

User Manual

Aptean Food and Beverage ERP

Advanced Pricing

Product Documentation



Contents

[Release notes](#)

[2603.0.0.0](#)

[2602.2.0.0](#)

[2602.1.0.0](#)

[2602.0.0.0](#)

[2601.3.0.0](#)

[2601.2.0.0](#)

[2601.1.0.0](#)

[2601.0.0.0](#)

[2514.3.0.0](#)

[2514.2.0.0](#)

[2514.1.0.0](#)

[2514.0.0.0](#)

[2513.2.0.0](#)

[2513.1.0.0](#)

[2513.0.0.0](#)

[2512.0.0.0](#)

[2511.0.0.0](#)

[2510.1.0.0](#)

[2510.0.0.0](#)

[2509.0.0.0](#)

[2508.0.0.0](#)

[2507.0.0.0](#)

[2506.1.0.0](#)

[2506.0.0.0](#)

[2505.0.0.0](#)

[2504.2.0.0](#)

[2504.1.0.0](#)

[2504.0.0.0](#)

[2503.1.0.0](#)

[2503.0.0.0](#)

[2502.1.0.0](#)



2502.0.0.0	.....
2501.1.0.0	.....
2501.0.0.0	.....
2410.1.0.0	.....
2410.0.0.0	.....
2409.0.0.0	.....
2408.0.0.0	.....
2407.2.0.0	.....
2407.1.0.0	.....
2407.0.0.0	.....
2406.2.0.0	.....
2406.1.0.0	.....
2406.0.0.0	.....
2405.4.0.0	.....
2405.3.0.0	.....
2405.2.0.0	.....
2405.1.0.0	.....
2405.0.0.0	.....
2404.1.0.0	.....
2404.0.0.0	.....
2403.1.0.0	.....
2403.0.0.0	.....
2402.3.0.0	.....
2402.2.0.0	.....
2402.1.0.0	.....
2402.0.0.0	.....
2401.0.0.0	.....
2302.0.0.0	.....
2301.3.0.0	.....
2301.2.0.0	.....
2301.1.0.0	.....
1.14.119061.0	.....
1.13.116148.0	.....
1.12.115164.0	.....
1.12.104941.0	.....



1.11.93546.0	.....
1.10.93063.0	.....
1.10.92682.0	.....
1.10.91830.0	.....
1.9.80814.0	.....
1.8.76923.0	.....
1.7.65829.0	.....
1.6.63626.0	.....
1.5.53922.0	.....
1.4.49678.0	.....
1.3.46580.0	.....
Introduction	.....
Setup	.....
Manage permission sets	.....
General setup	.....
Set up advanced pricing	.....
Set up purchase price reference date	.....
Advanced pricing method hierarchy	.....
Advanced pricing method hierarchy with lot attribute values	.....
Information about the applied sales price and discount	.....
Information about the applied purchase price and discount	.....
Advanced pricing functionality	.....
Manually change sales price and/or discount	.....
Manually change purchase price and discount	.....
Freeze sales price and discount	.....
Freeze and unfreeze purchase price and discount	.....
Place a hold on sales order lines for pricing	.....
Manage the reprice on sales orders	.....
Set up the reprice on a customer level	.....
Automatic reprice on sales orders	.....
Manual reprice on sales orders	.....
Copy and correct functions in sales documents	.....
Copy and correct functions in purchase documents	.....
Archived sales documents	.....
Archived purchase documents	.....



Posted documents	.....
Manage bracket pricing	.....
Set up bracket pricing_group	.....
Configure bracket pricing threshold	.....
Calculate bracket threshold by weight	.....
Calculate bracket threshold by quantity	.....
Calculate bracket threshold by weight and quantity	.....
Calculate bracket threshold by weight or quantity	.....
Create sales quote with bracket pricing	.....
Create sales order with bracket pricing	.....
Create sales invoice with bracket pricing	.....
Manage price list reports	.....
Create price report templates	.....
Generate price list reports	.....
Integrations	.....
Aptean Advanced Attributes	.....
Aptean Commodity Harvest	.....
Aptean Service Provisioning	.....
Aptean Backorder Management	.....
Aptean Customer Item Catalog	.....
Aptean Combine Shipments per Period	.....
Aptean Packaging	.....



Release notes

Article • 6/24/2026 • 3 min read

To view what's new or changed in each release of the Aptean Advanced Pricing extension, select the specific release version.

Date	Release version	Description
July 2026	2603.0.0.0	Major release
June 2026	2602.2.0.0	Minor release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Stability release
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
December 2025	2514.3.0.0	Stability release
November 2025	2514.2.0.0	Stability release
November 2025	2514.1.0.0	Stability release
November 2025	2514.0.0.0	Feature release
November 2025	2513.2.0.0	Stability release
October 2025	2513.1.0.0	Stability release
October 2025	2513.0.0.0	Feature release
September 2025	2512.0.0.0	Feature release
September 2025	2511.0.0.0	Feature release
August 2025	2510.1.0.0	Stability release
July 2025	2510.0.0.0	Feature release
July 2025	2509.0.0.0	Feature release



July 2025	2508.0.0.0	Feature release
July 2025	2507.0.0.0	Feature release
April 2025	2506.1.0.0	Stability release
April 2025	2506.0.0.0	Feature release
April 2025	2505.0.0.0	Feature release
March 2025	2504.2.0.0	Stability release
March 2025	2504.1.0.0	Stability release
March 2025	2504.0.0.0	Feature release
February 2025	2503.1.0.0	Stability release
February 2025	2503.0.0.0	Feature release
February 2025	2502.1.0.0	Stability release
January 2025	2502.0.0.0	Feature release
January 2025	2501.1.0.0	Stability release
January 2025	2501.0.0.0	Feature release
December 2024	2410.1.0.0	Stability release
December 2024	2410.0.0.0	Feature release
December 2024	2409.0.0.0	Feature release
November 2024	2408.0.0.0	Feature release
November 2024	2407.2.0.0	Stability release
October 2024	2407.1.0.0	Stability release
October 2024	2407.0.0.0	Feature release
September 2024	2406.2.0.0	Stability release
September 2024	2406.1.0.0	Stability release
September 2024	2406.0.0.0	Feature release
August 2024	2405.4.0.0	Stability release



August 2024	2405.3.0.0	Stability release
May 2024	2405.2.0.0	Stability release
May 2024	2405.1.0.0	Stability release
May 2024	2405.0.0.0	Feature release
May 2024	2404.1.0.0	Stability release
April 2024	2404.0.0.0	Feature release
April 2024	2403.1.0.0	Stability release
April 2024	2403.0.0.0	Feature release
March 2024	2402.3.0.0	Stability release
March 2024	2402.2.0.0	Stability release
March 2024	2402.1.0.0	Stability release
March 2024	2402.0.0.0	Feature release
February 2024	2401.0.0.0	Feature release
December 2023	2302.0.0.0	Feature release
December 2023	2301.3.0.0	Stability release
December 2023	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
September 2023	1.14.119061.0	Feature release
September 2023	1.13.116148.0	Stability release
September 2023	1.12.115164.0	Stability release
June 2023	1.12.104941.0	Stability release
April 2023	1.11.93546.0	Stability release
April 2023	1.10.93063.0	Stability release
April 2023	1.10.92682.0	Feature release
April 2023	1.10.91830.0	Stability release



February 2023	1.9.80814.0	Stability release
January 2023	1.8.76923.0	Stability release
November 2022	1.7.65829.0	Stability release
October 2022	1.6.63626.0	Stability release
July 2022	1.5.53922.0	Stability release
May 2022	1.4.49678.0	Feature release
March 2022	1.3.46580.0	Stability release



2603.0.0.0

Release Note • 7/22/2026 • 2 min read

Enhancements/Modifications

The price finding takes into account the prices set in sales contracts when a sales order is created from a sales contract or when a sales order is assigned to a sales contract. If the Advanced Pricing app is installed, the "Applied Sales Price and Discount" overview also displays the sales contract from which the price or discount originated. This integration enhancement requires the latest versions of the following apps from the July 2026 release:

- Advanced Pricing
- Integration Layer
- Contract Management
- With this release of the Aptean Advanced Pricing extension, the invoice hold functionality on the **Sales Order** page has been enhanced in the following ways:
 - You can now set the **Invoice Hold Status** field value to *Hold - Pricing* or *Approved* for all eligible lines in a single action using the **Set All Lines to Invoice Hold** and **Set All Lines to Invoice Approved** actions on the **Sales Order** page, instead of updating each line individually.
 - The **Invoice Hold Present** field has been added to the **Sales Order** page header. This read-only field is automatically set to *Yes* when at least one line has the **Invoice Hold Status** field value set to *Hold - Pricing*, and to *No* when no lines are on hold. You can also use this field to filter the **Sales Orders** list page for orders that have lines on hold.

For more information, see [Place a hold on sales order lines for pricing](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Invoice Hold Present** field has been added to the **Sales Order** and **Sales Order List** pages.
- The **Set All Lines to Invoice Hold** action has been added to the **Sales Order** page.
- The **Set All Lines to Invoice Approved** action has been added to the **Sales Order** page.



2602.2.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
369662	The system fails to post a warehouse shipment on the Sales Order page when the item's unit price has been updated (repriced) after the order was created.
376323	The system fails to create a new customer when <i>Read</i> permissions are not assigned on the Advanced Pricing Setup page.



2602.1.0.0

Release Note • 5/27/2026 • 2 min read

Enhancements/Modifications

With this release of the **Aptean Advanced Pricing** extension, the **Applied Direct Unit Cost** field is now available by default on the **Purchase Return Order** lines, eliminating the need for additional customization. Additionally, the system now recalculates the **Line Amount Excl. VAT** and header totals such as **Subtotal Excl. VAT**, **Total Excl. VAT**, and **Total Incl. VAT** correctly after pricing changes, and transfers the **Applied Direct Unit Cost** value to the **Posted Purchase Credit Memo**, ensuring consistent pricing information across both documents.

- You can view the **Freeze Price & Discount** and **Unfreeze Price & Discount** actions on the **Sales Credit Memo**, **Sales Return Order**, **Purchase Credit Memo**, and **Purchase Return Order** pages. The actions can be executed at the header level to apply to all lines, or at the line level to apply to the active line only.

UI/UX changes

The **Freeze Price & Discount** and **Unfreeze Price & Discount** actions have been added to the action bar and the **Lines** FastTab of the **Sales Credit Memo**, **Sales Return Order**, **Purchase Credit Memo**, and **Purchase Return Order** pages.

Resolved issues

The following issue has been resolved in this release.

ID	Description
366056	The system fails to recalculate the sales price when the Unit of Measure Code field value is updated on the Sales Order page. This issue occurs when using advanced pricing with contracts and trade plans.
370681	The system fails to display the Applied Direct Unit Cost field by default on the Purchase Return Order lines, requiring additional customization. Additionally, the Purchase Return Order document type is missing from the pricing recalculation logic, causing the Line Amount Excl. VAT field value and header totals such as Subtotal Excl. VAT , Total Excl. VAT , and Total Incl. VAT field values to not recalculate correctly, and the Applied Direct Unit Cost field value is not transferred to the Posted Purchase Credit Memo page, resulting in inconsistent pricing information across documents.



2602.0.0.0

Release Note • 4/22/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the system ensures the **Applied Unit Price** field value flows from the **Sales Return Orders** to the **Posted Sales Credit Memos** page. You can make this field visible through personalization on both pages. The system stores the value in the sales credit memo line table and transfers it during posting, ensuring consistency across documents.



2601.3.0.0

Release Note • 3/25/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
350034	The system fails to validate the Price Calculation Method field value when it is set to <i>Advanced Pricing</i> , instead it directly applies the sales price based on the Bill-to Customer field value while opening the Sales Price List page from the Customer Card page.
360523	The system fetches an incorrect sales price list or purchase price list when multiple price lists with consecutive date ranges are active and the Attribute Driven Pricing toggle is turned on, because the Starting Date and Ending Date filters on price list lines are not correctly applied during automatic price calculation, causing incorrect prices on sales and purchase documents.
359423	The system incorrectly updates the Line Discount % field value on the Purchase Invoice page when entering a value in the Applied Discount % field for an item with a standard cost trade plan.



2601.2.0.0

Release Note • 2/27/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
355822	The system incorrectly uses the same object ID in multiple extensions, creating a potential conflict.



2601.1.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
353553	The system incorrectly applies the line discount on the Sales Quote page based on the Work Date field value instead of the Shipment Date field value on the related Sales Price List page.
335300	The system fails to populate the Rate unit of measure code field value on the Document Trading Lines page when creating the sales order and adding the sales contract.
355822	The system uses the same object ID in multiple extensions, creating a potential conflict. Although no issue is currently observed, the extension has been updated to prevent future conflicts.
349986	The system fails to maintain the <i>Frozen</i> status and applied pricing consistency on the Applied Sales and Discount page when updating lines in a sales order. Additionally, the system incorrectly changes the pricing behaviour when new items are added or the quantity of an existing line is modified, even when the applied sales price is marked as <i>Frozen</i> .



2601.0.0.0

Release Note • 1/28/2026 • 3 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can:

- Exclude specific items from bracket pricing calculations using the **Exclude from Bracket Pricing** toggle. This toggle is available on item and sales line records, with the sales line value defaulted from the item and remaining editable.
- Control whether manual price and discount changes use the document header currency code through the **Use Document Currency for Manual Change** toggle on the **Advanced Pricing Setup** page. This applies to both price and discount updates across sales and purchase documents.
- Define the bracket pricing group code and reprice sales orders field values on the **Customer Template** page, and these values are inherited by the customer when you create the customer using the template.
- Bypass bracket pricing after calculation by clearing the **Bracket Pricing Group** field on the document header. When cleared, the system recalculates pricing and restores related header and line fields to their pre-bracket pricing values. The logic must consider the original source of those values.

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension,

- The system supports attribute-based filtering in report templates for the **Price List Report** to control which items and customers are included. The system allows advanced lot attribute-based and advanced customer attribute-based criteria to be defined in the report template and stores these filters with the template for reuse. When the **Price List Report** is generated, the system applies the saved attribute filters to determine the applicable set of items and customers.
- You can view the global lot attribute field values on the **Get Price Line** page when selecting prices on sales documents. These fields are visible only when the **Attribute Driven Pricing** toggle on the **Sales Price List** page is turned on, and the attribute names are displayed based on the associated field values on the **Advanced Attribute Setup** page.

UI/UX changes

The following UI/UX changes have been made in this release.



- The **Exclude from Bracket Pricing** toggle have been added to the following pages:
 - Item Templates Card
 - Item Card
 - Sales Quote
 - Sales Order
 - Sales Invoice
- The following toggles have been added to the **Advanced Pricing Setup** page.
 - Use Sales Document Currency for Manual Change
 - Use Purchase Document Currency for Manual Change
- The following fields have been added to the **Customer Template Card** page.
 - Bracket Pricing Group Code
 - Reprice Sales Orders
- The **Advanced Item Attribute Filters** sub-table section and the **Lot Attributes** filter field have been added to the **Report Template** page.



2514.3.0.0

Release Note • 12/9/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the system updates the **Default Purchase Price Reference Date** field value as *Order Date* on the **Advanced Pricing Setup** page when the field is left blank. This works similarly for the **Purchase Price Reference Date** field on the **Vendors** and **Vendor Templates** pages. This enhancement addresses the issue reported in bug ID #343446.

Resolved issues

The following issue has been resolved in this release.

ID	Description
343446	The system does not update the Default Purchase Price Reference Date field value to <i>Order Date</i> on the Advanced Pricing Setup page when the field is left blank. This issue also occurs for the Purchase Price Reference Date field on the Vendors and Vendor Templates pages.



2514.2.0.0

Release Note • 11/28/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
341693,342545,330737	An error occurs on the Sales Credit Memo page when posting a credit memo that includes order-bound packaging information.



2514.1.0.0

Release Note • 11/26/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

Resolved issues

The following issues have been resolved in this release.

ID	Description
327686	An error occurs when executing the Release action on the Sales Order page if the Bracket Pricing Group Code field value is left blank and the Calculate Sales Bracket Pricing On Release toggle on the Advanced Pricing Setup page is turned on.
327688	The system incorrectly calculates the total quantity when executing the Calculate Bracket Pricing action on the Sales Order page. This issue occurs when the Threshold Type field value is set to <i>Quantity</i> for the associated code on the Bracket Pricing Groups page.



2514.0.0.0

Release Note • 11/26/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Pricing extension, you can configure a reference date for purchase price determination on the vendor card. This allows companies to centrally manage how the system determines which date to use when looking up prices from price lists. For more information, see [Set up purchase price reference date](#).

UI/UX changes

The **Purchase Price Reference Date** and **Purchase Price Reference Vendor** fields have been added to the **Vendor Card** page.



2513.2.0.0

Release Note • 11/4/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced pricing extension,

- Updates have been made to ensure interoperability with the recent changes in the Aptean EDI extension. For more information, see [What's new in EDI, version 2515.1.0.0](#).
- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2513.1.0.0

Release Note • 10/22/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
326691	The system fails to update the sales price on the sales quotes when the customer is linked to a reference customer through the Sales Price Reference Setup page.
321519	The system incorrectly updates the Applied Price Unit of Measure Code and Applied Direct Unit Cost field values on the Lines FastTab of the Purchase Order page when a purchase order is created from a sales order. This issue occurs only when the Aptean Trade Management extension is installed.



2513.0.0.0

Release Note • 10/22/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can:

- Freeze and unfreeze the lines displaying the prices and discount values on both the **Purchase Order** and **Sales Order** pages. For more information, see [Freeze and unfreeze purchase price and discount](#) and [Freeze and unfreeze sales price and discount](#).
- Configure whether manual changes to prices or discounts automatically freeze pricing results. For more information, see [Set up advanced pricing](#).

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension,

- You can edit and manage the **Line Discount Amount** field value on the **Sales Order** page, allowing automatic synchronization of discount values across related pages for improved pricing accuracy.
- The system automatically freezes the related fields whenever a manual price or discount change is made when the **Freeze Price & Discount** toggle is turned on the **Change Applied Line Discount** page and the **Freeze Price & Discount** toggle is turned on the **Change Applied Direct Unit Cost** page.

Additionally, this extension has been updated to ensure interoperability with the recent changes in the Aptean Trading Board extension. For more information, see [What's new in Trading Board, version 2503.0.0.0](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Freeze Price & Discount** and **Unfreeze Price & Discount** actions have been added to action bar and the **Lines** FastTab of the **Purchase Order** and **Sales Order** pages.
- The **Freeze Price & Discount** toggle has been added to the following pages:
 - Change Applied Line Discount
 - Change Applied Direct Unit Cost
 - Change Applied Unit Price
- The following fields have been added to the **Advanced Pricing Setup** page:



- Freeze Sales Price on Manual Change
- Freeze Purchase Price on Manual Change

Resolved issues

The following issue has been resolved in this release.

ID	Description
306579	The system fails to initialize control for freezing price and discount during manual discount changes.



2512.0.0.0

Release Note • 9/24/2025 • 3 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension,

- You can generate price list reports for customers based on specific configurations defined in price report templates. These price list reports are customizable, ensuring accurate pricing information is generated for customers to plan their purchase effectively. For example, you can generate a price list report for all items in a specific item category within a specified date range, providing up-to-date prices for a customer interested in browsing through available products. For more information, see [Create price report templates](#) and [Generate price list reports](#).
- Based on the configuration of the **Customer Card** page,
 - The system automatically applies the current unit price of items to sales order lines when you release or post sales orders. For more information, see [Automatic reprice on sales orders](#).
 - Alternatively, if the automatic reprice is not configured, you can manually execute the **Reprice Sales Orders** action to apply the current unit price of items to sales order lines in open sales orders. For more information, see [Manual reprice on sales orders](#).

This ensures that the system applies the current unit price of items in sales orders. For more information about the setup, see [Set up the reprice on a customer level](#).

- You can place a hold on sales order lines to prevent them from being invoiced due to ongoing pricing negotiations, for example, if the salesperson wants an additional discount or if a customer is negotiating prices via email.
When pricing discussions are settled, you can remove the hold placed in the sales order lines by updating the status so they can be invoiced. For more information, see [Place a hold on sales order lines for pricing](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the following extensions:

- Aptean [Customer Item Catalog](#)
- Aptean [Combine Shipments per Period](#)
- Aptean [Packaging](#)

For more information, see [Integrations](#).



UI/UX changes

The following UI/UX changes have been made in this release.

- The **Price Report Templates** and **Price List Reports** pages have been added.
- The **Print Price Report** action has been added to the **Customers** and **Customer Card** pages.
- The **Reprice Sales Order** action has been added to the **Sales Orders** and **Sales Order** pages.
- The **Reprice Sales Order** field has been added to the **Advanced Pricing** section on the **Invoicing** FastTab of the **Customer Card** page.
- The **Invoice Hold Status** field has been added to the **Sales Order** page.



2511.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Backorder Management extension. For more information, see [What's new in Backorder Management, version 2501.0.0.0](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the Aptean [Backorder Management](#) extension. For more information, see [Integrations](#).



2510.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
300733	The system incorrectly displays the Applied Direct Unit Cost field value on the Purchase Invoice page after executing the Get Receipt Lines action. This issue arises even when the Direct Unit Cost field value is manually updated on the Applied Purchase Price and Discount page before posting the purchase receipt.



2510.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Pricing extension, you can define the sales price reference date on the **Customer Template** page. To know more, see [General setup](#)

UI/UX changes

The following fields have been added to the **Customer Template** page:

- Sales Price Reference Date
- Sales Price Reference Customer



2509.0.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
266733	The system fails to display the applied trade plan on the Document Trade Lines page of a purchase order when a manual price is added via the Applied Purchase Price and Discount page.
304793	The system incorrectly sets the Unit Amount and Amount field values to 0 after executing the Recalculate action on the Document Trade Lines page of a purchase order. This issue arises when a manual price is added via the Applied Purchase Price and Discount page.

 Note

These issues occur only when the Aptean [Trade Management](#) extension is installed. For more information, see [What's new in Trade Management, version 2506.0.0.0](#).



2508.0.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, when the Aptean [Service Provisioning](#) extension is installed, the system automatically selects the **Frozen** checkbox for the lines on the sales and purchase orders created from the **Transfer Ownership** page if you have manually entered a value in the **Unit Price Excl. VAT** and **Unit Cost Excl. VAT** fields on the **Sales** and **Purchase** FastTabs, respectively. For more information, see [Transfer the ownership of items](#).

Integrations

The Aptean Advanced Pricing extension has been integrated with the Aptean [Service Provisioning](#) extension. For more information, see [Integrations](#).



2507.0.0.0

Release Note • 7/2/2025 • 2 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can:

- Apply dynamic pricing based on weight or quantity thresholds using the bracket pricing feature. For more information, see [Configure bracket pricing threshold](#).
- View the **Bracket Pricing** FactBox on the **Sales Quote**, **Sales Order**, and **Sales Invoice** pages. For more information, see [Create sales order with bracket pricing](#), [Create sales quotes with bracket pricing](#), and [Create sales invoice with bracket pricing](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The following pages have been added.
 - Bracket Pricing Groups
 - Bracket Threshold
- The []**Bracket Pricing Groups** action has been added to the **Advanced Pricing Setup** page.
- The **Calculate Bracket Pricing** action (**Actions** > **Functions**) has been added to the following pages:
 - Sales quote
 - Sales order
 - Sales invoice
- The **Bracket Pricing** FastTab has been added to the **Advanced Pricing Setup** page.
- The **Bracket Pricing** FactBox has been added to the **Sales Quote**, **Sales Order**, and **Sales Invoice** pages.
- The **Bracket Pricing Group Code** field has been added to the **Invoicing** FastTab of the **Customer Card**, **Ship-to Address**, **Sales Quote**, **Sales Order**, and **Sales Invoice** pages.
- The following fields have been added to the **Advanced Pricing Setup** page.
 - Enable Bracket Pricing for Sales
 - Calculate Sales Bracket Pricing On Release
 - Update Method for Sales Bracket Change



2506.1.0.0

Release Note • 4/25/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2506.0.0.0

Release Note • 4/14/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. For more information, see [What's new in Trade Management, version 2505.0.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
278637	The system fails to update the Direct Unit Cost Excl. VAT field value when the Applied Direct Unit Cost field value is manually updated on the Lines FastTab of the Purchase Order page. This issue occurs when the purchase line does not have an associated document trade line and the Aptean Trade Management extension is installed.



2505.0.0.0

Release Note • 4/9/2025 • 1 min read

Features

With the features added in this release of the Aptean Advanced Pricing extension, you can specify reasons for price changes. For more information, see [Manually change sales price and/or discount](#) and [Manually change sales price](#).

UI/UX changes

The **Price Change Reason Code** field has been added to the following pages:

- Change Applied Unit Price
- Change Applied Line Discount
- Change Applied Direct Unit Cost



2504.2.0.0

Release Note • 3/28/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
278674	An error occurs when attempting to open the Sales Order page from the Sales Lines page.



2504.1.0.0

Release Note • 3/13/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
246855	An error occurs when modifying the Applied Direct Unit Cost field value on the Lines FastTab of the Purchase Order page. This issue arises only when the Aptean Trade Management extension is installed.



2504.0.0.0

Release Note • 3/14/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the internal API page has been enhanced to determine and send item prices based on parameters such as customer, location, item details, document date, delivery date, and shipment date.



2503.1.0.0

Release Note • 2/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
259156	An error occurs when attempting to edit purchase order lines in Excel when the lines are copied using the Edit in Excel action on the Purchase Order page.



2503.0.0.0

Release Note • 2/11/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in Trade Management, version 2501.0.0.0](#).



2502.1.0.0

Release Note • 2/5/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the translation file for the Chinese (zh-CN) language has been added.



2502.0.0.0

Release Note • 1/21/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the **Quantity Expressed in Base UoM** and **Quantity Expressed in the UoM** fields on the **Item Units of Measure** page have been removed from this extension and added to the Aptean Standard Measurements extension. To know more, see [Highlights of Standard Measurements, version 2501.0.0.0](#).

Note

- Businesses using the Aptean Advanced Pricing extension must install the Aptean Standard Measurements extension to ensure full compatibility. However, it is crucial to update the Aptean Advanced Pricing extension to the latest version, with the minimum required version being 2502.0.0.0, after installing the Aptean Standard Measurements extension. This update is essential to ensure that any new item unit of measure quantities are correctly detected and used in document line pricing, especially when alternative unit of measure pricing is required.
- While the system enforces the dependency for installing the Aptean Standard Measurements extension with the Aptean Advanced Pricing extension, it does not enforce the reverse scenario. Therefore, ensure both extensions are updated to maintain seamless functionality.

UI/UX changes

The **Quantity Expressed in Base UoM** and **Quantity Expressed in the UoM** fields have been removed from the **Item Units of Measure** page.



2501.1.0.0

Release Note • 1/17/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. To know more, see [What's new in EDI, version 2409.7.0.0](#).



2501.0.0.0

Release Note • 1/9/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to resolve an issue in drop shipment transactions for the US and Canada localizations. Previously, when the **Direct Unit Cost** field value was indirectly changed on the **Purchase Order** page, the **Unit Cost** field value on the **Sales Order** page was not updated accordingly. This caused the **Cost Amount (Expected)** field value on the **Value Entries** page to be incorrect for drop shipment transactions.



2410.1.0.0

Release Note • 12/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
247911	The system incorrectly displays the Unit Price field value in the sales invoice line upon executing the Get Shipment Lines action on the Sales Invoice page for a shipped sales order when a discount value is entered manually in the Applied Discount Value field.



2410.0.0.0

Release Note • 12/11/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension,

- The system inherits the value of the **Applied Currency Code** field on the sales order line from the **Currency Code** field on the related sales price list line, based on the selected customer and item. This functionality also applies to blanket sales orders, sales invoices, and sales credit memos.
- You can edit the value of the **Applied Unit Price** and **Applied Discount Value** fields on the **Sales Invoice** and **Sales Credit Memo** pages.

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Applied Currency Code** field has been added to the **Lines** FastTab of the **Blanket Sales Order**, **Sales Order**, **Sales Invoice**, and **Sales Credit Memo** pages.
- The **Applied Unit Price** and **Applied Discount Value** fields on the **Sales Invoice** and **Sales Credit Memo** pages have been made editable.



2409.0.0.0

Release Note • 12/5/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing Extension, you can add the new **Price Change Reason Code** field on the **Sales Price List** and **Purchase Price List** pages to specify reasons for price changes or new records. For more information, see [General setup](#).

UI/UX changes

The following UI/UX changes have been made in this release.

- The **Price Change Reason Code(s)** list page has been added.
- The **Price Change Reason Code** field has been added to the **Sales Price List** and **Purchase Price List** pages.

Note

This field is made visible through personalization.



2408.0.0.0

Release Note • 11/28/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Contract Management extension. To know more, see [What's new in Contract Management, version 2404.0.0.0](#).



2407.2.0.0

Release Note • 11/14/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean EDI extension. To know more, see [What's new in Aptean EDI, version 2408.0.0.0](#).



2407.1.0.0

Release Note • 10/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
234297	An error occurs upon executing the Get Shipment Lines action on the Sales Invoice page. This issue occurs when the unit price value is zero or empty on the sales invoice lines.



2407.0.0.0

Release Note • 10/1/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean [Trade Management](#) extension, to accomodate the integration with the Aptean [Transport](#) extension. To know more, see [What's new in Trade Management, version 2411.0.0.0](#).



2406.2.0.0

Release Note • 9/24/2024 • 1 min read

Enhancements/Modifications

The translation files for the Danish (da-DK) language have been updated with standard texts for better readability.



2406.1.0.0

Release Note • 9/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, you can edit the applied direct unit cost value in the **Applied Direct Unit Cost** field on the **Purchase Credit Memo** page. This enhancement addresses the issue reported in bug ID #224131.

UI/UX changes

The **Applied Direct Unit Cost** field has been added to the **Purchase Credit Memo** page.



2406.0.0.0

Release Note • 9/4/2024 • 2 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight and Aptean Trade Managements extensions. To know more, see [What's new in version 2405.0.0.0](#) of the Aptean Catch Weight extension and [What's new in version 2409.0.0.0](#) of the Aptean Trade Management extension.

UI/UX changes

The following UI/UX changes have been made in this release.

- The following fields are added to the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page associated with the **Blanket Sales Order, Sales Quote, Sales Order, Sales Order Achieve, Sales Invoice, Posted Sales Invoice, Sales Return Order, Sales Credit Memo, and Posted Sales Credit Memo** pages.
 - Weight Recalculation Factor
 - Unit Price (Converted) by Weight Factor
 - Discount Value (Converted) by Weight Factor

Note

These fields are displayed only when the Aptean [Catch Weight](#) extension is installed.

- The following fields are added to the **Applied Trade Lines** FastTab of the **Applied Sales Price and Discount** page associated with the **Blanket Sales Order, Sales Quote, Sales Order, Sales Order Achieve, Sales Invoice, Posted Sales Invoice, Sales Return Order, Sales Credit Memo, and Posted Sales Credit Memo** pages.
 - Base Discount Value
 - Discount Amount from Trade Lines

Note

The **Applied Trade Lines** FastTab and the associated fields are displayed only when the Aptean [Trade Management](#) extension is installed.

- The **Unit Price in Sales Line** field is removed and replaced with the **Unit Price (Converted)** field on the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page.



- The **Discount Value** field is removed and replaced with the **Discount Value (Converted)** field on the **Price Calculation** FastTab of the **Applied Sales Price and Discount** page.

For more information, see [Information about the applied sales price and discount](#).



2405.4.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, modifications have been made to accommodate the following changes:

- Procedures have been removed to streamline the permission management and enhance the upgrade process. The *OnUpgradePerCompany* and *OnValidateUpgradePerCompany* triggers manage upgrades per-company basis, reducing complexity and enhancing performance. This refactoring eliminates redundant and unnecessary procedures, leading to a more efficient and optimized upgrade process.

! Note

This release has been implemented in correlation with the enhancement made in version [2405.1.0.0](#).

- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

! Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2405.3.0.0

Release Note • 8/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
224130	The system fails to update the Direct Unit Cost Excl. VAT field on the Purchase Invoice page when the Applied Direct Unit Cost field value is changed. Additionally, the system does not update the Direct Unit Cost Excl. VAT field when the Direct Unit Cost field is modified using the Manual Price action on the Change Applied Direct Unit Cost dialog.



2405.2.0.0

Release Note • 5/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
207674/200422	An error occurs upon executing the Get Shipment Lines action on the Sales Invoice page, and the system fails to display the appropriate value in the Applied Unit Price field on the Lines FastTab.



2405.1.0.0

Release Note • 5/24/2024 • 1 min read

Enhancements/Modifications

Modifications were made for the Aptean Advanced Pricing extension to accommodate the following changes:

- Procedures were added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a **per-company** and **per-database** basis.
- Application Area Refresh: Updates were implemented to improve the application area refresh process by integrating a new procedure into the **Enable** codeunit.
- Improved Management of Install and Upgrade Code: The **Install** and **Upgrade** code units were updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized License Management Procedures: The existing license management codeunit was modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



2405.0.0.0

Release Note • 5/15/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. With this release, you can view the updated **Unit Price Excl. Tax** and **Line Discount %** field values associated with the sales line, where the **Price Calculation Method** is set as *Advanced Pricing*. To know more, see [What's new in version 2404.0.0.0](#).



2404.1.0.0

Release Note • 5/14/2024 • 1 min read

Enhancements/Modifications

The Swedish translation files have been updated with standard texts for better readability



2404.0.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Contract Management extension. To know more, see [What's new in version 2402.0.0.0](#).



2403.1.0.0

Release Note • 4/17/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Catch Weight extension. To know more, see [What's new in version 2402.1.0.0](#)

Resolved issues

The following issue has been resolved in this release:

ID	Description
187912	Upon executing the Get Shipment Lines action on the Sales Invoice page, the system inherits the price from the price list rather than the value manually defined on the Sales Order page.



2403.0.0.0

Release Note • 4/3/2024 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension, the **Sales Return Order** and **Sales Credit Memo** created from the **Sales Claims** or **Posted Sales Order** inherit the values from the **Applied Sales Price and Discount** and the **Document Trade Lines** appropriately.



2402.3.0.0

Release Note • 3/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
182429	The system's customization affects sales line status, leading to loss of global variables and impacting manual price application on Released Sales Orders .



2402.2.0.0

Release Note • 3/20/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
182422	When modifying the Applied Direct Unit Cost field value of an item on the Blanket Purchase Order, the system fails to update the new cost and retains the original value specified on the Purchase Order.



2402.1.0.0

Release Note • 3/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, the issues arising from the indirect permission set have been effectively resolved to ensure the seamless functionality of the extension.

Resolved issues

The following issue has been resolved in this release:

ID	Description
175514	Incorrect language translations for specific terms within the French language code (fr-FR).



2402.0.0.0

Release Note • 3/6/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Fresh Bridge extension. To know more, see [What's new in version 2402.0.0.0](#).



2401.0.0.0

Release Note • 2/26/2024 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Contract Management extension. To know more, see [What's new in version 2401.0.0.0](#).



2302.0.0.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Pricing Matrix extension. For more information, see [Highlights of version 2301.0.0.0](#).



2301.3.0.0

Release Note • 12/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154270	The performance issue occurs due to the constant validation of the Sales Line Update Influence field on the Advanced Pricing Setup page.



2301.2.0.0

Release Note • 12/6/2023 • 1 min read

Enhancements/Modifications

The translation files have been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



2301.1.0.0

Release Note • 10/17/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the following extensions:

- Aptean [Reporting](#)
- Aptean [Claims](#)

To know more, visit the respective links.



1.14.119061.0

Release Note • 9/20/2023 • 1 min read

Features

With this release of the Aptean Advanced Pricing extension, you can modify the Sales/Purchase unit price/cost and discount values directly on the sales or purchase order lines. To know more, see [Advanced Pricing Setup](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Advanced Pricing Setup** page has been added.
- The following fields are added to the Sales Order lines, Sales Quote and Sales Blanket Order, and are made available on the lines by personalization:
 - **Applied Price Unit of Measure Code**
 - **Applied Unit Price**
 - **Applied Discount Method**
 - **Applied Discount Value**
 - **Applied Discount Unit of Measure Code**
- The following fields are added to the Purchase Order lines, Purchase Quote, and Purchase Blanket Order, and are made available on the lines by personalization:
 - **Applied Price Unit of Measure Code**
 - **Applied Direct Unit Cost**
 - **Applied Discount %**
 - **Applied Discount Unit of Measure Code**



1.13.116148.0

Release Note • 9/6/2023 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Pricing extension, you can:

- Recreate the sales lines based on the price group and discount group defined in the header level.
- Update the existing price group and discount groups of the sales header associated with the defined address.



1.12.115164.0

Release Note • 8/31/2023 • 1 min read

Enhancements/Modifications

The translation file for the Swedish language code (sv-SE) has been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.



1.12.104941.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issue has been resolved in the release:

ID	Description
120770	When the Manual Discount action is used to update the Discount Value field on the Applied Sales Price and Discount page of the selected Sales Order , the existing record on the Document Trade Lines is deleted.



1.11.93546.0

Release Note • 6/22/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean Catch Weight extension. To know more, see [What's new in version 3.1.93082.0](#).



1.10.93063.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with the Aptean Catch Weight extension. To know more, see [What's new in version 3.1.93082.0](#).



1.10.92682.0

Release Note • 12/6/2023 • 1 min read

Features

With the features added in this release, you can Integrate the Aptean Advanced Pricing extension with the Aptean [Advanced Attributes](#) extension to select the price on the purchase or sales price list lines based on the attribute values of an item. When the **Attribute Driven Pricing** toggle on the Sales and Purchase Price List page is turned on, you will view the global lot attributes and location code. To know more, see [here](#) .

UI/UX changes

The **Attribute Driven Pricing** toggle is added on the **Sales Price List** and **Purchase Price List** pages. If the Aptean Advanced Attributes extension is installed, you can view the global lot attributes and location code fields on the sales and purchase lines. For more information, see [Visibility of Global Lot Attributes](#).



1.10.91830.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made to this extension to work seamlessly with the Aptean [Excise Duty](#) extension. You can now calculate the price and discount for excise items in the sales and purchase documents by selecting the *Advanced Pricing* option in the **Price Calculation Method** field on Customer/Vendor page.



1.9.80814.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Grower Return extension. To know more, see [Highlights of version 1.0.80944.0](#)



1.8.76923.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
87613	If the string length of Customer Discount Group field is more than 10, then the Line Discount % is not updated in the sales order line.



1.7.65829.0

Release Note • 12/6/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release:

ID	Description
52478	When Super Permission and Indirect Permission are set for all the Apps for the user, an error occurs while accessing the Lines FastTab on the Sales Order page.
60116	In the Price Calculation Method field, the <i>Food Pricing</i> option is present on the Vendors, Customers, Sales and Purchase documents.



1.6.63626.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to seamlessly work with the Aptean Trading Board extension. To know more, see [Highlights of version 1.0.66835.0](#)



1.5.53922.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made

- To keep our apps in line with the *updated* coding guidelines for Business Central.
- To seamlessly work with the Aptean [Reporting](#) extension, which provides easy-to-read Sales and Manufacturing reports. These reports can be printed or saved as a file.



1.4.49678.0

Release Note • 12/6/2023 • 3 min read

Features

The term **Food Pricing** has been changed to **Advanced Pricing**.

Purchase Pricing

Previously, Advanced Pricing was only applied to the sales documents, with this release Advanced Pricing is now available for Purchase Prices and Discounts.

To determine the Purchase Prices and Discounts for items in all available purchase documents, a calculation method called the **Advanced Pricing** is applied.

Several enhancements in relation to **Purchase Prices and Discounts** are applied in this release. For more information, see [Purchase Prices and Discounts](#).

Advanced Pricing calculation method

You can apply the purchase price calculation based on the Advanced Pricing method when entering a purchase line for an item in all available purchase document types. For more information, see [Advanced pricing calculation method](#).

Applied purchase price and discount

The **Applied Purchase Price and Discount** page shows purchase & discount related data for all the different Purchase Documents. See [Information about the applied purchase price and discount](#).

Manually change purchase price and discount

The purchase price, purchase discount or any purchase characteristic can be varied from the value based on system setup to a value chosen by the purchaser. You can keep track on such manual changes of purchase prices and discounts when using Advanced Pricing.

For more information, see [Manually change purchase price and/or discount](#).

Freeze and unfreeze purchase price and discount

After changing the purchase price and/or discount manually, the purchase line is automatically set to **Frozen**. The purchase price and/or discount can be changed by selecting the **Unfreeze** function. For more information, see [Freeze purchase price and discount](#).

Copy and Correct functions



The **Applied Purchase Price and Discount** page gives insight in the source of a purchase price and discount in the Purchase Order.

When receipt lines are retrieved in a Purchase Invoice, the person creating the Purchase Invoice should get the same insights as this can be relevant within the invoicing process. The **Copy** function is used for copying the information from the Purchase Order to the Purchase Invoice.

The **Correct** function on the posted purchase invoice performs two operations:

First, a Purchase Credit Memo is created that exactly reverses everything that was posted in the Purchase Invoice.

Second, a new Purchase Invoice is created so the user can quickly register corrected quantities or prices.

In both cases, the Applied Purchase Price and Discount lines that were linked to the Posted Purchase Invoice, should be copied to the documents mentioned above.

The copy and correct function also work when you post the purchase document. These functions also apply to the archived and posted documents.

For more information, see [Copy and Correct functions in Purchase Documents](#).

Archived and Posted Purchase documents

The **Applied Purchase Price and Discount** page shows purchase & discount related data for the different Archived and Posted Purchase Document types. For more information, see [Archived documents – Purchase and Posted Purchase Invoice](#).

Resolved issues

The following issue has been resolved in this release:

ID	Description
32951	The Quantity Expressed in BOX and Quantity Expressed in the UOM fields are not editable when creating new Item Units of Measure.



1.3.46580.0

Release Note • 5/29/2023 • 1 min read

Enhancements/Modifications

A localized version of Advanced Pricing extension is made available for the Switzerland market with the addition of German language code [de-CH].



Introduction

Article • 4/3/2023 • 7 min read

Sales

The Aptean Advanced Pricing (APR) extension makes it possible to determine sales prices and discounts for items based on a predefined hierarchy instead of the lowest price. For instance, you may have set a low sales price for all customers and a second-higher sales price for a specific customer. In this case, you want the system to collect the customer price because specific agreements have been made with it. By default, Microsoft Dynamics 365 Business Central chooses the lowest price, which is the lowest permissible price with the highest permissible line discount on a given date. The Advanced Pricing extension allows us to determine the pricing per customer, per customer price group, or the whole company if the prices and discounts must be based on a predefined hierarchical structure instead of the standard lowest price determination. When this hierarchical determination is used by setting up the **Advanced Pricing** as the price calculation method, the system searches for valid prices in the following order when an item is entered in a sales document:

1. Campaign & item
2. Customer & item
3. Customer price group & item
4. All customers & item
5. Item card

If a valid price is found, that price is considered, and the system will no longer search for prices at the levels lower in the hierarchy. The same hierarchy is considered to determine sales discounts, but extra levels have been added due to the available setup for item discount groups.

The system first looks for a valid price or discount where the currency code is equal to the sales document and where the variant matches the item on the sales price line. If there is no applicable price (or discount) found on one of the hierarchical levels, the system goes through the hierarchy again, but then with currency and/or variant code empty. This aspect is explained in detail in the [Advanced pricing method hierarchy](#).

This extension also offers other functionality besides the hierarchical price and discount determination. In the industries, especially when you sell to retail, it is common to use discounts expressed in percentages and amounts. By default, it is only possible to express sales discounts in percentages in Dynamics 365 Business Central. The extension makes it possible to set up and calculate the sales discounts in an amount as well. Those amounts are only applied if the "Advanced Pricing" method is used in the sales price line as the price calculation method instead of the lowest price method.

To provide the user with detailed insight into the sales and discount calculation based on the *Advanced Pricing method*, the **Applied Sales Price and Discount** page can be opened from a sales price line. It shows information concerning the origin of the applied sales price or discount line and the used item units of measure. It explains how the applied unit price from the sales price line is converted into the unit price on the sales price line. This is done



considering that the unit of measure code and the currency code from the applied sales price line can differ from the codes on the sales price line. The same explanation is shown if the unit price in the sales price line is expressed, including VAT, whereas the unit price on the sales price line is expressed excluding VAT or vice versa.

Insights in Applied Sales Price and Discount are available in all sales documents, including Blanket Sales Order, Sales Quote, Sales Order, Sales Return Order, Sales Invoice and Sales Credit Memo. When standard functions in Business Central such as Copy Document, Get Posted document lines to reverse, Archive document is executed, the sub administration of Applied Sales Prices and Discount are copied from the original to the new document.

You can also find the applied sales price and discount fields on the sales document lines, which are editable based on the configuration on the Advanced Pricing Setup page. These fields are not available by default on the sales document lines. You must personalize them. For more information, see With [Allow Direct Sales Line Price Influence toggle turned on](#).

Furthermore, the extension offers multiple tools for flexible deployment of sales pricing strategies:

- Apply the same pricing strategy to multiple customers simultaneously by introducing a reference customer to register sales prices and discounts.
- Differentiate pricing strategies for various locations of one customer by defining pricing parameters on the ship-to address level.
- Define reference dates used for pricing (order date, shipment date, and delivery date) on customer level.

The Advanced Pricing extension functionality is seamlessly integrated with all the sales pricing functions available in standard Business Central.

Purchase

The Aptean Advanced Pricing extension makes it possible to determine purchase prices and discounts for items based on a predefined hierarchy instead of choosing the lowest price.

For instance, you may have need to set a low purchase price for all vendors and a second-higher purchase price for a specific vendor. In this case, you want the system to collect the vendor price because specific agreements have been made with it.

By default, Microsoft Dynamics 365 Business Central chooses the lowest price, which is the lowest permissible price with the highest permissible line discount on a given date. The Advanced Pricing extension allows us to determine the pricing:

- Per vendor
- For All Vendors
- Per Item

If the prices and discounts can be based on a predefined hierarchical structure instead of the standard lowest price determination. When this hierarchical determination is used by setting up the *Advanced Pricing method* as the price



calculation method, the system searches for valid prices in the following order when an item is entered in a purchase document:

- Vendor & item
- All Vendors & item
- Item card

If a valid price is found, that price is considered, and the system will no longer search for prices at the levels lower in the hierarchy. The same hierarchy is considered to determine purchase discounts, but extra levels have been added due to the available setup for item discount groups.

The system first looks for a valid price or discount where the currency code is equal to the purchase document and where the variant matches the item on the purchase price line. If there is no applicable price (or discount) found on one of the hierarchical levels, the system goes through the hierarchy again, but then with currency and/or variant code empty. This aspect is explained in detail in the [Advanced pricing method hierarchy](#).

To provide the user with detailed insight into the purchase and discount calculation based on the *Advanced Pricing method*, the **Applied Purchase Price and Discount** page can be opened from a purchase price line. It shows information concerning the origin of the applied purchase price or discount line and the used item units of measure. It explains how the applied direct unit cost from the purchase price line is converted into the direct unit cost on the purchase price line. This conversion is done considering that the unit of measure code and the currency code from the applied purchase price line can differ from the codes on the purchase price line. The same explanation is shown if the direct unit cost in the purchase price line is expressed, including VAT, while the direct unit cost on the purchase price line is expressed excluding VAT or vice versa.

Insights in Applied Purchase Price and Discount are available in all purchase documents, including Blanket Purchase Order, Purchase Quote, Purchase Order, Purchase Return Order, Purchase Invoice and Purchase Credit Memo. When standard functions in Business Central such as Copy Document, Get Posted document lines to reverse, Archive document is executed, the sub administration of Applied Purchase Prices and Discount are copied from the original to the new document.

You can also find the applied purchase cost and discount fields on the purchase document lines, which are editable based on the configuration on the Advanced Pricing Setup page. These fields are not available by default on the purchase document lines. You must personalize them. For more information, see With [Allow Direct Purchase Line Cost update toggle turned on](#).

The Advanced Pricing extension functionality is seamlessly integrated with all purchase pricing functions available in standard Business Central.



Setup

Article • 10/24/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [General setup](#)
- [Set up advanced pricing](#)



Manage permission sets

Article • 10/24/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *ADVANCEDPRICINGFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *ADVPRICINGBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



Advanced Pricing

The associated fields are automatically updated based on the entered value.

The user has the necessary permissions to use the features of the Aptean Advanced Pricing extension, ensuring secure and role-based access.



General setup

Article • 7/30/2025 • 43 min read

Depending on the price calculation method, the Sales Price and Sales Discount in the sales document and Purchase Price and Purchase Discount in the purchase document are determined with the standard best price or lowest price method or the Advanced pricing method. The Advanced pricing method uses hierarchical determination for selecting a valid price and discount for an item. This hierarchy is explained in the [Advanced pricing method hierarchy](#). Changing the price calculation method to the Advanced pricing makes it possible to use other functionality added with this extension, such as sales discounts expressed in amounts.

Advanced pricing calculation method

The advanced price calculation method can be set up at three levels in the following order:

For sales pricing

- Sales & Receivables Setup
- Customer Price Groups or
- Customer card.

For purchase pricing

- Purchase & Payables Setup
- Vendor card

The method that is set at the lowest level surpasses the method(s) set at a higher level(s).

Sales & receivables setup

The Advanced pricing method can be set as the default method to use throughout the whole system for every sales transaction with an item by selecting **Advanced Pricing** in the **Sales & Receivables Setup**.

1. Select the Search icon  , enter **Sales & Receivables Setup**, and then choose the related link.
2. On the **Prices** FastTab, in the **Price Calculation Method** field, select the **Advanced Pricing** option from the list.



 Note

- i) The **Price Calculation Method** field is not visible by default. You can add the field through personalization.
- ii) When you receive an error while changing the **Price Calculation Method** field value to *Advanced Pricing*, open the **Price Calculation Methods** to resolve it. This will add the *Advanced Pricing* to the page if it was not added during the installation of the extension.

The **Sales & Receivables Setup** is now set up with **Advanced Pricing** as the Price Calculation Method.

Customer price group

If the Advanced Pricing method is not selected in the Sales & Receivables Setup, it is still possible to set the Advanced Pricing method as default for a specific customer price group assigned to one or more customers.

1. Select the Search icon , enter **Customer Price Groups**, and then choose the related link.
The **Customer Price Groups** page opens.
2. Enter **Code**.
3. Enter **Description**.
4. Click the **Price Calculation Method** field.
5. Select the **Advanced Pricing** option from the list.

The customer price group is now set up with *Advanced Pricing* as the Price Calculation Method. This group can be assigned to one or more customers. The system automatically inherits the **Sales Price Reference Date** and **Sales Price Reference Customer** field values on the **Customer Template** page from the **Customer Card** page. Additionally, you can manually select the field values.

Customer

Another option to deviate, is to fill the Price Calculation Method with the *Advanced Pricing* on the specific Customer Card.

1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Click the preferred **No.** on the Customers list to open the **Customer Card** page.
3. On the **Invoicing** FastTab, click the **Price Calculation Method** field.
4. Select the **Advanced Pricing** option from the list.



Purchase & Payables Setup

The Advanced Pricing method can be set as the default method to use throughout the whole system for every purchase transaction with an item by selecting **Advanced Pricing** in the **Purchases & Payables Setup**.

1. Select the Search icon , enter **Purchases & Payables Setup**, and then choose the related link.
2. On the **Prices** FastTab, click the **Price Calculation Method** field.
3. Select the **Advanced Pricing** option from the list.

The **Purchases & Payables Setup** is now set up with *Advanced Pricing* as the Price Calculation Method.

Vendor

Another option to deviate, is to fill the Price Calculation Method with *Advanced Pricing* on the specific Vendor Card.

1. Select the Search icon , enter **Vendors**, and then choose the related link.
The **Vendors** list page opens.
2. Click the preferred **No.** on the Vendors list to open the **Vendor Card** page.
3. On the **Invoicing** FastTab, click the **Price Calculation Method** field.
4. Select the **Advanced Pricing** option from the list.

Reference date, reference customer and ship-to address

The reference date and reference customer only work when the customer (or customer price group) is set up with the Price Calculation Method as *Advanced Pricing*, or when the *Advanced Pricing* method is set up as general pricing method in the **Sales and Receivables Setup** page.

Reference date

Depending on the type of business a company is in, the pricing strategy can differ substantially. The date that should be used to determine a sales price and discount can vary accordingly. In many cases, the date that a sales order was registered, is the date that the price is set by the salesperson. In businesses where market value (purchase- and sales prices) are constantly fluctuating, the exact moment of shipment or promised/requested moment of delivery may be used to determine the price and discount. Therefore, it is possible to set this **Sales Price Reference Date** per customer, ensuring that sales price determination in the sales order is as exact as possible. The reference date is always picked from the Bill-to customer in the sales document.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Click the preferred **No.** on the **Customers** list to open the **Customer Card** page.
3. Click the **Sales Price Reference Date** field on the **Invoicing** FastTab.
4. Select a date option from the dropdown list.

Note

The system automatically updates the **Sales Price Reference Date** field value on the **Customer Template** page. This value is inherited from the **Sales Price Reference Date** field on the **Customer Card** page, and you can also manually select the field value.

The reference date is only used to determine the sales price and discount for an item in a sales order with the price calculation method set to *Advanced Pricing*. All other sales document types apply the standard date. To know more on how reference dates are used in the sales process, see [Apply different reference dates](#).

Reference customer

In some cases, it is preferable that pricing for a particular customer is set up on a higher level than the individual customer. For example, for a group of retail customers, a single set of prices may exist. In such a scenario, it is unfavorable to have to register prices for each customer belonging to this group. It can also be unfavorable to use the customer price group because the specific customer price surpasses the prices set at the customer price group level.

To create a maintainable set of prices, it should be possible to define prices for a *dummy customer* that is referred to on the customer cards of the customers belonging to the group. This way, it can be chosen via setup, if prices are registered on the customer itself, or on a reference customer, possibly linked to multiple other customers.

1. Click the **Sales Price Reference Customer** field on the **Customer Card** page on the **Invoicing** FastTab.
2. Select and click the required **No.** to choose a customer.

Note

The system automatically updates the **Sales Price Reference Customer** field value on the **Customer Template** page. This value is inherited from the **Sales Price Reference Customer** field on the **Customer Card** page, and you can also manually select the field value.

The selected customer number will be used in the sales document to search for the valid price and discount. The reference customer is only used to determine the sales price and discount for an item in a sales order with Price Calculation Method set to Advanced Pricing.



All other sales document types apply the Bill-to customer by default. To know more on how reference customers are used in the sales process, see [Using Reference customers for pricing](#).

Ship-to address

In some cases, prices can differ for one customer depending on the ship-to address for that specific customer. If a large customer has offices/warehouses across the country (say region North and South), prices may differ between these regions due to transportation costs. Hence, the system supports the sales process in these ship-to address specific sales prices by selecting a different customer price - and/or discount group on the ship-to address than on the customer card. The customer price - and discount group on ship-to addresses only work when the customer is set up with the price calculation method set to *Advanced Pricing*, or when the Advanced Pricing method is set up as general pricing method in the sales and receivables setup.

1. On the **Customer Card** page, on the action bar, click **More options** > **Related** > **Customer** > **Ship-to Addresses**. The **Ship-to Address List** page opens.



2. Select and click the required **Code**.
3. The Ship-to Address can now be set up with a different **Customer Price Group** than selected on the customer card.



4. The Ship-to Address can now be set up with a different **Customer Disc. Group** than selected on the customer card.

The setup is now completed.

To know more on how ship-to address specific prices and discounts are used in the sales process, see [Using ship-to address specific customer price group and customer discount group for pricing](#).

Sales prices and discounts

This section explains how to set up and maintain sales prices and discounts for items. The sales prices and discounts can be opened from both the item card and the customer card because sales prices are based on a combination of item and customer setup.

Sales prices

In industries, especially when you sell to retail, it is common to use sales prices based on an agreement with a customer (group). In previous Business Central versions, you could insert the sales price directly into a customer card



or item card. In the current version, you need to create a sales price list and then link it. You can have a specific sales price inserted on a sales price line if a certain combination of customer, item, minimum quantity, unit of measure, or starting/ending date exists. The sales prices can be opened from the customer card and item card.

1. Select the Search icon , enter **Customers**, and then choose the related link. The **Customers** list page opens.
2. On the action bar, click **Related** > **Prices and Discounts** > **Sales Price Lists** to open the **Sales Price Lists** page.
3. On the action bar, click **New** to open the **Sales Price List** page. Note that it is necessary to create a price list before actual prices for items can be registered.
4. On the **General** FastTab, enter **Code** to identify the price list, e.g., "PL-0024".
5. Enter **Description**, e.g., "New Price List Super Heerlen".
6. In the **Assign-to Type** field, select the required type from the following options.

Options	Description
All Customers	Specifies that the Sales Price List is applicable to all existing customers.
Customer	Specifies that the Sales Price List is applicable to a particular customer.
Customer Price Group	Specifies that the Sales Price List is applicable to a specified customer price group.
Customer Disc. Group	Specifies that the Sales Price List is applicable to a specified customer discount group.
Campaigns	Specifies that the Sales Price List is applicable to a specified campaign.
Contact	Specifies that the Sales Price List is applicable to a specified contact.

7. Enter **Assign-to No.** based on the selected **Assign-to Type**.
This field is disabled when the **Assign-to Type** is set to *All customers*.
8. Click the **View Columns for** field.
Review the **View Columns for** field. By default, the field is set to option **Price & Discount**, meaning that both Unit Price and Discount % can be filled on the line level
You can change this to suit your preference, for example, if you want the price list only to contain unit prices, change its value to **Price**.
9. Select **Price** in the **View Columns for** field.
10. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is setup in any currency other than the local currency.
11. Enter **Starting Date** from which the price is valid.
12. Enter **Ending Date**, if required to specify the date until which the price is valid.
13. On the **Lines** FastTab, click on the field **Product Type**.
14. Select the option **Item** from the dropdown list.



15. Enter **Product No.**

16. Enter **Unit Price.**

17. Select the **Allow Line Disc.** checkbox.

When the **Allow Line Disc.** checkbox is selected, it will allow you to apply any additional line discounts to the unit price, if they are set up for the combination of customer and item.

18. Click the **Status** field on the **General** FastTab.

19. Select the **Active** option to set the price list to the **Active** status.

20. Click on **Yes** in the dialog box to confirm the status change.

Note

You can also access the **Sales Price Lists** from **Campaign Card** by selecting **Prices & Discounts > Sales Price Lists** on the action bar of the campaign card.

You can view the prices for a specific item from the **Item Card** page by selecting **Prices & Discounts > Sales Price** on the action bar to access the Price List Lines page.

You can view the prices directly from the overview. The Price List Code of the related item is highlighted and you can view its Unit Price along with other details. The Assign-to field specifies the entity name to which the prices are assigned. The options depend on the selection in the Assign-to Type field. If you choose an entity, the price list will be used only for that entity. Optionally, you can open a specific price list by clicking it to view the items and prices available in it.

The setup of a sales price list via the menu is now complete.

The description for the fields on the **Sales Price List** is as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this sales price line belongs.
Assign-to Type	Specifies the type of source this price line applies to. One of the following options can be selected: All Customers , Customer , Customer Price Group or Campaign .
Assign-to	Specifies the number or the code of the source to which this price line applies.
VAT Bus. Posting Gr. (Price)	Specifies the code for the VAT business posting group of the customer.
Price Includes VAT	Specifies if the unit price includes VAT.
Status	Specifies the status of the sales price list.



Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.
Line Defaults	Specifies the default behavior of Allow Invoice Disc. and Allow Line Disc. fields. These checkmarks apply to all lines in the price list by default.

On the **Lines** FastTab:

Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group.
Product No.	Specifies the number of the item to which the price line applies.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies
Unit of Measure Code	Specifies the unit of measure of the item
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line
Unit Price	Specifies the sales price of the item/variant expressed in the unit of measure of this line
Cost Factor	Specifies the unit cost factor as agreed with the customer
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line

Sales discounts

Similar to sales prices, sales discounts can be set up via the customer card or via the menu if discounts apply to "All customers" for example. In this scenario, we create a Sales Discount List for a particular customer.

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select and click the required **No.** to open the **Customer Card** page.



3. On the action bar, click **Related** > **Prices and Discounts** > **Sales Price Lists**.
4. On the action bar, click **New** on the **Sales Price Lists** page to open the **Sales Price List** page.
5. On the **General** FastTab, enter **Code** to identify the discount list, e.g., "PL-0034".
6. Enter **Description**, e.g., "New Discount List Super Heerlen".
7. Enter **Currency Code**, if necessary.
8. Enter **Starting Date** from which the discount is valid.
9. Enter **Ending Date**, if required to specify the date until which the discount is valid.
10. On the **Lines** FastTab, click the **Product Type** field.
11. Select the **Item** option from the dropdown list.
12. Enter **Product No.**
13. Click the **Discount Method** field.
14. Select the required method from the options, *Percentage* and *Amount*. For example, **Percentage**.
15. Enter **Discount Value**, e.g., "8.00".
In case discount method percentage is chosen, the discount value registered represents a percentage over the unit price. If the discount method **Amount** is chosen, the discount value registered represent an absolute amount as a combination of the unit of measure and currency of the price list line.
16. Click the **Status** field on the **General** FastTab.
17. Select the **Active** option to set the price list to the **Active** status.
18. Click **Yes** in the dialog box to confirm the status change.

The setting up of a sales discount list via the customer card is now complete.

In the above example, a price list of type discount was set up for a specific customer. It is also possible to create a price list of type discount for **All customers**. This is done via the menu.

19. Select the Search icon , enter **Sales Price Lists**, and then choose the related link.
The **Sales Price Lists** page opens.
20. On the action bar, click **New** to open the **Sales Price List** page.
21. On the **General** FastTab, enter **Code** to identify the price list, e.g., "PL-0038".
22. Enter **Description**, e.g., "New Discount List".
23. In the **Assign-to Type** field, select the required type, e.g., *All customers*.
24. Enter **Assign-to** based on the selected **Assign-to Type**.

Note

This field is disabled when the **Assign-to Type** is set to *All customers*.



25. Click on the **View Columns for** field. Review the **View Columns for** field. By default, the field is set to option **Price & Discount**, meaning that both Unit Price and Discount % can be filled on the line level. You can change this to suit your preference, for example, if you want the price list only to contain discounts, change its value to **Discount**.
26. Select *Discount* in the **View Columns for** field.
27. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is set up in any currency other than the local currency.
28. Enter **Starting Date** from which the discount is valid.
29. Enter **Ending Date**, if required to specify the date until which the discount is valid.
30. On the **Lines** FastTab, click the **Product Type** field.
31. Select the option **Item** from the dropdown list.
32. Enter **Product No.**
33. Click the **Discount Method** field.
34. Select the required method from the options, *Percentage* and *Amount*. For example, *Percentage*.
35. Enter **Discount Value**, e.g., "1.00".
36. Click the **Status** field on the **General** FastTab.
37. Select the **Active** option to set the price list to the **Active** status.
38. Click **Yes** in the dialog box to confirm the status change.

The setup of a sales discount list via the menu is now complete.

The description for the fields on the **Sales Price List** page are as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this sales price line belongs.
Assign-to Type	Specifies the type of source this price line applies to. One of the following options can be selected: All Customers , Customer , Customer Price Group or Campaign .
Assign-to	Specifies the number or the code of the source to which this price line applies.
VAT Bus. Posting Gr. (Price)	Specifies the code for the VAT business posting group of the customer.
Price Includes VAT	Specifies if the discount includes VAT.
Status	Specifies the status of the sales price list.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.



Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line

On the **Lines** FastTab:

Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group .
Product No.	Specifies the number of the item to which the price line applies.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies
Unit of Measure Code	Specifies the unit of measure of the item
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line
Price Change Reason Code	Specifies the reason for the price change. This field is optional and is updated when altering prices. You can add or change codes on the Price Reason Change Codes list page.
Discount Method	Specifies whether the discount value is specified as a percentage or as an absolute amount.
Discount Value	Specifies the discount that will be granted to the sales line, expressed as a percentage or absolute amount (see the Discount Method field).

In some cases, you may wish to see what discounts exist for a specific item, regardless of a specific customer or price discount list. In that case, it is possible to view all discounts directly from the item card.

39. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

40. Select and click the required **No.** to open the **Item Card** page.



41. On the action bar, click **Sales Prices & Discounts** > **Sales Prices** to open the **Price List Lines** page.

You can view the line discounts directly from the overview. The **Assign-to** field specifies the entity name to which the prices are assigned. The options depend on the selection in the **Assign-to Type** field. If you choose an entity, the price list will be used only for that entity. The **Price List Code** for discount for the related item is highlighted and you can view its **Line Discount %** along with other details.



Optionally, you can open a specific price discount list by clicking it to view the items and discounts available in it.

Note

You can view the global lot attribute and the location code fields along the Sales Price List Line, Applied Sales Price Line, and Applied Sales Discount Line only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Sales Price List** page is turned on.

Purchase prices and discounts

This section explains how to set up and maintain purchase prices and payables for items. You can access purchase prices and payables from both the Item card and the Vendor card as the purchase prices are based on the Item-Vendor setup combination

Purchase prices

In industries, especially when purchasing from retail vendors, it is common to use purchase prices based on an agreement with a vendor. In the previous versions of Business Central, you could insert the purchase price directly into a Vendor Card or an Item Card. However, in the current version, you need to create a vendor price list and then link it. You can have a specific vendor price inserted on a purchase line if a particular combination of vendor, item, minimum quantity, unit of measure, or starting/ending date exists. The purchase prices can be accessed from the Vendor Card and Item Card.

To set up the Purchase Price List via the Vendor Card,

1. Select the Search icon , enter **Vendors**, and then choose the related link.
The **Vendors** list page opens.
2. Select and click the required **No.** to open the **Vendor Card** page.
3. On the action bar, click **Prices & Discounts** > **Purchase Price Lists** to open the **Purchase Price Lists** page.
4. On the action bar, click **New** to open the **Purchase Price List** page.

Note that it is necessary to create a price list before actual prices for items can be registered.



5. On the **General** FastTab, enter **Code** to identify the price list. This code is created as per the set Number series in **Purchase & Payable Setup**, e.g., "PL-0024".
6. Enter **Description**, e.g., "New Price List Super Heerlen".
7. Enter **Currency Code**, if necessary. Enter the currency code only if the price list is setup in any currency other than the local currency.
8. Enter **Starting Date** from which the price is valid.
9. Enter **Ending Date**, if required to specify the date until which the price is valid.
10. Turn on the **Allow Updating Defaults** toggle to allow the users to change the field values on the price list line containing default values from the header.
11. Turn on the **Allow Invoice Disc.** toggle to allow the invoice discount. You can change this value on the lines only if this toggle is turned on.
12. Turn on the **Allow Line Disc.** toggle to allow line discounts. You can change this value on the lines only if this toggle is turned on.
13. On the **Lines** FastTab, click the **Product Type** field.
14. Select the option **Item** from the dropdown list.
15. Enter **Product No.**
16. Enter **Direct Unit Cost**.
Direct Unit Cost is automatically filled with the data from the existing price lists or from the Item Card. You can also enter it manually.
17. Enter **Minimum Quantity**, **Variant Code**, **Unit of Measure** and **Currency Code** to calculate the **Direct Unit Cost** automatically.
18. Select the **Allow Line Disc.** checkbox.

 Note

When the **Allow Line Disc.** checkbox is selected, it allows you to apply any additional line payables to the direct unit cost, if they are set up for the combination of vendor and item.

19. Select the **Allow Invoice Disc.** checkbox.

 Note

When the **Allow Line Disc.** checkbox is selected, the invoice discount will be calculated when the price is offered.

20. Click the **Status** field on the **General** FastTab.
21. Select the **Active** option to set the price list to the **Active** status.
22. Click **Yes** in the dialog box to confirm the status change.



The setup of a purchase price list via the vendor card is now complete.

When we select **All Vendors**, the **Assign-to** field is disabled

In some cases, you might want to view the prices for a specific item, regardless of a particular vendor or price list. It is now possible to view all prices directly from the Item Card for such scenarios.

23. Select the Search icon , enter **Items**, and then choose the related link.

The **Items** list page opens.

24. Select and click the required **No.** to open the **Item Card** page.

25. On the action bar, click **Prices & Discounts** > **Purchase Prices** to open the **Price List Lines** page.

You can view the prices directly from the overview. The **Price List Code** of the related item is highlighted, and you can view its **Direct Unit Cost** along with other details.

Optionally, you can open a specific price list by clicking it to view the items and prices available in it.

Purchase Price Lists

The description for the fields on the **Purchase Price List** page are as follows:

On the **General** FastTab:

Field	Description
Code	Specifies the price list to which this purchase price line belongs.
Assign-to Type	Specifies the type of entity to which the price list is assigned. The options are All Vendors and Vendor . Campaign or Contact options cannot be selected when price calculation is done using Advanced Pricing.
Assign-to	Specifies entity to which the prices are assigned. The options depend on the selection in the Assign-to Type field. If you choose an entity, the price list is used only for that entity.
Price Includes VAT	Specifies if the direct unit cost includes VAT.
View Columns for	Specifies the amount type filter that defines the columns shown in the price list lines. One of the following options can be selected: Price & Discount, Price or Discount.
Status	Specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and used for price calculations.
Currency Code	Specifies the currency in which the direct unit cost is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.



Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.
Line Defaults	Specifies the default behavior of Allow Updating Defaults , Allow Invoice Disc. and Allow Line Disc. fields. These checkmarks apply to all lines in the price list by default.

On the **Lines** FastTab:

Field	Description
Product Type	Specifies the type of the item to which the price line applies. The logic as described in extension APR only applies to price list lines of type Item and/or Item Discount group.
Product No.	Specifies the identifier of the product. If no product is selected, the price and discount values will apply to all products of the selected product type for which those values are not specified. For example, if you choose Item as the product type but do not specify a specific item, the price will apply to all items for which a price is not specified.
Description	Specifies item details.
Variant Code	Specifies the item variant to which this price line applies.
Work Type Code	Specifies the work type code for the resource.
Unit of Measure Code	Specifies the unit of measure of the item.
Minimum Quantity	Specifies the minimum quantity required in a purchase line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Defines	Specifies if the price list line defines prices, discounts, or both.
Direct unit Cost	Specifies the cost of one unit of the selected item.
Price Change Reason Code	Specifies the reason for the price change. This field is optional and is updated when altering prices. You can add or change codes on the Price Reason Change Codes list page.
Currency Code	Specifies the currency in which the direct unit cost is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the direct unit cost of this price line.
Line Discount %	Specifies the line discount percentage in the purchase line.



Allow Invoice Disc.

Specifies if a possible available invoice discount may be subtracted from the direct unit cost of this price line.

Purchase Order

1. Select the Search icon , enter **Purchase Orders**, and then choose the related link.
2. On the action bar, click **New** to open the **Purchase Order** page.
3. On the **General** FastTab, in the **Vendor No.** field, select and click the required Vendor No. with Advanced Pricing.
4. On the Lines, select **Type** as Item.
5. Enter Item **No.**
6. Enter the **Quantity**.
7. Enter the **Unit of Measure Code**.
8. The **Direct Unit Cost Excl. VAT** is entered automatically. In the **Details** FactBox, on **Purchase Line Details**, click **Purchase Prices** to see how many special prices your vendor grants you for the purchase line. Choose the value to see the special purchase prices.
9. The **Line Amount Excl. VAT** is also filled automatically.
10. The **Invoice Discount Amount** and **Total Incl. VAT** is calculated based on the lines.

You can then post the purchase order.

You can check the calculation for advanced pricing by clicking the line and then the **Applied Purchase Price and Discount** function.

Note

You can view the global lot attribute and the location code fields along the Purchase Price List Line, Applied Purchase Price Line, and Applied Purchase Discount Line only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Purchase Price List** page is turned on.



Set up advanced pricing

Article • 1/28/2026 • 8 min read

You can set up advanced pricing configurations to manage pricing calculations, discounts, bracket pricing, and price freezing behaviors across sales and purchase transactions.

To set up advanced pricing, follow these steps:

1. Select the Search icon , enter **Advanced Pricing Setup**, and then choose the related link. The **Advanced Pricing Setup** page opens.
2. On the **Sales** FastTab, enter the required information in the following fields:

Field	Description
Allow Direct Sales Line Price Update	Turn on the toggle to enable direct modification of applied price and discount fields in sales order lines. This is applicable only when the Price Calculation Method field value is set to <i>Advanced Pricing</i> .
Freeze Sales Price on Manual Change	Select whether the system must freeze the sales line price or discount after a manual update, to prevent recalculation if the sales line quantity is subsequently edited. The available options are: • Yes: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned on by default and is editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field value, the applied price records are automatically frozen. • No: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned off by default and is editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are not automatically frozen. • Always: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change



	Applied Line Discount pages is turned on by default and is non-editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are automatically frozen. • <i>Never</i>: The Freeze Price & Discount toggle on the Change Applied Unit Price and Change Applied Line Discount pages is turned off by default and is non-editable. When you change the price or discount directly in the document line using the Applied Unit Price, Applied Discount Value, or Line Discount Amount field, the applied price records are not automatically frozen.
Default Applied Discount Method	Select the default format for discounts. The available options are: • <i>Percentage</i>: The applied discount is indicated in percentage. • <i>Amount</i>: The applied discount is indicated in decimal values. The selected option is applied to items in the sales line if they do not have a default value from the sales price list. This field is available only when the Allow Direct Sales Line Price Update toggle is turned on.
Sales Line Update Influence	Select how unit price updates affect pricing calculations. The available options are: • <i>Unit Price</i>: The unit price indicates that the special price applied with override all other pricing for the item. • <i>Trade Base Price</i>: The trade base price indicates that the applied unit price entered with undergo additional changes through the trade plans. This option is visible only if the Aptean Trade Management extension is installed. This field is available only when the Allow Direct Sales Line Price Update toggle is turned on.
Default Sales Price Reference Date	Select the reference date used for price calculations.



Use Sales Document Currency for Manual Change	Specifies whether the currency of the sales document is used when you manually change prices or discounts on sales lines.
Use Purchase Document Currency for Manual Change	Specifies whether the currency of the purchase document is used when you manually change prices or discounts on purchase lines.

When the **Use Sales Document Currency for Manual Change** toggle is turned on and a sales document contains a currency code in the header, any manual price or discount changes made through the **Manual Price**, **Manual Discount** page, or at the line level are updated based on the currency code specified in the sales document header. When this toggle is turned off, manual price or discount changes does not use document currency code.

When the **Use Purchase Document Currency for Manual Change** toggle is turned on and a purchase document contains a currency code in the header, any manual cost or discount changes made through the **Manual Price**, **Manual Discount** page, or at the line level are updated based on the currency code specified in the purchase document header. When this toggle is turned off, manual cost or discount changes does not use document currency code.

3. On the **Purchase** FastTab, enter the required information in the following fields:

Field	Description
Allow Direct Purchase Line Cost Update	Turn on the toggle to enable direct modification of applied cost and discount fields in purchase order lines.
Freeze Purchase Price on Manual Change	Select whether the system must freeze the purchase line price or discount after a manual update, to prevent recalculation if the purchase line quantity is subsequently edited. The available options are: • Yes: The Freeze Price & Discount toggle on the Change Applied Direct Unit Cost and Change Applied Line Discount pages is turned on by default and is editable. When this toggle is turned on, and you update the price or discount directly in the document line using the Applied Direct Unit Cost or Applied Discount % field values, the applied price records are automatically frozen. • No: The Freeze Price & Discount toggle turned on the Change Applied Direct Unit Cost and Change Applied Line Discount pages is turned off by default and is editable. When this toggle is turned on, and you change the price or discount directly in the document line using the Applied Direct Unit Cost or Applied Discount % fields, the applied price records are not automatically frozen.



- **Always:** The **Freeze Price & Discount** toggle turned on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is on by default and is non-editable. When this toggle is turned on, and you update the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** fields, the applied price records are automatically frozen.
- **Never:** The **Freeze Price & Discount** toggle turned on the **Change Applied Direct Unit Cost** and **Change Applied Line Discount** pages is turned off by default and is non-editable. When this toggle is turned on, and you update the price or discount directly in the document line using the **Applied Direct Unit Cost** or **Applied Discount %** fields, the applied price records are not automatically frozen.

4. On the **Bracket Pricing** FastTab, enter the required information in the following fields:

Field	Description
Enable Bracket Pricing for Sales	Turn on the toggle to apply bracket pricing to sales orders, sales invoices, and sales quotes. For more information, see Manage bracket pricing .
Calculate Sales Bracket Pricing On Release	Turn on the toggle if the system must calculate bracket pricing automatically when a sales document is released. This field is available only when the Enable Bracket Pricing for Sales toggle is turned on.
Update Method for Sales Bracket Change	Select how the system must update pricing in the event of threshold changes. The available options are: • Update Only: Only the bracket pricing source type is updated on the source document. • Message Only: Displays a message indicating which record can be updated. If the document is reopened and released again without updating the source number, the message continues to appear. • Update and Message: The source number value is updated, and a confirmation message is displayed. This field is available only when the Enable Bracket Pricing for Sales toggle is turned on.

Note

You can select the **Bracket Pricing Groups** action to open the **Bracket Pricing Groups** page. For more information, see [Set up bracket pricing groups](#).



5. On the **Report** FastTab, in the **Price Report Template Nos.** field, select the number series to use in print report templates.

The advanced pricing setup is complete.

Working with direct sales line price updates

You can directly modify the values of the applied price and discount fields in the sales order lines. These fields can be customized through personalization. The fields are:

- Applied Unit Price
- Applied Price Unit of Measure Code
- Applied Discount Method
- Applied Discount Value
- Applied Discount Unit of Measure Code

However, the **Applied Unit Price**, **Applied Price Unit of Measure Code**, and **Applied Discount Value** field values are only editable, when

- i) *Advanced Pricing* is being used as the price calculation method.
- ii) The **Allow Direct Sales Line Price Influence** toggle on the **Advanced Pricing Setup** page is turned on.

The **Applied Discount Method** and **Applied Discount Unit of Measure Code** field values are not editable.

The following steps describe how to fill the fields:

1. The **Applied Unit Price** field automatically inherits the value from the **Unit Price** field in the applied sales price line. If this field is blank, then the **Applied Unit Price** field value is empty.
This is influenced by the option selected in the **Sales Line Update Influence** field on the **Advanced Pricing Setup** page: *Unit Price* or *Trade Base Price*.
 - a. When *Unit Price* is selected, The entered value will update the **Unit Price** field on the **Applied Sales Price Line**, and then trigger a price update in the **Unit Price Excl. VAT** field in the sales lines. The **Currency Recalculation Factor** field value is recalculated and updated based on the value entered.
 - b. When *Trade Base Price* is selected, The entered value will serve as the base price, and the trade line will be recalculated accordingly. This is possible only when the Aptean [Trade Management](#) extension is installed. The value entered in the **Applied Unit Price** field is expressed in applied unit of measure code. If the applied unit of measure code is different from the value in the sales line, then the **Unit Price Excl. VAT** field value is recalculated internally using the unit of measure code conversion.

When you update this value in the applied sales price line through **Manual Price** action, the same values are inherited to the field in the sales order Lines.



Note

This field is editable on the **Sales Invoice** and **Sales Credit Memo** pages.

2. The **Applied Price Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the Applied Sales Price Line. When you update this value, the **Unit Price Excl. VAT** field value also gets updated accordingly.
3. The **Applied Discount Method** field value automatically inherits the value from the **Discount Method** field on the **Applied Line Discount** page. The options are *Percentage* or *Amount*.
4. In the **Applied Discount Value** field, enter the desired decimal value.

This automatically calculates and updates the **Line Discount%** field value, similar to manually entering the discount value for the item through the **Manual Discount** action. It also updates the same value in the **Discount Value** field on the **Applied Sales Price and Discount** page.

Note

When *Percentage* is selected, the **Discount Value** field value is inherited to the **Line Discount%** field, whereas when *Amount* is selected, the **Line Discount%** field value is internally calculated based on the value entered.

5. The **Applied Discount Unit of Measure Code** field value automatically inherits the value from the **Unit of Measure Code** field on the applied sales discount line. This is populated only after you enter the value in the **Applied Discount Value** field.

The values entered in the sales order lines for the above fields are updated automatically on the Applied Sales Price and Discount page and vice versa.

This applies to both sales quotes and sales blanket orders.

With allow direct purchase line cost update toggle turned on

You can directly modify the values of the applied cost and discount fields on the purchase order lines, and these fields can be customized through personalization. The fields are:

- Applied Direct Unit Cost
- Applied Price Unit of Measure Code
- Applied Discount %
- Applied Discount Unit of Measure Code



However, the **Applied Direct Unit Cost**, **Applied Price Unit of Measure Code**, and **Applied Discount%** field values are editable only when

- i) *Advance Pricing* is being used as a price calculation method.
- ii) The **Allow Direct Purchase Line Cost Update** toggle on the **Advanced Pricing Setup** page is turned on.

The **Applied Discount Unit of Measure Code** field value is not editable.

The following steps describe how to fill the fields: 1. The **Applied Direct Unit Cost** field automatically inherits the value from the **Direct Unit Cost** field in the applied purchase price line.

Note

If the value in the **Unit of Measure Code** and **Applied Price Unit of Measure Code** fields are the same, then the unit cost value remains the same. If they are different, on changing the **Applied Direct Unit Cost** field value, the **Direct Unit Cost Excl. VAT** field value will be internally recalculated based on the unit of measure code conversion.

When you update this value on the Applied Purchase Price line through **Manual Price** action, the same values are inherited to the field in the purchase order lines.

1. The **Applied Price Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the applied purchase price line.
When you update this value, the **Direct Unit Cost Excl. VAT** field value is also updated.
2. The **Applied Discount %** field automatically inherits the value from the **Line Discount %** field in the applied purchase discount line.
When you update this value, the same value is updated to the **Line Discount%** field in the applied purchase discount line.
3. The **Applied Discount Unit of Measure Code** field automatically inherits the value from the **Unit of Measure Code** field in the applied purchase discount line.
This value is not editable on the purchase lines.
The values entered on the purchase order lines for the above fields are updated automatically on the **Applied Purchase Price and Discount** page and vice versa.

This applies to both purchase quotes and purchase blanket orders.



Set up purchase price reference date

Article • 11/26/2025 • 2 min read

On the **Vendor Card** page, on the **Invoicing** FastTab, in the **Advanced Pricing** section, in the **Purchase Price Reference Date** field, select the date type the system uses when determining purchase prices. The available options are:

- Order Date
- Expected Receipt Date
- Requested Receipt Date
- Promised Receipt Date

Note

If the **Purchase Price Reference Date** field value is left blank, the system defaults to using the order date for price determination.

On the **Vendor Card** page, on the **Invoicing** FastTab, in the **Advanced Pricing** section, in the **Purchase Price Reference Vendor** field, select another vendor whose price lists the system uses for price determination.

Note

- When you create a purchase document for the selected vendor, the system retrieves prices from the price list lines of the referenced vendor instead of the actual vendor.
- If the **Purchase Price Reference Vendor** field value is left blank, the system uses the actual vendor number for price determination.

When you create a purchase order for a vendor with the **Pricing Method** field set to *Advanced Pricing*, the system automatically applies prices based on the vendor configuration.

On the **Purchase Order** page, on the **General** FastTab, the **Purchase Price Reference Vendor** field displays the reference vendor number configured on the vendor card. This field is not editable.

When you add lines to the purchase order, the system determines prices as follows:

1. The system checks the **Purchase Price Reference Date** field value on the vendor card to identify which date to use for price lookups.
2. The system retrieves prices from the price lists of the vendor specified in the **Purchase Price Reference Vendor** field.
3. The system validates minimum quantity requirements and applies the correct price based on the reference date.



For example a purchase order with the following configuration:

- The **Order Date** field value is set to *02-10-2025*
- The **Expected Receipt Date** field value is set to *12-10-2025*
- The **Purchase Price Reference Vendor** field value is set to *10001*

The system applies prices from vendor 10001's price lists valid on 12-10-2025.

Item No.	Description	Quantity	Unit of Measure	Applied Price	Source
0025	Tomatoes Box 10 kg	100	BOX	14.50 per BOX	Vendor 10001
0030	Cheddar Cheese 5 kg	50	PCS	18.75 per PCS	Vendor 10001
0040	Butter 25 kg block	60	BLOCK	96.00 per BLOCK	Vendor 10001

When you change the **Expected Receipt Date** field value to 20-10-2025, the system displays a confirmation message.

If you select **Yes**, the system re-evaluates each line based on the new reference date:

Note

- The confirmation message appears when you change the **Expected Receipt Date**, **Requested Receipt Date**, or **Promised Receipt Date** field values.
- If the **Purchase Price Reference Vendor** field value is left blank, the system uses the actual vendor for price determination.
- If the **Purchase Price Reference Date** field value is left blank, the system defaults to the order date.
- If the reference vendor has no valid price list line for the reference date, the system uses the actual vendor price list.
- This functionality applies only when the **Pricing Method** field value is set to *Advanced Pricing* on the vendor card.



Advanced pricing method hierarchy

Article • 5/29/2023 • 12 min read

When creating a new sales document, the system will determine the price calculation method. In this topic, we presume that the price calculation method is set to the advanced pricing method.

To explain how a price is selected in a sales order line, we will give an example. Let's say you have created a sales order for customer C0015, with an order line for item number 15:

.

And let's assume you have specified the following price lines for item 15 on the **Sales Prices** page. Lines that do not match the selected item number, customer, customer group or campaign are already filtered out in this picture.

.

So which price from the price list will be chosen for the order line? First, the system will filter out all price lines that are not valid for this order. The picture below explains when a price line is valid or invalid.

Which lines are valid?	
Item number	Only price lines with <i>same</i> item number as the item on the order line are valid.
Sales type/Sales code	• Lines with Sales Type CUSTOMER are only valid when the customer is equal to the customer on the order or to the sales price reference customer (when this field is specified for the customer on the order). • Lines with Sales Type CUSTOMER PRICE GROUP are only valid when the customer group is linked to the customer on the order. • Lines with Sales Type CAMPAIGN are only valid when this campaign is selected on the order. • Lines with Sales Type ALL CUSTOMER are always valid.
Starting date	• For <i>sales orders</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> order/shipment/promised delivery/requested delivery date are valid: Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. • For other <i>sales documents</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> the order date are valid.



Currency code	Only price lines that have <i>no</i> currency code (i.e., representing the default system currency) or have the <i>same</i> * currency code as the currency on the order header are valid.
Variant code	Only price lines that have <i>no</i> variant code or have the <i>same</i> variant code as the item on the order line are valid.
Unit of measure	All unit of measure codes are valid.
Minimum quantity	Only lines that have a <i>lower</i> minimum quantity than the quantity in the order line are valid.
Ending date	- For <i>sales orders</i>: only price lines that have <i>no</i> starting date, or a starting date that is <i>before or equal to</i> the order date are valid. Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. - For other <i>sales documents</i>: only price lines with <i>no</i> starting date or a starting date that is <i>before or equal to</i> the order date are valid.

 Note

When a different unit of measure code is specified in the price line than in the order line, the minimum quantity is recalculated using the item unit of measure table.

 Note

When determining the sales discount instead of the sales price, a similar process is followed. But additionally, the item discount group is then also considered. If no item number is found at a certain level but a discount is present for an item discount group that is assigned to the item, then this discount will be considered. And instead of the sales type *customer price group*, the system will search for the sales type *customer discount group*.

Using the rules in the picture above, the pink lines in the picture below are filtered out of the price list in our example. The reason why they are not valid (in combination with our order example) is highlighted in red.

 Note

When no lines remain, the *Unit Price* of the item card would be used on the order line.

After filtering out these *invalid* price lines, the system will continue to filter lines (in 4 steps) based on a certain hierarchy (which also applies when a discount is retrieved). The most important fields are **Currency Code** and



Variant Code. The first step the system will take is checking whether price lines exist in which the values of both fields match the values in the order (line). If so, it will continue to step 2 with those price lines. If they are not found, it will look further for lines that contain only the correct currency code. If those are not found, it will look for lines that contain only the correct variant code. And finally, if those are not found, it will continue to step 2 with the remaining price lines (which have no value for both fields).

In the second step, the remaining lines are filtered on the Source Type field. Lines with sales type *Campaign* trump lines with *CUSTOMER*, which in turn trump lines with *CUSTOMER PRICE GROUP*, which in turn trump lines of type *ALL CUSTOMERS*.

Next (if multiple lines still exist), price lines with the most recent starting date will be selected. And of those lines, the price line(s) with the highest minimum quantity remain(s).

Applying these four steps to the valid price lines we had left in our example, would filter out the orange lines in the picture below, resulting in 1 remaining (grey) price line. Explanation:

Step 1: Since price lines with *USD* and *RED* exist, 5 lines are filtered out.

Step 2: *CUSTOMER* trumps *ALL CUSTOMER*, so the line with *ALL CUSTOMER* is filtered out.

Step 3: As price lines with UoM *BOX* exist, the price line with no UoM is filtered out.

Step 4: As *2017* is older than *2018*, the line with starting date 01/01/2017 is filtered out.

Step 5: As *10* is higher than *0*, the line that remains is the line with minimum quantity *10*.

The unit price that will be used in the order will be 9 USD.

In the example above, the price line that is selected in the end contains the currency *USD*. Since the order contains the same currency, the price does not need to be recalculated. However, if the selected price line contains an empty currency code (representing the local currency as set up in the General Ledger Setup), the price would be recalculated to USD before entering it in the order line. See [Sales prices and discounts in sales documents](#) for more details.

In the example above, the price line that is selected in the end contains the unit of measure *BOX*. Since the item on the order line is also specified in *BOX*, the price does not need to be recalculated. However, this is not always the case. Below, four possible situations that could result after step 5 are described.



Advanced pricing method hierarchy with lot attribute values

Article • 5/29/2023 • 13 min read

To execute the price calculation based on the attribute driven pricing on the sales/purchase documents, the price list pages should be created with values predefined for an item. When the **Attribute Driven Pricing** toggle is turned on and the Price Calculation method is set to **Advanced Pricing Method**, the selection of the price on the lines takes place as follows:

To explain how a price is selected in a sales order line, we will give an example. Let's say you have created a sales order for customer C0015, with an order line for item number 15 along with the below attributes and location code:

Let us assume that you have specified the following price lines for item 15 on the Sales Price page. Lines that do not match the selected item number, Customer, Customer group or Campaign are already filtered out in this picture.

So which price from the price list will be chosen for the order line? First, the system will filter out all price lines that are not valid for this order. The picture below explains when a price line is valid or invalid when the Attribute Driven Pricing toggle is turned on.

Which lines are valid?	
Item number	Only price lines with the same item number as the item on the order line are valid.
Sales type/Sales code	• Lines with Sales Type CUSTOMER are only valid when the customer is equal to the customer on the order or to the sales price reference customer (when this field is specified for the customer on the order). • Lines with Sales Type CUSTOMER PRICE GROUP are only valid when the customer group is linked to the customer on the order. • Lines with Sales Type CAMPAIGN are only valid when this campaign is selected on the order. • Lines with Sales Type ALL CUSTOMER are always valid.
Starting date	• For <i>sales orders</i>: only price lines with no starting date or a starting date that is before or equal to order/shipment/promised delivery/requested delivery date are valid: Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card.



	For other <i>sales documents</i>: only price lines with no starting date or a starting date that is before or equal to the order date are valid.
Currency code	Only price lines that have no currency code (i.e., representing the default system currency) or have the same currency code as the currency on the order header are valid.
Variant code	Only price lines that have no variant code or have the same variant code as the item on the order line are valid.
Unit of measure	All unit of measure codes are valid.
Minimum quantity	Only lines that have a lower minimum quantity than the quantity in the order line are valid. When in the price line another unit of measure code is specified than in the order line, the minimum quantity is recalculated using the item unit of measure table.
Ending date	- For <i>sales orders</i>: only price lines that have no ending date, or an ending date that is after the order/shipment/promised delivery/requested delivery date are valid. Which of these dates is applicable depends on the 'Sales Price Reference Date', specified on the customer card. - For other <i>sales documents</i>: only price lines with no starting date or a starting date that is before or equal to the order date are valid.
Location	Only Lines with the same location on the order line are valid.
Global Lot Attributes	Only lines that have no global lot attribute values or have the same global lot attributes on the order line are valid.

 Note

When determining the sales discount instead of the sales price, a similar process is followed. But additionally, the item discount group is then also considered. If no item number is found at a certain level but a discount is present for an item discount group that is assigned to the item, then this discount will be considered. And instead of the sales type *customer price group*, the system will search for the sales type *customer discount group*.

Using the rules in the picture above, the pink lines in the picture below are filtered out of the price list in our example. The reason why they are not valid (in combination with our order example) is highlighted in red.



 Note

When no lines remain, the *Unit Price* of the item card would be used on the order line.

After filtering out these *invalid* price lines, the system will continue to filter lines (in 7 steps) based on a certain hierarchy (which also applies when a discount is retrieved). The most important fields are **Currency Code** and **Variant Code**. The first step the system will take is checking whether price lines exist in which the values of both fields match the values in the order (line). If so, it will continue to step 2 with those price lines. If they are not found, it will look further for lines that contain only the correct currency code. If those are not found, it will look for lines that contain only the correct variant code. And finally, if those are not found, it will continue to step 2 with the remaining price lines (which have no value for both fields).

In the second step, the remaining lines are filtered on the *Source Type* field. Lines with sales type *Campaign* trump lines with *CUSTOMER*, which in turn trump lines with *CUSTOMER PRICE GROUP*, which in turn trump lines of type *ALL CUSTOMERS*.

In the third step, the Unit of Measure Code is checked for the exact match between the price list lines and order line.

Next (if multiple lines still exist), price lines with the most recent starting date will be selected. And of those lines, the price line(s) with the highest minimum quantity remain(s).

Then, the system checks for the lines that have the same location code as that of the order line. Finally, the system will look for any pricing lines that already exist with the same global attribute values as the order line. If they cannot be located, it will look for lines in the global lot attribute fields that have least matching or empty values.

 Note

The system accepts any values on the pricing list lines for the blank field values on the order line.

Applying these seven steps to the valid price lines we had left in our example, would filter out the orange lines in the picture below, resulting in remaining (grey) price lines. Explanation:

Step 1: Since price lines with *USD* and *RED* exist, two lines are filtered out.

Step 2: *CUSTOMER* trumps *ALL CUSTOMER*, so the line with *ALL CUSTOMER* is filtered out.

Step 3: As price lines with UoM *BOX* exist, the price line with no UoM is filtered out.

Step 4: As *2017* and *_2018_* are older than, the line with starting date 01/01/2017 & 01/01/2018 are filtered out.



Step 5: As the remaining lines are with same minimum quantity 50, all three lines exist.

Step 6: As price lines with Location *East* exist, the price line with other or no locations are filtered out.

Step 7: Finally, the system will filter and only display the pricing lines that match the order line's global lot attribute values. However, if any value is not specified or left blank in the order line, the system will also consider any assigned or empty values in the pricing line for that specific global lot attribute.

Based on the above the following lines are filtered,

When multiple records are found after the hierarchical filtering, the system will select the price from the line with lowest price. Here it will select the Unit Price of 11 from the filtered lines as it is the lowest.



Information about the applied sales price and discount

Article • 12/11/2024 • 12 min read

When creating a sales price line for a customer that is set up with the *Advanced Pricing* method, the system will apply a price and discount according to the hierarchy mentioned in the previous topic. In the sales price line, the additional **Applied Sales Price and Discount** page is added to give the user more information about the applied price and discount in the sales price line.

In this example, a sales order line is created for item number "0015", the base unit of measure is a can, and the customer is set up with the *Advanced Pricing* method. The system automatically calculates the unit price and line discount based on the *Advanced Pricing* method. The **Applied Sales Price and Discount** page shows all relevant information about the selected sales price line and sales discount line on which these values are based. The conversion from the unit price on the price line to the unit price on the sales price line is explained by considering the different unit of measures, different currencies and the including/excluding VAT difference.

The **Applied Sales Price and Discount** page can be opened from the following sales documents:

- Sales order
- Sales return order
- Sales invoice
- Sales credit memo
- Sales quote
- Blanket sales order
- For example, on a sales order, on the action bar, select **Line > Related Information > Applied Sales Price and Discount**.

The page **Applied Sales Price and Discount** can also be opened by clicking directly on the row button on the sales order line on the **Lines** FastTab.

1. In the **Type** field, select the context menu  , and then select **Applied Sales Price and Discount**.

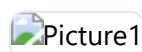
The **Applied Sales Price & Discount** page has four FastTabs, as explained below:

The **Applied Sales Price Line** FastTab displays the price line that is applied.

Field	Description
Originated From	Specifies where the price line originates from. It could be a price line that was set up in the Sales Prices list, it could be the price from the item card (when no valid sales price line exists), or it could be a price that was manually specified.



Frozen	Specifies if the applied sales price line is frozen. When frozen, it will not change anymore when you adjust for example the order quantity or UoM in the sales line.
Price List Code	Specifies the price list to which this sales price line belongs.
Source Type	Specifies to what type of source this price line applies. It is assigned based on the option selected in the Assign-to Type on the Sales Price List page.
Source No.	Specifies the number or the code of the source to which this price line applies.
Asset No.	Specifies the number of the item to which this price line applies.
Variant Code	Specifies the item variant to which this price line applies.
Unit of Measure Code	Specifies the unit of measure of the item.
Minimum Quantity	Specifies the minimum quantity required in a sales line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Unit Price	Specifies the sales price of the item/variant expressed per unit of measure of this line.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup. The Applied Currency Code field on the sales order, blanket sales order, sales invoice, and sales credit memo will inherit this values based on the selection of customer and item.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line.
Price Includes VAT	Specifies if the unit price includes VAT.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.



The **Applied Sales Discount Line** FastTab displays the origin of the discount that is applied.

Field	Description
-------	-------------



Originated From	Specifies where the price line originates from. It could be a price line that was set up in the Sales Prices list, it could be the price from the item card (when no valid sales price line exists), or it could be a price that was manually specified.
Minimum Quantity	Specifies the minimum quantity required in a sales line for this discount line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Discount Method	Specifies whether the discount value is specified as a percentage or as an absolute amount.
Discount Value	Specifies the discount that will be granted to the sales line, expressed as a percentage or absolute amount (see Discount Method field).
Currency Code	Specifies the currency in which the discount is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Price Includes VAT	Specifies if the discount value (absolute amount) includes VAT.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.

 The **Applied Item Unit of Measure** FastTab displays the unit of measure codes that are used in the applied sales price line, the applied sales discount line, or in the sales document line.

Field	Description
Code	Specifies the unit of measure code that is used in the applied document price line, the applied document discount line or the document line.
Quantity Expressed in the UoM	Specifies how many units (expressed in the unit of measure code) are linked to the number of units as specified in the field 'Quantity Expressed in the Base Unit of Measure'.
Quantity Expressed in BOX	Specifies how many units (expressed in the base unit of measure) are linked to the number of units as specified in the field 'Quantity Expressed in the UoM' (expressed in the unit of measure code).



- The **Price calculation** FastTab displays fields related to applied price (**Price group**) and applied discount (**Discount group**).

Field	Description
-------	-------------



Unit Price from Sales Price Line	Specifies the unit price per unit of measure (incl. or excl. VAT), as set up in the applied sales price line.
Unit of Measure Recalculation Factor	Specifies the ratio between the unit of measure from the applied sales price line and the unit of measure from the sales document line. This ratio is used to recalculate the unit price from the price line to the unit price on the document line, in case they are specified for different units of measure.
Currency Recalculation Factor	Specifies the ratio between the currency from the applied sales price line and the currency from the sales document. This ratio is used to recalculate the unit price from the price line to the unit price on the document line, in case they are specified in different currencies.
VAT Recalculation Factor	Specifies the VAT percentage as set up on the VAT Posting Setup page. This percentage is used to recalculate the unit price from the applied sales price line to the unit price on the sales document line, in case one of them is specified as 'incl. VAT' and the other as 'excl. VAT'.
Unit Price (Converted)	Calculates the adjusted unit price by applying recalculation factors such as unit of measure (UoM) and currency conversions to the initial unit price from the applied sales price line. This calculation involves multiplying the initial unit price on the sales price line by the item's net weight, resulting in the final converted unit price that reflects accurate pricing based on these adjustments.
Discount Method	Specifies whether the discount value from the applied sales discount line is specified as a percentage or as an absolute amount.
Discount Value from Sales Discount Line	Specifies the discount value per unit of measure, as set up in the applied sales discount line.
Unit of Measure Recalculation Factor	Specifies the ratio between the unit of measure from the applied sales discount line and the unit of measure from the sales document line. This ratio is used to recalculate the discount from the discount line to the discount percentage on the document line, in case they are specified for different units of measure.
Currency Recalculation Factor	Specifies the ratio between the currency from the applied sales discount line and the currency from the sales document. This ratio is used to recalculate the discount from the discount line to



	the discount percentage on the document line, in case they are specified in different currencies.
VAT Recalculation Factor	Specifies the VAT percentage and VAT calculation as set up on the VAT Posting Setup page. This percentage, if applicable based on the VAT calculation type, is used to recalculate the discount from the discount line to the discount on the sales document line, in case one of them is specified as 'incl. VAT' and the other as 'excl. VAT'.
Discount Value (Converted)	Indicates the discount value derived from the applied sales discount line. This value is calculated by multiplying the item's net weight by the standard discount for regular items.
Base Line Discount %	Specifies the line discount percentage based on the unit price (converted) and discount amount (converted) of the document line. If the Discount Method field is set to <i>Percentage</i> for the applied line discount, this field displays the discount percentage from the discount line.

You can view how the unit price from the sales price line (**Unit Price from Sales Price Line** field) is converted into the unit price on the sales price line (**Unit Price in Sales Price Line** field), taking into consideration the unit of measure code and/or the currency code from the applied sales price line can differ from the codes on the sales price line. The same calculation applies if the unit price in the sales price line is expressed including VAT, while the unit price on the sales price line is expressed excluding VAT (or vice versa).



The following fields on the **Price Calculation** FastTab are displayed only when the Aptean [Catch Weight](#) extension is installed.

Field	Description
Weight Recalculation Factor	Defines the ratio between the actual weight of a catch weight item, as recorded on the item tracking lines, and the item's standard net weight. The ratio is determined by dividing the updated weight quantity to invoice specified on the item tracking lines by the standard weight quantity. This recalculated unit price accounts for variations between the item's net weight and actual recorded weight. If the sales order is partially posted, the Weight Recalculation Factor and Unit Price (Converted) by Weight Factor fields will update automatically based on the invoiced weight quantities. Note that the Weight Recalculation Factor field will only display a value if the Update Catch Weight Item Unit Price action is executed or when a document is posted for shipment or invoice. If not, this field will remain empty.



Unit Price (Converted) by Weight Factor	Determines the unit price adjusted by the weight recalculation factor to reflect the actual price of a catch weight item on the sales line unit of measure. The final unit price is obtained by multiplying the weight recalculation factor and the unit price (converted).
Discount Value (Converted) by Weight Factor	Indicates the discount value adjusted by the weight recalculation factor to determine the actual discount for the catch weight item based on the weight quantity to invoice and the weight quantity already invoiced as specified in the item tracking lines when the Discount Method field is set to <i>Amount</i> . This value is calculated by multiplying the weight recalculation factor by the discount value (converted). If the Discount Method is set to <i>Percentage</i> for the applied line discount, no value will be displayed in this field.

You can also view these fields on the following pages:

- Blanket Sales Order
- Sales Quote
- Sales Order
- Sales Order Achieve
- Sales Invoice
- Posted Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Posted Sales Credit Memo

The **Applied Trade Lines** FastTab displays fields related to applied price (**Price** group) and applied discount (**Discount** group).

Field	Description
Trade Base Unit Price (per Sales Price UoM)	Specifies the base unit price per sales price unit of measure that is used as the starting point to which trade plan rates are applied. Depending on the set up of the first trade plan line in the trade calculation, this will be either the unit cost of the item or the price that was found in the Sales Price list recalculated to the currency of the sales document.
Total Price Increase (per Sales Price UoM)	Specifies the sum of all price increases per sales price unit of measure that result from the applied document trade lines.



New Unit Price (per Sales Price UoM)	Specifies the new unit price per sales price unit of measure. This field is calculated by adding the 'Total Price Increase (per Sales Price UoM)' to the 'Trade Base Unit Price.'
Unit Price Excl. VAT	Specifies the new unit price per sales price unit of measure. This is the price as shown in the sales line.
Total Discount Amount	Specifies the sum of all discount values that result from the applied document trade lines, added to the discount value that results from the applied sales discount line.
New Line discount % in sales line	Specifies the new line discount percentage, as shown in the sales line. This value is calculated by adding the 'Base Line Discount %' (recalculated to an amount using the 'New Unit Price') to the 'Total Discount Amount' and relating this total discount amount to the 'New Unit Price'.

The **Applied Trade Lines** FastTab displays the following fields related to the applied price (**Price** group) and the applied discount (**Discount** group) only when the Aptean [Trade Management](#) extension is installed.

Field	Description
Base Discount Value	Indicates the discount value derived from the applied sales discount line. For catch weight items, this amount is calculated by multiplying the discount value (converted) by the weight factor and the quantity specified on the sales line.
Discount Amount from Trade Lines	Indicates the total discount amount accumulated from all the applied document trade lines. This value is calculated by summing the Amount field values from each document trade line with the Price Rule field set as <i>Discount</i> .

For percentage-based discounts, the system displays the discount percentage and recalculates the line discount based on the combined discount amount.

For amount-based discounts, the system shows the discount per unit and adjusts the line discount percentage accordingly.

You can also view these fields on the following pages:

- Blanket Sales Order
- Sales Quote
- Sales Order
- Sales Order Achieve



- Sales Invoice
- Posted Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Posted Sales Credit Memo

The **Applied Sales Price Line** FastTab shows that the applied sales price is set up with a unit price of 85.75 per crate, without VAT. The currency code in the applied sales price line is empty, which means that the local currency is used for this price, which is, in this case, the currency code GBP. This information is summarized as "85.75 GBP/CRATE excl. VAT" in the **Unit Price from Sales Price Line** field on this FastTab.

The **Unit of Measure Recalculation Factor** field on this FastTab specifies the ratio between the unit of measure from the applied sales price line (crate) and the unit of measure from the sales document line (can). In this example, 1 crate contains 20 cans, which is shown in the following manner: "CRATE: CAN = 1:20". This information is taken from the item unit of measure table shown in the third FastTab of this page. This ratio is used to recalculate the unit price from the price line to the unit price on the document line, as they are specified for different units of measure.

The field **Currency Recalculation Factor** specifies the ratio between the currency from the applied sales price line (local currency) and the currency from the sales document, which is in this case the currency code EUR, which is shown in the following manner: "GBP: EUR = 64.58:100". This ratio is used to recalculate the unit price from the price line to the unit price on the document line, since they are specified in different currencies.

The field **VAT Recalculation Factor** specifies the VAT percentage as set up on the VAT Posting Setup page. This percentage is used to recalculate the unit price from the applied sales price line to the unit price on the sales document line, since one of them is specified as "incl. VAT" and the other as "excl. VAT".

The explanation of the recalculation for the applied discount (**Discount** field group) is similar, with the difference that when an absolute value is used as a discount, this amount is recalculated to a percentage.

Note

You can view the global lot attribute and the location code fields along the Applied Sales Price Line and Applied Sales Discount Line of all the sales documents (Sales order, Sales Return Order, Sales Invoice, Sales Credit Memo, Sales Quote, and Blanket Sales Order) only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Sales Price List** page is turned on.

On the action bar, select **Actions > Functions** to view the following fields:

Field	Description
Get Price	Select which of the available sales price lines, as set up on the page Sales Price, you want to apply to the sales line.



Get Line Discount	Select which of the available sales discount lines, as set up on the page Sales Discounts, you want to apply to the sales line.
Freeze Price & Discount	Freeze the applied sales price and sales discount. When frozen, they will not change anymore when you adjust for example the order quantity or UoM in the sales line.
Unfreeze Price & Discount	Unfreeze the applied sales price and sales discount. When unfrozen, the system will automatically update them every time you change for example the order quantity or UoM in the sales line.
Manual Price	Register the manual sales price (Alt+S).
Manual Discount	Register the manual sales discount (Alt+D).



Information about the applied purchase price and discount

Article • 4/3/2023 • 12 min read

When creating a purchase price line for a vendor that is set up with the *Advanced Pricing method*, the system will apply a price and discount according to the hierarchy mentioned in the topic [Advanced pricing method hierarchy](#). The newly added **Applied Purchase Price and Discount** page, at the purchase price line level, gives more information about the applied price and discount on the purchase price line.

In this example, a purchase order line is created for item number "0015", the base unit of measure is a can, and the vendor is set up with the *Advanced Pricing method*.

The system automatically calculates the unit price and line discount based on the *Advanced Pricing method*. The **Applied Purchase Price and Discount** page shows all relevant information about the selected purchase price line and purchase discount line on which these values are based. The conversion of the unit price to the Direct Unit Cost on the purchase price line is explained by considering different units of measures, different currencies, and including/excluding the VAT difference.

Open the **Applied Purchase Price and Discount** page from the following purchase documents:

- Purchase order
- Purchase return order
- Purchase invoice
- Purchase credit memo
- Purchase quote
- Blanket Purchase order

Purchase Order

The following example explains how to access the **Applied Purchase Price and Discount** page from a **Purchase Order**.

1. On the **Purchase Order** page, in the action bar, click **Line > Applied Purchase Price and Discount**. The page **Applied Purchase Price and Discount** can also be opened by clicking directly on the row button on the purchase order line on the **Lines** FastTab.
2. In the **Type** field, select the context menu , and then select **Applied Purchase Price and Discount**.

The **Applied Purchase Price & Discount** page has four FastTabs, as explained below:

- **Applied Purchase Price Line** FastTab: Shows the price line that is applied.



Field	Description
Originated From	Specifies where the price line originates from. It could be a price line that was set up in the Purchase Prices list, it could be the price from the item card (when no valid purchase price line exists), or it could be a price that was manually specified.
Frozen	Specifies if the applied purchase price line is frozen. When frozen, it will not change anymore when you adjust, for example, the order quantity or UoM in the purchase line.
Price List Code	Specifies the price list to which this purchase price line belongs.
Source Type	Specifies to what type of source this price line applies. It is assigned based on the option selected in the Assign-to Type on the Purchase Price List page.
Source No.	Specifies the number or the code of the source to which this price line applies.
Asset No.	Specifies the number of the item to which this price line applies.
Variant Code	Specifies the item variant to which this price line applies.
Unit of Measure Code	Specifies the unit of measure of the item.
Minimum Quantity	Specifies the minimum quantity required in a purchase line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Direct Unit Cost	Specifies the cost of one unit of the selected item or resource.
Currency Code	Specifies the currency in which the unit price is expressed. An empty currency code represents the local currency as set up in the General Ledger Setup.
Allow Line Disc.	Specifies if a possible available line discount may be subtracted from the unit price of this price line.
Allow Invoice Disc.	Specifies if a possible available invoice discount may be subtracted from the unit price of this price line.
Price Includes VAT	Specifies if the direct unit cost includes VAT.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.

- **Applied Purchase Discount Line FastTab:** Shows the origin of the discount that is applied.

Field	Description
-------	-------------



Originated From	Specifies where the values in this line originated from. Options include: from the Purchase Discounts list or Manually Specified.
Frozen	Specifies if the applied purchase discount line is frozen. When frozen, it will not change anymore when you adjust, for example, the order quantity or UoM in the purchase lines.
Price List Code	Specifies the price list to which this purchase discount line belongs.
Source Type	Specifies to what type of source this discount line applies.
Source No.	Specifies the number or the code of the source to which this discount line applies.
Asset Type	Specifies if the discount line applies to an item or item discount group.
Asset No.	Specifies the number of the item or code of the item discount group.
Variant Code	Specifies the item variant to which this discount line applies.
Unit of Measure Code	Specifies the unit of measure of the item or of the item(s) within the item discount group.
Minimum Quantity	Specifies the minimum quantity required in a purchase line for this price line to be valid. The minimum quantity is expressed in the unit of measure of this line.
Line Discount %	Specifies the discount percentage that is granted for this discount line.
Starting Date	Specifies the date from which this line is valid.
Ending Date	Specifies the date until which this line is valid.

- **Applied Item Unit of Measure FastTab:**

Field	Description
Code	Specifies the unit of measure codes that are used in the applied purchase price line, the applied purchase discount line, or in the purchase document line.
Quantity Expressed in the UoM	Specifies how many units (expressed in the unit of measure code) are linked to the number of units as specified in the field 'Quantity Expressed in the Base Unit of Measure'.
Quantity Expressed in BOX	Specifies how many units (expressed in the base unit of measure) are linked to the number of units as specified in the field 'Quantity Expressed in the UoM' (expressed in the unit of measure code).



- **Price calculation** FastTab: Shows fields related to applied price (Price field group) and applied discount (Discount field group).

Field	Description
Direct Unit Cost from Purchase Price Line	Specifies the direct unit cost per unit of measure (incl. or excl. VAT), as set up in the applied purchase price line.
Unit of Measure Recalculation Factor	Specifies the ratio between the unit of measure from the applied purchase price line and the unit of measure from the purchase document line. This ratio is used to recalculate the direct unit cost from the price line to the direct unit cost on the document line, in case they are specified for different units of measure.
Currency Recalculation Factor	Specifies the ratio between the currency from the applied purchase price line and the currency from the purchase document. This ratio is used to recalculate the direct unit cost from the price line to the direct unit cost on the document line, in case they are specified in different currencies.
VAT Recalculation Factor	Specifies the VAT percentage as set up on the VAT Posting Setup page. This percentage is used to recalculate the direct unit cost from the applied purchase price line to the direct unit cost on the purchase document line, in case one of them is specified as 'incl. VAT' and the other as 'excl. VAT'.
Direct Unit Cost in Purchase Line	Specifies the direct unit cost per unit of measure (incl. or excl. VAT), as shown in the purchase document line. This value is calculated by applying the recalculation factors for UoM, currency, and VAT to the direct unit cost from the applied purchase price line.
Line Discount %	Specifies the line discount percentage in the purchase line.

You can view how the unit price from the purchase price line (**Direct Unit Cost from Purchase Price Line** field) is converted into the direct unit cost on the purchase price line (**Direct Unit Cost in Purchase Price Line** field), taking into consideration the unit of measure code and/or the currency code from the applied purchase price line can differ from the codes on the purchase price line. The same calculation applies if the direct unit cost in the purchase price line is expressed including VAT, whereas the direct unit cost on the purchase price line is expressed excluding VAT (or vice versa).

- The **Applied Purchase Price Line** FastTab shows that the applied purchase price is set up with a direct unit cost of 10 Euros per piece, without VAT. The currency code in the applied purchase price line is empty, which means that the local currency is used for this price, which is, in this case, the currency code GBP. This information is summarized as "10 EUR/PCS excl. VAT" in the **Direct Unit Cost from Purchase Price Line** field on this FastTab.



- The **Unit of Measure Recalculation Factor** field on this FastTab specifies the ratio between the unit of measure from the applied purchase price line (pieces) and the unit of measure from the purchase document line (box). In this example, 12 pieces are contained in 1 box, which is shown in the following manner: "PCS: BOX = 12:1". This information is taken from the item unit of measure table shown in the third FastTab of this page. This ratio is used to recalculate the direct unit cost from the price line to the direct unit cost on the document line, as they are specified for different units of measure.
- The **Currency Recalculation Factor** field specifies the ratio between the currency from the applied purchase price line (local currency) and the currency from the purchase document, which is in this case the currency code USD, which is shown in the following manner: "EUR: USD = 90:100". This ratio is used to recalculate the direct unit cost from the price line to the direct unit cost on the document line, since they are specified in different currencies.
- The **VAT Recalculation Factor** field specifies the VAT percentage as set up on the VAT Posting Setup page. This percentage is used to recalculate the direct unit cost from the applied purchase price line to the direct unit cost on the purchase document line, since one of them is specified as "incl. VAT" and the other as "excl. VAT". In this example, the VAT Recalculation Factor is set as "20%."
- The **Direct Unit Cost in Purchase Line** field specifies the direct unit cost per unit of measure (incl. or excl. VAT), as shown in the purchase document line. This value is calculated by applying the recalculation factors for the unit of measure, currency, and VAT to the direct unit cost from the applied purchase price line, which results in this example in "160 EUR/BOX excl. VAT".
- The **Line Discount %** on the **Discount** field group specifies the line discount percentage in the purchase line

On the action bar,

Field	Description
Freeze Price & Discount	Freeze the applied purchase price and purchase discount. When frozen, these will not change anymore when you adjust the fields like order quantity or UoM in the purchase line.
Unfreeze Price & Discount	Unfreeze the applied purchase price and discount. When unfrozen, the system will automatically update every time you change the fields like order quantity or UoM in the purchase line.
Manual Price	Register the manual purchase price (Alt+S).
Manual Discount	Register the manual purchase discount (Alt+D).

Purchase Invoice

- The data on the **Applied Purchase Price and Discount** page associated with the **Purchase Invoice** page is based on the table Document Price List Line linked to the invoice line. The **Get Receipt Lines** function is used to copy the Document Price List Line from the Purchase Order Line to the Document Price List Line linked to the Purchase Invoice Line.



- The currency rate captured in the purchase header of the invoice deviates from the currency rate applied in the **Currency Recalculation Factor**. The currency rate in the currency recalculation factor is the same rate as applied in the **Purchase Order**. This is to ensure that the same Direct Unit Cost is calculated in the **Purchase Invoice** as the agreed Direct Unit Cost in the **Purchase Order**.

Purchase Return Order

- The data on the **Applied Purchase Price and Discount** page associated with the **Purchase Return Order** page is based on the table **Document Price List** Line linked to the purchase return order line. The **Get Posted Documents Lines** function can be used to reverse the **Posted Document Price List** Line from the **Posted Purchase Invoice** Lines are copied to the **Document Price List** Line linked to the **Purchase Return Order** Line.
- The currency rate captured in the purchase header of the **Purchase Return Order** deviates from the currency rate applied in the **Currency Recalculation Factor**. The currency rate in the currency recalculation factor is the same rate as applied in the **Posted Purchase Invoice** Line. This is to ensure that the same **Direct Unit Cost** is calculated in the **Purchase Return Order** as the invoiced Direct Unit Cost in the **Posted Purchase Invoice**.
- If you change the Purchase Price and/ or Discount in the **Purchase Return Order** line prior to Posting the shipment, the changed Purchase Price and/ or Discount will be captured in the **Document Price List** Line linked to the purchase return order line. The **Applied Purchase Price and Discount** page also shows this changed price and/ or discount.

Purchase Credit Memo

- The data on the **Applied Purchase Price and Discount** page associated with the **Purchase Credit Memo** page is based on the table **Document Price List** Line linked to the **Purchase Credit Memo** Line. Using the **Get Return Shipment Lines** function, the **Document Price List** Line from the **Purchase Return Order** Line are copied to the **Document Price List** Line linked to the **Purchase Return Order** Line.
- The currency rate captured in the purchase header of the **Purchase Credit Memo** deviates from the currency rate applied in the **Currency Recalculation Factor**. The currency rate applied in the **Currency Recalculation Factor** is the same rate as applied in the **Purchase Return Order** Line. This is to ensure that the same **Direct Unit Cost** is calculated in the **Purchase Credit Memo** as agreed **Direct Unit Cost** in the **Purchase Return Order**.

Posted Purchase Invoice

- The data on the **Posted Purchase Invoice** page is based on the table **Posted Document Price List** Line linked to the **Posted Purchase Invoice** line. When posting the **Purchase Invoice**, the **Document Price List** Line from the **Purchase Invoice** Line are copied to the **Document Price List** Line linked to the **Posted Purchase Invoice** Line.
- The currency rate captured in the posted purchase header of the invoice deviates from the currency rate applied in the **Currency Recalculation Factor**. The latter currency rate is the same rate as applied in the purchase order and purchase invoice.



A **Posted Purchase Invoice** can be created by

- Using the **Get Receipt Lines** function in a **Purchase Invoice** and then post the Purchase Invoice.
- Using the function **Post Receipt and Invoice** or **Post Invoice** on the action bar, on **Posting > Post** directly from within a **Purchase Order**.

Posted Purchase Credit Memo

- The data on the **Posted Purchase Credit Memo** page is based on the table Posted Document Price List Line linked to the Posted Purchase Cr. Memo line. When posting the Purchase Credit Memo, the Document Price List Line from the Purchase Cr. Memo Line are copied to the Posted Document Price List Line linked to the Posted Purchase Cr. Memo Line.
- The currency rate captured in the posted purchase header of the invoice deviates from the currency rate applied in the **Currency Recalculation Factor**. The currency rate applied in the **Currency Recalculation Factor** is the same rate as applied in the **Purchase Order** and **Purchase Invoice**.
- Instead of using the **Get Return Shipment Lines** function in a **Purchase Credit Memo** and then post the purchase credit memo, a **Posted Purchase Credit Memo** can also be created directly from within a **Purchase Return Order** using the **Post Shipment** function.

Archived Purchase Quote

- In a **Purchase Quote**, the user registers a price agreement with the vendor. In many cases, multiple purchase quote versions are set up, before the business partners come to an agreement. Typically, each version of the purchase quote is archived for future reference. As with the posted and unposted version of purchase orders, quotes, etc. Information should be given on where the price in the purchase document originated from.
- When archiving a purchase document, the Applied Purchase Prices and Discounts Records should be copied as well.
- The data on the **Applied Purchase Price and Discounts** page is based on the table Archived Document Price List Line linked to the Archived Purchase Quote Line. When archiving the purchase quote, the Document Price List Line from the Purchase Quote Line are copied to the Document Price List Line linked to the **Archived Purchase Quote** Line.
- The currency rate captured in the **Archived Purchase Quote** deviates from the currency rate applied in the **Currency Recalculation Factor**. The currency rate applied in the **Currency Recalculation Factor** is the same rate as applied in the **Purchase Order** and **Purchase Invoice**.



 Note

You can view the global lot attribute and the location code fields along the Applied Purchase Price Line and Applied Purchase Discount Line of all purchase documents (Purchase Order, Purchase Return Order, Purchase Invoice, Purchase Credit Memo, Purchase Quote, and Blanket Purchase Order) only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Purchase Price List** page is turned on.



Advanced pricing functionality

Article • 2/12/2026 • 18 min read

Apply different reference dates

A reference date can be set up on the Bill-to customer level. Based on this setup, the system will use a different date to fetch prices and discounts from the setup.

In the following example, assume that the customer Bucofoods has the shipment date set up as the reference date, and that Bucofoods is also both the Sell to and Bill to customer.

Multiple prices for different dates are set for this item.



Create a new sales order for the customer, Bucofoods. The shipment date is defaulted to the work date.

1. Enter **Customer No.** on the **General** FastTab on the **Sales Order** page. After inserting a new sales price line on the **Lines** FastTab, the sales price line shows that the unit price is "10.00" in the **Unit Price Excl. VAT** field and the **Shipment Date** (on the **Shipping and Billing** FastTab) as "1/1/2021". The unit price is fetched based on the shipment date in this example. 

2. Enter a new **Shipment Date**.
3. Click **Yes** in the dialog box to confirm the modified shipment date.

A notification indicating a change in the reference date appears in a blue bar at the top of the **Sales Order** page. You need to insert the sales price lines again to recalculate the prices/discounts.



After inserting a new sales price line:

The new sales price line shows that the unit price has changed to "9.00" in the **Unit Price Excl. VAT** field corresponding to the new shipment date of "1/2/2021".

Using Reference customers for pricing

A reference customer can be set up on the sell-to customer level. Based on this setup, the system will use a different customer number to fetch prices and discounts from the setup.



In the following example, the customer C0022 is set up as a reference customer for customer C0018 Super France Paris and that C0018 is both the Sell to and Bill to customer.

The prices for customers C0018 and C0022 are set up for an item as 8.00 and 9.00 respectively.



1. Create a new sales order for the customer Super France Paris.
2. Enter "C0018" as the sell-to customer in the **Customer No.** field.
3. After an item line is created on the **Lines** FastTab, in the **Type** field, select the context menu  , and then select **Applied Sales Price and Discount**.

On the **Applied Sales Price and Discount** page, you can view from the **Source No.** field that the price for this sales order is picked from the reference customer "C0022".

Using ship-to address specific customer price group and customer discount group for pricing

Different customer price and customer discount groups can be set up on ship to address. Based on this setup, the system will use a different customer price and/or discount group from the setup.

Example: Customer Super Espana (FP) has two Ship-to address configured on the **Ship-to Address List** pages, NORTH and SOUTH, and specific sales prices exist for both addresses.



On the respective **Ship-to Address** card page, on the **Advanced Pricing** FastTab, the **Customer price group** "SUPER ES N" is linked to "NORTH" and the **Customer price group** "SUPER ES S" is linked to "SOUTH".

Note that for item "0011", the **Unit Price** for the two customer groups "SUPER ES N" and "SUPER ES S" are set to "8.00" and "9.00" respectively and can be viewed on the **Price List Lines** page.



Create a new sales order for the customer *Super Espana (FP)* whose customer code is "C0020".

To change the ship-to address:

1. On the **Sales Order** page, on the **Shipping and Billing** FastTab, in the **Ship-to** field, select **Alternate Shipping Address** from the list.



2. On the **Ship-to Address List** page, select the link in the **Code** field with the value "NORTH". A notification appears in a blue bar at the top of the **Sales Order** page citing the change in ship-to address and the associated customer price group. Note that the sales price line will not be updated automatically. You can update the existing sales price lines by re-entering the quantity to fetch the correct sales prices/discounts.
3. After inserting a sales price line on the **Lines FastTab**, in the **Type** field, select the context menu , and then select **Applied Sales Price and Discount**.  The **Applied Sales Price and Discount** page shows that the **Unit Price** "8.00" is fetched based on the customer price group "SUPER ES N" linked to the ship-to address.

To change the ship-to address to "SOUTH":

4. On the **Sales Order** page, on the **Shipping and Billing** FastTab, Click the **Code** field.
5. Click the link in the **Code** field with the value "SOUTH".
6. After inserting a sales price line on the **Lines FastTab**, select the **Type** field for the selected line and select the context menu , and then select **Applied Sales Price and Discount**.



The **Applied Sales Price and Discount** page shows that the **Unit Price** "9.00" is fetched based on the customer price group "SUPER ES S" linked to the ship-to address.

Note

If the **Assign-to Type** field value is set to *Customer* on the **Sales Price List** page, and a different price list is assigned at the ship-to level with the **Assign-to Type** field value set to *Customer Price Group* on the **Ship-to Address List** page, the system applies to the customer-level price list. Customer-specific price list assignments take precedence over customer price group assignments, and the ship-to level pricing is ignored in this scenario.

Get Price and Get Discount

In some cases, the salesperson might want to deviate from the price and/or discount that was automatically applied when using the Advanced Pricing hierarchy and get insight into what other prices/discounts are available. For this, the function **Get Price** and **Get Discount** on the sales price line and on the page **Applied Sales Price and Discount** can be used.

The business rules that exist in the Advanced Pricing logic (for example, the possibility to recalculate prices from the unit of measure defined in the price list line to the unit of measure on the sales price line) also applies to the screens **Get Price** and **Get Discount**. This means that all prices and discounts are visible and selectable, regardless of their unit of measure, currency code and VAT setting.



The function **Get Price** is added to the **Applied Sales Price and Discount** page.

1. On the **Applied Sales Price and Discount** page, on the action bar, select **Actions > Functions > Get Price**.
2. Select and click the required **Unit Price** to open the **Get Price Line – Pick Price** page.
3. Click **OK**. The function **Get Line Discount** is also added to the **Applied Sales Price and Discount** page and shows all the available discounts.
4. On the **Applied Sales Price and Discount** page, on the action bar, select **Actions > Functions > Get Line Discount**.
5. Select and click the required **Discount Method** on the **Get Price Line – Pick Discount** page.
6. Click **OK**.



After this change to the price or discount, the **Applied Sales Price and Discount** page including the recalculation factors is updated. The same can be seen on the **Price Calculation FastTab**.



Manually change sales price and/or discount

Article • 11/4/2025 • 6 min read

Not in all cases, the prices that are suggested by the Advanced Pricing logic are correct in the eyes of the person registering the transaction. Setup can be missing, or a salesperson may want to deviate from general pricing to satisfy a customer in the trading process for example. Therefore, it is possible to overrule/change the prices that are suggested by the system.

When manually changing the price or discount, recalculation factors are altered, and the applied sales price line/discount line is identified as *manually specified*. The price and discount will be frozen, i.e., they will not automatically change anymore when, for example the order quantity or UoM in the sales price line is adjusted.

Manually change the sales price

1. On the **Applied Sales Price and Discount** page, on the action bar, select **Actions > Functions > Manual Price**.
2. On the **Change Applied Unit Price** page, enter **Unit Price**, e.g., *11.00*.
3. Click the lookup button **Unit of Measure Code**. If required, change the unit of measure in which the manual price is registered on the **Item Units of Measure** page.
4. Select and click the required **Code**.
5. Select another unit of measure, if necessary, and click **OK**. Optionally, these additional details can be added on the **Change Applied Unit Price** page.
6. Enter **Currency Code**.
7. Turn on the **Allow Line Disc.** toggle.
8. Turn on the **Price Includes VAT** toggle.
9. In the **Price Change Reason Code** field, enter the reason for the price change. The default value is derived from the **Price Change Reason Code** field value on the **Sales Price List** page.
10. Turn on the **Freeze Price & Discount** toggle to control whether the resulting new price and discount must be marked as frozen, meaning that the system does not recalculate if the sales line quantity is subsequently changed. The starting value and editability of this toggle are controlled by the **Freeze Sales Price on Manual Change** field value on the **Advanced Pricing Setup** page.
11. Select **OK**.
12. Navigate to the **Applied Sales Price and Discount** page. On the **Applied Sales Price Line** FastTab: 
 - The **Originated From** field value has automatically updated to *Manually Specified* to indicate that the price from system setup was overruled.
 - The **Frozen** checkbox is selected.
 - The **Unit Price** field value is updated from *10.00* to *11.00*.

Manually change the discount

1. On the **Applied Sales Price and Discount** page, on the action bar, click **Actions > Functions > Manual Discount**.
2. On the **Change Applied Line Discount** page, click the **Discount Method** field.
3. Select the required method, e.g., **Amount**, from the options **Percentage** and **Amount**.
4. Enter **Discount Value**, e.g., **6.00**.
5. Click the lookup button in the **Unit of Measure Code**. If required, change the unit of measure.
6. Select and click the required **Code**.
7. Select another unit of measure, if necessary, and click **OK**.
8. On the **Change Applied Line Discount** page, enter **Currency Code**.
9. Turn on the **Price Includes VAT** toggle.
10. In the **Price Change Reason Code** field, enter the reason for the discounted price. The default value is derived from the **Price Change Reason Code** field value on the **Sales Price List** page.
11. Turn on the **Freeze Price & Discount** toggle to control whether the resulting new price and discount must be marked as frozen, meaning that the system does not recalculate if the sales line quantity is subsequently changed. The starting value and editability of this toggle are controlled by the **Freeze Sales Price on Manual Change** field value on the **Advanced Pricing Setup** page.
12. Select **OK**.
13. Navigate to the **Applied Sales Price and Discount** page. On the **Applied Sales Price Line** FastTab: 
 - The **Originated From** field value has automatically updated to *Manually Specified* to indicate that the discount from system setup was overruled.
 - The **Frozen** checkbox is selected.
 - The **Discount Value** field value is updated from **5.00** to **6.00**.

Note

The values you update through the **Manual Price** and **Manual Discount** actions on the sales documents are updated to the applied sales price and discount fields on the sales document lines based on the configuration on the **Advanced Pricing Setup** page and vice versa.



Manually change purchase price and discount

Article • 11/4/2025 • 4 min read

Not in all cases, the prices that are suggested by the Advanced Pricing logic are correct in the eyes of the person registering the transaction. Setup can be missing, or a vendor may want to deviate from general pricing to satisfy a company in the trading process for example. Therefore, it is possible to overrule/change the prices that are suggested by the system.

When manually changing the price or discount, recalculation factors are altered, and the applied purchase price line/discount line is identified as *Manually Specified*. The price and discount will be frozen, i.e.: they will not automatically change anymore when, for example the order quantity or UoM in the purchase price line is adjusted.

Manually change the purchase price

1. On the **Applied Purchase Price and Discount** page, on the action bar, click **Manual Price**.
2. On the **Change Applied Direct Unit Cost** page, enter **Direct Unit Cost**, e.g., *11.00*.
3. Click the lookup button in the **Unit of Measure Code** field. If required, change the unit of measure in which the manual price is registered on the **Item Units of Measure** page.
4. Select and click the required **Code**.
5. Select another unit of measure, if necessary, and click **OK**. Optionally, these additional details can be added on the **Change Applied Unit Price** page.
6. Enter **Currency Code**.
7. Turn on the **Allow Invoice Disc.** toggle.
8. Turn on the **Allow Line Disc.** toggle.
9. Turn on the **Price Includes VAT** toggle.
10. In the **Price Change Reason Code** field, enter the reason for the price change. The default value is derived from the **Price Change Reason Code** field value on the **Purchase Price List** page.
11. Turn on the **Freeze Price & Discount** toggle to control whether the resulting new price and discount will be marked as frozen, meaning that it will not recalculate if the sales line quantity is subsequently changed. The starting value and editability of this toggle is controlled by the **Freeze Purchase Price on Manual Change** field value on the **Advanced Pricing Setup** page.
12. Select **OK**.
13. Navigate to the **Applied Purchase Price and Discount** page. On the **Applied Purchase Price Line** FastTab:
 - The **Originated From** field value is automatically updated to *Manually Specified* to indicate that the price from the system setup is overruled.
 - The **Frozen** checkbox is selected.
 - The **Direct Unit Cost** field value is updated to *11.00*.



Manually change the discount

1. On the **Applied Purchase Price and Discount** page, on the action bar, click **Manual Discount**.
2. On the **Change Applied Line Discount** page, enter the **Line Discount %** with the required value, e.g., 6.00.
3. In the **Price Change Reason Code** field, enter the reason for the discounted price. The default value is derived from the **Price Change Reason Code** field value on the **Purchase Price List** page.
4. Turn on the **Freeze Price & Discount** toggle to control whether the resulting new price and discount will be marked as frozen, meaning that it will not recalculate if the sales line quantity is subsequently changed. The starting value and editability of this toggle is controlled by the **Freeze Purchase Price on Manual Change** field value on the **Advanced Pricing Setup** page.
5. Select **OK**.
6. Navigate to the **Applied Purchase Price and Discount** page. On the **Applied Purchase Price Line** FastTab:
 - The **Originated From** field value is automatically updated to *Manually Specified* to indicate that the discount from the system setup is overruled.
 - The **Frozen** checkbox is selected.
 - The **Discount Value** field value updates to 6.00.

Note

The values you update through the **Manual Price** and **Manual Discount** actions on the purchase documents are updated to the applied sales price and discount fields on the purchase document lines based on the configuration on the **Advanced Pricing Setup** page and vice versa.



Freeze sales price and discount

Article • 11/3/2025 • 8 min read

In some cases, the salesperson may want to manually freeze a sales price/discount, just to make sure that changes in order characteristics (e.g., changing the order quantity) or pricing setup will not affect the price/discount that eventually will be invoiced to the customer. The (un)freezing of sales prices and discounts works for all the following order types:

- Sales order
- Sales return order
- Sales invoice
- Sales credit memo
- Sales quote
- Blanket sales order

When you enter 0 in the **Line Discount Amount** field on the **Sales Order** page, the system deletes the corresponding line on the **Applied Sales Discount Line** FastTab of the **Applied Sales Price and Discount – Sales Order** page.

When you directly edit the **Line Discount Amount** field on the **Sales Order** page, the system automatically updates the **Applied Discount Value** and **Line Discount %** fields on both the **Sales Order** page and the **Applied Sales Price and Discount – Sales Order** page.

When the **Applied Discount Method** field is set to *Amount* or *Percentage*, and the **Originated From** field is set to *Manually Specified* on the **Sales Order** page, the system automatically selects the **Frozen** checkbox and populates the **Discount Value** field with the value from the **Applied Discount Value** field on the **Applied Sales Discount Line** FastTab of the **Applied Sales Price and Discount – Sales Order** page.

When you change the **Line Discount Amount** field value, the system updates the **Unit of Measure Code** and **Currency Code** field values accordingly.

Automatically Freeze Sales Price and Discount

In some situations, the sales price and discount must be automatically pinned (frozen) so that a new price is not accidentally picked up as soon as a change occurs on the sales price line. For example, when using the **Get Receipt Lines** function from the sale invoice line, the price that is registered on the accompanying sales order line is copied to the sales invoice. However, if the person creating the invoice is changing the quantity (e.g., because the customer requires a partial invoice) the price will be validated against the price lines and possibly overwritten. As this is unwanted in almost all cases, the price and discount that exist for the sales invoice line are automatically set as **Frozen** for the applied sales price and discount.

Besides the **Get Shipment Lines** function, several functions exist in the system that creates new sales order lines based on existing sales order lines (for example, function copy document) in which it is favorable that the original price is copied initially and maintained in case of quantity change. This works similarly for all the following functions:



- **Get Shipment Lines** from the **Sales Invoice**
- **Get Receipt Lines** from the **Sales Credit Memo**
- **Get Posted Document Lines** to reverse from **Sales Return Order** or **Sales Credit Memo**
- **Make Order** executed from **Sales Quote** or **Blanket Sales Order**
- Select **Blanket Sales Order Number** on **Sales Order line**
- Correct, cancel, create return related document or create **Corrective Credit Memo**
- Move negative lines

Copy document with the exception of executing the function with **Recalculate Lines** checkbox selected: in this case the unit price is validated again by the Advanced Pricing logic.

Also, when the function **Get Price**, **Get Line discount** on the sales price line is executed or the function; **Get Price**, **Get Line Discount**, **Manual Price** and **Manual Discount** from page **Applied Sales Price** and discount is executed, the sales price line set to **Frozen**. This is designed so that whenever the sales prices are manually changed by the user, his/her intention is to keep this price in all cases.

Manually Unfreeze Sales Price and Discount

The price and discount can be frozen manually as well. This can be done from the **Applied Sales Price and Discount** page.

1. On the **Applied Sales Price and Discount** page, on the action bar, click **Actions > Functions > Freeze Price & Discount**.

The sales price line on the **Applied Sales Price Line** FastTab shows that the sales price is frozen since the **Frozen** checkbox is selected.

The discount line on the **Applied Sales Discount Line** FastTab shows that the sales discount is frozen since the **Frozen** checkbox is selected.



The price and discount can be unfrozen manually as well. This can also be done from the **Applied Sales Price and Discount** page.

2. On the **Applied Sales Price and Discount** page, on the action bar, click **Actions > Functions > Unfreeze Price & Discount....**

The sales price line on the **Applied Sales Price Line** FastTab shows that the sales price is not frozen since the **Frozen** checkbox is cleared.





The discount line on the **Applied Sales Discount Line** FastTab shows that the sales discount is not frozen since the **Frozen** checkbox is cleared.

To freeze prices and discounts, use the **Freeze Price & Discount** action:

- To apply to all sales lines, execute the action from **Actions > Functions**.
- To apply selected sales lines, execute the action from **Lines** FastTab.

To unfreeze prices and discounts, use the **Unfreeze Price & Discount** action:

- To apply to all sales lines, execute the action from **Actions > Functions**.
- To apply selected sales lines, execute the action from **Lines** FastTab.

When the **Sales Line Update Influence** field value is set to *Unit Price* on the **Advanced Pricing Setup** page:

- If a user manually changes the **Unit Price** or **Discount Value** field value (either as a percentage or amount) through the **Manual Price** or **Manual Discount** actions on the **Applied Sales Price and Discount** page, or directly edits these fields on the **Sales Order Subform** page, the **Frozen** field value is automatically set to *True* on both the **Applied Sales Price and Discount** page and the sales order subform.

When the **Sales Line Update Influence** field value is set to *Trade Base Price* on the **Advanced Pricing Setup** page:

- If a user manually changes the **Unit Price** or **Discount Value** field value (percentage or amount) through the **Manual Price** or **Manual Discount** actions on the **Applied Sales Price and Discount** page, or directly on the **Sales Order Subform** page, the **Frozen** field value is automatically set to *True* on the sales order subform, **Applied Sales Price and Discount** page, and **Document Trade Lines** page.



Freeze and unfreeze purchase price and discount

Article • 10/22/2025 • 4 min read

In some cases, the company may want to manually freeze a purchase price/discount, just to make sure that changes in order characteristics (e.g., changing the order quantity) or pricing setup will not affect the price/discount that eventually will be invoiced by the vendor. The (un)freezing of purchase prices and discounts works for all the following order types:

- Purchase order
- Purchase return order
- Purchase invoice
- Purchase credit memo
- Purchase quote
- Blanket purchase order

Automatically Freeze Purchase Price and Discount

In some situations, the purchase price and discount must be automatically pinned (frozen) so that a new price is not accidentally picked up as soon as a change occurs on the purchase price line. For example, when using the **Get Receipt Lines** function from the purchase invoice line, the price that is registered on the accompanying purchase order line is copied to the purchase invoice. However, if the person creating the invoice changes the quantity (e.g., because the vendor provides a partial invoice) the price will be validated against the price lines and possibly overwritten. As this is unwanted in almost all cases, the price and discount that exist for the purchase invoice line are automatically set as **Frozen** for the applied purchase price and discount.

Besides the **Get Receipt lines** function, a number of functions exist in the system that creates new purchase order lines based on existing purchase order lines (for example function copy document) in which it is favorable that the original price is copied initially and maintained in case of quantity change. This works similar for all of the following functions:

- **Get Receipt lines** from the **Purchase Invoice**
- **Get Posted Document lines** to reverse from **Purchase Return Order** or **Purchase Credit Memo**
- **Make Order** executed from **Purchase Quote** or **Blanket Purchase Order**
- Select **Blanket Purchase Order Number** on **Purchase Order Line**
- Correct, cancel, create return related document or create corrective credit memo
- Move negative lines

Copy document except for executing the function with **Recalculate Lines** checkbox selected: in this case the direct unit cost is validated again by the Advanced Pricing logic.



Also, when **Direct Unit Cost** on the purchase price line is entered manually, **Manual Price** and **Manual Discount** from **Applied Purchase Price and Discount** page is executed, the purchase price line is set to **Frozen**. This is designed so that whenever the purchase prices are manually changed by the user, his/her intention is to keep this price in all cases.

Manually Unfreeze Purchase Price and Discount

The price and discount can be frozen manually as well. This can be done from the **Applied Purchase Price and Discount** page.

1. On the **Applied Purchase Price and Discount** page, on the action bar, click **Freeze Price & Discount**.

The purchase price line on the **Applied Purchase Price Line** FastTab shows that the purchase price is frozen since the **Frozen** checkbox is selected.

The discount line on the **Applied Purchase Discount Line** FastTab shows that the purchase discount is frozen since the **Frozen** checkbox is selected.

The price and discount can be unfrozen manually as well. This can also be done from the **Applied Purchase Price and Discount** page.

2. On the **Applied Purchase Price and Discount** page, on the action bar, click **Unfreeze Price & Discount**.

The purchase price line on the **Applied Purchase Price Line** FastTab shows that the purchase price is not frozen since the **Frozen** checkbox is cleared.

The discount line on the **Applied Purchase Discount Line** FastTab shows that the purchase discount is not frozen since the **Frozen** checkbox is cleared.

To freeze prices and discounts, use the **Freeze Price & Discount** action:

- To apply to all purchase lines, execute this action from **Actions > Functions**.
- To apply to selected purchase lines, execute this action from the **Lines** FastTab.

To unfreeze prices and discounts, use the **Unfreeze Price & Discount** action:

- To apply to all purchase lines, execute the action from **Actions > Functions**.
- To apply to selected purchase lines, execute the action from the **Lines** FastTab.



Place a hold on sales order lines for pricing

Article • 7/22/2026 • 3 min read

You can place a hold on sales order lines to prevent them from being invoiced due to ongoing pricing negotiations, for example, if the salesperson wants an additional discount or if a customer is negotiating prices via email.

To place a hold on a sales order line,

- In the **Invoice Hold Status** field, select *Hold - Pricing*.

Note

This field is visible only via personalization.

The system excludes the sales order line with this status when invoicing the sales order.

Note

- The system excludes sales order lines that are put on hold when creating a consolidated sales shipment via the **Combine Sales Shipment** and **Combine Shipment By** pages.
The **Combine Shipment By** page is available only when the Aptean [Combine Shipments per Period](#) extension is installed.
- The system does not display the sales order lines that are put on hold on the **Get Shipment Lines** page accessed via the **Get Shipment Lines** action on the **Sales Invoice** page.
- When sales order lines of the main item are put on hold, the system sets the **Invoice Hold Status** field value to *Hold - Pricing* for the associated packaging item lines only when the **Allow Packaging Recalculation** checkbox is selected for the packaging lines. The system automatically updates the status of the packaging lines when the status of the associated sales order lines is updated.
This functionality is applicable only when the Aptean [Packaging](#) extension is installed.

When pricing discussions are settled, you can remove the hold placed in the sales order lines by updating the **Invoice Hold Status** field value to *Approved*.

Set the Invoice Hold Status on all eligible lines at once

Instead of updating the **Invoice Hold Status** field line by line, you can apply the same status to all eligible lines on an open sales order in a single action.

- To place a hold on all eligible lines, on the **Sales Order** page, on the action bar, click **Actions > Functions > Set All Lines to Invoice Hold**.



- To remove the hold from all eligible lines, on the **Sales Order** page, on the action bar, click **Actions > Functions > Set All Lines to Invoice Approved**.

Both actions are available only while the sales order **Status** field value is *Open*, and only apply to sales lines that:

- Are of the type *Item*.
- Have not yet been invoiced, i.e., the **Quantity Invoiced** field value is *0*.
- Do not already have the **Invoice Hold Status** field value that the action is setting.
- Are not automated packaging item lines.

Automated packaging lines are not updated directly by these actions; their **Invoice Hold Status** field value instead follows the associated main item line automatically, as described above.

This exclusion is applicable only when the Aptean [Packaging](#) extension is installed.

Sales lines that have already been partially or fully shipped, i.e., the **Quantity Shipped** field value is not *0*, and currently have a blank **Invoice Hold Status** field value, are left unchanged by the **Set All Lines to Invoice Hold** action. This is because the system does not allow a shipped line to change from *Blank* to *Hold - Pricing* or *Approved*.

If none of the sales lines on the sales order are eligible for the selected action, the system displays a message, and no lines are updated.

Note

On sales order lines that have been partially or fully shipped, the **Invoice Hold Status** field value can only be changed between *Hold - Pricing* and *Approved*.

The field value cannot be cleared (set to *Blank*) or set from *Blank* on these lines, whether it is changed on the individual line or through the **Set All Lines to Invoice Hold** and **Set All Lines to Invoice Approved** actions.

View whether a sales order has lines on hold

The read-only **Invoice Hold Present** field on the **Sales Order** page and the **Sales Orders** list page shows *Yes* when at least one sales line on the sales order has the **Invoice Hold Status** field value set to *Hold - Pricing*, and *No* when no sales lines are on hold. Use this field to identify or filter sales orders that have sales lines on hold without having to open and check each sales order individually.



Manage the reprice on sales orders

Article • 9/24/2025 • 1 min read

Based on the configuration of the **Customer Card** page,

- The system automatically applies the current unit price of items to sales order lines when you release or post sales orders. For more information, see [Automatic reprice on sales orders](#).
- Alternatively, if the automatic reprice is not configured, you can manually execute the **Reprice Sales Orders** action to apply the current unit price of items to sales order lines in open sales orders. For more information, see [Manual reprice on sales orders](#).

This ensures that the system applies the current unit price of items in sales orders.



Set up the reprice on a customer level

Article • 1/28/2026 • 1 min read

To configure how the system must reprice sales order lines, on the relevant **Customer Card** page, on the **Invoicing** FastTab, on the **Advanced Pricing** section, in the **Reprice Sales Order** field, select one of the following options:

- **Blank:** You can manually execute the **Reprice Sales Orders** action to apply the current unit price of items to sales order lines in open sales orders. For more information, see [Manual reprice on sales orders](#).
- **Reprice on Sales Orders Release:** The system automatically applies the current unit price of items to sales order lines when releasing sales orders. For more information, see [Automatic reprice on sales orders](#).
- **Reprice on Sales Orders Posting:** The system automatically applies the current unit price of items to sales order lines when posting sales orders. For more information, see [Automatic reprice on sales orders](#).

The **Reprice Sales Orders** field is available on the **Customer Template** page. When a customer is created using a template:

- The **Reprice Sales Orders** field value from the template is automatically copied to the new customer record.
- The field remains editable on the customer card after customer creation.



Automatic reprice on sales orders

Article • 9/24/2025 • 1 min read

When the **Reprice Sales Order** field value on the **Customer Card** page is set to:

- *Reprice on Sales Orders Release*: The system automatically updates the **Unit Price Excl. VAT**, **Applied Unit Price**, and **Line Amount Excl. VAT** field values on the **Lines** FastTab of the **Sales Order** page based on the current unit price of items when releasing the sales order.
- *Reprice on Sales Orders Posting*: The system automatically updates the **Unit Price Excl. VAT**, **Applied Unit Price**, and **Line Amount Excl. VAT** field values on the **Lines** FastTab of the **Sales Order** page based on the current unit price of items when posting the sales order.



Manual reprice on sales orders

Article • 9/24/2025 • 1 min read

When the **Reprice Sales Order** field value is set to blank on the **Customer Card** page, you can manually reprice sales order lines.

- On the action bar, select **Actions > Functions > Reprice Sales Orders**.

 Note

You can execute this action only when the **Status** field value is set to *Open* on the **General** FastTab of the **Sales Order** page. The system updates the **Unit Price Excl. VAT**, **Applied Unit Price**, and **Line Amount Excl. VAT** field values based on the current unit price of items.

 Note

The **Reprice Sales Order** action is available on both **Sales Orders** list and **Sales Order** card pages.



Copy and correct functions in sales documents

Article • 4/29/2023 • 12 min read

Multiple copy and correct functions exist in Dynamics 365 Business Central. In this topic, it is explained per function how the applied sales price and discount are handled. In each situation that is described in this topic, it is assumed that the pricing method on the document is set with *Advanced Pricing*.

Get shipment lines

In the sales order, the Applied Sales Price and Discount page gives insight into the source of a sales price and discount (e.g., customer-specific price, discount coming from a customer discount group, et cetera). When shipment lines are retrieved in a sales invoice, the person creating the sales invoice should get the same insights as this can be relevant within the invoicing process. Hence, the information is copied from the sales order to the sales invoice when the function Get Shipment Lines is executed.

In the sales return order, the Applied Sales price and the discount page gives insight into the source of a sales price and discount as well. In some cases, these records were copied from the original sales order, or the lines were created manually. Regardless, when the posted receipt lines are retrieved in a sales credit memo, the person creating the sales credit memo should get the same insights as this can be relevant within the crediting process. Hence, the information is copied from the sales return order to the sales credit memo.

Create a sales order for the customer C0015 and insert a sales price line on the **Lines** FastTab.

The sales price line shows that the unit price is "8.00" in the **Unit Price Excl. VAT** field.

1. In the **Type** field, select the context menu , and then select **Applied Sales Price and Discount**.

The **Applied Sales Price and Discount** page shows that the **Unit Price** "8.00".



Create a sales invoice.

2. Enter **Customer No.**, "C0015".
3. On the **Lines** FastTab, on the action bar, click **Line** > **Functions** > **Get Shipment Lines**.
4. On the **Get Shipment Lines** page, click on the link in the field **Document No.** on any row.



The sales invoice on the **Lines** FastTab shows that the unit price (**Unit Price Excl. VAT** field) is "8.00", same as the unit price on the related sales order. Even if the sales price is changed in the meantime, the sales invoice will always use the sales price from the sales order, when using the **Get Shipment lines** function.



- Click the **Type** field for the selected line and click the Show more options button , and then select **Applied Sales Price and Discount**.



The **Applied Sales Price and Discount** page provides the same insight and shows that the **Unit Price** "8.00" for the specified line on the **Applied Sales Price Line** FastTab.

Get posted document lines to reverse

The **Get Posted Document Lines to Reverse** function can be used on the documents Sales Return Order and Sales Credit Memo when the sales prices and discounts must be an exact reversal of the original order. This means that when the function is executed, the prices and discounts on the original document are copied to the new document.

When using the function, there are several options to choose from. When the user selects the "Posted Shipment" option, the system checks whether the initial sales order still exists (since the document price list line is not copied to a posted shipment).

- If the initial sales order of the selected posted shipment line still exists, the document price list line of the sales order is copied to the document.
- If the initial sales order of the selected posted shipment line has been deleted, the document price list line of the corresponding posted sales invoice line is copied to the document.

When the *Posted Invoice* option is selected, then the applied sales price and discount of the posted sales invoice line will be used.

When the *Posted Return Receipt* option is selected, then the applied sales price and discount of the posted sales return order line will be used.

- If the initial sales return order of the selected posted return receipt line still exists, the document price list line of the sales return order is copied to the document.
- If the initial sales return order of the selected posted return receipt line has been deleted, the document price list line of the corresponding posted credit memo line is copied to the document.

When the *Posted Credit Memo* option is selected, then the Applied Sales Price and Discount of the posted credit memo line will be used.

Make order

When using the **Make Order** function from the document blanket sales order or sales quote, the applied prices and/or discounts on the document are included when converting the document to a sales order.



Manually select blanket order line in sales order line

Besides creating a sales order from a blanket sales order, it is also possible to refer to a blanket order when creating a sales price line. In this case, the price is retrieved from the specific blanket order line. The applied sales price and discount records on the blanket order line are copied to the sales order as well.

Move negative lines to another document

In various order types, the **Move Negative Lines** function can be used to copy order lines with a negative quantity to its counterpart. Sales order lines can for example be copied to either sales return order- or credit memo lines. When the line is copied, pricing information is also copied from the original order to its counterpart. The applied sales price and discount records are copied as well.

Make invoice from page sales quote

When using the **Make Invoice** function from the document sales quote, the applied prices and/or discounts are included when converting the document.

Correct

The **Correct** function on the posted sales invoice has a dual function: first, a sales credit memo is created that exactly reverses everything that was posted in the sales invoice. Second, a new sales invoice has been created so you can quickly register corrected quantities or prices. In both cases, the applied sales price and discount linked to the posted sales invoice are copied to the documents mentioned above.

Cancel

The **Cancel** function on the posted sales invoice creates a credit memo in which the transaction as registered in the posted sales invoice is reversed. After the creation, the sales credit memo is posted automatically. In this case, the applied sales price and discount that were linked to the posted sales invoice are copied to the sales credit memo and the posted sales credit memo.

Create corrective credit memo

The **Create Corrective Credit Memo** function on the posted sales invoice creates a credit memo in which the transaction as registered in the posted sales invoice is reversed. In contrast to the Correct and Cancel functions, the



created sales credit memo is not posted automatically. In this case, the applied sales price and discount that were linked to the posted sales invoice are copied to the sales credit memo.

Copy document

The **Copy Document** function can be used on all sales related document types:

- Blanket sales order
- Sales quote
- Sales order
- Sales return order
- Sales invoice
- Sales credit memo

And the function can use all the documents mentioned below as source for another document (for example: a blanket sales order can be copied to a sales invoice):

- Blanket sales order
- Sales quote
- Sales order
- Sales return order
- Sales invoice
- Sales credit memo
- Posted shipment
- Posted Invoice
- Posted return receipt
- Posted credit memo
- Archived quote
- Archived sales order
- Archived blanket order
- Archived return order

When the function is used, the applied sales price and discount that were linked to the original document, are copied to the newly created document.



Copy and correct functions in purchase documents

Article • 4/29/2023 • 15 min read

Multiple copy and correct functions exist in Dynamics 365 Business Central. In this topic, it is explained per function how the applied purchase price and discount are handled. In each situation that is described in this topic, it is assumed that the pricing method on the document is set with *Advanced Pricing*.

Get receipt line

In the purchase order, the Applied Purchase Price and Discount page gives insight into the source of a purchase price and discount. When receipt lines are retrieved in a purchase invoice, the person creating the purchase invoice should get the same insights as this can be relevant within the invoicing process. Hence, the information is copied from the purchase order to the purchase invoice when the function Get Receipt Lines is executed.

In the purchase return order, the Applied Purchase price and the discount page gives insight into the source of a purchase price and discount as well. In some cases, these records were copied from the original purchase order or the lines were created manually. Regardless, when the posted receipt lines are retrieved in a purchase credit memo, the person creating the purchase credit memo should get the same insights as this can be relevant within the crediting process. Hence, the information is copied from the purchase return order to the purchase credit memo.

Create a purchase invoice for the vendor V0011 and insert a purchase price line on the **Lines** FastTab.

The purchase price line shows that the direct unit cost is "8.00" in the **Direct Unit Cost Excl. VAT** field.

1. In the **Type** field, click the context menu , and then select **Applied Purchase Price and Discount**. The **Applied Purchase Price and Discount** page shows that the **Direct Unit Cost** "8.00".
2. Create a purchase invoice.
3. Enter **Vendor No.**, "V0011".
4. On the **Lines** FastTab, on the action bar, click **Line** > **Functions** > **Get Receipt Lines**.
5. On the **Get Receipt Lines** page, select and click the required **Document No.** The purchase invoice on the **Lines** FastTab shows that the direct unit cost (**Direct Unit Cost Excl. VAT** field) is "10.00" and discount % is "1%", same as the direct unit cost and discount on the related purchase order. Even if the purchase price is changed in the meantime, the purchase invoice will always use the purchase price from the purchase order, when using the function **Get Receipt Lines**.
6. In the **Type** field for the selected line, click the context menu , and then select **Applied Purchase Price and Discount**.

The **Applied Purchase Price and Discount** page provides the same insight and shows that the Direct Unit Cost "10.00" and Discount % "1%" for the specified line on the **Applied Purchase Price Line** FastTab.



When you use **Advanced Pricing** method in the purchase invoice lines, the **Applied Purchase Price and Discount** records are created and updated automatically by the system. When the purchase invoice is posted, the purchase invoice document is deleted. The applied purchase price and discount records are copied to the posted document for future reference.

Get return shipment line

The **Purchase Credit Memo** and **Purchase Return Order** can contain purchase prices and discounts based on the **Advanced Pricing Method**.

1. Select the Search icon , enter "Purchase Credit Memos", and then choose **Purchase Credit Memos**.
The **Purchase Credit Memos** Lists is opened.
2. Click **New** to open the **Purchase Credit Memo** page.
3. Enter the **Vendor Name**.
4. Enter the **Vendor Authorization No.** and **Vendor Cr. Memo No.**
5. Enter the **Lines** FastTab, click **Type** to choose **Item**.
6. Enter the **No.**, **Description**, **Location Code** and **Unit of Measure Code**.
7. On the action bar in the **Lines** FastTab, click **Functions** > **Get Return Shipment Lines**.
8. Select and click the required Document No. on the **Get Return Shipment Lines** page.

The **Applied Purchase Price and Discount** records are created and updated automatically by the system for the purchase credit memo line copied from the purchase return order line. Click the **Type** field for the selected line and click the context menu , and then select **Applied Purchase Price and Discount** to access the records.

When the **Purchase Credit Memo** is posted, the **Applied Purchase Price and Discount** lines from the **Purchase Credit Memo** is copied to the **Posted Purchase Credit Memo** line and can be retrieved or viewed later. Records for **Purchase Credit Memo** are deleted from the **Applied Purchase Price and Discount** table.

Get posted document lines to reverse

The **Get Posted Document Lines to Reverse** function can be used on the documents **Purchase Return Order** and **Purchase Credit Memo** when the purchase prices and discounts must be an exact reversal of the original order. This means that when the function is executed, the prices and discounts on the original document are copied to the new document.

- On the **Purchase Return Order** page, on the action bar, click **Process** > **Get Posted Document Lines to Reverse**.
- On the **Purchase Credit Memo** page, on the action bar, click **Actions** > **Functions** > **Get Posted Document Lines to Reverse**.



The **Posted Purchase Document Lines** page is opened. On the **Options** FastTab, in the **Document Type Filter** field, when you select the **Posted Receipts** option, the system checks whether the initial purchase order still exists (since the document price list line is not copied to a posted shipment).

- If the initial purchase order of the selected posted shipment line still exists, the document price list line of the purchase order is copied to the document.
- If the initial purchase order of the selected posted shipment line has been deleted, the document price list line of the corresponding posted purchase invoice line is copied to the document.

When the option **Posted Invoices** is selected, then the Document Price List Line of the posted purchase invoice line will be used.

When the option **Posted Return Shipments** is selected, then the Document Price List Line of the posted purchase return order line will be used.

- If the initial purchase return order of the selected posted return shipment line still exists, the document price list line of the purchase return order is copied to the document.
- If the initial purchase return order of the selected posted return shipment line has been deleted, the document price list line of the corresponding posted credit memo line is copied to the document.

When the option **Posted Credit Memos** is selected, then the Document Price List Line of the posted credit memo line will be used.

Make order

To use the **Make Order** function from the

- **Blanket Purchase Order** page, on the action bar, click **Process > Make Order**.
- **Purchase Quote** page, on the action bar, click **Process > Make Order**.

The unit price, invoice discounts and line discounts from the **Blanket Purchase Order/Purchase Quote** document line are copied to the **Document Price List Line** of the **Purchase Order** and the **Frozen** field is checked on the **Applied Purchase Price and Discount** page.

Manually select blanket order line in purchase order line

Besides creating a **Purchase Order** from a **Blanket Purchase Order**, you can also refer to a blanket purchase order when creating a purchase line. In this case, the price is retrieved from the specific Blanket Order line. The Applied Purchase Price and Discount records under the Blanket Order line are also copied from the Blanket Order to the Purchase Order Line.



Move negative lines to another document

In various order types, the **Move Negative Lines** function can be used to copy order lines with a negative quantity to its counterpart. For example, **Purchase Order** Lines can be copied to either **Purchase Return Order** or **Credit Memo** Lines. When the line is copied, pricing information is also copied from the original order to its counterpart. The **Applied Purchase Price and Discount** records are also copied.

1. Select the Search icon , enter **Purchase Order**, and then choose the related link. The **Purchase Order** Lists is opened.
2. Select and click the required **No.** to open the **Purchase Order** Page.
3. On the action bar, click **Actions > Functions > Move Negative Lines**. The **Move Negative Purchase Lines** page is opened.
4. On the **Options** FastTab, click the drop-down menu on **To Document Type** field to specify which document type you want to move the negative purchase lines to.
5. On the **Advanced** FastTab, enter the **Maximum row generation time** field with the maximum time it can take to generate rows for the report. If exceeded, the report will be canceled. The value must have the format [d.]hh:mm:ss[.ffffff]. Milliseconds can be included but will be ignored.
6. Enter the **Maximum rows** field with the maximum number of rows that can be included in this report. If exceeded, the report will be canceled.
7. Enter the **Maximum documents** field with the maximum number of documents that can be included in this report. Notice that this setting applies to document reports only. If exceeded, the report will be canceled.
8. Click **OK**.

When you move a negative purchase line to your selected document type, the quantity of the line on the selected document will become positive.

Correct

On the **Posted Purchase Invoices** page, on the action bar, click **Correct > Correct**.

The **Correct** function has two functionalities. First, a **Purchase Credit Memo** is created that exactly reverses everything that was posted in the **Purchase Invoice**. Second, a new **Purchase Invoice** is created so the user can quickly register corrected quantities or prices. In both cases, the **Applied Purchase Price and Discount** linked to the **Posted Purchase Invoice** are copied to the newly created **Purchase Invoice**.

Cancel

On the **Posted Purchase Invoices** page, on the action bar, click **Correct > Cancel**.



The **Cancel** function creates a credit memo in which the transaction as registered in the **Posted Purchase Invoice** is reversed. After creation, the **Purchase Credit Memo** is posted automatically. In this case, the **Applied Purchase Price and Discount** that were linked to the **Posted Purchase Invoice** are copied to the **Purchase Credit Memo** and the **Posted Purchase Credit Memo**.

Create corrective credit memo

On the **Posted Purchase Invoices** page, on the action bar, click **Correct > Create Corrective Credit Memo**.

The **Create corrective credit memo** function creates a credit memo in which the transaction as registered in the **Posted Purchase Invoice** is reversed. In contrast to the **Correct** and **Cancel** functions, the created **Purchase Credit Memo** is not posted automatically. In this case, the **Applied Purchase Price and Discount** that were linked to the **Posted Purchase Invoice** are copied to the **Purchase Credit Memo**.

Copy document

The **Copy document** function can be used on all purchase related document types:

- Blanket Purchase Order
- Purchase Quote
- Purchase Order
- Purchase Return Order
- Purchase Invoice
- Purchase Credit Memo

The function can be used for all the documents mentioned below as a source for copying to another document (for example: a **Blanket Purchase Order** can be copied to a **Purchase Invoice**):

- Blanket Purchase Order
- Purchase Quote
- Purchase Order
- Purchase Return Order
- Purchase Invoice
- Purchase Credit Memo
- Posted Receipt
- Posted Invoice
- Posted Return Shipment
- Posted Credit Memo



Advanced Pricing

- Archived Quote
- Archived Purchase Order
- Archived Blanket Order
- Archived Return Order

When the function is used, the **Applied Purchase Price and Discount** lines that were linked to the original document, are copied to the newly created document.



Archived sales documents

Article • 4/29/2023 • 2 min read

Dynamics 365 Business Central offers the possibility to archive sales orders, quotes, return orders, and blanket orders, for example because you want to save a copy of a document for reuse later. You can archive a sales document several times, saving a different archived version each time. For archived documents where the original still exists and is not posted, you can use the **Restore** function to overwrite the original with the archived version of the document. This is practical if you need to restore the contents of a document to an earlier state. For archived documents where the original document is deleted, you can only reuse the content by copying the data, for example with the **Copy from Document** function.

Archive document

The **Archive document** function can be used on the following sales related document types:

- Blanket sales order
- Sales quote
- Sales order
- Sales return order

When the function is used, the applied sales price and discount that were linked to the original document, are copied to the archived version as well.

Restore from archive

The **Restore from Archive** function can be used on the following sales related document types:

- Blanket sales order archive
- Sales quote archive
- Sales order archive
- Sales return order archive

When the function is used, the archived version of (for example the sales order) is restored in the original order if it is not posted or deleted. When the function is used, the applied sales price and discount that were linked to the archived version of the document, are copied to the original document.



 Note

You can view the global lot attribute and the location code fields along the lines of the archived sales documents (Blanket Sales Order Archives, Sales Quote Archives, Sales Order Archives, and Sales Order Archives) only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Sales Price List** page is turned on.



Archived purchase documents

Article • 4/29/2023 • 2 min read

Dynamics 365 Business Central offers the possibility to archive Purchase orders, quotes, return orders, and blanket orders, for example if you want to save a copy of a document for reuse later. You can archive a purchase document several times, saving a different archived version each time. For archived documents where the original still exists and is not posted, you can use the Restore function to overwrite the original with the archived version of the document. This is practical if you need to restore the contents of a document to an earlier state.

Archive document

The **Archive document** function can be used on the following Purchase related document types:

- Blanket Purchase order
- Purchase quote
- Purchase order
- Purchase return order

When the function is used, the Applied Purchase Price and Discount that were linked to the original document, are copied to the archived version as well.

Note

You can view the global lot attribute and the location code fields along the lines of the archived purchase documents (Blanket Purchase Order Archives, Purchase Quote Archives, Purchase Order Archives, and Purchase Order Archives) only if Aptean [Advanced Attributes](#) extension is installed and **Attribute Driven Pricing** toggle on the **Purchase Price List** page is turned on.



Posted documents

Article • 4/3/2023 • 5 min read

When posting a sales document, the applied sales price and discount will be copied to the posted document. For example, when a sales invoice is posted, the sales invoice document itself will be deleted. Because the source of the price (and possible manual updates) should remain visible, the applied sales price and discount records are copied to the posted document for future reference.

When the sales credit memo is posted (by posting the credit itself or when posting the sales return order and credit memo at once), the applied sales price and discount from the sales credit memo or sales return order are copied to the posted credit memo line as well.

The Posted Applied Sales Price and Discount page can be opened from the posted document and an unposted sales document in the same manner.

For example, on a posted sales invoice, on the action bar, click **Line > Applied Sales Price and Discount**.

The **Posted Applied Sales Price and Discount** page can also be opened by clicking the **Type** field on a row > clicking the context menu  > **Applied Sales Price and Discount**.



The **Posted Applied Sales Price and Discount** page contains the same information as an unposted sales document.



Manage bracket pricing

Article • 7/2/2025 • 1 min read

The bracket pricing feature enables businesses to apply dynamic pricing based on weight or quantity thresholds. This ensures that customers receive appropriate discounts or pricing adjustments based on the volume of goods being purchased, allowing for more strategic and competitive pricing models.

You can define bracket thresholds and group them based on different criteria such as campaign, customer price group, or customer discount group. The system evaluates the thresholds during sales transactions and selects the most suitable bracket using defined logic, ensuring accuracy and transparency in pricing.

You can view and use the **Bracket Pricing** FactBox on the following pages:

- Sales Quote
- Sales Order
- Sales Invoice



Set up bracket pricing group

Article • 1/28/2026 • 5 min read

You can define and customize bracket pricing details to control how pricing tiers are applied based on different usage types, sources, and thresholds.

To set up a bracket pricing group, follow these steps:

- 1. Select the Search icon , enter **Bracket Pricing Groups**, and then choose the related link.
The **Bracket Pricing Groups** page opens.
- 2. Enter the required information in the following fields:

Field	Description
Code	Enter a code for the bracket pricing group.
Description	Enter a description for the bracket pricing group.
Usage Type	Select the usage type of the bracket pricing group. The default value is <i>Sale</i> .
Source Type	Select the source type to which the system must apply the bracket pricing group of the sales document. The available options are: • <i>Campaign</i>: The system updates the bracket pricing code in the Campaign field of the sales document. • <i>Cust. Price Group</i>: The system updates the bracket pricing group code in the Customer Price Group field of the sales document. • <i>Cust. Disc. Group</i>: The system updates the bracket pricing code in the Customer Disc. Group field of the sales document.
Threshold Type	Select the type of threshold the system must apply. The available options are: • <i>Quantity</i>: Applies bracket pricing based on the quantity of items in the sales document. • <i>Weight</i>: Applies bracket pricing based on the total weight of items. • <i>Weight and Quantity</i>: Applies bracket pricing only when both weight and quantity meet the respective thresholds. <i>Weight or Quantity</i>: Applies bracket pricing if either the weight or quantity meets the threshold.
Unit of Measure Code	Select the unit of measure code used for the bracket pricing group.



 Note

When a new line is created, the system displays the following field values by default.

- The **Source Type** field value is set to *Campaign*.
- The **Threshold Type** field value is set to *Weight*.

The system displays an error when the **Bracket Pricing Group Code** field value on the **Bracket Pricing Groups** page is duplicated.

To edit exclude from bracket pricing in the item templates, follow these steps:

11. Select the Search icon , enter **Item Templates**, and then choose the related link.
The **Item Templates** page opens.
12. Select the preferred code on the item templates to open the **Item Template Card** page.
13. On the **Prices and Sales** FastTab, turn on the **Exclude from Bracket Pricing** toggle to exclude the item from bracket pricing calculations.
14. Turn off the **Exclude from Bracket Pricing** toggle to include the item from bracket pricing calculations.

When the item is created using a template:

- The **Exclude from Bracket Pricing** field value from the template is automatically copied to the new item record.
- The toggle remains editable on the item card after item creation.

To assign bracket pricing group code in the customer templates, follow these steps:

15. Select the Search icon , enter **Customer Templates**, and then choose the related link.
The **Customer Template** page opens.
16. On the **Invoicing** FastTab, on the **Advanced Pricing** section, select the **Bracket Pricing Group Code** field.
17. Select the required code.

When a customer is created using a template:

- The **Bracket Pricing Group Code** field value from the template is automatically copied to the new customer record.
- The field remains editable on the customer card after customer creation.

This setting is only applicable in a sales document when the price calculation method, *Advanced Pricing* is used.



Configure bracket pricing threshold

Article • 7/2/2025 • 3 min read

You can define and manage pricing thresholds that are inherited from the configured **Bracket Pricing Group** page. For more information, see [Set up bracket pricing groups](#).

1. Select the Search icon , enter **Bracket Thresholds**, and then choose the related link.

The **Bracket Thresholds** page opens. It displays all the threshold code and their associated attributes.

2. Enter the required information in the following fields:

Field	Description
Code	Enter a code for the bracket pricing group.
Description	Enter a description for the bracket pricing group.
Usage Type	Select the usage type of the bracket pricing group. The default value is <i>Sale</i> .
Source Type	Select the source type to which the system must apply the bracket pricing group on the sales document. The available options are: • <i>Campaign</i>: The system updates the bracket pricing code in the Campaign field of the sales document. • <i>Cust. Price Group</i>: The system updates the bracket pricing group code in the Customer Price Group field of the sales document. • <i>Cust. Disc. Group</i>: The system updates the bracket pricing code in the Customer Disc. Group field of the sales document.
Threshold Type	Select the type of threshold the system must apply. The available options are: • <i>Quantity</i>: Applies bracket pricing based on the quantity of items in the sales document. • <i>Weight</i>: Applies bracket pricing based on the total weight of items. • <i>Weight and Quantity</i>: Applies bracket pricing only when both weight and quantity meet their respective thresholds. <i>Weight or Quantity</i>: Applies bracket pricing if either the weight or quantity meets the threshold.
Unit of Measure Code	Select the unit of measure code used for the bracket pricing group.
Maximum Weight	Enter the maximum weight applicable for bracket pricing.



Minimum Weight	Enter the minimum weight applicable for bracket pricing.
Maximum Quantity	Enter the maximum quantity applicable for bracket pricing.
Minimum Quantity	Enter the minimum quantity applicable for bracket pricing.

! Note

The following field values cannot be modified, as their values are inherited from the **Bracket Pricing Groups** page.

- Usage Type
- Bracket Pricing Group Code
- Source Type
- Source Description
- Threshold Type
- Unit of Measure Code

The system displays an error if a duplicate **Source No.** field value is entered. When the field value is same for the following fields:

- Bracket Pricing Group Code
- Source Type
- Threshold Type

The source number in the source document is updated based on the bracket pricing calculation in the associated **Campaign No.**, **Customer Price Group**, or **Customer Disc. Group** field on the following pages.

- Sales Quote
- Sales Order
- Sales Invoice

To understand the four types of threshold calculation, see:

- [Bracket threshold calculation by weight](#)
- [Bracket threshold calculation by quantity](#)
- [Bracket threshold calculation by weight and quantity](#)
- [Bracket threshold calculation by weight or quantity](#)



Calculate bracket threshold by weight

Article • 7/2/2025 • 2 min read

When the **Threshold Type** field value is set to *Weight*, and the **Source Type** field value is set to *Cust. Price Group* on the **Bracket Thresholds** page, the system evaluates the **Quantity** field value on the sales document against the **Maximum Weight** and **Minimum Weight** field values defined on the **Bracket Thresholds** page.

Note

- The quantity on the sales document is calculated as a product of the quantity and gross weight.
- The gross weight is inherited from the **Gross Weight** field value on the **Item Card** page.

For example, consider the following configuration:

Bracket Pricing Group Code	Source Type	Source No.	Maximum Weight	Minimum Weight
Code 1	Cust. Price Group	Bracket 01	300	200
Code 2	Cust. Price Group	Bracket 02	40	20
Code 3	Cust. Price Group	Bracket 03	600	350
Code 4	Cust. Price Group	Bracket 04	200	110

Weight Calculation = Quantity × Gross Weight

Scenario 1:

If the **Quantity** field value is set to *12* and the **Gross Weight** field value is *10*, the calculated weight is: $12 \times 10 = 120$. The calculated value falls within the range of *Bracket 04* (between 110 and 200).

In this case, *Bracket 04* is selected, and its source type is updated in the source document. So the system updates the **Customer Price Group** field value with *Code 4*.

Scenario 2:

If the **Quantity** field value is set to *30* and the **Gross Weight** field value is *20*, the calculated weight is: $30 \times 20 = 600$. The weight falls within the range of *Bracket 01* and *Bracket 03*.

The system compares the **Minimum Weight** field values of the qualifying brackets and selects the one with the highest minimum weight.

In this case, Bracket 03 is selected, and its source type is updated in the source document.

For example: The system updates the **Customer Price Group** field value with *Code 3*.



 Note

The record is not accepted if the weight value falls outside all defined ranges. The system displays a notification.



Calculate bracket threshold by quantity

Article • 7/2/2025 • 2 min read

When the **Threshold Type** field value is set to *Quantity* on the **Bracket Thresholds** page, the system evaluates the **Quantity** field value from the sales document against the **Minimum Quantity** and **Maximum Quantity** field values defined on the **Bracket Thresholds** page.

For example, consider the following configuration:

Bracket Pricing Group Code	Source Type	Source No.	Maximum Quantity	Minimum Quantity
Code 1	Cust. Price Group	Bracket 01	100	70
Code 2	Cust. Price Group	Bracket 02	40	20
Code 3	Cust. Price Group	Bracket 03	60	30
Code 4	Cust. Price Group	Bracket 04	25	11

Scenario 1:

If the **Quantity** field value is set to *12* on the source document, it falls within the range of *Bracket 04* (between 11 and 25).

The system updates the **Customer Price Group** field value with *Code 4*.

Scenario 2:

If the **Quantity** field value is set to *30* on the source document, it falls within the range of Bracket 02 and Bracket 03.

The system compares the **Minimum Quantity** field values of the qualifying brackets and selects the one with the highest minimum quantity.

In this case, *Bracket 03* is selected, and its source type is updated in the source document. So, the system updates the **Customer Price Group** field value with *Code 3*.

Note

The record is not accepted if the quantity value falls outside all defined ranges. The system displays a notification.



Calculate bracket threshold by weight and quantity

Article • 7/2/2025 • 2 min read

When the **Threshold Type** field value is set to *Weight and Quantity*, and the **Source Type** field value is set to *Cust. Price Group* on the **Bracket Thresholds** page, the system evaluates whether both the quantity and the calculated weight on the sales document fall within the defined threshold ranges.

ⓘ Note

- The quantity is inherited from the **Quantity** field value on the sales document.
- The weight is calculated as a product of the quantity and gross weight.
- The gross weight is inherited from the **Gross Weight** field on the **Item Card** page.

For example, consider the following configuration:

Bracket Pricing Group Code	Source Type	Source No.	Maximum Weight	Minimum Weight	Maximum
Code 1	Cust. Price Group	Bracket 01	300	200	40
Code 2	Cust. Price Group	Bracket 02	40	20	20
Code 3	Cust. Price Group	Bracket 03	600	350	30
Code 4	Cust. Price Group	Bracket 04	200	60	15

Weight Calculation = Quantity × Gross Weight

Scenario 1:

If the **Quantity** field value is set to 6 and the **Gross Weight** field value is 10, the calculated weight is: $6 \times 10 = 60$.

Both the quantity and the calculated weight fall within the range of Bracket 02 and Bracket 04.

The system compares the **Minimum Weight** field values of the qualifying brackets and selects the one with the highest minimum weight.

In this case, *Bracket 04* is selected, and its source type is updated in the source document. So, the system updates the **Customer Price Group** field value with *Code 4*.



Scenario 2:

If the **Quantity** field value is set to *30* and the **Gross Weight** field value is *15*, the calculated weight is: $30 \times 15 = 450$.

Both the quantity and the calculated weight fall within the range of Bracket 01 and Bracket 03.

The system compares the **Minimum Weight** field values of the qualifying brackets and selects the one with the highest minimum weight.

In this case, *Bracket 03* is selected, and its source type is updated in the source document. So, the system updates the **Customer Price Group** field value with *Code 3*.

 Note

The record is not accepted if either the quantity or the weight value falls outside all defined ranges. The system displays a notification.



Calculate bracket threshold by weight or quantity

Article • 7/2/2025 • 2 min read

When the **Threshold Type** field value is set to *Weight* or *Quantity*, and the **Source Type** field value is set to *Cust. Price Group* on the **Bracket Thresholds** page, the system evaluates either the quantity or the calculated weight on the sales document falls within the defined threshold ranges.

Note

- The quantity value is inherited from the **Quantity** field value on the sales document.
- The weight is calculated as a product of the quantity and gross weight.
- The gross weight is inherited from the **Gross Weight** field value on the **Item Card** page.

For example, consider the following configuration:

Bracket Pricing Group Code	Source Type	Source No.	Maximum Weight	Minimum Weight	Maximum
Code 1	Cust. Price Group	Bracket 01	300	200	100
Code 2	Cust. Price Group	Bracket 02	80	40	30
Code 3	Cust. Price Group	Bracket 03	500	300	50
Code 4	Cust. Price Group	Bracket 04	1500	60	20

Weight Calculation = Quantity × Gross Weight

Scenario 1:

If the **Quantity** field value is set to *10*, which does not match any defined quantity range, and the **Gross Weight** field value is *7*, the calculated weight is: $10 \times 7 = 70$.

The calculated weight value falls within the range of Bracket 02 and Bracket 04.

The system compares the **Minimum Weight** field values of the qualifying brackets and selects the one with the highest minimum weight.

In this case, *Bracket 04* is selected, and its source type is updated in the source document. So the system updates the **Customer Price Group** field value with *Code 4*.



Scenario 2:

If the **Quantity** field value is set to *60* and the **Gross Weight** field value is *28*, the calculated weight is: $60 \times 28 = 1680$.

Both the quantity and the calculated weight values fall within the range of Bracket 01 and Bracket 03.

The system compares the **Minimum Weight** field values of the qualifying brackets and selects the one with the highest minimum weight.

In this case, *Bracket 03* is selected, and its source type is updated in the source document. So the system updates the **Customer Price Group** field value with *Code 3*.

Note

The record is not accepted if neither the quantity nor the weight value falls within any of the defined ranges. The system displays a notification.



Create sales quote with bracket pricing

Article • 1/28/2026 • 4 min read

When creating a sales quote for a customer using the bracket pricing feature, the system applies pricing based on the configured hierarchy. The bracket pricing group code is inherited from the **Customer Card** page and the **Bracket Pricing** FactBox displays details about the applicable thresholds.

Bracket pricing group code inheritance

The **Bracket Pricing Group Code** field value on the **Sales Quote** page is inherited from the **Customer Card** page based on the following fields:

- No. (General FastTab)
- Bill-to Customer (Invoicing FastTab)
- Sales Price Reference Customer (Invoicing FastTab)
- Ship-to Code (Shipping FastTab)

No.	Bill-to Customer	Sales Price Reference Customer	Ship-to Code	Bracket Pricing Group Code field value
C011	C011	Value is blank	Value is blank	Based on the No. field value.
C011	C012	Value is blank	Value is blank	Based on the Bill-to Customer field value.
C011	C011	C011 (If value is configured)	Value is blank	Based on the Sales Price Reference Customer field value.
C011	C014	C019	C012	Based on the Ship-to Code field value.

 Note

- The system checks these fields in sequence. If the **Ship-to Code** field value is configured, the **Bracket Pricing Group Code** field value takes precedence.
- If the **Bill-to Customer** field value is updated on the **Sales Order** page, the **Bracket Pricing Group Code** field value updates accordingly.
- If the **Ship-to Code** field value is updated, the **Bracket Pricing Group Code** field value updates based on the new **Ship-to Code** field value.
- Even if the **Bill-to Customer** field value is updated, the **Bracket Pricing Group Code** field value is still inherited from the **Ship-to Code** field value, if it is configured.

In the **Sales Quote** section of the FactBox, you can view the following details:



Field	Description
Code	Enter a code for the bracket pricing group.
Description	Enter a description for the bracket pricing group.
Usage Type	Select the usage type of the bracket pricing group. The default value is <i>Sale</i> .
Source Type	Select the source type to which the system must apply the bracket pricing group of the sales document. The available options are: • <i>Campaign</i>: The system updates the bracket pricing code in the Campaign field of the sales document. • <i>Cust. Price Group</i>: The system updates the bracket pricing group code in the Customer Price Group field of the sales document. • <i>Cust. Disc. Group</i>: The system updates the bracket pricing code in the Customer Disc. Group field of the sales document.
Threshold Type	Select the type of threshold the system must apply. The available options are: • <i>Quantity</i>: Applies bracket pricing based on the quantity of items in the sales document. • <i>Weight</i>: Applies bracket pricing based on the total weight of items. • <i>Weight and Quantity</i>: Applies bracket pricing only when both weight and quantity meet their respective thresholds. <i>Weight or Quantity</i>: Applies bracket pricing if either the weight or quantity meets the threshold.
Unit of Measure Code	Select the unit of measure code used for the bracket pricing group.
Maximum Weight	Enter the maximum weight applicable for bracket pricing.
Minimum Weight	Enter the minimum weight applicable for bracket pricing.
Maximum Quantity	Enter the maximum quantity applicable for bracket pricing.
Minimum Quantity	Enter the minimum quantity applicable for bracket pricing.

If the **Bracket Pricing Group Code** field value on the **Sales Quote** page is set to blank, the field values on the **Bracket Pricing** FactBox are not generated.



 Note

On the **Sales Order** page, if the **Bracket Pricing Group Code** field value is set to blank, the **Calculate Bracket Pricing** action (**Actions > Functions**) cannot be executed.

When the **Exclude from Bracket Pricing** toggle is turned on for the items in sales quote, the items are excluded from bracket pricing calculations. When the toggle is turned off, the items are included in bracket pricing calculations. This toggle is editable in the sales quote lines.

When bracket pricing is applied to a sales quote and the defined threshold is met, the system updates the **Customer Price Group** or **Customer Discount Group** field values on the sales document based on the bracket pricing rules. These updated values are then used to recalculate prices and discounts on the sales lines. If the **Bracket Pricing Group Code** field value is later cleared on the sales document, the system treats this as a bypass of bracket pricing. In response, pricing is recalculated and the **Customer Price Group** or **Customer Discount Group** field values are restored to their original state. The system determines these original values based on their initial source, which may be the **Ship-To Address**, **Sales Price Reference Customer No.**, or **Bill-To Customer No.** fields, ensuring the document returns to its pre-bracket pricing behaviour.



Create sales order with bracket pricing

Article • 1/28/2026 • 4 min read

When creating a sales order for a customer using the bracket pricing feature, the system applies pricing based on the configured hierarchy. The bracket pricing group code is inherited from the **Customer Card** page and the FactBox displays details about the applicable thresholds.

Bracket pricing group code inheritance

The **Bracket Pricing Group Code** field value on the **Sales Order** page is inherited from the **Customer Card** page based on the following fields:

- No. (General FastTab)
- Bill-to Customer (Invoicing FastTab)
- Sales Price Reference Customer (Invoicing FastTab)
- Ship-to Code (Shipping FastTab)

No.	Bill-to Customer	Sales Price Reference Customer	Ship-to Code	Bracket Pricing Group Code field value
C011	C011	Value is blank	Value is blank	Based on the No. field value
C011	C012	Value is blank	Value is blank	Based on the Bill-to Customer field value
C011	C011	C011 (If value is configured)	Value is blank	Based on the Sales Price Reference Customer field value
C011	C014	C019	C012	Based on the Ship-to Code field value

 Note

- The system checks these fields in sequence. If the **Ship-to Code** field value is configured, the **Bracket Pricing Group Code** field value takes precedence.
- If the **Bill-to Customer** field value is updated on the **Sales Order** page, the **Bracket Pricing Group Code** field value updates accordingly.
- If the **Ship-to Code** field value is updated, the **Bracket Pricing Group Code** field value updates based on the new **Ship-to Code** field value.
- Even if the **Bill-to Customer** field value is updated, the **Bracket Pricing Group Code** field value is still inherited from the **Ship-to Code** field value, if it is configured.

In the **Sales Order** section of the FactBox, you can view the following details:



Field	Description
Code	Enter a code for the bracket pricing group.
Description	Enter a description for the bracket pricing group.
Usage Type	Select the usage type of the bracket pricing group. The default value is <i>Sale</i> .
Source Type	Select the source type to which the system must apply the bracket pricing group of the sales document. The available options are: • <i>Campaign</i>: The system updates the bracket pricing code in the Campaign field of the sales document. • <i>Cust. Price Group</i>: The system updates the bracket pricing group code in the Customer Price Group field of the sales document. • <i>Cust. Disc. Group</i>: The system updates the bracket pricing code in the Customer Disc. Group field of the sales document.
Threshold Type	Select the type of threshold the system must apply. The available options are: • <i>Quantity</i>: Applies bracket pricing based on the quantity of items in the sales document. • <i>Weight</i>: Applies bracket pricing based on the total weight of items. • <i>Weight and Quantity</i>: Applies bracket pricing only when both weight and quantity meet their respective thresholds. <i>Weight or Quantity</i>: Applies bracket pricing if either the weight or quantity meets the threshold.
Unit of Measure Code	Select the unit of measure code used for the bracket pricing group.
Maximum Weight	Enter the maximum weight applicable for bracket pricing.
Minimum Weight	Enter the minimum weight applicable for bracket pricing.
Maximum Quantity	Enter the maximum quantity applicable for bracket pricing.
Minimum Quantity	Enter the minimum quantity applicable for bracket pricing.

If the **Bracket Pricing Group Code** field value on the **Sales Quote** page is set to blank, the field values on the **Bracket Pricing** FactBox are not generated.



 Note

On the **Sales Order** page, if the **Bracket Pricing Group Code** field value is set to blank, the **Calculate Bracket Pricing** action (**Actions > Functions**) cannot be executed.

When the **Exclude from Bracket Pricing** toggle is turned on for the items in sales quote, the items are excluded from bracket pricing calculations. When the toggle is turned off, the items are included in bracket pricing calculations. This toggle is editable in the sales quote lines.

When bracket pricing is applied to a sales order and the defined threshold is met, the system updates the **Customer Price Group** or **Customer Discount Group** field values on the sales document based on the bracket pricing rules. These updated values are then used to recalculate prices and discounts on the sales lines. If the **Bracket Pricing Group Code** field value is later cleared on the sales document, the system treats this as a bypass of bracket pricing. In response, pricing is recalculated and the **Customer Price Group** or **Customer Discount Group** field values are restored to their original state. The system determines these original values based on their initial source, which may be the **Ship-To Address**, **Sales Price Reference Customer No.**, or **Bill-To Customer No.** fields, ensuring the document returns to its pre-bracket pricing behaviour.



Create sales invoice with bracket pricing

Article • 1/28/2026 • 4 min read

When creating a sales invoice for a customer using the bracket pricing feature, the system applies pricing based on the configured hierarchy. The bracket pricing group code is inherited from the **Customer Card** page and the FactBox displays details about the applicable thresholds.

The **Bracket Pricing Group Code** field value on the **Sales Invoice** page is inherited from the **Customer Card** page based on the following fields:

- No. (General FastTab)
- Bill-to Customer (Invoicing FastTab)
- Sales Price Reference Customer (Invoicing FastTab)
- Ship-to Code (Shipping FastTab)

No.	Bill-to Customer	Sales Price Reference Customer	Ship-to Code	Bracket Pricing Group Code field v
C011	C011	Value is blank	Value is blank	Based on the No. field value
C011	C012	Value is blank	Value is blank	Based on the Bill-to Customer field v
C011	C011	C011 (If value is configured)	Value is blank	Based on the Sales Price Reference C
C011	C014	C019	C012	Based on the Ship-to Code field value

 Note

- The system checks these fields in sequence. If the **Ship-to Code** field value is configured, the **Bracket Pricing Group Code** field value takes precedence.
- If the **Bill-to Customer** field value is updated on the **Sales Order** page, the **Bracket Pricing Group Code** field value updates accordingly.
- If the **Ship-to Code** field value is updated, the **Bracket Pricing Group Code** field value updates based on the new **Ship-to Code** field value.
- Even if the **Bill-to Customer** field value is updated, the **Bracket Pricing Group Code** field value is still inherited from the **Ship-to Code** field value, if it is configured.

In the **Sales Invoice** section of the FactBox, you can view the following details:

Field	Description
Code	Enter a code for the bracket pricing group.



Description	Enter a description for the bracket pricing group.
Usage Type	Select the usage type of the bracket pricing group. The default value is <i>Sale</i> .
Source Type	Select the source type to which the system must apply the bracket pricing group of the sales document. The available options are: • <i>Campaign</i>: The system updates the bracket pricing code in the Campaign field of the sales document. • <i>Cust. Price Group</i>: The system updates the bracket pricing group code in the Customer Price Group field of the sales document. • <i>Cust. Disc. Group</i>: The system updates the bracket pricing code in the Customer Disc. Group field of the sales document.
Threshold Type	Select the type of threshold the system must apply. The available options are: • <i>Quantity</i>: Applies bracket pricing based on the quantity of items in the sales document. • <i>Weight</i>: Applies bracket pricing based on the total weight of items. • <i>Weight and Quantity</i>: Applies bracket pricing only when both weight and quantity meet their respective thresholds. <i>Weight or Quantity</i>: Applies bracket pricing if either the weight or quantity meets the threshold.
Unit of Measure Code	Select the unit of measure code used for the bracket pricing group.
Maximum Weight	Enter the maximum weight applicable for bracket pricing.
Minimum Weight	Enter the minimum weight applicable for bracket pricing.
Maximum Quantity	Enter the maximum quantity applicable for bracket pricing.
Minimum Quantity	Enter the minimum quantity applicable for bracket pricing.

If the **Bracket Pricing Group Code** field value on the **Sales Quote** page is set to blank, the field values on the **Bracket Pricing** FactBox are not generated.

Note

On the **Sales Order** page, if the **Bracket Pricing Group Code** field value is set to blank, the **Calculate Bracket Pricing** action (**Actions > Functions**) cannot be executed.



When the **Exclude from Bracket Pricing** toggle is turned on for the items in sales quote, the items are excluded from bracket pricing calculations. When the toggle is turned off, the items are included in bracket pricing calculations. This toggle is editable in the sales quote lines.

When bracket pricing is applied to a sales invoice and the defined threshold is met, the system updates the **Customer Price Group** or **Customer Discount Group** field values on the sales document based on the bracket pricing rules. These updated values are then used to recalculate prices and discounts on the sales lines. If the **Bracket Pricing Group Code** field value is later cleared on the sales document, the system treats this as a bypass of bracket pricing. In response, pricing is recalculated and the **Customer Price Group** or **Customer Discount Group** field values are restored to their original state. The system determines these original values based on their initial source, which may be the **Ship-To Address**, **Sales Price Reference Customer No.**, or **Bill-To Customer No.** fields, ensuring the document returns to its pre-bracket pricing behaviour.



Manage price list reports

Article • 9/24/2025 • 1 min read

You can generate price list reports for customers based on specific configurations defined in price report templates. These price list reports are customizable, ensuring accurate pricing information is generated for customers to plan their purchase effectively. For example, you can generate a price list report for all items in a specific item category within a specified date range, providing up-to-date prices for a customer interested in browsing through available products.

See also

- [Create price report templates](#)
- [Generate price list reports](#)



Create price report templates

Article • 9/24/2025 • 2 min read

You can create price report templates and configure pricing dates, item selection, and layout of the report. This configuration helps you customize the generation of price list reports as per your requirements.

To create a price report template, follow these steps:

- 1. Select the Search icon , enter **Price Report Templates**, and then choose the related link.
The **Price Report Templates** page opens.
- 2. On the action bar, select **New**.
The **Price Report Template** page opens.
- 3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Code	Specifies the unique code of the price report template. The number series used is set up in the Price Report Template Nos. field on the Advanced Pricing Setup page. For more information, see Set up advanced pricing .
Description	Enter a description for the price report template.

- 4. On the **Pricing Dates** FastTab, enter the required information in the following fields:

Field	Description
Specific Start Date	Enter the date formula that defines the start date of the pricing from when the report is run, for example, <i>2D</i> means that the system generates the pricing report for two days after the current date.
Price Effective Range	Enter the date formula that defines the price effectiveness period for the price list report. For example, <i>1D</i> for one day, <i>2M</i> for two months, and <i>3Y</i> for three years.

- 5. On the **Item Selection** FastTab, enter the required information in the following fields:

Field	Description
Skip Items Without Price	Turn on the toggle to exclude items without defined prices from the price list report.
Skip Items Without Inventory	Turn on the toggle to exclude items without inventory from the price list report.



Sales Price List Code	Select a sales price list code if you want the system to include items that are only a part of the sales price list code in the price list report. This field is editable only when the Item Catalog Code field value is not selected and the All Customer Catalogs toggle is turned off.
Item Catalog Code	Select an item catalog code if you want the system to include items that are only a part of the item catalog in the price list report. This field is editable only when the Sales Price List Code field value is not selected and the All Customer Catalogs toggle is turned off.
All Customer Catalogs	Turn on the toggle if you want the system to include items in all customer catalogs associated with the selected customer in the price list report. This field is editable only when the Sales Price List Code and Item Catalog Code field values are not selected.

 Note

The **Item Catalog Code** field and **All Customer Catalogs** toggle are visible only when the Aptean [Customer Item Catalog](#) extension is installed.

6. On the **Report Layout** FastTab, enter the required information in the following fields:

Field	Description
Zero Price Text	Enter the text to display for items with zero price in the price list report. If this field value is left blank, the system does not display zero prices in the report.
Sorting Method	Select how the system must sort items in the price list report. The available options are: <i>Item Category</i> , <i>Item No.</i> , <i>Item Description</i> , and <i>Item Search Description</i> . This field value is set to <i>Item Category</i> by default.
Section Headers	Select whether you want the price list report to include section headers based on item categories. The available options are: Blank and <i>Item Category</i> . This field value is set to <i>Item Category</i> by default.

7. On the action bar, select **Item Filter** to add specific filter criteria for items, such as item category, item number, or unit cost.

8. Select the **Item Attribute** action to add specific filter criteria for item attribute values.

The price report template is set up.

You can apply price report templates when generating price list reports. For more information, see [Generate price list reports](#).



Generate price list reports

Article • 1/28/2026 • 3 min read

To generate price list reports, follow these steps:

- 1. Select the Search icon , enter **Price List Report**, and then choose the related link.
The **Price List Report** page opens.
- 2. Enter the required information in the following fields:

Field	Description
Printer	Specifies the printer set up for this report on the Printer Selection page.
Report Layout	Select whether you want to print the report in .rdlc or .docx format.

- 3. On the **Options** FastTab, in the **Price Report Template** field, select a price report template you want the system to use for the price list report.
The system displays the description of the selected price report template in the **Price Report Template Description** field.

! Note

The selected **Price Report Template** may contain predefined item and customer attribute filters. These filters are applied automatically during report generation and determine which items and customers are included in the **Price List Report**.

- 4. On the **Filter: Customer** FastTab, in the **No.** field, select the customer from whom you want to print the price list.
You can add more than one customer or add additional customer-related filters. In such cases, the system downloads the price list report as a .zip file with multiple reports.
- 5. On the **Advanced** FastTab, you can set up advanced configurations in the following fields:

Field	Description
Maximum row generation time	Enter the maximum time the system must take to generate the report in the <i>[d.]hh:mm:ss[.ffffff]</i> format. If the time is exceeded, the report generation is canceled.
Maximum rows	Enter the maximum number of rows that can be included in the report. If exceeded, the report generation is cancelled.



Maximum documents	Enter the maximum number of documents that can be included in this report. If exceeded, the report generation is cancelled.
Format region	Select the format region used to format numbers and dates in the report in the <i>xx-yy</i> format, where <i>xx</i> is the language code and <i>yy</i> is the region code. For example, <i>en-US</i> for English in the United States.
Language	Select the application language that must be used to localize captions and strings in the report.

6. Select **Print**.

The price list report is generated.

 Note

You can access the **Price List Report** page directly from the **Customers** and **Customer Card** pages on the action bar via the **Print Price Report** action.

Attribute based filtering in price report templates

The selected price report template includes attribute-based filters that control which items and customers are included on the **Price List Report** page.

- You can define advanced lot attribute–based criteria in the report template to control which items are included in the price list report.
- You can define advanced customer attribute–based filters in the report template to restrict the price list report to customers that match specific attributes such as region, customer type, or classification.
- The system stores the defined item and customer attribute filters with the report template so that the same filtering logic is reused each time the report is generated.
- When you generate the Price List Report, the system applies the saved attribute filters from the selected template to determine the final set of items and customers included in the report.

These template-based filters are applied in addition to any filters that you set on the **Price List Report** page.



Integrations

Article • 9/24/2025 • 1 min read

The Aptean Advanced Pricing extension has been integrated with the following extensions:

- [Aptean Advanced Attributes](#)
- [Aptean Commodity Harvest](#)
- [Aptean Service Provisioning](#)
- [Aptean Backorder Management](#)
- [Aptean Customer Item Catalog](#)
- [Aptean Combine Shipments per Period](#)
- [Aptean Packaging](#)



Aptean Advanced Attributes

Article • 9/4/2025 • 2 min read

The Aptean Advanced Pricing extension makes use of the features in the Aptean [Advanced Attributes](#) extension to select the price on the purchase or sales price list lines. This is enabled by the addition of the **Attribute Driven Pricing** toggle on the price list pages. When the toggle is turned on, you can see the attribute values and location of the items assigned to it.

Note

You can turn on the **Attribute Driven Pricing** toggle and modify the values in the Global Lot Attribute fields only when the **Status** field is set as *Draft*.

The Purchase/Sales Price list lines can have the same item multiple times with different global lot attribute values and the same location code. Similarly, the same item may be used multiple times with empty values for the global lot attribute but with different location codes.

Note

The **Attribute Driven Pricing** toggle is only available when the Aptean [Advanced Attributes](#) extension is used in conjunction with the Advanced Pricing extension.

Visibility of Global Lot Attributes

You can view the new global lot attribute and the location code fields along the lines of the purchase price list and sales price list. You can also view them on the following documents:

- Applied Sales Price & Discount
- Applied Purchase Price & Discount
- Sales/Purchase Quotes
- Sales/Purchase Orders
- Blanket Sales/Purchase Orders
- Sales/Purchase Invoices
- Sales/Purchase Return Orders
- Sales/Purchase Credit Memos
- Posted Sales/Purchase Invoices
- Posted Sales/Purchase Credit Memos
- Blanket Sales/Purchase Order Archives



Advanced Pricing

- Sales/Purchase Quote Archives
- Sales/Purchase Order Archives
- Sales/Purchase Return Order Archives

To know more about the selection of price from price list lines, see [Advanced Pricing Method Hierarchy with Lot Attribute values](#).



Aptean Commodity Harvest

Article • 9/4/2025 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Commodity Harvest](#) extension:

- You can add items associated with a vendor to an agricultural location by using the **Add Vendor Item Catalog** action on the **Agricultural Location By Product** page. For more information, see [Manage agricultural locations](#).
- The system automatically filters and displays vendor-specific items in the **Source Type** field value on the **Items by Global Lot Attribute and Item Category Filter** page for harvest order lines with the **Type** field value set to *Item Category*. For more information, see:
 - [Create purchase or blanket purchase orders from harvest orders](#)
 - [Create purchase contracts from harvest orders](#)
 - [Create week or day forecasts from harvest orders](#)
 - [Create purchase orders from forecast approval worksheet](#)



Aptean Service Provisioning

Article • 7/30/2025 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Service Provisioning](#) extension, the system automatically selects the **Frozen** checkbox for the lines on the sales and purchase orders created from the **Transfer Ownership** page if you have manually entered a value in the **Unit Price Excl. VAT** and **Unit Cost Excl. VAT** fields on the **Sales** FastTab and **Purchase** FastTab, respectively. For more information, see [Transfer the ownership of items](#).



Aptean Backorder Management

Article • 9/24/2025 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Backorder Management](#) extension, the system ensures that pricing and discount rules are correctly applied even when backorders are created or modified, maintaining accurate sales calculations and minimizing manual intervention.



Aptean Customer Item Catalog

Article • 9/24/2025 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Customer Item Catalog](#) extension, you can configure whether the system must include items that are part of a specific item catalog or all customer catalogs in price list reports on the **Price Report Template** page. For more information, see [Create price report templates](#).



Aptean Combine Shipments per Period

Article • 9/24/2025 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Combine Shipments per Period](#) extension, the system excludes sales order lines with the **Invoice Hold Status** field value set to *Hold - Pricing* when creating a consolidated sales shipment via the **Combine Shipment By** page. For more information, see [Place a hold on sales order lines for pricing](#).



Aptean Packaging

Article • 7/22/2026 • 1 min read

When the Aptean Advanced Pricing extension is used in conjunction with the Aptean [Packaging](#) extension, the system sets the **Invoice Hold Status** field value to *Hold - Pricing* for packaging lines with the **Allow Packaging Recalculation** checkbox selected when the associated sales order lines are put on hold on the **Sales Order** page. This also applies when the **Invoice Hold Status** field value is set using the **Set All Lines to Invoice Hold** and **Set All Lines to Invoice Approved** actions on the **Sales Order** page. These actions do not update packaging lines directly. The packaging lines' **Invoice Hold Status** field value is still updated automatically based on the associated sales order line. For more information, see [Place a hold on sales order lines for pricing](#).

