

Business One in Action - How To Set Up Sales Discounts Per Warehouse?



Applies to:

SAP Business One, [Logistics](#), [Stock](#)

Summary:

This article explains how to provide discounts base on the warehouse used in the marketing document.

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Author Bio:

Murielle Saliber joined SAP in 2002 and is currently active as Senior Support Consultant for SAP Business One. She has worked as both technical and business consultant. She authored this article as a direct response to a partner enquiry during the Expert-on-Phone project, where she consulted on mainly logistics, administrative, printing and data migratory topics.

Table of Content

How to set up sales discounts per warehouse?	3
Related Contents.....	9
Copyright.....	10

How to set up sales discounts per warehouse?

Note [1300099](#)

[How to guide](#): How to Define and Use User-Defined Values

Companies may at times provide discounts to their customers depending on the location where the items are sold. These locations can be set as Warehouses in SAP Business One. For example, 'The Delicious Fish Ltd' has 3 outlets: a shop at the port, a stand on the market and a shop in the shopping centre. The fish sold in the shop on the port are usually 40% cheaper than the fish sold in the shopping centre. The fish shop in the market is 20% cheaper than the one in the shopping centre. Sometimes the company gives a discount according to the type of fish (Item Group) or to regular customers. As all shops use the same SAP Business One database, each location is set as a warehouse.

To fulfill this requirement, the following procedures may be employed:

1. Create a *User Defined Field (UDF)* on the warehouse form. These *UDFs* will hold the discounts defined for each warehouse. To create these *UDFs*, access the Tools -> Customization Tools -> User-Defined Field - Management. From the *Master Data* category, select *Warehouses*.

Let us assume that the discount is on a percentage of the sales amount. In this case, set the *UDF* as *Type: Units and Totals* and *Structure: Percents*.

The screenshot shows the 'Field Data' dialog box in SAP. The 'Title' field is set to 'Discount' and the 'Description' field is also set to 'Discount'. The 'Type' field is set to 'Units and Totals' and the 'Structure' field is set to 'Percents'. These two fields are highlighted with a red rectangle. Below these fields are three unchecked checkboxes: 'Set Valid Values for Field', 'Set Default Value for Field', and 'Mandatory Field'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Category	Title	Description	Type	Dflt	Mand.	Index	Linked Table
▼ Master Data					<input type="checkbox"/>	<input type="checkbox"/>	
Activities					<input type="checkbox"/>	<input type="checkbox"/>	
Agent Name					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Business Partner					<input type="checkbox"/>	<input type="checkbox"/>	
Cargo Duty Declaration Numbe					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Employees					<input type="checkbox"/>	<input type="checkbox"/>	
G/L Accounts					<input type="checkbox"/>	<input type="checkbox"/>	
Item Groups					<input type="checkbox"/>	<input type="checkbox"/>	
▶ Items					<input type="checkbox"/>	<input type="checkbox"/>	
Price Lists					<input type="checkbox"/>	<input type="checkbox"/>	
Project Codes					<input type="checkbox"/>	<input type="checkbox"/>	
Sales Employee					<input type="checkbox"/>	<input type="checkbox"/>	
Users					<input type="checkbox"/>	<input type="checkbox"/>	
▼ Warehouses	Discount	Discount	Percents		<input type="checkbox"/>	<input type="checkbox"/>	
Withholding Tax					<input type="checkbox"/>	<input type="checkbox"/>	

2. Access the warehouses (Administration -> Setup ->Stock Management) and define a numeric value representing the discount percentage. In this case, it is 20%.

Warehouse Code: 04 Warehouse Name: Port-Sales

General Accounting

Location: Drop Ship
 Nettable

Street/PO Box:

Block:

Postcode:

City:

County:

Country: United Kingdom

State:

VAT Number:

OK Cancel

General

Discount: 40.00

- The query below can then be used as a *Formatted Search (FMS)* to call the value of the discount from the warehouse into system field 'Discount' on row level in the marketing document. The value from the *UDF* on the warehouse form is called only if the discount field is empty and there is a change in the remark field.

```
Select
  Distinct
Case
  When  ${38.15.Number} = 0 Then T1.U_Discount
  Else  ${38.15.Number}
End
From
  OWHS T1
Where
  T1.WhsCode =${38.24.0}
```

This query is linked to the *Discount* field with a *FMS* and is refreshed when the *Remarks* field is changed. The field to trigger the *FMS* has to be decided according to the business process at the customer site.

If special prices were defined for the item or business partner, these special prices take precedence over the warehouse discount. For further details on the hierarchy of the default discount selection in SAP Business One please review the how to guide: [How to Define Special Prices](#).

For customer 001 below, if there has been no special prices defined, the warehouse discount shows a default of 20%.

Sales Quotation

Customer: 001, Name: TIE, No.: Primary, 92, Status: Open, Posting Date: 24.05.2010, Valid Until: 24.06.2010, Document Date: 24.05.2010

Contents | Logistics | Accounting

#	Item No.	Quantity	Whse	Unit Price	Disc...	VAT Code	Total (LC)	del_pay...
1	FRS	1	04	GBP 6.500	40.00	01	GBP 3.90	
2					0.00	01		

Sales Employee: -No Sales Employee-
 Owner:
 Remarks: SDN_Library

Total Before Discount: GBP 3.90
 Discount: %
 Freight:
 Rounding
 Tax: GBP 0.67
 Total: GBP 4.57

OK Cancel Copy To

For customer 001 wherein a special price has been defined for the *Discount Group*: SDN_library. For Item *FSF* the default discount is taken from the *Discount Group*.

Item Master Data

Item Number: FSF, Description: SwordFish, Desc. in Foreign Lang.: SwordFish, Item Type: Items, Item Group: SDN_Library, Price List: Base Price

General | Purchasing Data | Sales Data

Set G/L Accounts by: Warehouse
 Stock UoM:
 Valuation Method: Standard
 Item Cost: 8

#	Whse Code	Whse Name	Locked	In Stock
1	01	General Warehouse	<input type="checkbox"/>	
2	02	Shop	<input type="checkbox"/>	
3	03	Drop Ship	<input type="checkbox"/>	
4	04	Port-Sales	<input type="checkbox"/>	
5	05	Cork	<input type="checkbox"/>	
6	06	Production	<input type="checkbox"/>	

Discount Groups

BP Code: 001, BP Name: TIE

Item Groups | Properties | Manufacturer

#	Group	Discount %
1	Accessories	0.00
2	HP Printers	0.00
3	IBM Printers	0.00
4	Items	0.00
5	PCs	0.00
6	SDN_Library	5.00
7	Servers	0.00
8	Temporary	0.00

New Group Reset

OK Cancel Copy to Selection Criteria

For item *FRS* the discount is taken from the warehouse as there are no special prices defined for it on item, business partner or group level.

Item Master Data				
Item Number	FRS	Bar Code		<input checked="" type="checkbox"/> Stock Item
Description	Red Snapper			<input checked="" type="checkbox"/> Sales Item
Desc. in Foreign Lang.	Vivaneau			<input checked="" type="checkbox"/> Purchased Item
Item Type	Items			<input type="checkbox"/> Fixed Assets
Item Group	Temporary			
Price List	Base Price	Unit Price	GBP 6,500	

When creating a sales order for the two items above without changing the remarks field there is no discount for item *FRS* while *FSF* has a discount.

Sales Quotation				
Customer	001	No.	Primary	93
Name	TIE	Status	Open	
Contact Person		Posting Date	24.05.2010	
Customer Ref. No.		Valid Until	24.06.2010	
Local Currency		Document Date	24.05.2010	

Contents		Logistics		Accounting				
Item/Service Type	Item	Summary Type	No Summary					
#	Item No.	Quantity	Whse	Unit Price	Disc...	VAT Code	Total (LC)	del_pay...
1	FRS	1	04	GBP 6.500	0.00	O1	GBP 6.50	
2	FSF	1	04	GBP 9.000	5.00	O1	GBP 8.55	
3					0.00	O1		

Sales Employee	-No Sales Employee-	Total Before Discount	GBP 15.05
Owner		Discount	%
		Freight	
		<input type="checkbox"/> Rounding	
		Tax	GBP 2.58
		Total	GBP 17.63

Remarks

After the user modified the *Remarks* field, the item *FRS* has its discount updated to 40% as defined on the warehouse level.

Sales Quotation

Customer: 001 No. Primary: 93
 Name: TIE Status: Open
 Contact Person: Posting Date: 24.05.2010
 Customer Ref. No.: Valid Until: 24.06.2010
 Local Currency: Document Date: 24.05.2010

Contents Logistics Accounting

Item/Service Type: Item Summary Type: No Summary

#	Item No.	Quantity	Whse	Unit Price	Disc...	VAT Code	Total (LC)	del_pay...
1	FRS	1	04	GBP 6.500	40.00	O1	GBP 3.90	
2	FSF	1	04	GBP 9.000	5.00	O1	GBP 8.55	
3					0.00	O1		

Sales Employee: -No Sales Employee- Total Before Discount: GBP 12.45
 Owner: Discount: %
 Freight: Freight: Rounding:
 Tax: GBP 2.14
 Total: GBP 14.59

Remarks: Triggers the discounts

OK Cancel Copy To

Related Contents

- [SAP Business One in Action Catalog Page](#)
- [Link to DRC](#) documentation
- Note [1227722](#)
- For more information, visit the [Business One homepage](#).

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