Simple scenario (Discounts) ERP Microsoft Dynamics NAV 2016

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Date	:	31.10.2018
For	:	MPH_AOMA and AOPR and BPH_EPS1
Database	:	MS Dynamics NAV 2016 W1
Keys	:	Ctrl-N=New, F4=Look-up, Ctrl-F7-entries, F7-statistics, F9-post
Shorthands	:	G/L General Ledger, TO-Transfer Order
		Tutor-**TU**

1. Find Customer card and Customer with code 10000.
2. On the Tool bar, you will see in Navigation section three icons.
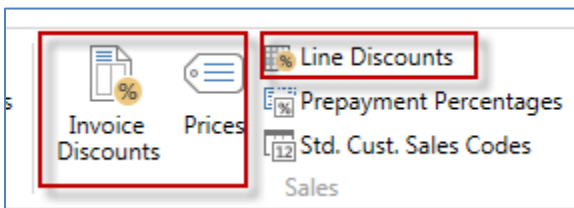
3. Open icon Prices and enter in this window Customer (it should be already there) and enter item 1964-W. Standard Unit price from the item card supposed to be 292.
4. Enter 3 pcs and enter a new price for this quantity and higher amount 290 and 5 for 280.

General

Sales Type Filter:	Customer	Starting Date Filter:	
Sales Code Filter:	10000	Currency Code Filter:	
Item No. Filter:			

Sales Type	Sales Code	Item No.	Unit of Measur...	Minimum Quantity	Unit Price
Customer	10000	1964-W	PCS	3	290,00
Customer	10000	1964-W	PCS	5	280,00

Confirm by OK and go to the icon Line Discount and enter different quantity and % values as shown below.

General

Sales Type Filter:	None	Type Filter:	Item
Sales Code Filter:		Code Filter:	1964-W
Starting Date Filter:		Currency Code Filter:	

Sales Type	Sales Code	Type	Code	Unit of Measur...	Minimum Quantity	Line Discount %
Customer	10000	Item	1964-W	PCS	7,00	5,00
Customer	10000	Item	1964-W	PCS	9,00	10,00

Be aware, that this is only tested on how ERP NAV can calculate discounts.

Pcs	Unit Price	%	Final unit price	Total
1	292,00	0,00	292,00	292,00
3	290,00	0,00	290,00	870,00
5	280,00	0,00	280,00	1 400,00
7	280,00	7,00	260,40	1 822,80
9	280,00	9,00	254,80	2 293,20

Create Sales Order with several lines as we have done is in a normal business situation this situation is pointless.

Type	No.	Description	Location Code	Quantity	Reserved Quantity	Unit of Measur...	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Discount %	Qty. to Ship	Quantity Shipped	Qty. to Invoice
Item	1964-W	INNSBRUCK St... BLUE		1		PCS	292,00	292,00		1		1
Item	1964-W	INNSBRUCK St... BLUE		3		PCS	290,00	870,00		3		3
Item	1964-W	INNSBRUCK St... BLUE		5		PCS	280,00	1 400,00		5		5
Item	1964-W	INNSBRUCK St... BLUE		7		PCS	280,00	1 862,00	5	7		7
Item	1964-W	INNSBRUCK St... BLUE		9		PCS	280,00	2 268,00	10	9		9

General Ledger Entries

Show results:

✕ Where   Entry No. ▾ is   2947..2951

+ Add Filter

Posting Date	Docum... Type	Document No.	G/L Accou...	Description	Gen. Postin...	Gen. Bus. Posting ...	Gen. Prod. Posting ...	Amount	Bal. Accou...
1.4.2019	Invoice	103047	6910	Order 1014	Sale	NATIONAL	RETAIL	350,00	G/L Account
1.4.2019	Invoice	103047	5610	Order 1014				87,50	G/L Account
1.4.2019	Invoice	103047	6110	Order 1014	Sale	NATIONAL	RETAIL	-7 042,00	G/L Account
1.4.2019	Invoice	103047	5610	Order 1014				-1 760,50	G/L Account
1.4.2019	Invoice	103047	2310	Order 1014				8 365,00	G/L Account

5. Go back to the Customer 10000 and in the tool area find and use icon Invoice Discount in order to set this type of discount
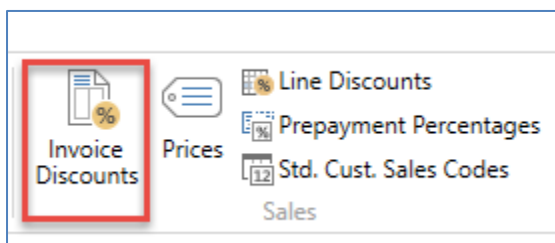
The meaning of setup is clear. If the total amount related to created Sales Order will be higher the set limits, the customer will get setup % off discount for this document.

6. Create new Sales Order with Customer 10000 in its header with enough quantity of item 1964-W in order to exceed the set limit. See only Sales Order lines
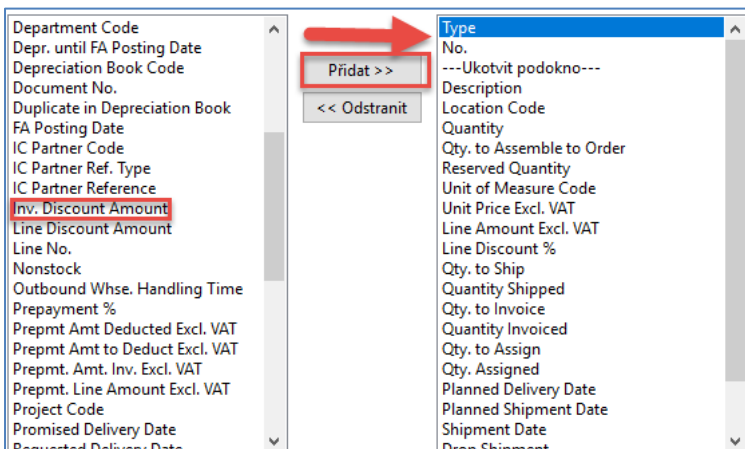

There is only Price discount applied but not Invoice discount which has to be activated by selling person manually. Before calculation of an Invoice, discount see Statistics of this Sales Order by use of key F7. You could see, that the filed Invoice Discount is empty so far.
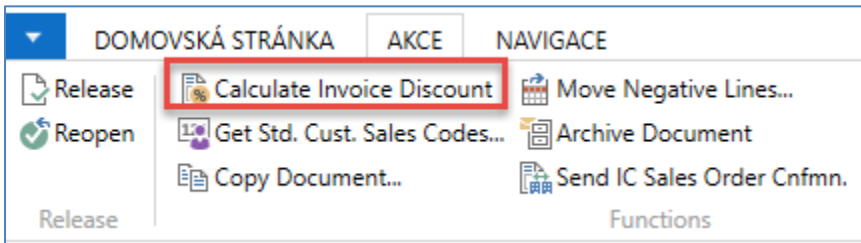
When using icon Calculate Invoice Discount, you will see calculated Invoice Discount by use of Statistics window or you can u can see this field with the show column (right mouse click on the line description area. Czech word Přidat means Add

Statistics F7 will show total amount 870 British pounds and 870 x 0,92 =800,4 and 870-800,4=**69,60**

If you change the number of items to **7** in order to get at least some % discount um the line and you will recalculate Invoice Discount, you will get

Post Sales Order by use of key F9 and see General register and General Ledger Entries. Financial Management->General Ledger->Archive ->History->G/L Register and last line and upper left corner icon General Ledger

147	01.08.2018	NAVERTICA\JSKORKOVSKY	SALES		2876	2878	918	918
148	23.10.2018	NAVERTICA\JSKORKOVSKY	GENJNL	CASH	2879	2881	919	918
149	23.10.2018	NAVERTICA\JSKORKOVSKY	UNAPPSA		2882	2883	919	918
150	23.10.2018	NAVERTICA\JSKORKOVSKY	GENJNL	DEFAULT	2884	2885	919	918
151	30.10.2018	NAVERTICA\JSKORKOVSKY	SALES		2886	2890	919	920

General Ledger will show

New set price was 290.Total 1960 and after 5% line discount we have got 1960*0,95=1862. And after Invoice Discount of 8% is applied, we have got **1862***0,92=**1713,04**. If we will get posted document from G/L Register via Customer Ledger Entries->Navigate we will get: