

# Introduction to MS Dynamics 365 Business Central

(Discounts)

Ing.J.Skorkovský,CSc.

MASARYK UNIVERSITY BRNO, Czech Republic  
Faculty of economics and business administration  
Department of Business Management

# Announcement

- Student BC instances do not have the option to activate the Feature Management application to add some new functionality such as Sales Price Lists due to user settings. So, if this functionality appears in the presentation, it is only an awareness that such possibilities might be available.
- However, knowing about such applications is very useful because you need to know about all the other options that are available to users with higher permissions

Tell me what you want to do

Go to Pages and Tasks

> Feature Management



# Feature Management

Feature		Automatically enabled from	Enabled for	Get started	Current Company Status
→ <a href="#">Feature Update: Allow using of multiple posting groups for customer or vendor</a>	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Disabled
Feature Preview: Analysis mode, quickly analyse data directly in Business Central.	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	<a href="#">Try it out</a>	Disabled
Feature Update: Replace the existing Automatic Account Codes functionality wi...	<a href="#">Learn more</a>	Update 25.0 (Q4 2024)	None	–	Disabled
Feature Update: Use the platform table 'Report Layout List' for adding and sele...	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Disabled
Feature Preview: Create AI-powered product descriptions with Copilot	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	<b>All Users</b>	–	<b>Enabled</b>
Feature Update: Enable use of new extensible exchange rate adjustment, includi...	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Disabled
Feature Update: Enable use of new extensible invoice posting engine	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Disabled
<b>Feature: Convert user group permissions</b>	<a href="#">Learn more</a>	Update 25.0 (Q4 2024)	<b>All Users</b>	<a href="#">Try it out</a>	<b>Enabled</b>
Feature: Enable using Form 1096 to transmit paper Tax Forms to the IRS in the ...	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	<b>All Users</b>	–	<b>Enabled</b>
Feature Update: Modern Action Bar	<a href="#">Learn more</a>	Update 24.0 (Q2 2024)	<b>All Users</b>	<a href="#">Try it out</a>	<b>Enabled</b>
Feature Update: Legacy list views are hidden	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	<a href="#">Try it out</a>	Disabled
Feature Update: Use tracking by package number in reservation and tracking sy...	<a href="#">Learn more</a>	Update 24.0 (Q2 2024)	None	–	Disabled
Feature: New approval workflow experience with Power Automate templates	<a href="#">Learn more</a>	Update 25.0 (Q4 2024)	<b>All Users</b>	<a href="#">Try it out</a>	<b>Enabled</b>
Feature: New Microsoft Word report rendering platform.	<a href="#">Learn more</a>	Update 24.0 (Q2 2024)	<b>All Users</b>	–	<b>Enabled</b>
Feature Update: Replace the existing Intrastat functionality with the new Intrast...	<a href="#">Learn more</a>	Update 24.0 (Q2 2024)	None	–	Disabled
Feature Update: Replace Multiple Interest Rate CZ with Finance Charge Interest ...	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Disabled
Feature Update: Replace VAT Date CZ with VAT Reporting Date	<a href="#">Learn more</a>	Update 25.0 (Q4 2024)	None	–	Disabled
<b>Feature Update: New sales pricing experience</b>	<a href="#">Learn more</a>	Update 24.0 (Q2 2024)	<b>All Users</b>	–	<b>Completed ...</b>
Feature Update: Auto-save with every field change	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	<b>All Users</b>	<a href="#">Try it out</a>	<b>Enabled</b>
Feature: Enable using of Service Declaration (Intrastat for Services)	<a href="#">Learn more</a>	Update 23.0 (Q4 2023)	None	–	Enabled

# User administrations - Teacher

Teacher 1

[Effective Permissions](#)
[ACS Setup](#)
[Change Password](#)
[Send Email](#)
[Sent Emails](#)
[More options](#)

Full Name ..... Teacher 1 ..... Authentication Email .....  
 License Type ..... Full User ..... Application ID .....  
 Status ..... Active ..... Authentication Status ..... Disabled  
 Expiry Date ..... Web Service  
 Contact Email ..... Web Service Access Key .....

**Windows Authentication**

Windows User Name .....

**Access Control Service Authentication**

ACS Access Status ..... Disabled

**Business Central Password Authentication**

Password ..... User must change password at next login .....

[User Permission Sets](#)
[New Line](#)
[Delete Line](#)
[Permissions](#)

Permission Sets				Result			
Type	Permission Set	Name	Scope	Permission Set	Name	Scope	Inclusion Status
→ Include	APPLICATION OBJECTS - E...		System	→ APPLICATION OBJECTS - EXEC		System	Full
Include	SUPER (DATA)	Superuser of data	System	SUPER (DATA)	Superuser of data	System	Full
Include	SYSTEM OBJECTS - EXEC		System	SYSTEM OBJECTS - EXEC		System	Full

# User administrations - Student

User Card

Effective Permissions ACS Setup Change Password Send Email Sent Emails Více možností

Status: Active

Expiry Date:

Contact Email:

Web Service Access Key:

### Windows Authentication

Windows User Name:

### Access Control Service Authentication

ACS Access Status: Disabled

### Business Central Password Authentication >

User Permission Sets: [Nový řádek](#) [Odstranit řádek](#) [Permissions](#)

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ SUPER	Tato role má všechna p...			System

Sady oprávnění			
Typ ↑	Sada oprávnění ↑	Název	Rozsah
→ Včetně	APPLICATION OBJECTS - E...		System
Včetně	SUPER (DATA)	Superuživatel dat	System
Včetně	SYSTEM OBJECTS - EXEC		System

Výsledek			
Sada oprávnění	Název	Rozsah	Stav zařazení
→ APPLICATION OBJECTS - EXEC		System	Úplně
SUPER (DATA)	Superuživatel dat	System	Úplně
SYSTEM OBJECTS - EXEC		System	Úplně

# Statement about users

- Considering the users' settings, both parties (teacher and student) have the same types of settings
- Another option is to set specific permission



# Permission sets - teacher

Permission Set ↑	Name	Type ↑	Extension Name
FA-JOURNAL, POST	Post FA journals	System	OnPrem Permissions
FA-PERIODIC	FA periodic activities	System	OnPrem Permissions
FA-REGISTER	Read FA registers	System	OnPrem Permissions
FA-SETUP	FA setup	System	OnPrem Permissions
<b>FEATURE MGT. - ADMIN</b>	<b>Feature Management - Admin</b>	System	System Application
FOUNDATION	Recommended for UI Removal	System	OnPrem Permissions

Permissions

Type	Object Type ↑	Object ID ↑	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
(There is nothing to show in this view)									

Permission Sets ↓

Type ↑	Permission Set ↑	Name	Scope	Result ↓	Permission Set	Name	Scope	Inclusion Status	
→ Include	⋮	FEATURE KEY - ADMIN	System	→	→	FEATURE KEY - ADMIN	⋮	System	Full

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
Table Data	200000121	User Property	Indirect				
Table Data	200000146	Intelligent Cloud	Indirect				
Table Data	200000175	Scheduled Task	Indirect				
Table Data	200000211	Feature Key	Indirect		Indirect		
Table	2610	<b>Feature Data Update Status</b>					Yes
Codeunit	2611	<b>Feature Management Facade</b>					Yes
Codeunit	2612	Update Feature Data					Yes

# Permission sets – student

Typ objektu ↑	ID objektu ↑	Object Name	Právo čtení	Právo vložit	Právo změnit	Právo odstranit	Právo spustit
Table Data	9005	Uživatel plánu		Nepřímo	Nepřímo	Nepřímo	
Table Data	2000000006	Společnost	Nepřímo				
Table Data	2000000045	Windows Language	Nepřímo				
Table Data	2000000053	Access Control	Nepřímo				
Table Data	2000000073	Přizpůsobení uživatele	Nepřímo	Nepřímo	Nepřímo		
Table Data	2000000080	Přizpůsobení dat stránky	Ano				
Table Data	2000000110	Aktivní relace	Nepřímo				
Table Data	2000000111	Událost relace	Nepřímo				
Table Data	2000000120	Uživatel	Nepřímo		Nepřímo		
Table Data	2000000121	Vlastnost uživatele	Nepřímo				
Table Data	2000000146	Intelligent Cloud	Nepřímo				
Table Data	2000000175	Plánovaná úloha	Nepřímo				
Table Data	2000000211	Klíč funkce	Nepřímo		Nepřímo		
Table	2610	Stav funkce aktualizace dat					Ano
Codeunit	2611	Feature Management Facade					Ano
Codeunit	2612	Update Feature Data					Ano

**Even here there is no visible difference**

The solution to this quasi-mystery is really simple - a change of language.  
The reason is the different language settings of the student and the teacher



# Student database

Moje nastavení - 111111

Role ..... Sales Order Processor ...

Společnost ..... CRONUS International Ltd. ...

Pracovní datum ..... 23.01.2025

Oblast ..... Czech (Czechia) ...

Jazyk ..... Czech (Czechia) ...

Časové pásmo ..... (UTC+01:00) Amsterdam, Berlin, Bern, Ro... ...

Notifications ..... Change when I receive notifications.

Výukové tipy .....

**Bezpečnost**

Vaše poslední přihlášení bylo 06.03.24 10:15.

Ok Storno

Řekněte mi, co chcete udělat

Správa

Přejít na stránky a úlohy

- > Správa funkcí Správa
- > Správa tiskáren Správa
- > Správa rozšíření Správa

# Správa funkcí = Feature Management

Funkce		Automaticky povoleno od	Povoleno pro	Začít	stav společnosti
→ Aktualizace funkcí: Povolit použití více účto s...	⋮ Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Zakázáno
Náhled funkcí: Režim analýzy, rychlá analyza ...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	Vyzkoušejte	Zakázáno
Aktualizace funkcí: Nahradte stávající funkci ...	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	Žádný	–	Zakázáno
Aktualizace funkcí: Použijte tabulku platform...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Zakázáno
Náhled funkcí: Vytváření popisů produktů vy...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	<b>Všichni uživatelé</b>	–	<b>Povoleno</b>
Aktualizace funkcí: Povolit použití nové rozšíř...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Zakázáno
Aktualizace funkcí: Povolení použití nového r...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Zakázáno
Funkce: Převod oprávnění skupiny uživatelů	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	<b>Všichni uživatelé</b>	Vyzkoušejte	<b>Povoleno</b>
Funkce: Povolit použití formuláře 1096 k pře...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	<b>Všichni uživatelé</b>	–	<b>Povoleno</b>
Aktualizace funkcí: Moderní panel akcí	Naučte se více	Aktualizace 24.0 (2. čtvrtletí 2024)	<b>Všichni uživatelé</b>	Vyzkoušejte	<b>Povoleno</b>
Aktualizace funkcí: Starší zobrazení seznamu ...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	Vyzkoušejte	Zakázáno
Aktualizace funkce: Použití sledování podle čí...	Naučte se více	Aktualizace 24.0 (2. čtvrtletí 2024)	Žádný	–	Zakázáno
Funkce: Nové prostředí workflow schvalování...	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	<b>Všichni uživatelé</b>	Vyzkoušejte	<b>Povoleno</b>
Funkce: Nová platforma pro vykreslování ses...	⋮ Naučte se více	Aktualizace 24.0 (2. čtvrtletí 2024)	<b>Všichni uživatelé</b>	–	<b>Povoleno</b>
Aktualizace funkcí: Nahradit stávající funkci l...	Naučte se více	Aktualizace 24.0 (2. čtvrtletí 2024)	Žádný	–	Zakázáno
Aktualizace funkce: Nahrazení Více úrokovéc...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Zakázáno
Aktualizace funkcí: Nahradit datum DPH CZ ...	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	Žádný	–	Zakázáno
Aktualizace funkcí: Nové zkušenosti s cenami...	Naučte se více	Aktualizace 24.0 (2. čtvrtletí 2024)	Žádný	–	Zakázáno
Aktualizace funkcí: Automatické ukládání při ...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	<b>Všichni uživatelé</b>	Vyzkoušejte	<b>Povoleno</b>
Funkce: Povolit použití deklarace služby (Intr...	Naučte se více	Aktualizace 23.0 (4. čtvrtletí 2023)	Žádný	–	Povoleno
Aktualizace funkcí: Použití nových šablon zák...	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	Žádný	–	Zakázáno
Aktualizace funkcí: Povolení použití exportu s...	Naučte se více	Aktualizace 25.0 (4. čtvrtletí 2024)	Žádný	–	Zakázáno

# Statement

- Since students have the same rights (permissions) as teachers, they can activate the required function. The problem is that it is not possible to deactivate the activated function without administrator permission and none of the BC cloud users at ESF. And the PWP presentation describing easier setup and use of discounts would no longer be fully valid. So there is a BC - 6-2 file that describes the creation of a Sales Price List.

# Discounts

- **Use of discounts:**

- Support of „Sales“ actions->lower stock value and better liquidity
- Support of marketing -> Acquiring new customers
- Basic incentives for any client
- To differentiate between clients (based on sales in the last period or other criteria)
- **Discount types :**
  - Price ->modification of Unit Price (an absolute change)
  - Line ->change the final price in %
  - Invoice Discount ->based on the level of the total amount on the invoice

# Discount calculations - example I.

- Unit price=100
- Change Unit price to 90 (icon Prices)
- Line discount 10 % added
- New updated Unit price on the created document =  $90 * 0,9 = 81$

Unit price = Prodejní cena

# 1st possibility to access discounts setup from the customer list

No. ↑	Name	Center	Location Code	Phone No.	Contact
01121212	Spotsmeyer's Furnishings		YELLOW		Mr. Mike Nash
01445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald
01905893	Candoxy Canada Inc.		YELLOW		Mr. Rob Young
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner
01905902	London Candoxy Storage Cam...		YELLOW		Mr. John Kane
10000	The Cannon Group PLC	BIRMINGHAM	BLUE		Mr. Andy Teal
	Selangorian Ltd.				Mr. Mark McArthur
	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat
	Highlights Electronics Sdn Bhd		GREEN		Mr. Mark Darrell Boland
	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman
	Somadis		YELLOW		M. Syed ABBAS

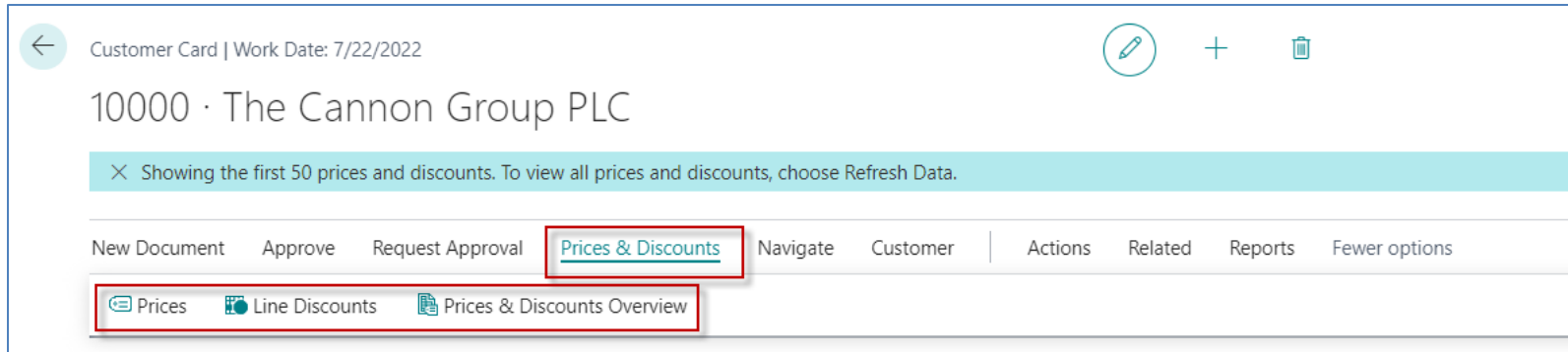
**Prices & Discounts**

- Prices
- Line Discounts

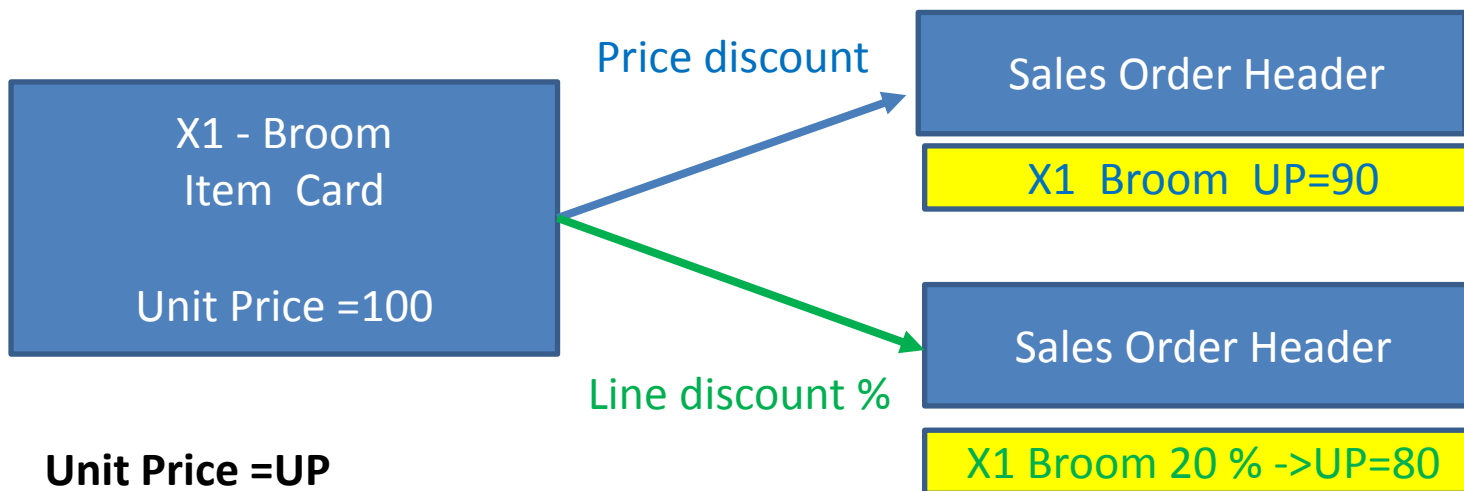
**Manage**

- View

## 2nd possibility to access discounts setup from the customer card



Here you can set the different unit prices in absolute values as well as the Line discounts in % depending on the quantity of goods (treshold)



## 3rd possibility to access discounts setup from the customer card

Customer Card | Work Date: 7/20/2022

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New Document   Approve   Request Approval   Prices & Discounts   Navigate   Customer   Actions   **Related**   Reports

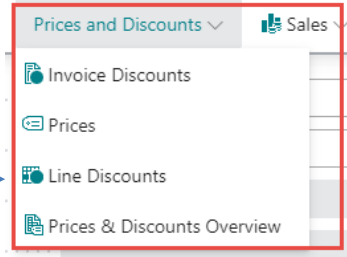
Customer ▾   History ▾   **Prices and Discounts ▾**   Sales ▾   Documents ▾   Service ▾

- Invoice Discounts
- Prices
- Line Discounts
- Prices & Discounts Overview

No. ....		...	Credit Limit (LCY) .....
Name .....			Blocked .....
Balance (LCY) .....		168,364.41	Total Sales .....
Balance Due (LCY) .....		168,364.41	Costs (LCY) .....

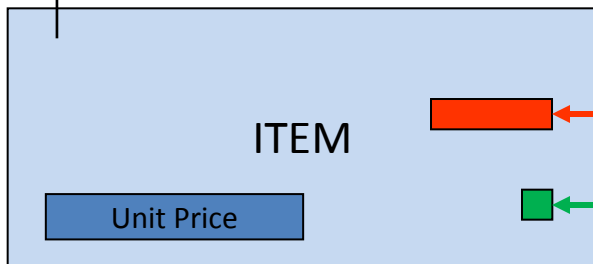


# Basic Blocks



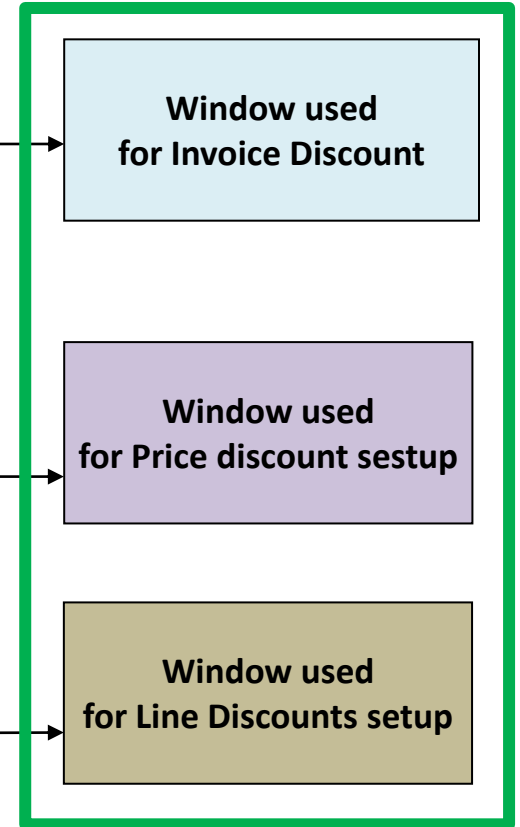
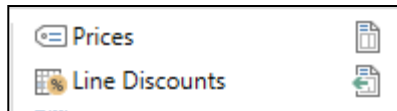
Customer Discount Group

Allow Line Discount (Yes or No)



Item Discount Group

Allow Invoice Discount (Yes or No)



Can be access either from **Customer Card** or from **Item Card**

# Window used for Line discounts Setup (%) I.

Sales Line Discounts | Search | + New | Edit List | Delete

General

Sales Type Filter ..... Customer

Sales Code Filter ..... 10000

Starting Date Filter .....

Type Filter ..... None

Code Filter .....

Currency Code Filter .....

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Starting Date ↑	Ending Date
→ Customer	10000	Item	1920-S	PCS	10,00	10,00		
Customer	10000	Item	1936-S	PCS	5,00	8,00		
Customer	10000	Item	1936-S	PCS	8,00	10,00		

**For one customer only**

# Window used for Line discounts Setup (%) II.

General

Sales Type Filter ..... Customer ▾ Type Filter ..... None ▾

Sales Code Filter ..... Code Filter .....

Starting Date Filter ..... Currency Code Filter .....

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Starting Date ↑	Ending Date
→ Customer Disc. Gro...	LARGE ACC	Item Discount Group	FINISHED		0.00	15.00		
Customer Disc. Gro...	LARGE ACC	Item Discount Group	RAW MAT		0.00	20.00		
Customer Disc. Gro...	LARGE ACC	Item Discount Group	RESALE		0.00	5.00		
Customer Disc. Gro...	RETAIL	Item Discount Group	FINISHED		0.00	10.00		
Customer Disc. Gro...	RETAIL	Item Discount Group	RAW MAT		0.00	15.00		
All Customers		Item Discount Group	A		5.00	15.00		
All Customers		Item Discount Group	A		15.00	25.00		
All Customers		Item Discount Group	B		25.00	15.00		
All Customers		Item Discount Group	B		100.00	25.00		

From this window you can see that some discounts are valid for **all customers**

# Setup of Customer Discount Group I.

Specifies the Customer Discount Group Code, which you can use as a criterion to set up special discounts in the Sales Line Discounts window.

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Home Request Approval New Document Prices & Discounts Customer Report | Actions ▾ Related ▾ Reports ▾ Fewer options

Prices Line Discounts Prices & Discounts Overview

Phone No.  Contact Name

**Invoicing** Show less

Bill-to Customer <input type="text"/>	<b>Posting Details</b>
VAT Registration No. <input type="text" value="789456278"/>	Gen. Bus. Posting Group <input type="text" value="DOMESTIC"/>
EORI Number <input type="text"/>	VAT Bus. Posting Group <input type="text" value="DOMESTIC"/>
GLN <input type="text" value="8712345000004"/>	Customer Posting Group <input type="text" value="DOMESTIC"/>
Use GLN in Electronic Documents <input type="checkbox"/>	<b>Prices and Discounts</b>
Copy Sell-to Addr. to Qte From <input type="text" value="Company"/>	Currency Code <input type="text"/>
Registration No. <input type="text"/>	Customer Price Group <input type="text"/>
	Customer Disc. Group <input type="text" value="LARGE ACC"/>
	Allow Line Disc. <input checked="" type="checkbox"/>

# Setup of Customer Discount Group II.

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Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Fewer options

Prices Line Discounts Prices & Discounts Overview

Phone No. Contact Name Mr. Andy Teal

**Invoicing** Show list

Bill to Customer VAT Registration No. 78945678 EORI Number 871234500004 Use GUN in Electronic Documents Copy Sell-to Addr. to Qte From Registration No.

**Posting Details**

Gen. Bus. Posting Group DOMESTIC VAT Bus. Posting Group DOMESTIC Customer Posting Group DOMESTIC

**Prices and Discounts**

Currency Code Customer Price Group Customer Disc. Group **LARGE ACC** Allow Line Disc.

Select - Customer Disc. Groups

+ New Edit List

Delete

Navigate

Show as menu

Code ↑ Desc

→ LARGE ACC

RETAIL

Sales Line Discounts

Customer Discount Group LARGE ACC Large account | Work Date: 17.02.2027

✓ Saved

Sales Line Discounts Search + New Edit List Delete

**General**

Sales Type Filter Customer Discount Group Type Filter None

Sales Code Filter LARGE ACC Code Filter

Starting Date Filter Currency Code Filter

Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Starting Date ↑	Ending Date
→ Customer Disc. Group	LARGE ACC	Item Discount Group	FINISHED		0,00	15,00		
Customer Disc. Group	LARGE ACC	Item Discount Group	RAW MAT		0,00	20,00		
Customer Disc. Group	LARGE ACC	Item Discount Group	RESALE		0,00	5,00		

# Window used for Line discounts Setup (%) III.

Customer Discount Group LARGE ACC Large account | Work Date: 17.02.2027 ✓ Saved

Sales Line Discounts | Search + New Edit List Delete 🔗 🔍 ☰

**General**

Sales Type Filter ..... Customer Discount Group  Type Filter ..... None

Sales Code Filter ..... LARGE ACC  Code Filter .....

Starting Date Filter .....  Currency Code Filter .....

Sales Type ↑ ▼	Sales Code ↑ ▼	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Starting Date ↑	Ending Date
→ Customer Disc. Group	LARGE ACC	Item Discount Group	FINISHED		0,00	15,00		
Customer Disc. Group	LARGE ACC	Item Discount Group	RAW MAT		0,00	20,00		
Customer Disc. Group	LARGE ACC	Item Discount Group	RESALE		0,00	5,00		

**Only for a chosen group of customers marked by Customer Discount Group Code**

# Window used for Line Discounts Setup (%)

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

Views: \*All

Filter list by: Sales Type: Customer

General

Sales Type Filter: Customer | Type Filter: None

Sales Code Filter: | Code Filter: ...



Starting Date Filter: | Currency Code Filter: ...








Sales Type ↑	Sales Code ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Starting Date ↑	Ending Date
Customer	10000	Item	1936-S	PCS	4.00	3.00		
→ Customer	20000	Item	1928-S	PCS	2.00	8.00		

**In none of our examples here do we indicate the start or end of discounts in time.**  
In our simple model we setup two Line discount % for one item only and different tresholds (Minimum quantity)




# Window used for Sales Line Discounts Setup

Customer 10000 The Cannon Group PLC | Work Date: 7/20/2022 Not saved  



Sales Prices |  Search  New  Edit List  Delete  Open in Excel | More options  

**General**

Sales Type Filter .....   Starting Date Filter .....

Sales Code Filter .....  ... Currency Code Filter .....  ...

Item No. Filter .....  ...

Sales Type ↑ 	Sales Code ↑ 	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Unit Price	Starting Date ↑	Ending Date
→ <u>Customer</u>	10000	1936-S	PCS	2	100.00	<input type="text" value=""/>	





Discount combination –similar example as on slide number 3

- Unit Price reduced from 100 to 90
- Line Discount % =10
- Final price after discounts were applied =  
 $90 * 0,9 = 81,0$

**I Like Discounts** 

# Invoice discount setup

Customer Card | Work Date: 7/20/2022

10000 · The Cannon Group PLC

New Document Approve Request Approval Prices & Discounts Navigate Customer Actions **Related** Reports

Customer History Prices and Discounts Sales Documents Service

Invoice Discounts Prices Line Discounts Prices & Discounts Overview

No. .... Credit Limit (LCY) .....

Name .....

Balance (LCY) ..... 168,364.41 Total Sales .....

Balance Due (LCY) ..... 168,364.41 Costs (LCY) .....



10000 | Work Date: 7/20/2022

✓ Saved

Cust. Invoice Discounts | Search + New Edit List Delete Open in Excel

Currency Code ↑	Minimum Amount ↑	Discount %	Service Charge
	500.00	5	0.00
→	800.00	6	0.00
	1,000.00	7	0.00

Invoice discount must be **allowed and manually confirmed** before you start to calculate it! The process is not automatic like the other two types of discounts.

# Sales Order

- Sales lines of the Sales Order

← Sales Order | Work Date: 7/20/2022 ✎ + 🗑

## 1004 · The Cannon Group PLC

✕ This customer has an overdue balance. [Show details](#)

Process Release Posting Prepare Order Request Approval Print/Send Navigate | More options

### General Show more

No. ....	1004	...	Due Date .....	8/20/2022	📅
Customer Name .....	The Cannon Group PLC	...	Requested Delivery Date .....		📅
Contact .....	Mr. Andy Teal	...	External Document No. ....		
Posting Date .....	7/20/2022	📅	Status .....	<b>Open</b>	
Order Date .....	7/20/2022	📅			

Lines | Manage More options 🔗

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	1		-	PCS	143.90	
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	3		-	PCS	100.00	
→ Item	⋮ 1936-S	BERLIN Guest Chair, yellow	BLUE	5	<input type="text"/>	-	PCS	100.00	3

This example is just to show how BC calculates discounts. From a practical point of view, it is nonsense to sell one item with different quantities. A realistic scenario would be : 9 items are sold and we get the highest discount.

# Invoice Discount calculation ( F7=Statistics)

Sales Order | Work Date: 17.02.2027

1117 · The Cannon Group PLC

Notifications: 2 *The available inventory for item 1936-S is lower than the entered quantity at this location. | This customer has an overdue balance.*

Home Prepare Print/Send Request Approval Order Actions Related Fewer options

Post... Release Create Warehouse Ship Functions

Country/Region Code GB Plan

Contact No. CT000008 Request Approval

Phone No. Posting

Mobile Phone No. Other

Email

Contact Mr. Andy Teal

No. of Archived Versions 0

Document Date 17.02.2027

Create Purchase Document

Send IC Sales Order

Reject IC Sales Order

Other

Calculate Invoice Discount


Get Recurring Sales Lines...

Copy Document...

Move Negative Lines...

Archive Document

Use short menu



 Do you want to calculate the invoice discount?

Yes No

Lines Manage More options **Sales lines before invoice discount application**

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	1		-	PCS	143.90	
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	2		-	PCS	100.00	
→ Item	⋮ 1936-S	BERLIN Guest Chair, yellow	BLUE	<input type="text" value="5"/>		-	PCS	100.00	3

# Invoice Discount calculation (access by use of F7 key)

Edit - Sales Order Statistics - 1005 · The Cannon Group PLC					
<b>General</b>				Show more	
Amount Excl. VAT	828.90	25% VAT	194.79		
Inv. Discount Amount	49.73	Total Incl. VAT	973.96		
Total Excl. VAT	779.17	Sales (LCY)	779.17		
<b>Invoicing</b>				Show more	
Amount Excl. VAT	828.90	25% VAT	194.79		
Inv. Discount Amount	49.73	Total Incl. VAT	973.96		
Total Excl. VAT	779.17	Sales (LCY)	779.17		

**F7 -> Statistics**

# Sales line after manual application of invoice discount

Lines   Manage   Line   Order   Fewer options												
Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Inv. Discount Amount Excl. VAT	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	1		-	PCS	8.63	143.90		143.90	
→ Item	⋮	BERLIN Guest Chair, yellow	BLUE	2		-	PCS	12.00	100.00		200.00	
Item	1936-S	BERLIN Guest Chair, yellow	BLUE	5		-	PCS	29.10	100.00	3	485.00	

# Sales order print

Order Confirmation 1005

20 July 2022  
Page 1 / 1



The Cannon Group PLC  
Mr. Andy Teal  
192 Market Square  
Birmingham, B27 4KT  
Great Britain

CRONUS, Birmingham RC.  
Aaron Nicholls  
Main Street, 14  
Birmingham, B27 4KT  
Great Britain



External Document No.      Salesperson      Quote No.      Shipment Method  
   Peter Sadow                Ex Warehouse

No.	Description	Quantity	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
1936-S	BERLIN Guest Chair, yellow	1 Piece	143.90	25	143.90
1936-S	BERLIN Guest Chair, yellow	2 Piece	100.00	25	200.00
1936-S	BERLIN Guest Chair, yellow	5 Piece	100.00	-3% 25	485.00
Subtotal					828.90
Invoice Discount					-49.73
Total GBP Excl. VAT					779.17
25% VAT					194.79
<b>Total GBP Incl. VAT</b>					<b>973.96</b>

# General ledger entries after posting F9

Tell me what you want to do ↗ ✕

On current page (Customers)

-  [Customer Register](#)  
View posted customer ledger entries divided into, and sorted according to, registers. By...
-  [Customer - Trial Balance](#)  
View the beginning and ending balance for customers with entries within a specified pe...




---

Go to Pages and Tasks Show all (6)

- > [General Ledger Setup](#) Administration
- > [G/L Budgets](#) Lists
- > [Job WIP Methods](#) Administration

---

Go to Reports and Analysis Show all (6)

-  [General Ledger Entries](#) Archive
-  [G/L Registers](#) Archive
-  [Job WIP To G/L](#) Reports and Analysis



# General ledger entries after posting F9

G/L Registers | Work Date: 7/20/2022

Search **Process** Report Reverse Open in Excel | More options

No. ↓	Creation Date	Creation Time	User ID	Source Code	Journal Batch Name	From Entry No.	To Entry No.
<u>142</u>	9/16/2021	10:45:52 AM	TEACHER	SALES		2850	2854
141	9/10/2021	9:44:27 AM	TEACHER	GENJNL	CASH	2848	2849
140	9/8/2021	2:06:57 PM	TEACHER	GENJNL	DEFAULT	2845	2847

G/L Registers | Work Date: 7/20/2022

Search Process Report Reverse Open in Excel | More options

- General Ledger**
- Vendor Ledger
- Bank Account Ledger
- Maintenance Ledger
- Customer Ledger
- Employee Ledger
- Fixed Asset Ledger
- VAT Entries

# General ledger entries after posting F9

6910 Discount Granted | Work Date: 7/20/2022

General Ledger Entries | Search | Edit List | Process | Entry | Open in Excel | More options

Posting Date ↓	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type
→ 7/20/2022	Invoice	103034	6910	Order 1005	Sale	DOMESTIC	RETAIL	64.73	G/L Account
7/20/2022	Invoice	103034	6110	Order 1005	Sale	DOMESTIC	RETAIL	-843.90	G/L Account
7/20/2022	Invoice	103034	5610	Order 1005				-210.98	G/L Account
7/20/2022	Invoice	103034	5610	Order 1005				16.19	G/L Account
7/20/2022	Invoice	103034	2310	Order 1005				973.96	G/L Account



**Discount granted**

# Simple seminar Example

**It can also be used to present discounts in education**

# Create New Customer and item

- Use item template: PIS2 Items
- **Name:** your name and company (e.g. John's company)- Or you can use a pre-configured customer such as 10000
- Create new item – see if Allow Invoice discount field is OK (**switched on**)

The screenshot shows the 'Prices & Sales' configuration interface. The 'Prices & Sales' tab is selected and highlighted with a red box. The 'Allow Invoice Disc.' toggle is also highlighted with a red box and is turned on. Other fields include Unit Price (100.00), Unit Price Excl. VAT (100.00), Price Includes VAT (off), Price/Profit Calculation (Profit=Price-Cost), Profit % (0.00), Sales Prices & Discounts (Create New...), Item Disc. Group (empty), Sales Unit of Measure (PCS), and Sales Blocked (off). A 'Show less' button is visible in the top right corner.

Field	Value
Unit Price	100.00
Unit Price Excl. VAT	100.00
Price Includes VAT	<input type="checkbox"/>
Price/Profit Calculation	Profit=Price-Cost
Profit %	0.00
Sales Prices & Discounts	Create New...
Allow Invoice Disc.	<input checked="" type="checkbox"/>
Item Disc. Group	
Sales Unit of Measure	PCS
Sales Blocked	<input type="checkbox"/>

# Customer card – Line discount to be allowed



**Invoicing** Show less








Bill-to Customer .....	<input type="text"/>	<b>Prices and Discounts</b>	
VAT Registration No. ....	<input type="text"/>	Currency Code .....	<input type="text"/>
GLN .....	<input type="text"/>	Customer Price Group .....	<input type="text"/>
Use GLN in Electronic Documents ...	<input type="checkbox"/>	Customer Disc. Group .....	<input type="text"/>
Copy Sell-to Addr. to Qte From .....	<input type="text" value="Company"/>	<b>Allow Line Disc. ....</b>	<input checked="" type="checkbox"/>
<b>Posting Details</b>		Invoice Disc. Code .....	<input type="text" value="C_AOPR_024"/>
Gen. Bus. Posting Group .....	<input type="text" value="DOMESTIC"/>	Prices Including VAT .....	<input type="checkbox"/>
VAT Bus. Posting Group .....	<input type="text" value="DOMESTIC"/>		

# Examples for seminar


(or could be used for presentation by students )



## Unit Price Discount Setup (absolute values, original UP=100)


Customer 10000 The Cannon Group PLC | Work Date: 7/20/2022 ✓ Saved  

Sales Prices |  Search  New  Edit List  Delete  Open in Excel | More options  

**General**


Sales Type Filter .....   Starting Date Filter .....

Sales Code Filter .....  .....  Currency Code Filter .....  ..... 

Item No. Filter .....  ..... 

**Your Customer number (or preconfigured Customer for example 10000 as it in our model)**

**Your item** **Your new Unit Price**

Sales Type ↑ ▼	Sales Code ↑ ▼	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Unit Price	Starting Date ↑	Ending Date
→ <u>Customer</u> 	10000	T_24	PCS	2	90.00		
Customer	10000	T_24	PCS	4	80.00		



Follow teacher's steps !!!








Thresholds for quantity rebates

# Examples for seminar



(or could be used for presentation by students)


## Line Discount % Setup


Customer 10000 The Cannon Group PLC | Work Date: 7/20/2022 ✓ Saved  








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

**General**

Sales Type Filter ..... Customer  Type Filter ..... None 

Sales Code Filter ..... 10000 ..... Code Filter ..... 

Starting Date Filter ..... Currency Code Filter ..... 



Sales Type 	Sales Code 	Type 	Code 	Unit of Measure Code 	Minimum Quantity 	Line Discount %
→ Customer 	10000	Item	1936-S	PCS	4.00	3.00
Customer	10000	Item	T_24	PCS	3.00	10.00
Customer	10000	Item	T_24	PCS	5.00	20.00








Thresholds for quantity rebates in Line discounts %

# Examples for seminar

(or could be used for presentation by students)

## Invoice Discount Setup

← 10000 | Work Date: 7/20/2022 ✓ Saved  

Cust. Invoice Discounts |  Search  New  Edit List  Delete  Open in Excel  

	Currency Code ↑		Minimum Amount ↑	Discount %	Service Charge
→	<input type="text" value=""/>	⋮	500.00	5	0.00
			800.00	6	0.00
			1,000.00	7	0.00



# Examples for seminar

(or could be used for presentation by students)

## Sales Order

General												
No.	1070					...	Due Date	8/20/2022				
Customer Name	The Cannon Group PLC					...	Requested Delivery Date					
Contact	Mr. Andy Teal					...	External Document No.					
Posting Date	7/20/2022					📅	Status	Open				
Order Date	7/20/2022					📅						

Lines	Manage	Line	Order	Fewer options								
Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Inv. Discount Amount Excl. VAT	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	
Item	T_24	Bearing M12	BLUE	1		-	PCS	0.00	100.00		100.00	
Item	⋮ T_24	Bearing M12	BLUE	2		-	PCS	0.00	90.00		180.00	
Item	T_24	Bearing M12	BLUE	3		-	PCS	0.00	90.00	10	243.00	
Item	T_24	Bearing M12	BLUE	4		-	PCS	0.00	80.00	10	288.00	
→ Item	⋮ T_24	Bearing M12	BLUE	5	...	-	PCS	0.00	80.00	20	320.00	

More sales lines are listed here only so you can see the gradual changes in the types of discounts so that these discounts change depending on the number of pieces ordered



# Examples for seminar

(or could be used for presentation by students)

## Invoice Discount Application : step 1

1070 · The Cannon Group PLC


Notifications: 2 *The available inventory for item T\_24 is lower than the entered quantity at this location. | This customer has an overdue balance.*

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

**Functions** Plan Request Approval Warehouse Posting Print Order Confirmation

- Create Purchase Document >
- Calculate Invoice Discount**
- Get Recurring Sales Lines...

1070	...	Due Date
The Cannon Group PLC	...	Requested Delivery Date
Mr. Andy Teal	...	External Document No.

 Do you want to calculate the invoice discount?

# Examples for seminar

(or could be used for presentation by students)

## Invoice Discount Application : step 2

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Inv. Discount Amount Excl. VAT	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Ship
→ Item	T_24	Bearing M12	BLUE	10			PCS	32.00	80.00	20	640.00	1

Subtotal Excl. VAT (GBP)	640.00	Total Excl. VAT (GBP)	608.00
Inv. Discount Amount Excl. VAT (GBP)	32.00	Total VAT (GBP)	60.80
Invoice Discount %	5	Total Incl. VAT (GBP)	668.80

**Posting Sales Ordes by key F9**

Ship  
 Invoice  
 Ship and Invoice

**OK** **Cancel**

# Examples for seminar

(or could be used for presentation by students)

## Posted Sales Invoice

← Posted Sales Invoice | Work Date: 7/20/2022 ✎ + 🗑️

103067 · The Cannon Group PLC

Process Invoice Correct Print/Send Navigate | More options

### General Show more

No. ....	103067	Due Date .....	8/20/2022
Customer .....	The Cannon Group PLC	Quote No. ....	
Contact .....	Mr. Andy Teal	Order No. ....	1070
Posting Date .....	7/20/2022	Closed .....	<input type="checkbox"/>

Lines | Manage More options 📄

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Deferral Code
→ <u>Item</u>	T_24	Bearing M12	10	PCS	80.00	20	640.00	

Invoice Discount Amount Excl. VAT ..	32.00	Total VAT (GBP) .....	60.80
Total Excl. VAT (GBP) .....	608.00	Total Incl. VAT (GBP) .....	<b>668.80</b>

# Examples for seminar

(or could be used for presentation by students)

## Printed Posted Sales Invoice

Invoice  
103067

**cronus**

CRONUS, Birmingham RC.


The Cannon Group PLC  
Mr. Andy Teal  
192 Market Square  
Birmingham, B27 4KT  
Great Britain

Aaron Nicholls  
Main Street, 14  
Birmingham, B27 4KT  
Great Britain

+44-161 818192

Document Date: 20 July 2022  
Due Date: 20 August 2022  
Payment Terms: 1 Month/2% 8 days

No.	Description	Quantity	Unit	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
T_24	Bearing M12	10	Piece	80.00	-20%	640.00
Subtotal						640.00
Invoice Discount						-32.00
Total £ Excl. VAT						608.00
10% VAT						60.80
<b>Total £</b>						<b>668.80</b>

 Pay with PayPal (NOTE: This is a test invoice. Therefore, no actual money transfer will be made.)

# Examples for seminar

(or could be used for presentation by students)

## General Ledger Entries

Tell me what you want to do

G/L Reg

Go to Reports and Analysis

G/L Register Reports and Analysis

G/L Registers Archive

Didn't find what you were looking for? Try [exploring](#)

G/L Registers | Work Date: 7/20/2022

Search Process Report Reverse Open in Excel Actions Related Reports

No. ↓	Creation Date	Creation Time	User ID	Source Code	Journal Batch Name	From Entry No.	To Entry No.
<a href="#">313</a>	10/27/2021	11:42:03 AM	TEACHER	SALES		3385	3389
312	10/20/2021	1:20:02 PM	520685	INVTPCOST		3381	3384
311	10/20/2021	1:20:00 PM	520685	INVTPCOST		3377	3380

# Examples for seminar

(or could be used for presentation by students)

## General Ledger Entries

Posting Date ↓	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type	
→ 7/20/2022	:	Invoice	103067	6910	Order 1070	Sale	DOMESTIC	RETAIL	192.00	G/L Account
7/20/2022		Invoice	103067	6110	Order 1070	Sale	DOMESTIC	RETAIL	-800.00	G/L Account
7/20/2022		Invoice	103067	5611	Order 1070				-80.00	G/L Account
7/20/2022		Invoice	103067	5611	Order 1070				19.20	G/L Account
7/20/2022		Invoice	103067	2310	Order 1070				668.80	G/L Account

**Account name : Discount granted**  
**Account number : 6910**



# Chart of accounts I.

The screenshot shows a search interface with a search bar containing the text 'chart'. A red arrow points to the search bar. Below the search bar, there is a list of search results. The first result is 'Generic Charts' with 'Lists' to its right. The second result is 'Chart of Accounts' with 'Lists' to its right, and this row is highlighted with a red box. The third result is 'Chart of Cost Types' with 'Lists' to its right. At the top left of the search interface is a box containing the text 'Tell me what you want to do'. At the top right are icons for a share link and a close button. Below the search bar, the text 'Go to Pages and Tasks' is on the left and 'Show all (20)' is on the right.

Tell me what you want to do

chart

Go to Pages and Tasks Show all (20)

- > Generic Charts Lists
- > Chart of Accounts Lists
- > Chart of Cost Types Lists

# Chart of accounts (set filter to 6910) II.

Chart of Accounts | Work Date: 7/22/2022

Search + New Edit List Delete Edit View Process Report Open in Excel More options

Views

No.	Name	Net Change	Balance	Income/Ba...	Account Subcategory	Account Type	Totaling
→ 6910	Discount Granted	53,246.70	53,246.70	Income Sta...	Sales Discounts	Posting	

Filter list by:  
× No.



← 6910 Discount Granted | Work Date: 7/22/2022 ✓ Saved

General Ledger Entries Search Edit List Process Entry Open in Excel More options

Posting Date	Document Type	Document No.	G/L Account No.	User ID	Description	Department Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type
→ 7/22/2022	Invoice	103179	6910	TEACHER	Order 1251		Sale	DOMESTIC	RETAIL	188.00	G/L Account
7/22/2022	Invoice	103158	6910	TEACHER	Order 1212	SALES	Sale	DOMESTIC	RETAIL	400.00	G/L Account
7/22/2022	Invoice	103155	6910	TEACHER	Invoice 1008	SALES	Sale	DOMESTIC	RETAIL	97.48	G/L Account
7/22/2022	Invoice	103154	6910	517125	Order 1209		Sale	DOMESTIC	RETAIL	112.96	G/L Account

# End of the section

(Discounts)



This is the end  
Beautiful friend  
This is the end  
My only friend, the end...

So why worry now .....