

Introduction to MS Dynamics

NAV X. (Discounts)

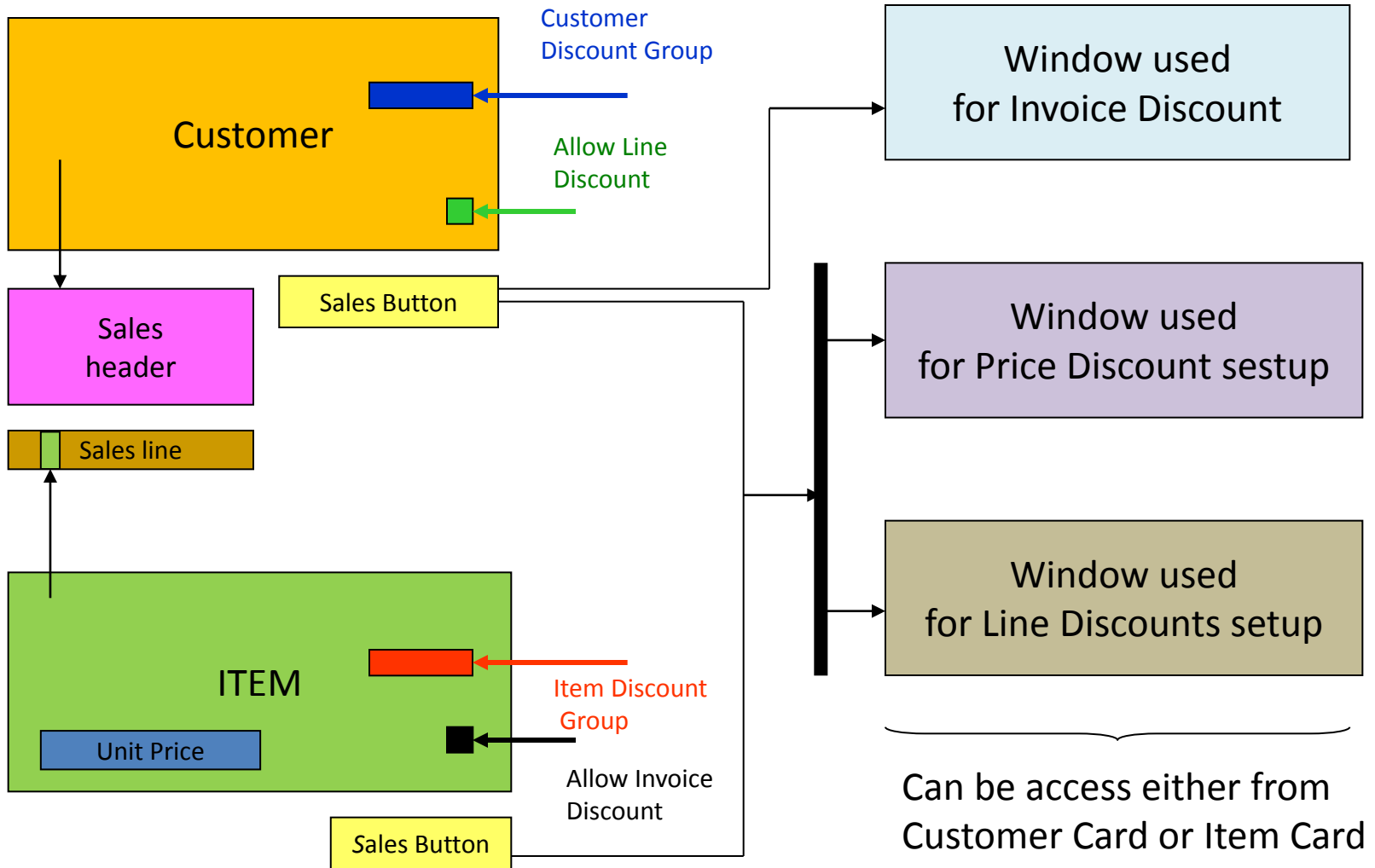
Ing.J.Skorkovský,CSc.

MASARYK UNIVERSITY BRNO, Czech Republic
Faculty of economics and business administration
Department of corporate economy

Discounts

- Use of discounts:
 - Support of „Sales“ actions->lower stock value and better liquidity
 - Support of marketing ->new clients
 - Basic incentives for any type of client
 - In order to differentiate between clients (based on sales in last period or other criteria
 - Types :
 - Price ->modification of Unit Price
 - Line ->change final price in %
 - Invoice Discount ->based on level of invoiced amount

Basic Blocks



Window used for Line Discounts Setup (%)

General Options

Sales Type Filter Customer
 Sales Code Filter IC1020
 Type Filter None
 Code Filter
 Starting Date Filter

Sales Type	Sales Code	Type	Code	Unit of Me...	Minimum Qua...	Line Discount %	Starting D...	Ending Date
Customer	10000	Item	1920-S		5,00	3,00		
Customer	20000	Item	1924-W		10,00	4,00		
Customer Disc. Group	LARGE ACC	Item Disc. Group	FINISHED		0,00	15,00		
Customer Disc. Group	LARGE ACC	Item Disc. Group	RAW MAT		0,00	20,00		
Customer Disc. Group	LARGE ACC	Item Disc. Group	RESALE		0,00	5,00		
Customer Disc. Group	RETAIL	Item Disc. Group	FINISHED		0,00	10,00		
Customer Disc. Group	RETAIL	Item Disc. Group	RAW MAT		0,00	15,00		
All Customers		Item Disc. Group	A		5,00	15,00		
All Customers		Item Disc. Group	A		15,00	25,00		
All Customers		Item Disc. Group	B		25,00	15,00		
All Customers		Item Disc. Group	B		100,00	25,00		
*▶ Customer		Item			0,00	0,00		

Window used for Sales Price Discounts Setup

General Options

Sales Type Filter Customer

Item No. Filter

Sales Code Filter 30000

Starting Date Filter

Sales Type	Sales Code	Item No.	Unit of Me...	Minimum Qua...	Unit Price	Starting D...	Ending Date
<input type="checkbox"/>	Customer	10000	1980-S		5,00	100,00	
<input type="checkbox"/>	Customer	30000	1988-W		2,00	800,00	
<input type="checkbox"/>	Customer Price...	TOP1	1988-S		20,00	90,00	
<input type="checkbox"/>	All Customers		1936-S		10,00	110,00	
<input checked="" type="checkbox"/>	All Customers		1972-W		0,00	350,00	

Discount combination

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

Simple example setup

General Options

Sales Type Filter . . . Customer ▼

Sales Code Filter . . . 10000 ▲

Item No. Filter [] ▲

Starting Date Filter . . . []

Sales Type	Sales Code	Item No.	Unit of Me...	Minimum Qua...	Unit Price	Starting D...	Ending Date
▶ Customer	10000	1980-S		5,00	100,00		

General Options

Sales Type Filter . . . Customer ▼

Sales Code Filter . . . 10000 ▲

Type Filter None ▼

Code Filter [] ▲

Starting Date Filter . . . []

Sales Type	Sales Code	Type	Code	Unit of Me...	Minimum Qua...	Line Discount %	Starting D...	Ending Date
Customer	10000	Item	1920-S		5,00	3,00		
*▶ Customer	10000	Item	1980-S		6,00	5,00		

Simple example- Sales Order

General Invoicing Shipping Foreign Trade E-Commerce Prepayment

No. 1012

Sell-to Customer No. 10000

Sell-to Contact No. CT000001

Sell-to Customer Name The Cannon Group PLC

Sell-to Address 192 Market Square

Sell-to Address 2

Sell-to Post Code/City B27 4KT Birmingham

Sell-to Contact Mr. Andy Teal

No. of Archived Versions. 0

Posting Date 09.09.12

Order Date 09.09.12

Document Date 09.09.12

Requested Delivery Date

Promised Delivery Date

Quote No.

External Document No.

Salesperson Code PS

Campaign No.

Opportunity No.

Responsibility Center BIRMINGHAM

Assigned User ID

Status Open

Type	No.	Description	Location Code	Reserved Quantity	Unit of Measu...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Disco...	Qty. to Ship	Quantity Shipped
Item	1980-S	MOSCOW Swivel Chair, red	BLUE	1	PCS	123,30	123,30			1
Item	1980-S	MOSCOW Swivel Chair, red	BLUE	5	PCS	100,00	500,00			5
Item	1980-S	MOSCOW Swivel Chair, red	BLUE	6	PCS	100,00	570,00	5		6

Where $570 = 6 * 100 * 0,95$

Invoice Discount Setup

	Code	Currency Code	Minimum Amount	Disco... %	Service Charge
▶	10000		500,00	5	0,00
	10000		1 000,00	6	0,00
	10000		1 200,00	7	0,00

SO and when invoice discount is applied

General Invoicing Shipping Foreign Trade E-Commerce Prepayment

No. 1013 Posting Date 09.09.12
Sell-to Customer No. 10000 Order Date 09.09.12
Sell-to Contact No. CT000001 Document Date 09.09.12
Sell-to Customer Name . The Cannon Group PLC Requested Delivery Date
Sell-to Address 192 Market Square Promised Delivery Date
Sell-to Address 2
Sell-to Post Code/City B27 4KT Birmingham External Document No.
Sell-to Contact Mr. Andy Teal Salesperson Code PS
No. of Archived Versions. 0 Campaign No.
Opportunity No.
Responsibility Center BIRMINGHAM
Assigned User ID
Status Open

Type	No.	Description	Location Code	Reserved Quantity	Unit of Measu...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Disco...	Qty. to Ship	Quantity Shipped
Item	1980-S	MOSCOW Swivel Chair, red	BLUE	10	PCS	100,00	950,00	5	10	

Order Line **Functions** Posting Print Help

- Calculate Invoice Discount**
- Get Price...
- Get Line Discount...
- Explode BOM
- Insert Ext. Texts
- Get Std. Cust. Sales Codes...
- Reserve...
- Order Tracking
- Nonstock Items
- Copy Document...
- Archive Document
- Move Negative Lines...
- Create Whse. Shipment
- Create Inventory Put-away / Pick...
- Send Approval Request
- Cancel Approval Request
- Release



End of the section X.



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