

# Pricing Engine

SYSPRO 8

Reference Guide

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# Sales Pricing Engine

## Exploring

### Where it fits in?

The **Sales Pricing Engine** is a simplified pricing configuration that supports a single point of capture and maintenance. It provides a flexible and powerful pricing structure that determines the best price for your customers.

### Functionality

- A contract and multiple price lists can be applied to a price group, allowing you to define price rules, including effective dates and priorities.
- Price groups can be associated with customers directly or via a customer class, branch, or geographical area.
- Price catalogs can be generated for customers using price lists or price groups.

### Benefits

- Price Management increases back-office efficiencies by providing sales and finance teams with the ability to better implement and support complex price structures and assign multiple price lists to customers, allowing for flexibility in the design of pricing structures.
- The **Sales Pricing Engine** caters for customers who need to run date-based multi-level pricing structures and manage different price rules and methods for different sections of their customer base.

It also lets customers set different prices based on a specific customer attribute, like customer class or geographic area.

- Sales price flexibility is achieved by using price groups which manage price lists for a selection of customers.

## Navigation

The programs related to this feature are accessed from the **Program List** of the SYSPRO menu:

- *Program List > Sales Orders > Pricing Engine*

# Terminology

## Pricing engine

The pricing engine is used to create flexible, multi-level pricing structures to manage a wide variety of price rules and methods. To facilitate this, a customer is linked to a price group which contains price rules. Price rules may refer to price lists or other configurations like invoice discounts or order discount breaks. Price lists can be created for stock codes, product classes, departments and price categories.

A stock code can exist on multiple price lists, which can have different price methods defined (e.g. flat price, price less %, etc.). In addition, multiple price lists can be linked to one price group, where each price list functions as a price rule.

## Pricing method

The pricing method determines what price the system must use for a sales order line as well as the discounts applicable to the sales order lines and total merchandise value.

The pricing method for **Contract Pricing** is defined at company level (*Setup Options > Configuration > Distribution > Sales Orders*) and against stock items using the **Stock Code Maintenance** program.

To use the **Sales Pricing Engine**, your **PRICING METHOD** must be defined as **Price groups** at company level (*Setup Options > Configuration > Distribution > Sales Orders*) and the pricing method must be specified against price lists using the **Price List Maintenance<sup>1</sup>** program (not against stock items).

## Cost

This indicates the current unit cost of a stocked item (calculated according to the costing method assigned to the warehouse).

## Best price

This indicates the lowest sales price available to the customer.

## GP%

This denotes the gross profit percentage and is calculated as:

$$\frac{\text{Sales price} - \text{Cost price}}{\text{Sales price}} \times \frac{100}{1}$$

<sup>1</sup>Program name: SORPPR

## Price group

Price groups are used to assign prices and discounts to commercial entities (e.g. customers, geographic areas or branches).

Price groups can have multiple price rules, which are linked to price lists.

You can create a hierarchical pricing structure by defining priorities and contracts against price rules. The price rule with the highest priority trumps other price rules and overrides the 'best price'. When a contract is linked to a price group, it becomes a price rule that is included in the pricing hierarchy.

## Price group level

The price group level establishes which price groups must be applied for the company.

### FOR EXAMPLE:

If price groups exist for both the customer and geographic area, then this setting determines which price group takes precedence.

## Price list

This indicates a listing that comprises of a grouping of stock codes, product classes, departments or price categories. A price method is specified for each price list, which may be a flat price, discounted price, or quantity discounted price.

You can define statuses against a price list, such as **BLANK - ACTIVE**, **R - IN REVIEW** or **H - ON HOLD**.

Only price lists that have a status of **BLANK - ACTIVE** are included when the **Price Query** determines the best price.

## Price catalog

This is a collection of stock codes with prices derived from a price group or price list.

It is a snapshot of prices, typically for a certain time frame, that can be produced and distributed to customers.

# Starting

## Prerequisites

### Setup Options

To use this feature, the following setup option(s) must be enabled:

*Setup Options > Configuration > Distribution > Sales Orders*

- Pricing method  
This must be defined as **Price groups**.
- Price group level
- Default uom for order quantity
- Request uom for order quantity

*Setup Options > History > Distribution > Inventory*

- Retain history of price changes

### Electronic Signatures

To use this feature, the following eSignatures must be defined accordingly in the **Electronic Signature Configuration Setup** program (as this allows for the various functions in the related programs):

- SO Add Price Group
- SO Add Price Group e.net
- SO Change Price Group
- SO Change Price Group e.net
- SO Delete Price Group
- SO Delete Price Group e.net
- SO Add Price Group Rule e.net
- SO Change Price Group Rule e.net
- SO Delete Price Group Rule e.net
- SO Add price list
- SO Add price list e.net
- SO Change price list
- SO Change price list e.net
- SO Delete price list
- SO Delete price list e.net
- SO Add price list details e.net

- SO Change price list details e.net
- SO Delete price list details e.net
- SO Add catalog header
- SO Add catalog header e.net
- SO Change catalog header
- SO Change catalog header e.net
- SO Delete catalog header
- SO Delete catalog header e.net



This only applies if the **Secure by default** option of your **Global Configuration** in the **Electronic Signature Configuration Setup** program is enabled prior to your updating to **SYSPRO 8 2021 R2**.

## Operator Activities

To use certain aspects of this feature, the following operator activities must be defined within the **Operator Maintenance** program:

- SO Allow change to price list status

## Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You restrict operator access to *activities* within a program using the **Operator Maintenance** program.
- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).
- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.
- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **Electronic Signature Configuration Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.
- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).
- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).

## Restrictions and Limits

- You can only define one price group per branch, geographic area, customer class or custom form field, if the **PRICE GROUP LEVEL** setup option is defined as **Branch**, **Geographic Area**, **Customer class** or **Custom form field**.



# Solving

## System messages

### Sales order setup pricing method



This program may only be used if the sales order setup pricing method has been set to price groups.

#### Cause

This message is displayed when you attempt to open any of the following programs before the **PRICING METHOD** setup option has been configured:

- Price List Maintenance
- SO Price Group Order Discounts
- Price Group Maintenance
- Price List Maintenance
- Price Query
- Price List Query
- Price Group Query
- Price List Browse
- Price Group Browse
- Price List Review
- Price List Conversion
- SO Stock Code Price Query by Price List
- SO Contract Price Maintenance by Price Group

#### Solution

Ensure that the **PRICING METHOD** setup option is defined as **Price Groups** within the **Setup Options** program (*Setup Options > Configuration > Distribution > Sales Orders*) before attempting to use any of these programs.

## Customer Price Look-up Query

### Customer Price Look-up Query ▾ ✕

This program may not be used if the pricing method has been set to Price Groups.

#### Cause

This message is displayed when you attempt to open the **Customer Price Query** program if the **PRICING METHOD** setup option is defined as **Price Groups**.

#### Solution

This program can't be accessed when the Sales Pricing Engine is used.

Ensure that the **PRICING METHOD** setup option is defined as **Manual**, **Simple** or **Extended** (*Setup Options > Configuration > Distribution > Sales Orders*) before attempting to use this program.

## FAQs

### How do I enable and configure the Sales Pricing Engine?

Follow these steps to set up the sales pricing engine:

1. Ensure that you have configured the following Electronic Signatures within the **Electronic Signature Configuration Setup** program:
  - SO Add Price Group
  - SO Change Price Group
  - SO Delete Price Group
  - SO Add Price Group e.net
  - SO Change Price Group e.net
  - SO Delete Price Group e.net
  - SO Add Price Group Rule e.net
  - SO Change Price Group Rule e.net
  - SO Delete Price Group Rule e.net
  - SO Add price list
  - SO Change price list
  - SO Delete price list
  - SO Add price list e.net
  - SO Change price list e.net
  - SO Delete price list e.net
  - SO Add price list details e.net
  - SO Change price list details e.net
  - SO Delete price list details e.net



This only applies if the **Secure by default** option in the **Global configuration** tab is enabled, i.e. Electronic Signatures are denied by default.

2. Define the **PRICING METHOD** setup option as **Price groups** and then select the level at which you want to implement price groups at the **PRICE GROUP LEVEL** setup option (*Setup Options > Configuration > Distribution > Sales Orders*).
3. Create a price list and capture price list details:

- a. Access the **Price List Maintenance**<sup>1</sup> program.
- b. Create a new price list and capture the price list header information.
- c. Select the **Maintain Price List Detail** icon to add price list details at the **Price List Details Entry** listview.



Use the **Price List Details Selection** pane to add a range of items, e.g. stock codes, product classes, etc. to the listview.

- d. Capture all relevant price list information such as discounts, mark-up %, etc.
  - e. Save your changes.
4. Create the price group and price group rules:
    - a. Access the **Price Group Maintenance** program.
    - b. Create a new price group and capture the price group header detail.
    - c. Add the price group rule detail, such as the price list on which the rule is based, the effective dates and invoice discount at the **Price Group Rules** listview.



Maintain invoice discounts using the **AR Invoice Discounts** program.

- d. Save your changes.

5. Configure order discount breaks for the price group:
  - a. Access the **SO Price Group Order Discounts** program.
  - b. Select the order discount level and the price group for which you want to maintain order discount breaks.
  - c. Capture the order discount breaks within the listview.
  - d. Save your changes.
6. Link the customer to a price group:



This only applies if the **PRICE GROUP LEVEL** setup option is defined as **Customer** (*Setup Options > Configuration > Distribution > Sales Orders*).

- a. Access the **Customers** program.
- b. Select the price group to which you want to link the customer at the **General Details** pane.
- c. Save your changes.

<sup>1</sup>Program name: SORPPR

## Where can I view the changes made to price list records?

Changes made to price list *header* records can be viewed within the **Price List History** report (*Program List > Sales Orders > Pricing Engine > Reports*).

Changes made to price list *detail line* records can be viewed within the **Price List History Detail** report (*Program List > Sales Orders > Pricing Engine > Reports*).

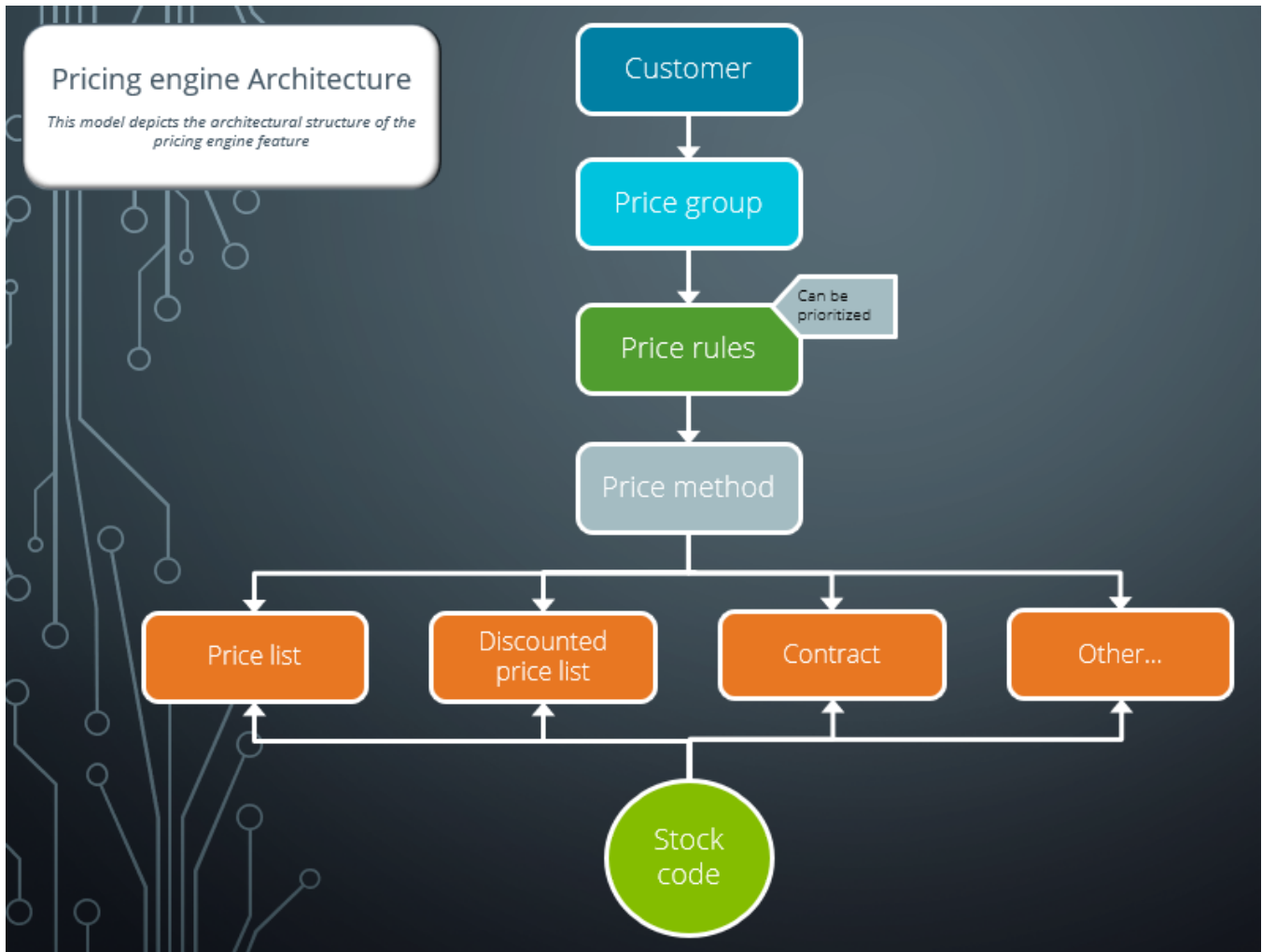


These changes are also recorded within the [SorPrclstHdrHist](#) and [SorPriceListHist](#) tables, if the **RETAIN HISTORY OF PRICE CHANGES** setup option is enabled (*Setup Options > History > Distribution > Inventory*).

# Using

## Process

### Pricing engine architecture



### Considerations

- Customers are either linked directly to a price group or via their branch, customer class, geographic area, or a custom form.
- A price group contains price group rules that can be configured using price lists, invoice discounts, order quantity discount breaks, or manual pricing.
- You can create a hierarchical pricing structure by defining priorities and contracts against price rules. The price rule with the highest priority trumps other price rules and overrides the 'best price'. When a contract is linked to a price group, it becomes a price rule that is included in the pricing hierarchy.

- The price list is controlled by effective dates and based on a price method (e.g. flat price, price list less %, quantity discount breaks, etc.).
- A stock code can exist on multiple price lists and various price lists can be linked to a price group.
- You can only define one price group per branch, geographic area, customer class or custom form field if the **PRICE GROUP LEVEL** setup option is defined as **Branch**, **Geographic Area**, **Customer class** or **Custom form field**.

## Configuration and setup of the Sales Pricing Engine

1. Ensure that you have configured the relevant Electronic Signatures, as these are denied by default if the **Secure by default** option is enabled (**Global configuration** tab within the **Electronic Signature Configuration Setup** program).
2. Define the **PRICING METHOD** setup option as **Price groups** and then select the level at which you want to implement price groups at the **PRICE GROUP LEVEL** setup option.
3. Create a price list and capture price list details using the **Price List Maintenance<sup>1</sup>** program.
4. Create the price group with price group rules using the **Price Group Maintenance** program.

You can select the price list and invoice discount when capturing the price group rule.

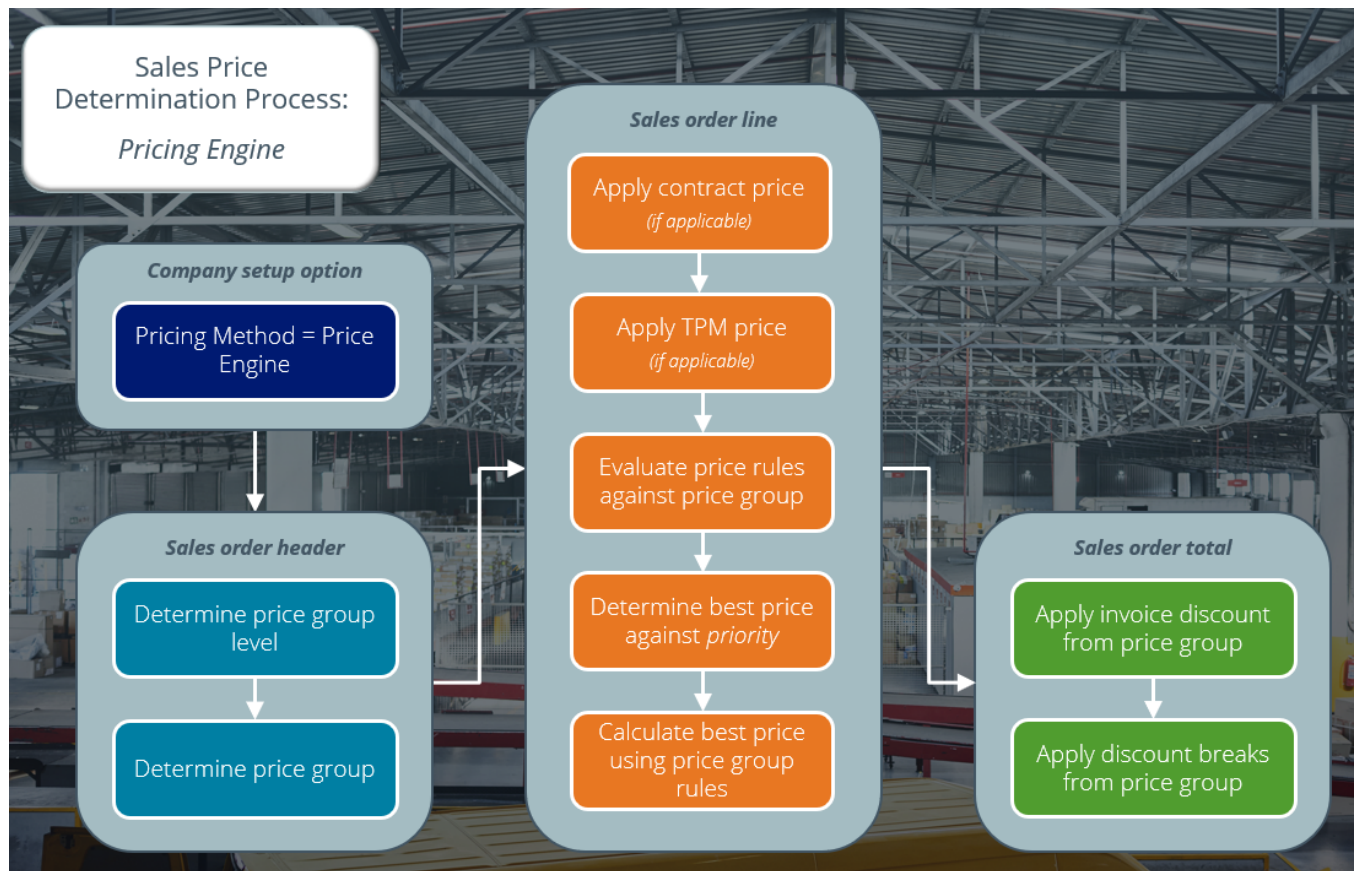


Maintain invoice discounts using the **AR Invoice Discounts** program.

5. If required, configure order discount breaks for price groups using the **SO Price Group Order Discounts** program.
6. If the **PRICE GROUP LEVEL** setup option is defined as **Customer**, link the price group to the customer using the **Customers** program.

<sup>1</sup>Program name: SORPPR


## Sales price determination process



## Considerations

- Sales order header:
  - The price group on the sales order header is used to determine the best price.
  - The price group level can be overwritten before adding sales order lines, but is governed by electronic signatures.
  - The price group can be overwritten before adding sales order lines, if the **PRICE GROUP LEVEL** setup option is defined as **Customer** or **Custom form**. This is governed by electronic signatures.
  - If the branch / geographic area is changed on the sales order header and **PRICE GROUP LEVEL** is defined as **Branch** or **Geographic area**, the price group is updated to align with the new branch / geographic area.
- Sales order line:
  - The system first determines whether contract pricing or trade promotions are applicable. If these are not configured, the best price for the stocked line is calculated using price group rules, taking the priority defined against these into



- □ consideration.
    - The price group rule and the price can be overwritten, but is governed by electronic signatures.
    - The *contract price* is applied if a contract is linked to a customer directly or via a buying group.
    - The *TPM price* is applied if a qualifying TPM price break is defined.
      - If the **Discount Type** for TPM price breaks is defined as **Price** in the **TPM Prices** program, then the TPM price takes precedence over the pricing engine price.
      - If the **Discount Type** for TPM price breaks is defined as **Discount** in the **TPM Prices** program, then the TPM price is calculated using the discount % and applying it to the pricing engine price.
    - The following occurs when the system evaluates price rules against the price group:
      - The order or document date on the sales order is compared to the start and expiry dates of price rules to confirm that the price rule is effective.
-  You can specify whether the order date or document date is used at the **Date basis** field in the **Price Group Rules** listview of the **Price Group Maintenance** program.
- □ Only price lists that have the same currency as the customer are taken into account.
    - If the stock code doesn't exist on any of the price rules, the list price is applied.
  - Invoice discounts and order quantity discount breaks are calculated on the sales order total and applied when the sales order is invoiced.

## Status Codes

### Price list statuses

The following indicates the possible status codes that can be assigned to a price list:

| Status         | Description   |
|----------------|---|
| BLANK - ACTIVE | <p>This indicates that the price list is effective and will be included when the <b>Price Query</b> determines the best price.</p> <p>When the effective dates of a price list have lapsed, the status of that price list remains as <b>BLANK - ACTIVE</b>, however it is no longer considered when determining the best price.</p> |
| H - ON HOLD    | <p>This indicates that a price list is retired and won't be considered when determining the best price.</p>   |
| R - IN REVIEW  | <p>This indicates that the price list was created, but has not yet been used or is currently in the process of being updated.</p> <p>A price list with this status won't be considered when determining the best price.</p>   |

#### Considerations:

- The status of all existing price lists defaults to **BLANK - ACTIVE**.
- The status of newly created price list using the **List price** price method, defaults to **R - IN REVIEW**.

## Price catalog statuses

The following indicates the possible status codes that can be assigned to a price catalog:

| Status        | Description   |
|---------------|---|
| R - IN REVIEW | <p>This indicates that the catalog is in design phase and can be changed. Once a catalog is generated, the following fields on the catalog header can no longer be edited:</p> <ul style="list-style-type: none"> <li>▪ Dates</li> <li>▪ Currency</li> <li>▪ Warehouse for Cost</li> <li>▪ Branch</li> </ul> <p>The catalog lines can be changed and the catalog re-generated until the status is changed to <b>A - ACTIVE</b>.</p> <p>The status can be manually changed to <b>A - ACTIVE</b>, <b>E - EXPIRED</b> or <b>H - ON HOLD</b>.</p> |
| A - ACTIVE    | <p>This indicates that the price catalog is effective (i.e. in use) and can no longer be changed.</p> <p>The status can be manually changed to <b>E - EXPIRED</b> or <b>H - ON HOLD</b>, but can't be moved back to <b>R - IN REVIEW</b>.</p>   |
| E - EXPIRED   | <p>This indicates that the catalog is retired and can't be maintained.</p> <p>A catalog can be manually placed in the <b>E - EXPIRED</b> status. If the expiry date of the catalog has lapsed, the status will <i>not</i> be automatically updated to <b>E - EXPIRED</b>, but the system sees the catalog as expired.</p> <p>Once expired, the catalog status can't be changed.</p>   |
| H - ON HOLD   | <p>This indicates that the price catalog is not usable as is.</p> <p>No fields on the catalog can be updated when it is in this status. The status can be manually changed to <b>A - ACTIVE</b> to update the catalog or <b>E - EXPIRED</b> to retire the catalog.</p>  |

## Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

### Setup programs

Price List Maintenance

*Program List > Sales Orders > Pricing Engine > Setup*

This program lets you create and maintain price lists for a range of stock codes using a basic pricing method (e.g. flat price, price list less %, etc.).

From this program, you can also:

- Assign a status to a price list.
- Specify the price basis against the header and detail lines of the price list.



Price lists can't be changed once the status is **BLANK - ACTIVE** and when the price list is used for an active price catalog and the **Price method** is defined as **List Price**.

Price Group Maintenance

*Program List > Sales Orders > Pricing Engine > Setup*

This program lets you create and maintain price groups that are used to manage the pricing for a customer, branch, geographic area, customer class or custom form field.

You can then configure price group rules against a price group.

From this program:

- The **Contract pricing** configuration type can be selected against a price group rule to integrate contracts into price groups.
- A priority between 0-9 (9 being the highest priority) can be defined against a price group rule to establish a price hierarchy.
- A priority can be assigned to price list and contract configurations to ensure that both are taken into consideration when the best price is obtained. Multiple price lists in a price group can have the same priority level.



The price basis for the price group rule determines the unit of measure by which the price is governed (i.e. order uom).

Price groups can't be changed when they are used within active price catalogs.

## SO Price Group Order Discounts

*Program List > Sales Orders > Pricing Engine > Setup*

This program lets you define percentage discount breaks for price groups and price group/product class combinations.

Order discount breaks are based on the value or the quantity of the order processed within the **Sales Order Entry** program.

## Stock Code Maintenance

*Program List > Inventory > Setup*

The following fields are disabled when maintaining a stock code if your **PRICING METHOD** setup option is defined as **Price Groups**:

- List price code
- List price
- List price basis
- Currency
- Pricing method fields

This information is then obtained from the **Price List Maintenance<sup>1</sup>** program.

## Customers

*Program List > Contact Management > Setup*

The following indicates areas of this program which are affected by this feature:

- The following fields are disabled if your **PRICING METHOD** setup option is defined as **Price Groups**:
  - Auto price code selection
  - Price category / code table
  - Invoice discounts
- The **Price group** and **Price group description** fields at the **General information** indicate to which price group the customer is linked.

## Dispatch Note Maintenance

*Program List > Sales Orders > Dispatch Notes > Transaction Processing*

The **Price group information** is displayed at the **Dispatch Note Details** pane.

<sup>1</sup>Program name: SORPPR

## Inventory Query

*Program List > Inventory*

The following indicates areas of this program which are affected by this feature:

- Select the **Show** hyperlink at the **Price Query** field to view price rules defined against a price group, as well as the customers that are linked to that group.
- The **Price basis** field displays the unit of measure on which the price is based, either from the price list detail line or the header (if the detail line is blank).
- You can access the **SO Stock Code Price Query by Price List<sup>1</sup>** program by clicking on the **Query** menu, selecting **Sales** and then selecting the **Pricing** option.

## SO Contract Price Maintenance by Price Group

*Program List > Sales Orders > Dispatch Notes > Transaction Processing*

This program lets you define contracts for specific stock codes that are linked price groups.

To include contracts in the pricing hierarchy, the contract is added as a price rule against the price group. A price group rule then takes the contracts into consideration when determining the best price.

## SO Contract Price Maintenance by Customer

*Program List > Sales Orders > Contract Pricing > Setup*

The price methods used by the Sales Pricing Engine are displayed within this program, if the **PRICING METHOD** setup option is defined as **Price Groups**.

## SO Contract Pricing Maintenance

*Accessible from the **Add Contracts** option within the **SO Contract Prices** and **SO Contract Price Maintenance by Customer** programs.*

Price lists are displayed (instead of price codes) when using the Sales Pricing Engine.

If a price group is used in a catalog and the active dates overlap with the sales contract, then a message is displayed to warn the user that the sales contract can't be changed.

## SO Contract Price Maintenance by Buying Group

*Program List > Sales Orders > Contract Pricing > Setup*

Price lists are displayed (instead of price codes) when using the Sales Pricing Engine.

<sup>1</sup>Program name: SORPSP

## AR Invoice Discounts

*Program List > Accounts Receivable > Setup*

A price list using the price method of *list price* or *flat price* can be selected when the **Basis for discount** is defined as **Specific price**.

## Promotion Code

*Program List > Sales Orders > Trade Promotions > Setup*

When using the Sales Pricing Engine, you can define the **Calculation type** as **Price list**.

At the **Price list** field (within the **Off Invoice** pane) you can then select the price list on which you want to base the trade promotion.

## SO Catalog Maintenance

*Program List > Sales Orders > Pricing Engine > Setup*

This program lets you create a price catalog.

You can determine which stock codes you want to include in the catalog and whether the catalog prices are derived from a price list or price group.

## Transaction Processing programs

### Sales Order Entry

*Program List > Sales Orders > Sales Order Processing*

The following indicates areas of this program which are affected by this feature:

- The price group can be selected at the **Order Header** pane.
- The price group rule is displayed within the **Entered Order Lines** listview but can be changed if required.
- The best price is displayed at the **Unit price** field in the **Entered Order Lines** listview. This is calculated by the **SO PRICING BEST PRICE QUERY**<sup>1</sup> business object using the price group selected at the sales order header, and the stock code and quantity entered on the sales order line.
- Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>2</sup> business object.

<sup>1</sup>Business object: SORQPQ

<sup>2</sup>Business object: SORQPQ

## SO Header Maintenance

*Program List > Sales Orders > Sales Order Processing*

The price group can be selected within the **Invoice** pane.

## Quick Sales Order Entry

*Program List > Sales Orders > Sales Order Processing*

The following indicates areas of this program which are affected by this feature:

- The price group can be selected within the **Quote Header** pane.
- The price group rule is displayed within the **Order Lines** pane but can be changed if required.
- Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>1</sup> business object.

## Sales Order Entry Express

*Program List > Sales Orders > Sales Order Processing*

The following indicates areas of this program which are affected by this feature:

- The price group can be selected within the **Order Header** pane.
- The price group rule is displayed at the **Sales Order Lines Capture** pane but can be changed if required.
- The best price is displayed at the **Price** field within the **Sales Order Lines Capture** pane. This is calculated by the **SO PRICING BEST PRICE QUERY**<sup>2</sup> business object using the price group selected at the sales order header, and the stock code and quantity entered on the sales order line.
- Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>3</sup> business object.

## SO Single Level BOM

*Automatically displayed when saving a sales order line for a kit item in the **Stock Code Maintenance** program.*

The following indicates areas of this program which are affected by this feature:

<sup>1</sup>Business object: SORQPQ

<sup>2</sup>Business object: SORQPQ

<sup>3</sup>Business object: SORQPQ



- The price group rule is displayed at the **Price group rule** field in the **Component Lines** pane.
- The **Price code** field is disabled when the Sales Pricing Engine is used.
- Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>1</sup> business object.

## Point of Sale Entry

*Program List > Sales Orders > Counter Sales > Transaction Processing*

When using the Sales Pricing Engine, the price is calculated by the **SO PRICING BEST PRICE QUERY**<sup>2</sup> business object using the price group, stock code and quantity.

Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>3</sup> business object.

## Quotations

*Program List > Quotations > Quotations Processing*

When using the Sales Pricing Engine, the price is calculated by the **SO PRICING BEST PRICE QUERY**<sup>4</sup> business object using the price group, stock code and quantity.

Line discounts are applied as calculated by the **SO PRICING BEST PRICE QUERY**<sup>5</sup> business object.

## Part Billings

*Program List > Work in Progress > Job Postings*

The **Customer price** option at the **Stocked lines to be valued at** field takes the price group into consideration if no contract or TPM price exists.

## Dispatch Note Header

*Accessible from the **Dispatch Selected** toolbar option at the listview within the **Dispatch Note Header** program.*

The **Price group information** is displayed at the **Dispatch Details** pane.

## Stock Code Copy

*Accessible from the **Copy** option within the **Edit** menu of the **Stock Code Maintenance** program.*

The **Copy price entries** option copies the entries of all price lists where the **Price method** is defined as **Flat price**.

<sup>1</sup>Business object: SORQPQ

<sup>2</sup>Business object: SORQPQ

<sup>3</sup>Business object: SORQPQ

<sup>4</sup>Business object: SORQPQ

<sup>5</sup>Business object: SORQPQ

## SO Order Discount Break Calculation

*This program is not accessible from within the product as it calculates the discount behind the scenes.*

The program uses the [SorPriceDisc](#) table (instead of [SorDiscCusQty](#)) to apply order and product class discount breaks on sales order lines.

## Batch programs

### Price List Conversion

*Program List > Sales Orders > Pricing Engine > Transaction Processing*

This program lets you convert existing price code configurations (e.g. existing stock code and price code combinations) into price lists to ensure a smooth transition to the **Sales Pricing Engine**.

You can generate new price lists that use the list price or flat price pricing methods.

### Price List Review

*Program List > Sales Orders > Pricing Engine > Transaction Processing*

This program lets you review and update price lists, giving you the ability to increase or decrease prices by a percentage or value.

You can create a new price list based on the cost of a stock code, as well as the prices of an existing price list.



Price lists can't be changed once the status is **BLANK - ACTIVE** and when the price list is used for an active price catalog and the **Price method** is defined as **List Price**.

## SO Contract Prices

*Program List > Sales Orders > Contract Pricing*

The following indicates areas of this program which are affected by this feature:

- Price groups can be included in the selection criteria.
- Price groups are visible within the **Contract Prices for Price Groups** and **All Contract Prices** listviews.

## Tax Code Setup

*Program List > General Ledger > Tax > Setup*

The price list (with a price method of list price or flat price) that is used to calculate sales tax can be selected at the **Price list** field.

## Inventory Price-Cost Percentage Change

*Program List > Inventory > Transaction Processing*

The price list (with a price method of list price or flat price) that is used to calculate sales tax can be selected at the **Price list** field.

## Import programs

### Sales Order Import

*Program List > Business-to-Business Trading*

When using the Sales Pricing Engine, the price is calculated by the **SO PRICING BEST PRICE QUERY**<sup>1</sup> business object using the price group, stock code and quantity.

## Report programs

### SO Discount Breaks for Price Groups

*Program List > Sales Orders > Reports*

This program lets you generate a report that displays information on price groups and their associated price group rules.

### Contract Price List

*Program List > Sales Orders > Contract Pricing > Reports*

The price group can be selected from the **Contract type** selection field.

The price groups and price methods you want to include in the report can be selected.

### Catalog Query

*Program List > Sales Orders > Pricing Engine*

This program lets you print a price catalog.

## Query programs

### Price Query

*Program List > Sales Orders > Pricing Engine*

This program lets you view pricing information to determine the best price and alternatives for a customer, price group and price list.

<sup>1</sup>Business object: SORQPQ

## Price List Query

*Program List > Sales Orders > Pricing Engine*

This program lets you view price lists and their associated detail lines.

The **Price basis** field displays the unit of measure on which the price is based, either from the price list detail line or the header (if the detail line is blank).

The **Status** field at the **Price List Header** pane indicates whether the price list is active, on hold or in review.

## Price Group Query

*Program List > Sales Orders > Pricing Engine*

This program lets you view rules defined against a price group, as well as the customers that are linked to that group.

## Price Query by Stock Code

*Accessible from the **View Details** hyperlink in the **Stock codes** listview of the **Price Query** program.*

This program lets you view pricing information to determine the best price and alternatives for a customer, price group or price list.

## Price Group Rule Query

*Accessible from the following programs:*

- From the **Price group rule** field in the **Order line** pane within the **Sales Order Entry** program.
- From the **Price group rule** column in the **Sales Order Lines Capture** pane within the **Sales Order Entry Express** program.
- From the **Price group rule** column in the **Order Lines** pane within the **Quick Sales Order Entry** program.

This program lets you view a list of price group rules from which one can be selected and applied to a sales order.

## Sales Order Query

*Program List > Sales Orders*

The **Price group information** is displayed at the **Order Header** pane and the **Price group rule** field at the **Details Lines** listview.

## SO Stock Code Price Query by Price List

Accessible from the following programs:

- From the **Edit** hyperlink at the **Pricing** field of the **Stock Code Details** pane within the **Stock Code Maintenance** program.
- From the **Pricing** option of the **Edit** menu within the **Browse on Stock Codes** program.
- From the **Pricing** option of the **Queries** menu within the **Inventory Query** program.

This program lets you view price list details for selected stock items.

## Customer Query

*Program List > Accounts Receivable*

The price group details are displayed at the **Customer Information** pane.

## Customer Catalog Query

*Program List > Sales Orders > Pricing Engine*

This program lets you view all active pricing catalogs for a selected customer.

## SO Catalog Query

*Program List > Sales Orders > Pricing Engine*

This program lets you view the header information and all detail lines of a price catalog.

## Browse programs

### Price List Browse

*Program List > Sales Orders > Pricing Engine > Browsers*

This program lets you browse and view details of existing price lists.

### Price Group Browse

*Program List > Sales Orders > Pricing Engine > Browsers*

This program lets you browse and view details of existing price groups.

### Browse on Tax Codes

Accessible from the **Browse** icon at the **Tax code** field within the **Tax Code Setup** program.

The selected price list is displayed at the **Price list** column in the listview.

## Affected business objects

### Setup objects

#### SO Pricing Engine Price Group Setup

The **SO PRICING ENGINE PRICE GROUP SETUP**<sup>1</sup> business object lets you create price group records.

#### SO Pricing Engine Price Group Rules Setup

The **SO PRICING ENGINE PRICE GROUP RULES SETUP**<sup>2</sup> business object lets you create price group rule records.

#### SO Price List Header Maintenance

The **SO PRICE LIST HEADER MAINTENANCE**<sup>3</sup> business object lets you create list price header records.

#### SO Price List Detail Maintenance

The **SO PRICE LIST DETAIL MAINTENANCE**<sup>4</sup> business object lets you create price list detail records.

### Transaction objects

#### Catalog Maintenance

The **CATALOG MAINTENANCE**<sup>5</sup> business object lets you add, change, maintain or delete a sales order catalog. The information you can indicate includes the start date, expiry date, currency, whether to include a trade promotion, catalog status and customers to which the catalog applies.

#### SO Contract Pricing Maintenance

This business object lets you maintain contract pricing for sales orders.

### Query objects

#### SO Pricing Price Query

The **SO PRICING PRICE QUERY**<sup>6</sup> business object lets you query the best price details per stock code (and other prices available in a price group) for a specific customer.

<sup>1</sup>Business object: SORSPG

<sup>2</sup>Business object: SORSPR

<sup>3</sup>Business object: SORSPH

<sup>4</sup>Business object: SORSPD

<sup>5</sup>Business object: SORT51

<sup>6</sup>Business object: SORQPP

## SO Price List Query

The **SO PRICE LIST QUERY**<sup>1</sup> business object lets you query a price list, with the option to see all associated stock codes and calculated prices.

## SO Pricing Best Price Query

The **SO PRICING BEST PRICE QUERY**<sup>2</sup> business object lets you calculate the best price for a given stock code and price group.

## SO Price Group Discount Breaks Query

The **SO PRICE GROUP DISCOUNT BREAKS QUERY**<sup>3</sup> business object lets you query order discount breaks for price groups created by the **SO Price Group Order Discounts** program.

## SO Catalog Query

This business object lets you query price catalog data and can be used by external developers to extract data into useful upload formats onto e-commerce sites.

## SO Customer Catalog Query

The **SO CUSTOMER CATALOG QUERY**<sup>4</sup> business object lets you view active catalogs for customers according to specified, or all dates.

## Catalogue Details Generation Query

The **CATALOGUE DETAILS GENERATION QUERY**<sup>5</sup> business object lets you specify the data and information for sales order pricing catalogs.

<sup>1</sup>Business object: SORQPR

<sup>2</sup>Business object: SORQPQ

<sup>3</sup>Business object: SORQ47

<sup>4</sup>Business object: SORQ52

<sup>5</sup>Business object: SORQ54



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