

PUBLIC

How to Manage Price Lists

Countries: All



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English

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Price Lists

Introduction

In SAP Business One, you define prices for items in price lists. During the creation of sales and purchasing documents, SAP Business One derives item prices directly from the price list linked to the business partner's payment terms.

SAP Business One provides 10 default price lists. You can use all 10 or just some of them. You can define new price lists and delete existing ones. You can also link different price lists to one another using multiplication factors.

Maintaining different price lists for items makes it possible to set special prices and quantity-dependent discounts in each one, thereby letting you offer your customers customized prices.

Last Purchase Price and Last Evaluated Price Lists

The following two price lists are automatically created and calculated by SAP Business One:

- *Last Purchase Price* - The item prices in this price list are updated automatically by the following:
 1. A/P invoice
 2. Goods receipt
 3. A positive beginning quantity
 4. A positive after-inventory update
 5. Landed costs document
 6. Production of a parent item – the parent item's last purchase price equals the total of its child items' last purchase prices (according to the quantities defined in the production bill of materials).
- *Last Evaluated Price* - In this case, SAP Business One uses the last calculated costs for each item. If you run a valuation under the FIFO method, for example, and then run a valuation for the last calculated costs, the system will value the items using the last value that was determined for an item under the FIFO method.



NOTE

- You cannot manually update the last purchase price list. That is, as long as an item has not been entered into the warehouse in one of the ways mentioned above, it will not have a last purchase price. The last purchase price can be used as a base price for other price lists. (For more details, see section [Defining an Independent Price List](#)).
- Receiving items with no price by using one of the documents mentioned above does not update their last purchase price.
- When you issue one of the documents mentioned above using a date prior to the last update date of a certain item, the last purchase price is not updated.

Setting Authorizations

For information on authorizations required for price lists, see the document *How to Define Authorizations in Releases 2007 A and 2007 B*, which you can download from the documentation area of the SAP Business One Customer Portal (<http://channel.sap.com/sbocustomer>).

Defining Price Lists

You define all the price lists (except *Last Purchase Price* and *Last Evaluated Price*) in the *Price Lists* window.




CAUTION

Prior to making global changes, back up the database with which you are currently working.

Defining an Independent Price List

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. From the *Data* menu, choose *Add Row*. Alternatively, right-click in the window and choose *Add Row*.
3. In the *Price Lists* window, specify the following data:

Field	Activity/Description	Comments
<i>Price List Name</i>	Specify a name for your price list, or use the default given name.	You cannot change the name of the <i>Last Purchase Price</i> list or the <i>Last Evaluated Price</i> list.
<i>Base Price List</i>	Select a price list on which to base the prices of the current price list.	In an independent price list, the base price list name should be identical to the current price list's name.
<i>Factor</i>	Specify a factor for multiplying the prices of the base price list.	In an independent price list the factor should be 1.  EXAMPLE You can specify that price list 2 is to be calculated with a factor of 1.5 with respect to price list 1, and price list 3 with a factor of 1.65 with respect to price list 1. Alternatively, you can specify that price list 3 is to be calculated with a factor of 1.1 with respect to price list 2 (factor 1.5 x factor 1.1 = factor 1.65). The result in price list 3 is the same.
<i>Rounding Method</i>	Specify one of the following rounding methods for each of your price lists: <ul style="list-style-type: none"> • <i>No Rounding</i> • <i>Round to Full Decimal Amount</i> • <i>Round to Full Amount</i> • <i>Round to Full Tens Amount</i> 	The rounding method is calculated for a single item. For examples, see Appendix: Examples of Rounding Methods .
<i>Authorization Group</i>	Assigning price lists to groups lets you block certain users from accessing the lists by setting appropriate permissions in the <i>Authorizations</i> window.	

4. To save changes, choose the *Update* button.



To update item prices manually, double-click the price list row number (to the left of the price list name) and specify the required prices in the *Unit Price* column.

For more information, see the section [Update Prices Manually](#).

Linking Price Lists to One Another

SAP Business One lets you link price lists to one another by defining multiplication factors. You specify the item prices in one price list, link the list to other price lists using a certain factor, and let SAP Business One calculate the prices automatically in each of the linked price lists.

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. Locate the price list you want to work with and specify the following data:

Field	Activity/Description	Comments
<i>Base Price List</i>	Specify the price list upon which to base the prices in the selected price list.	
<i>Factor</i>	Specify the factor by which to multiply the prices of the base price list.	
<i>Rounding Method</i>	Specify a rounding method to be used for the output of the multiplication operation triggered by the factor.	

3. To save your changes, choose the *Update* button.
4. To view the new item prices, double-click the price list's row number.



NOTE

You can specify a price in each of the currencies defined in SAP Business One (under *Administration* → *Setup* → *Financials* → *Currencies*). To specify a price in a foreign currency, type the currency symbol followed by the price.

Updating Price Lists

In SAP Business One you can do the following:

1. Update an entire price list
2. Update prices by selection
3. Update prices manually

Updating an Entire Price List

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. Select the radio button *Update Entire Price List* (at the top left).
3. Change the factor, the base price list, and/or the rounding method in the price list's row, and then choose the *Update* button.



NOTE

When you update a price list that is a base price list for other price lists, the prices in those lists change accordingly. In the case of an independent price list, the factor reverts to 1 after you update.

Updating Prices by Selection

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. Select the radio button *Update by Selection* (at the top left).
3. Change the factor and/or rounding method in the required price list, and then choose the *Update* button.
4. In the *Price List - Selection Criteria* window, set the required range of items to be updated, according to the item numbers, vendor codes (the preferred vendor defined under *Inventory* → *Item Master Data* → *Purchasing Data* tab), item groups, and properties.
5. To confirm the update for the selected range, choose the *OK* button.

This procedure updates the item prices in the selected range only. Other item prices do not change.



NOTE

- Updating the prices of the selected item range also updates the prices of these items in price lists linked to the current price list.
- The factor displayed for the price list in the *Price Lists* window is the one defined during the last update.

Updating Prices Manually

You may need to define prices for certain items regardless of the ones set by the price list factor. In this case, you would have to specify a price manually.

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. Double-click the relevant price list's row number to open its price list window.

Specify or view the following data:

Field/Button	Activity/Description	Comments
<i>Find</i>	Lets you locate a specific item number in the table.	When you specify the item number, SAP Business One highlights the corresponding item row.
<i>Item No.</i>	The item number.	
<i>Item Description</i>	Informative text about the item.	
<i>Base Price</i>	The item's price in the base price list.	In an independent price list, the value in the <i>Base Price</i> column is identical to the value in the <i>Unit Price</i> column.
<i>Factor</i>	The factor used for multiplying the base price.	Formula: $Base\ Price * Factor = Unit\ Price$.
<i>Unit Price</i>	Lets you update the item's price manually.	
<i>Manual</i>	Indicates that the price was entered manually and will not be changed if you update the base price list of the current price list.	The <i>Manual</i> column is not displayed in a base price list because the indicator is not required in this case.
<i>Clear</i>	Removes all the prices in the <i>Base Price</i> column and selects the <i>Manual</i> checkbox for all the items.	
<i>Selection Criteria</i>	Lets you display only selected items in this window.	Use the <i>Price List – Selection Criteria</i> window to set a range of items according to their preferred vendors, item numbers, item groups, and properties.

**NOTE**

- To set the entire price list to *Manual*, click the *Manual* column header. Click again to clear the setting.
 - You can update the item prices in the master data (under *Inventory* → *Item Master Data* → *Price List* field). This would update the price in the relevant price list. Updating the item prices in the *Price Lists* window will also update them in the master data.
3. Change the price for a single item or for several items.
 4. To save your changes, choose the *Update* button.

Defining Period and Volume Discounts for Price Lists

SAP Business One lets you define period and volume discounts for your regular price lists. You can define special prices for items in specific price lists, as well as set relevant validity dates, discounts, and quantity-dependent prices.

How SAP Business One Determines Item Prices in Documents

As you process a sales or purchasing document, SAP Business One checks the following elements to determine the item prices in the document:

1. Are there special prices defined for the business partner?
2. Are there discount groups linked to the business partner?
3. Are there period and volume discounts defined for the price list linked to the business partner?
4. Which price list is linked to the partner?

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Period and Volume Discounts*.
2. In the *Period and Volume Discounts* window, specify the following data to define a special price for a single item at a time:

Field	Activity/Description	Comments
<i>Price List</i>	Select the required price list.	
<i>Item No.</i>	Select the item numbers for which to define a special price in this price list.	
<i>Item Description</i>	Informative text displayed automatically when you select an item number.	
<i>Price</i>	Displays the item's price as defined in the selected price list.	If you define a special price for this item in the selected price list, the price changes accordingly.



NOTE

To define special prices for a large number of items in the selected price list, choose *Add Items*.



After selecting the items, define special prices for them in the selected price list.

3. To define a special price for an item, double-click a row number. Alternatively, place the cursor in one of the fields in the table and from the menu bar, choose *Goto* → *Period Discounts*.
4. Define a special price for the item and choose the *OK* button
5. To save your changes, choose the *Add* button.



NOTE

- Item rows containing validity dates and/or quantity-dependent discounts are displayed in **blue** in the *Period and Volume Discounts* window.
- Item rows that were changed only in the *Period and Volume Discounts* window are displayed in **black**.
- Item rows that were not changed – no special price or discount has been assigned to them yet in the selected price list – are displayed in **green**.

Black item row	1	➔ A00001	IBM Infoprint 1312	USD 1,800.00
Blue item row	2	➔ A00002	IBM Inforprint 1222	USD 1,559.94
Green item row	3	➔ S10000	Server Point 10000	USD 9,119.94

When green item rows are displayed in the items table, the following dialogue box appears:

“Update unchanged new rows (in green)?”

Yes: saves the green rows as special prices for the selected price list.

No: removes these rows from the table.

Updating the *Special Prices for Business Partners* window changes the green items to black.

Special Prices – Items – Selection Criteria Window

Use this window to set a range of items for which you want to define special prices in the selected price list.

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Period and Volume Discounts*.
2. Choose the *Add Items* button. The *Special Prices - Items - Selection Criteria* window opens.
3. Define the range of the relevant items and choose the *OK* button to copy your selection to the table in the *Period and Volume Discounts* window.



NOTE

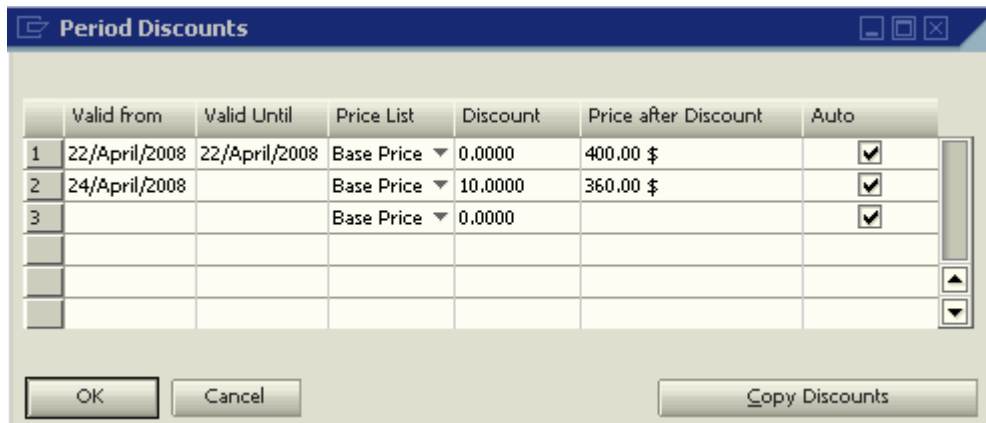
To define special prices for a small number of items in the selected price list, select these items individually using the *Item No.* field in the table.

Period Discounts Window

Use this window to edit date-dependent special prices.

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Period and Volume Discounts*.
2. To define a special price for an item, double-click a row number, or place the cursor in one of the fields in the table and from the menu bar, choose *Goto* → *Period Discounts*.



	Valid from	Valid Until	Price List	Discount	Price after Discount	Auto
1	22/April/2008	22/April/2008	Base Price ▼	0.0000	400.00 \$	<input checked="" type="checkbox"/>
2	24/April/2008		Base Price ▼	10.0000	360.00 \$	<input checked="" type="checkbox"/>
3			Base Price ▼	0.0000		<input checked="" type="checkbox"/>

OK Cancel Copy Discounts

3. In the *Period Discounts* window, specify the following data:

Field	Activity/Description	Comments
<i>Valid From, Valid Until</i>	Set a date range for the special price.	You can define as many validity dates as required.
<i>Price List</i>	Select the price list from which to take the base price.	We recommend leaving the current price list, since you are defining special prices for that specific price list.
<i>Discount</i>	Set a discount percentage.	
<i>Price after Discount</i>	The price is calculated according to the defined discount.	You can also set the price manually. In this case, the discount percentage is calculated automatically.
<i>Auto</i>	The price is recalculated	If you clear this box, the special price

	automatically according to the discount percentage with each update to the price list.	remains unchanged regardless of updates made to the price list.
--	--	---

4. To copy the details of a special price item to all other special price items, in the *Period and Volume Discounts* window, choose *Copy by Selection Criteria*.
5. Select one of the following options to define the copy type:
 - *All Items Displayed in the Period and Volume Discount Window* - SAP Business One copies the selected item details for all items in the specific price list.
 - *Items Displayed without Period or Volume Discount* - SAP Business One copies the selected item details only for items that do not yet have any item details.
6. To confirm the copy definition, choose the *OK* button.

**NOTE**

If you have defined quantity-based special prices for this line, this data is also copied.

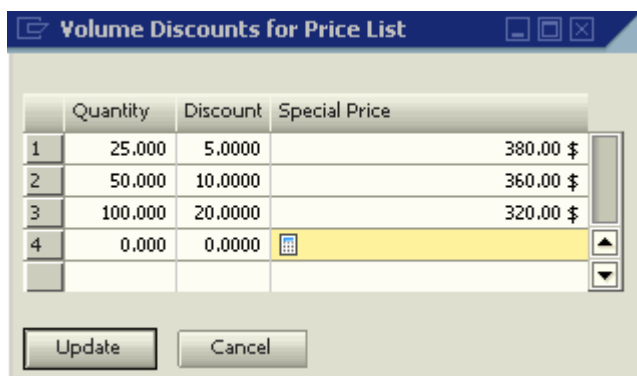
7. To save your changes, choose the *Update* button.

Volume Discounts for Price List Window

Use this window to define quantity-dependent discounts for an item price in the selected price list.

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Period and Volume Discounts*.
2. Double-click a row number or place the cursor in one of the fields in the table and from the menu bar, choose *Goto* → *Period Discounts*.
3. Double-click a row number in the *Period Discounts* window.



	Quantity	Discount	Special Price
1	25,000	5.0000	380.00 \$
2	50,000	10.0000	360.00 \$
3	100,000	20.0000	320.00 \$
4	0.000	0.0000	

In the *Volume Discounts for Price List* window, define quantity-dependent discounts for the item price in the selected price list by entering a quantity and its corresponding discount percentage in the table.

**EXAMPLE**

Assign a 5% discount to a quantity of 25. As a result, a quantity of 25 and higher receives a 5% discount. If you define an additional 10% discount for a quantity of 50, then a quantity of between 25 and 49 receives a 5% discount, while a quantity of 50 and higher receives a 10% discount.

You can define quantity-dependent discounts for every validity date range.

4. To save your changes, choose the *Update* button.

Deleting Price Lists

Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists*.
2. In the *Price Lists* window, place the cursor in one of the fields of the required price list row and from the menu bar, choose *Data* → *Delete Row*.
3. To save the change, choose the *Update* button, and then confirm the update..




NOTE

You cannot delete a price list linked to a business partner or one used as a base price list for other price lists.

Printing Price Lists

SAP Business One lets you print windows, documents, and reports. You can set default print templates for price lists and period and volume discounts to price lists.


Procedure

1. From the SAP Business One Main Menu, choose *Inventory* → *Price Lists* → *Price Lists / Period and Volume Discounts* according to the list you want to print.
2. From the *File* menu, choose *Print*, or click  in the toolbar.



NOTE

You can edit the default templates or create new ones by using Print Layout Designer (PLD).

From the *Tools* menu, choose *Print Layout Designer*, or click  in the toolbar.

For more information about Print Layout Designer (PLD), see the *How to Customize Printing Templates with the Print Layout Designer* document, which you can download from the documentation area of the SAP Business One Customer Portal (<http://channel.sap.com/sbocustomer>).

Price Lists

Update Entire Price List
 Update by Selection

#	Price List Name	Base Price List	Factor	Rounding Met...	Authorization Group	Gross Price
	Last Evaluated Price					<input type="checkbox"/>
	Last Purchase Price					<input type="checkbox"/>
1	Base Price List	Base Price List	1	No Rounding	Group 1	<input type="checkbox"/>
2	Gross Price list	Base Price List	1	No Rounding	Group 1	<input checked="" type="checkbox"/>
3	Price List 03	Price List 03	1	No Rounding	Group 1	<input type="checkbox"/>
4	Price List 04	Price List 04	1	No Rounding	Group 1	<input type="checkbox"/>
5	Price List 05	Price List 05	1	No Rounding	Group 1	<input type="checkbox"/>
6	Price List 06	Price List 06	1	No Rounding	Group 1	<input type="checkbox"/>
7	Price List 07	Price List 07	1	No Rounding	Group 1	<input type="checkbox"/>
8	Price List 08	Price List 08	1	No Rounding	Group 1	<input type="checkbox"/>
9	Price List 09	Price List 09	1	No Rounding	Group 1	<input type="checkbox"/>
10	Price List 10	Price List 10	1	No Rounding	Group 1	<input type="checkbox"/>

OK Cancel

To use gross prices for business partners, set a gross price list as the default for a business partner's payment terms (*Business Partner Master Data* → *Payment Terms* tab). The *Total(LC)* field in marketing documents is then filled with the gross price.

Database Tables Reference

For more information about the tables (fields and content) see the *Database Tables Reference Online Help* (available to all partners/customers at: <https://www.sdn.sap.com/irj/sdn/businessone>).

Appendix






Examples of Rounding Methods

When prices are calculated according to a base price list, the prices are rounded as described in the following table:

Base Price	Factor	Rounding Method	Price	Comments
10.60	1.3	No Rounding	13.78	
10.60	1.3	Round to Full Decimal Amount	13.80	Round to the nearest tenth. .05 or above is rounded to the next tenth. Below .05 is rounded to the previous tenth.
10.60	1.3	Round to Full Amount	14	Round to the nearest whole number. 0.5 or above is rounded to the next whole number. Below 0.5 is rounded to the previous whole number.
10.60	1.3	Round to Full Tens Amount	10	Round to the nearest 10. 5 or above is rounded to the next 10. Below 5 is rounded to the previous 10.

Icons and Typographic Conventions

Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters that appear on the screen. These include field names, screen titles, pushbuttons as well as menu names, paths and options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, titles of graphics and tables.
EXAMPLE TEXT	Names of elements in the system. These include report names, program names, transaction codes, table names, and individual key words of a programming language, when surrounded by body text, for example, SELECT and INCLUDE.
Example text	Screen output. This includes file and directory names and their paths, messages, source code, names of variables and parameters as well as names of installation, upgrade and database tools.
EXAMPLE TEXT	Keys on the keyboard, for example, function keys (such as F2) or the ENTER key.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Pointed brackets indicate that you replace these words and characters with appropriate entries.

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