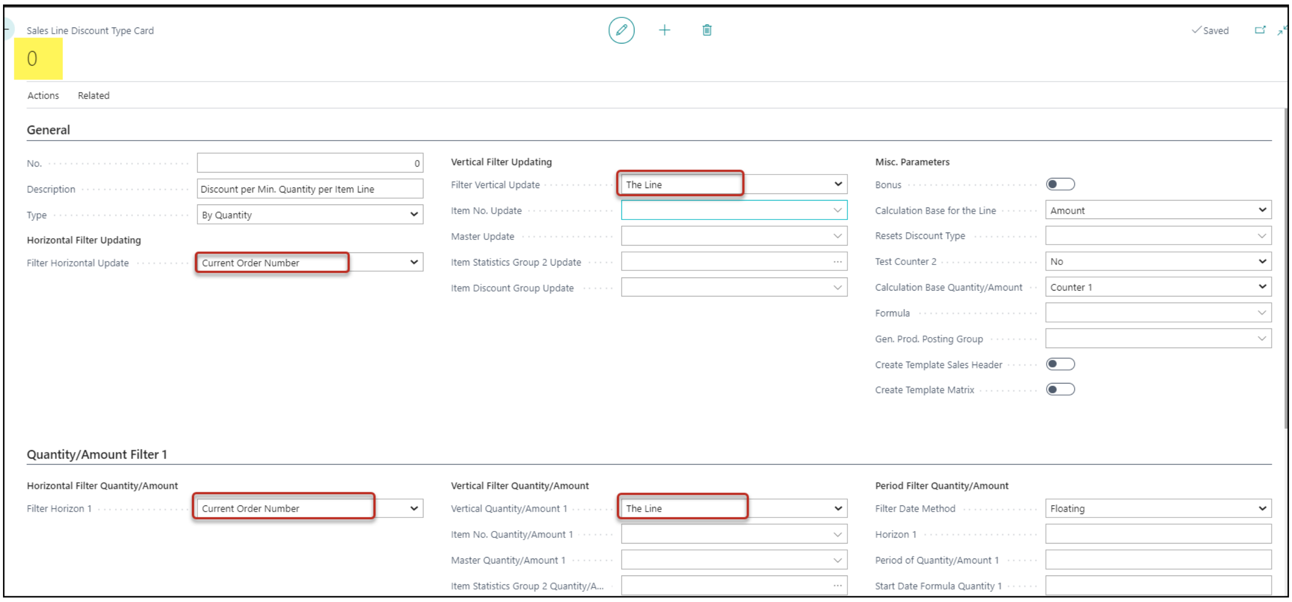
EXAMPLES SALES LINE DISCOUNTS

As mentioned earlier: to work with the **TRIMIT Sales Line Discounts** you need to set the Parameter **Extended Discount Search** to a value <> *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:



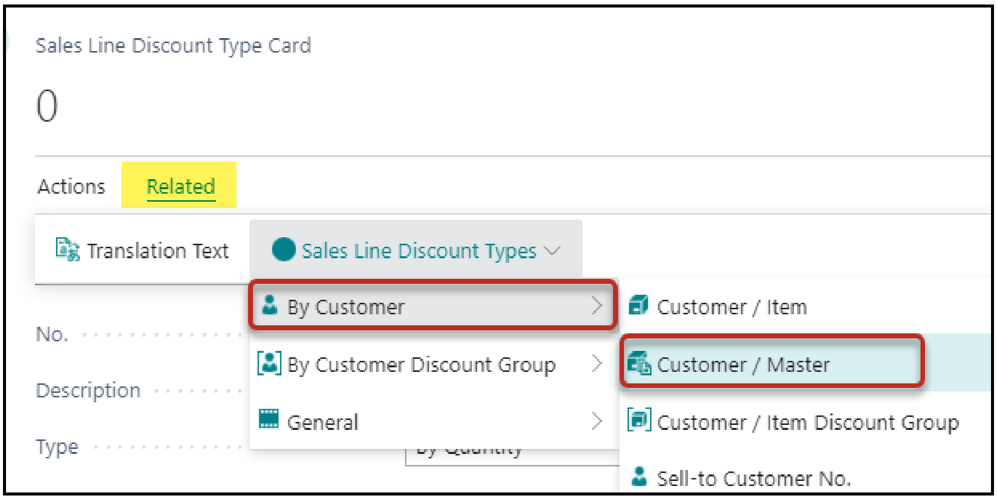
We have created a **Sales Line Discount Type** *0 (Zero)* for the regular Business Central Sales Line Discounts:
Departments/Sales & Marketing/Administration/Sales Line Discount Types



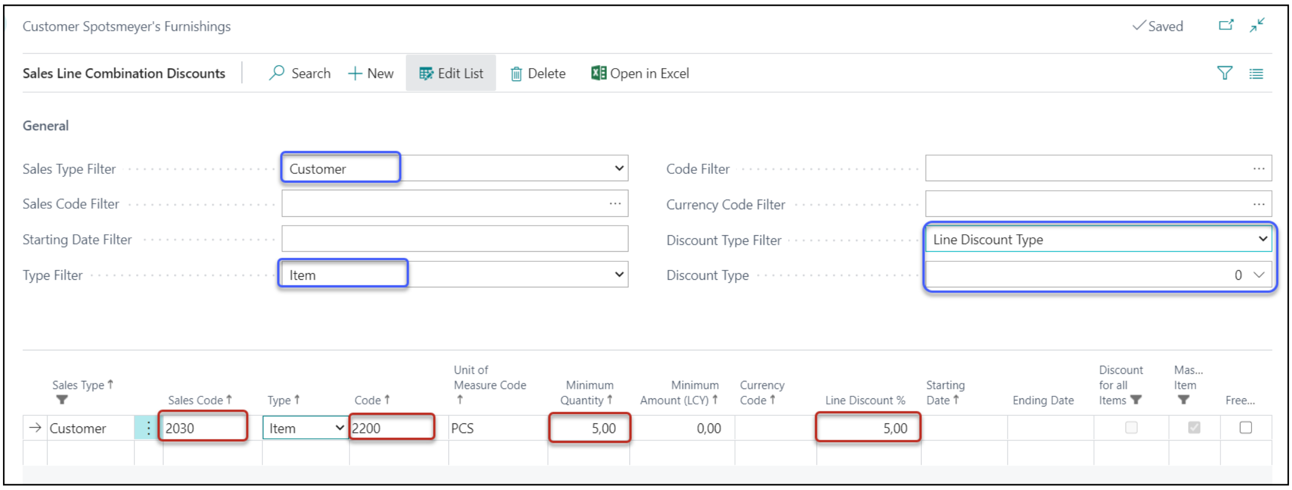
EXAMPLE 1 – REGULAR BUSINESS CENTRAL SALES LINE DISCOUNT VIA TRIMIT SALES LINE DISCOUNTS

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.

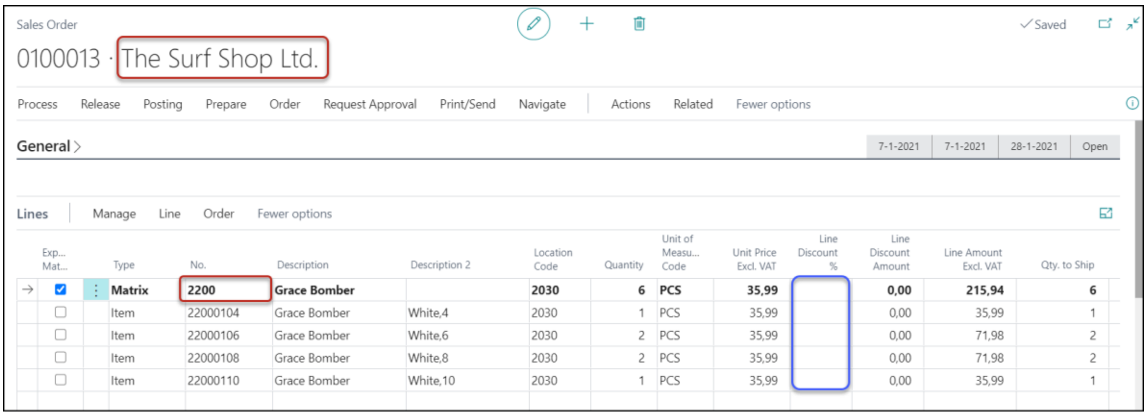
In the **Sales Line Discount Type** by clicking ***Related, Sales Line Discount Type, Customer, Customer / Master*** we entered the Discount:



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.



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



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	2030	6	PCS	35,99	5,00139	10,80	205,14	6
	☐		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

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

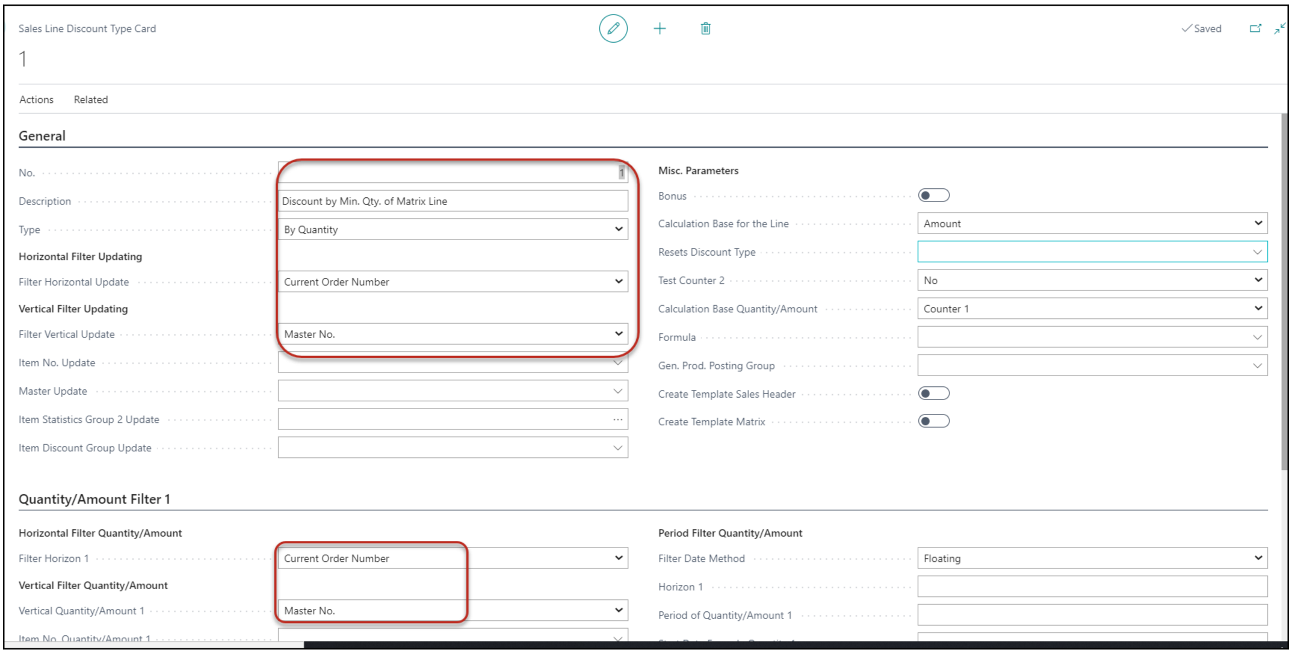
35,99 x 0,05 = 1,7995 x 6 = 10,797 ➔ 10,80

10,80 /6/35,99*100 = 5,001389274798555 ➔ 5,00139 %

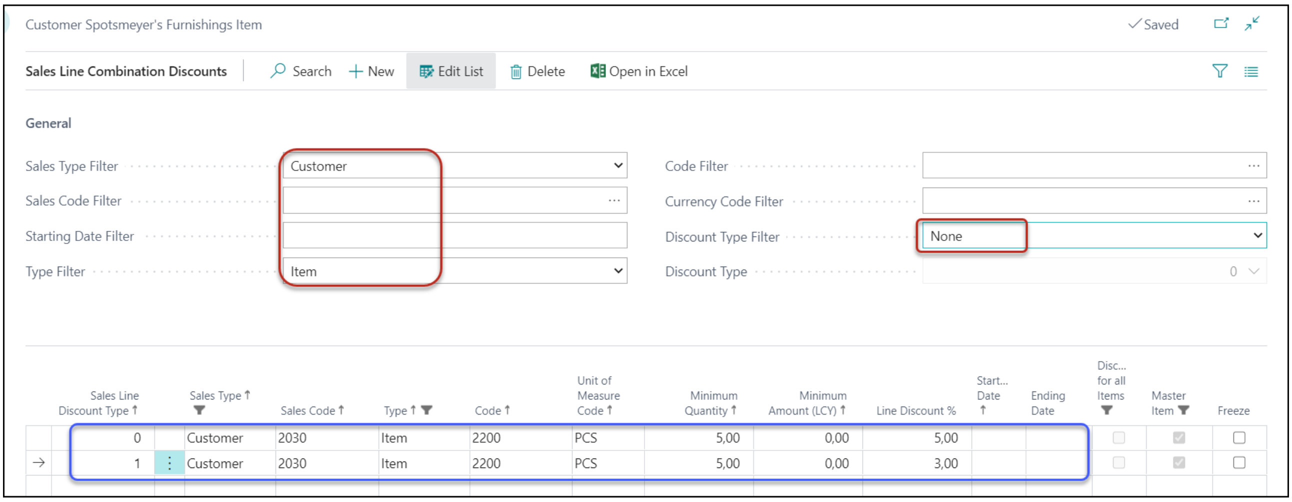
EXAMPLE 2 – SALES LINE DISCOUNT PER MASTER IN ONE SALES ORDER

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

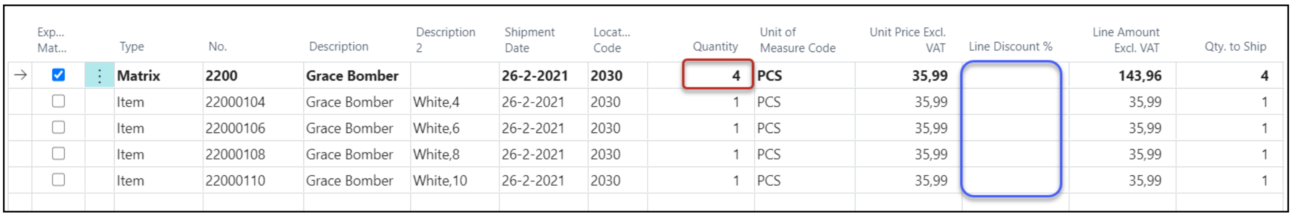
We first create a new **Sales Line Discount Type** to support this.



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



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.



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

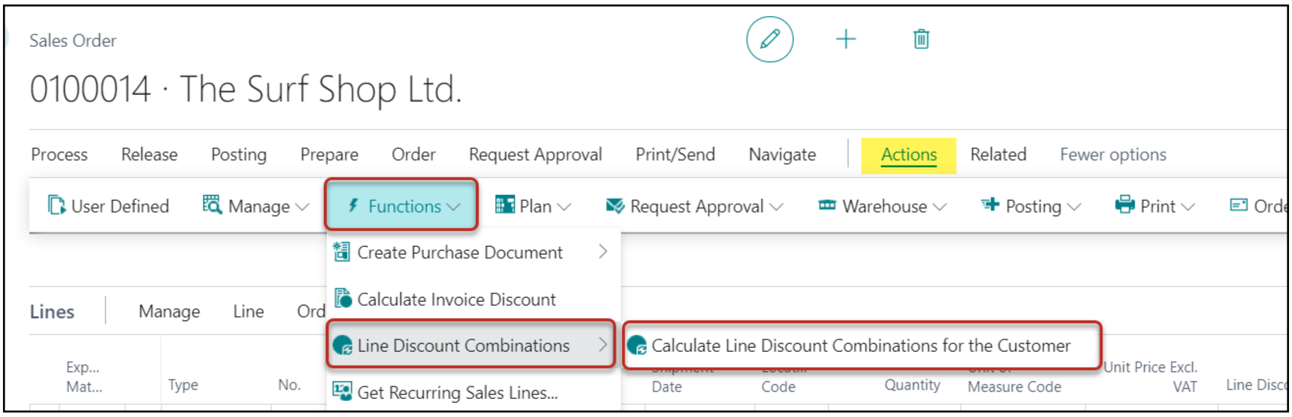
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
☑	**Matrix**	**2200**	**Grace Bomber**		**26-2-2021**	**2030**	**4**	**PCS**	**35,99**	**3,00083**	**139,64**	4
☐	Item	22000104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

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

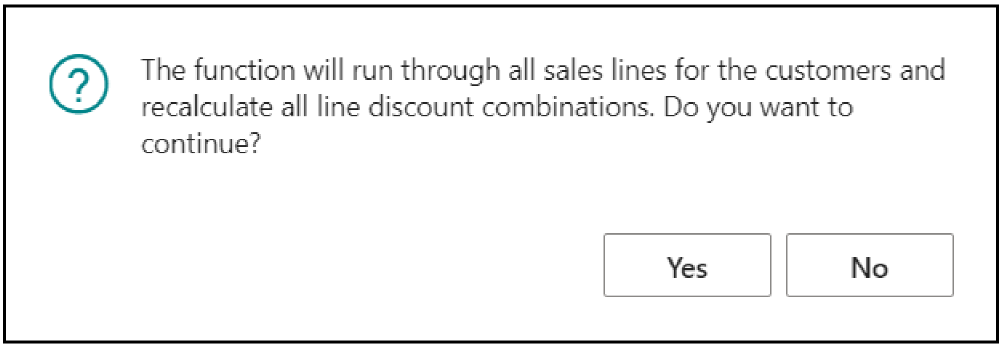
Lines | Manage | Line | Order | Fewer options

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:

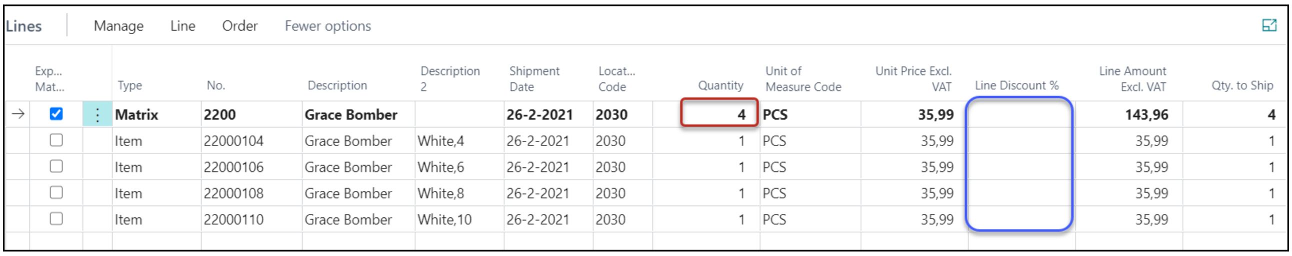


You will get a message:



Click **Yes**.

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

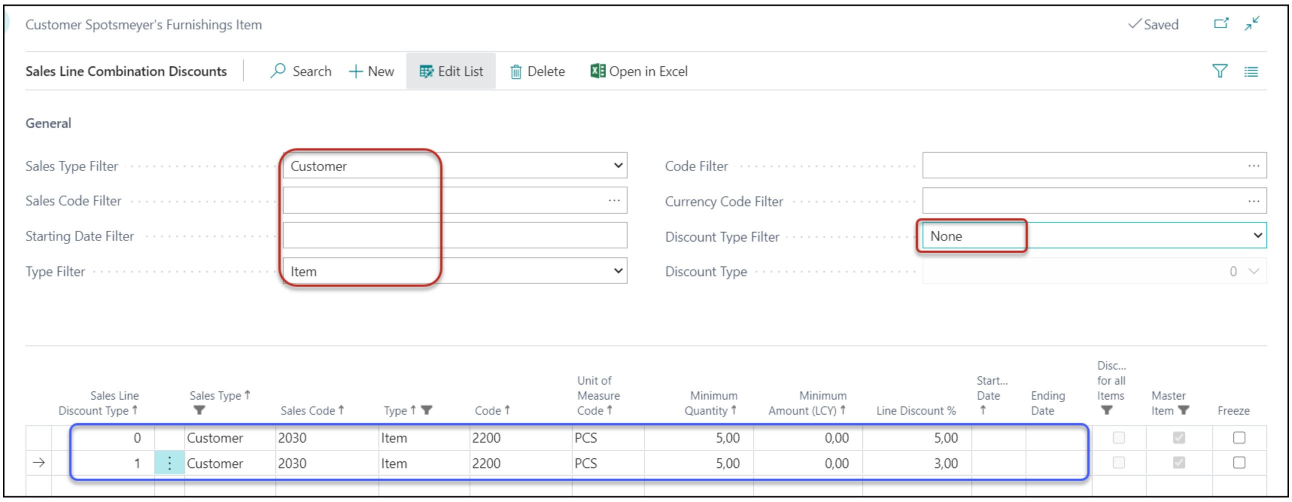


Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Locat... Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
☑	**Matrix**	**2200**	**Grace Bomber**		**26-2-2021**	**2030**	**4**	**PCS**	**35,99**		**143,96**	**4**
☐	Item	22000104	Grace 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

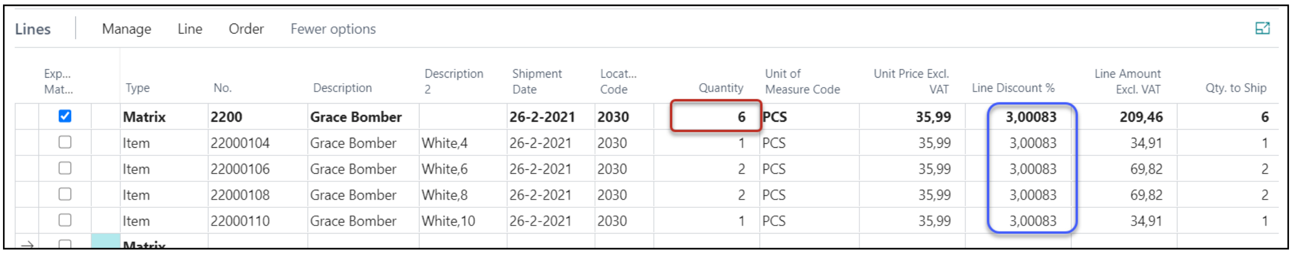
So, using the **TRIMIT Sales Line Discount Types** for Discounts on other levels as simply the individual Item Line within a Sales Order, might ask strict procedures regarding updating the **Line Discounts %** in several scenarios.
Otherwise, the **Line Discount %** will not be correct!

EXAMPLE 4 – SALES LINE DISCOUNT PER ITEM AND MASTER

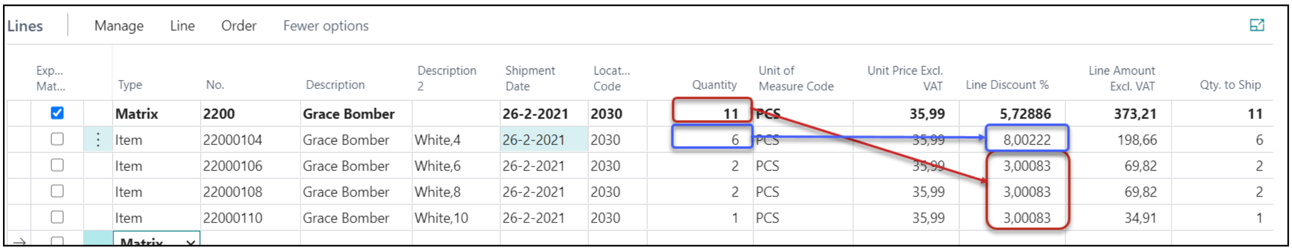
We still have the same **Sales Line Discount Type** *0* with regular Business Central Discount per Item and **Sales Line Discount** *1* for Discount per Master. And on Master *2200* we have the **Sales Line Discounts:**



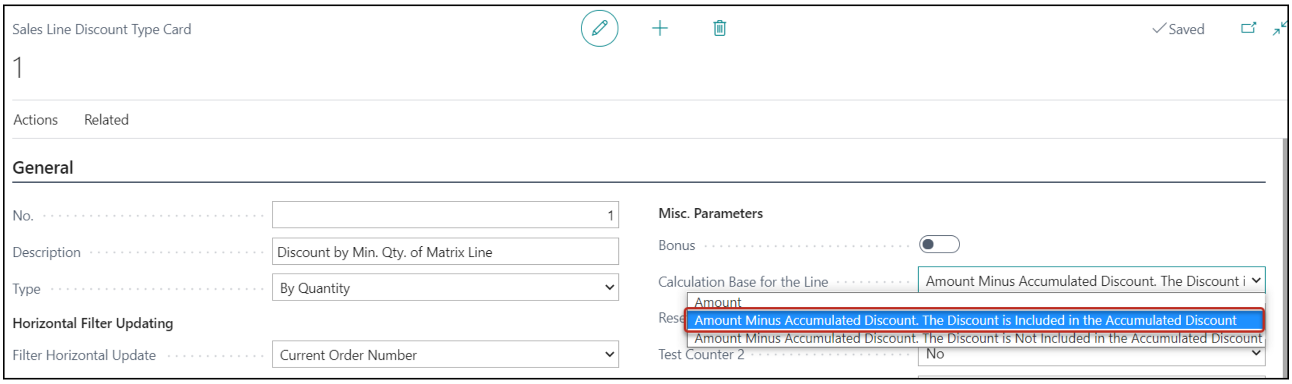
We start with a total Matrix Quantity of *6,* so get *3,00 %* Sales Line Discount:



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



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



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

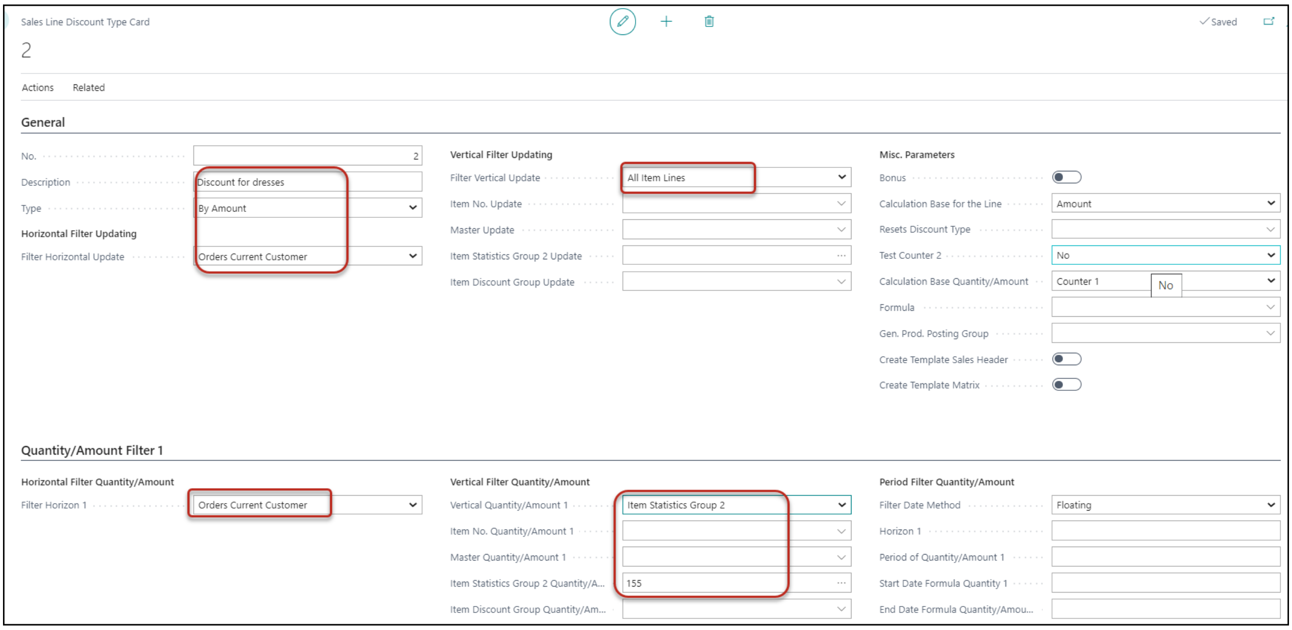
Lines | Manage | Line | Order | Fewer options

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**											

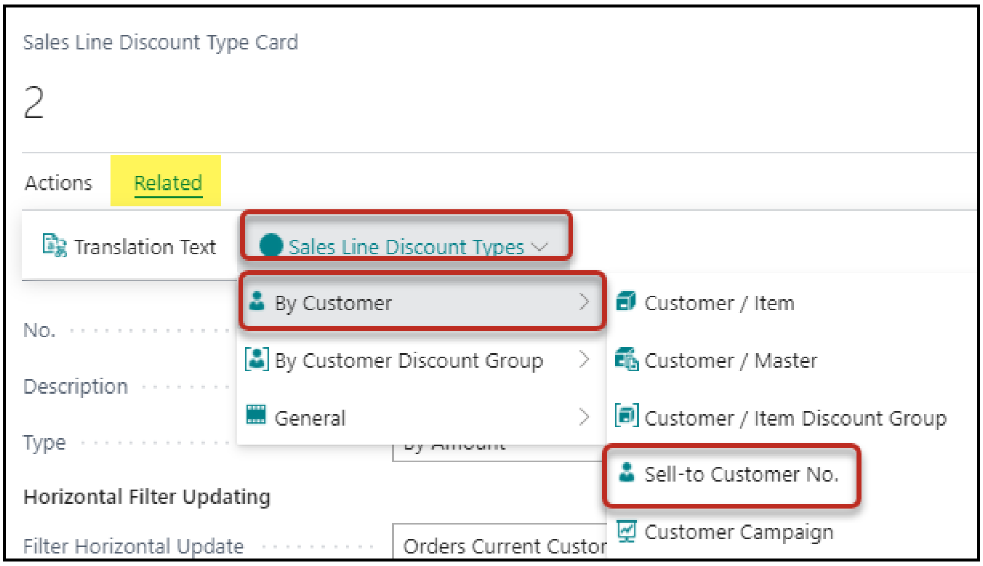
EXAMPLE 5 – CUSTOMER 2020 GETS 10 % DISCOUNT OVER ALL THEIR DRESSES

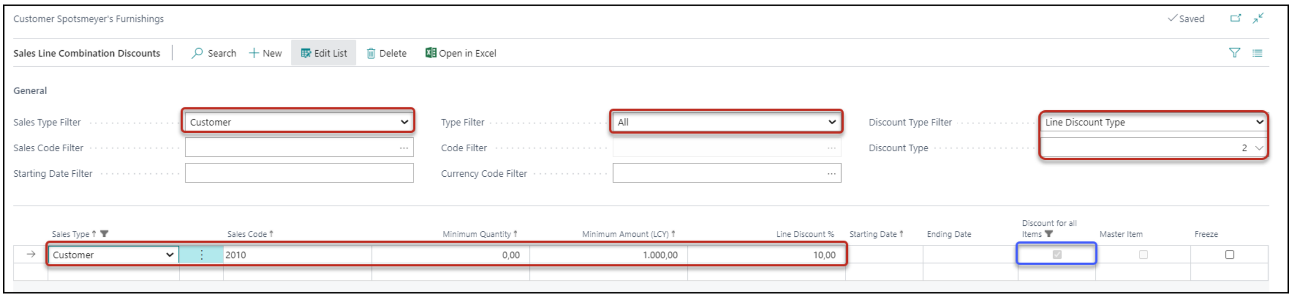
Customer *2010* will get *10 %* Discount if they buy more than an amount of *1000* on *Dresses*.

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



And via





So, if we have a Sales Order with an Amount less than *1000* on the dresses, we will not 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

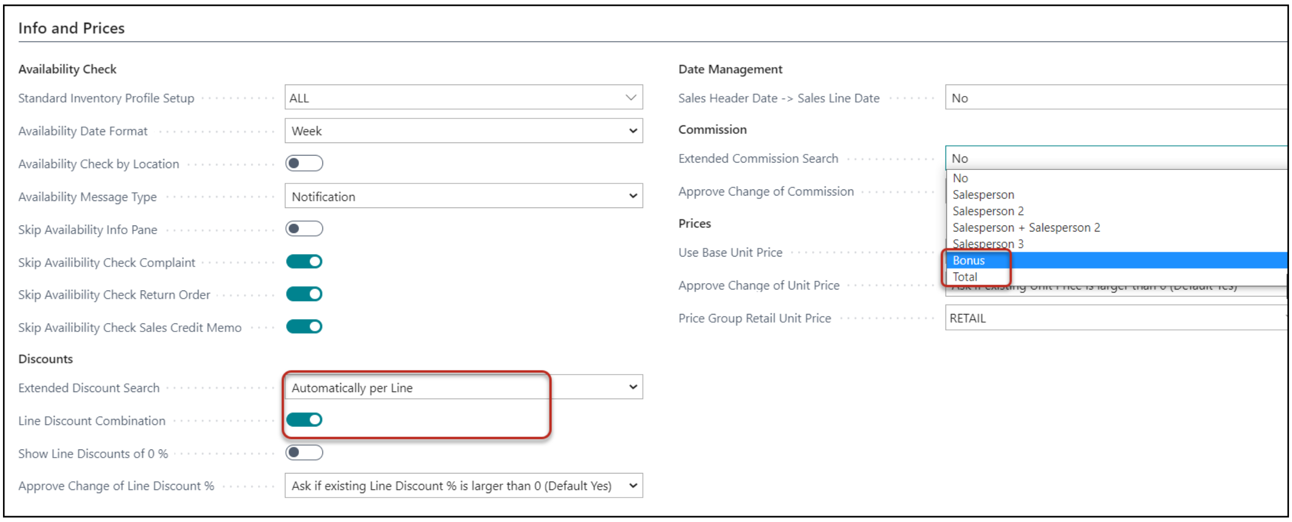
Exp... Mat...	Type	No.	Description	Description 2	Shipment Date	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty
☑	**Matrix**	**2300**	**Daisy Dress**		**26-2-2021**	**SHOEPROD**	**10**	**PCS**	**85,166**	**9,999**	**766,50**	
☐	Item	23002036	Daisy 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

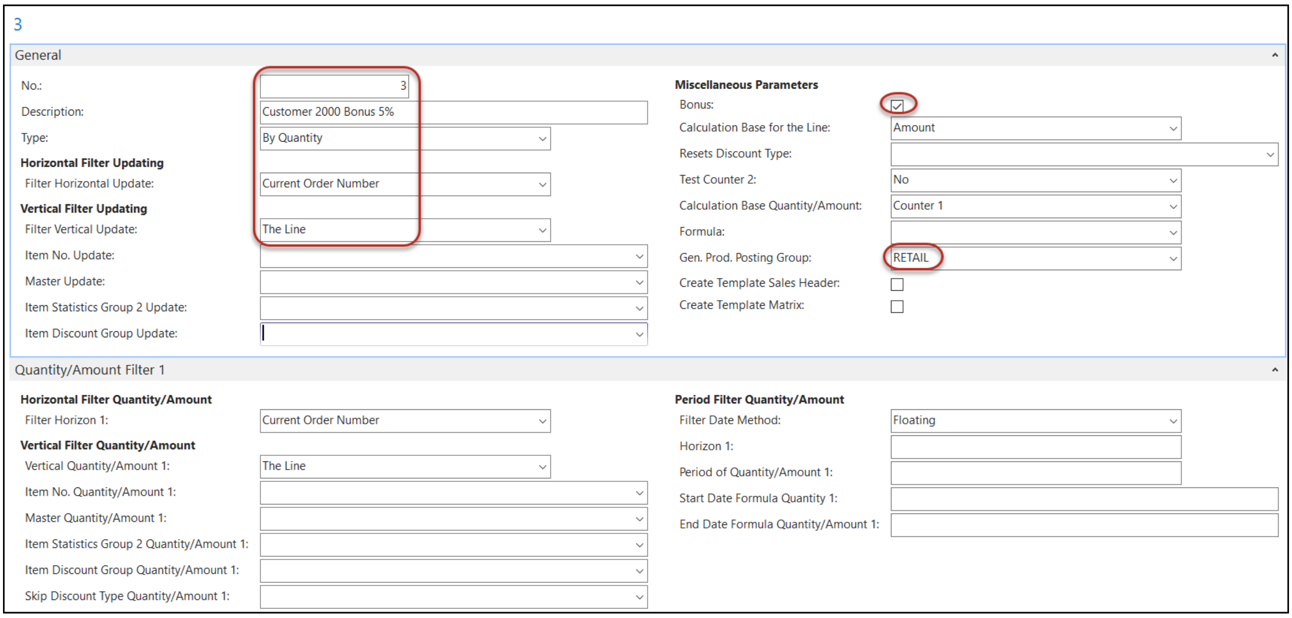
There is a special type of **Sales Line Discount Type**: the *Bonus.*

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

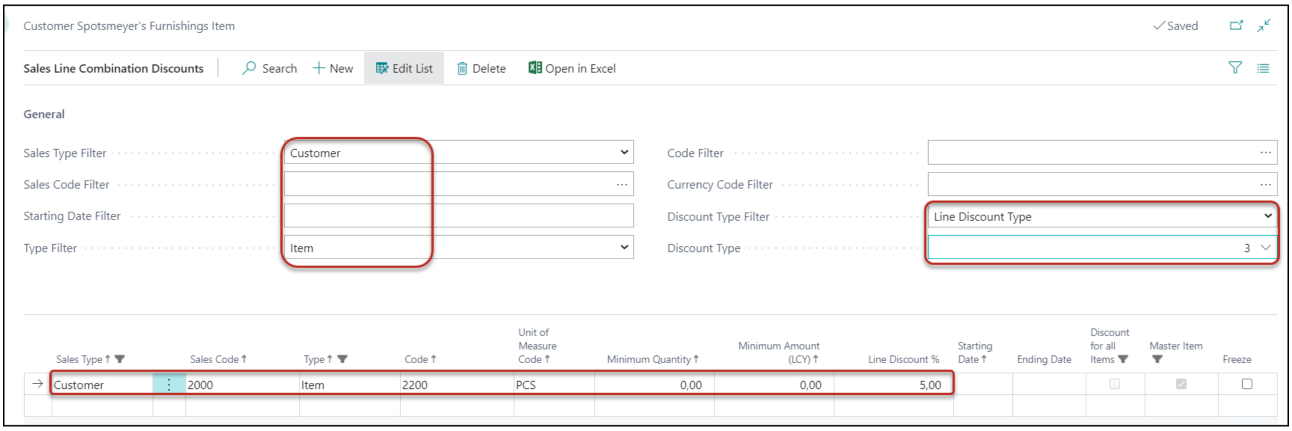
Therefore, besides the Parameters for the **Line Discounts,** you also need to set the Parameter for **Extended Commission Search** in the **Sales & Receivables Setup** to *Bonus* or *Total*:



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

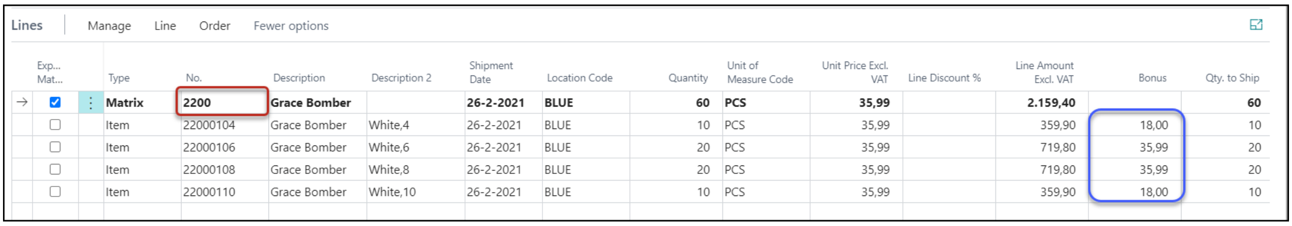


In the **Discount Type** *3,* click ***Relations, Sales Line Discount Type, By Customer***, ***Customer/Master***
Now we will enter the **Sales Code** (Customer), **Code** (Master) and the **Line Discount %**.



Sales Type	Sales Code	Type	Code	Unit of Measure Code	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			☐	☑	☐

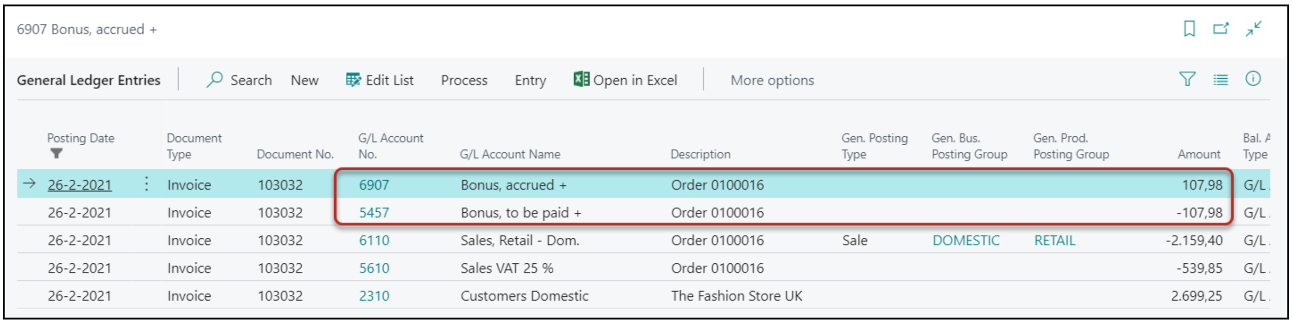
If you now enter a Sales Order for Customer *2000* and Master *2200*:



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:



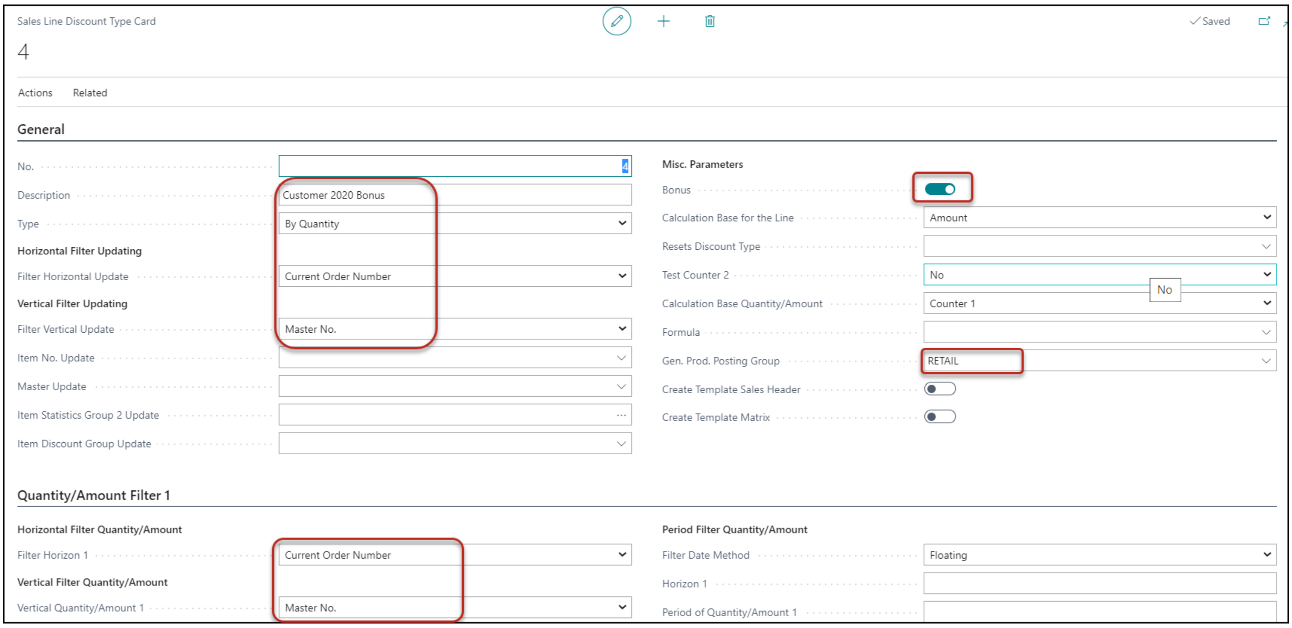
Posting Date	Document Type	Document No.	G/L Account No.	G/L Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. A Type
26-2-2021	Invoice	103032	6907	Bonus, accrued +	Order 0100016				107,98	G/L
26-2-2021	Invoice	103032	5457	Bonus, to be paid +	Order 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

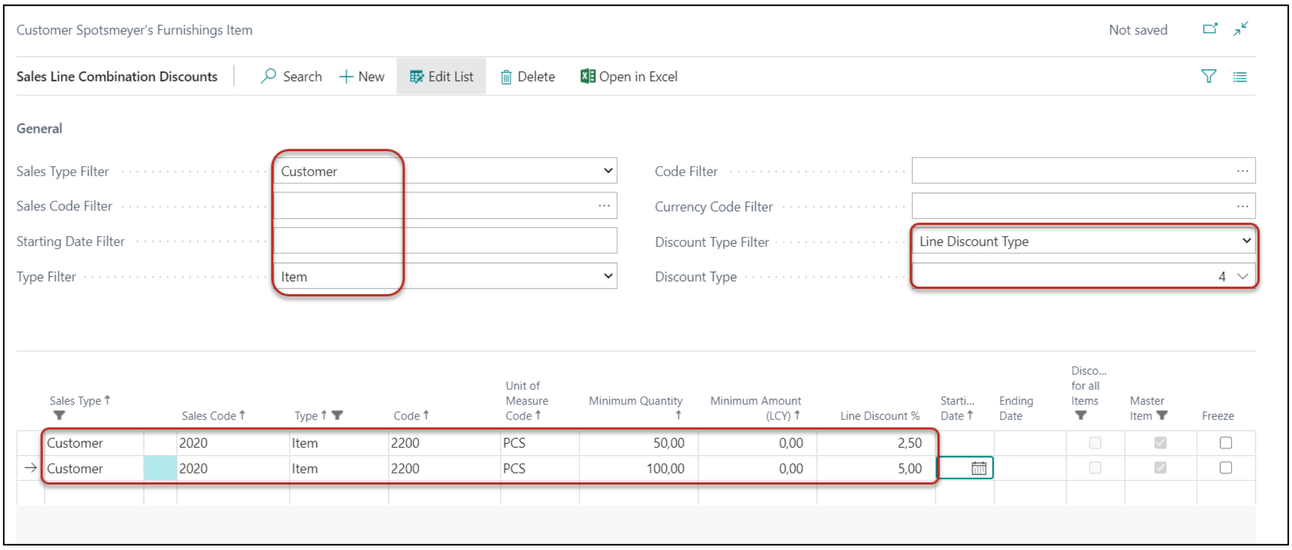
Customer *2020* will get a Bonus of *2,5 %* if the total quantity for Master *2200* will exceed *50* Pairs within 1 Sales Order and will get a Bonus of *5 %* if the total quantity for Master *2200* will exceed *100 Pairs* within 1 Sales Order.

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



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 %**.



Sales Type	Sales Code	Type	Code	Unit of Measure Code	Minimum Quantity	Minimum Amount (LCY)	Line Discount %	Starting Date	Ending Date	Discount 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.***