



Trade Discount

Megan De Freitas - 2024-11-22 - Sales

Overview

SalesPad pulls the Trade Discount from Dynamics GP (if set up) and, with proper security, allows users to change the percentage. The Trade Discount displays on the Customer Card Customer Properties, below Currency.

Setup

In the Security Editor, set *Customer Overview > Can Change Trade Discount* to True to allow users to change the Trade Discount percentage from the Trade Discount field. Set *Sales Document Properties > Trade Discount Enabled* to True to enable both the Discount field and the Discount % field.

Use

In Dynamics GP, the Trade Discount is set up on the Customer Maintenance card (Cards > Sales > Customer):

The screenshot shows the 'Customer Maintenance' window for 'sa Fabrikam, Inc. 4/12/2017'. The window has a menu bar (File, Edit, Tools, Help) and a toolbar (Save, Clear, Delete, Write Letters). The main area is divided into several sections:

- Customer Information:** Customer ID (AARONFIT0001), Name (Aaron Fitz Electrical), Short Name (Aaron Fitz Elec), Statement Name (Aaron Fitz Electrical), Parent Customer ID, Class ID (USA-ILMD-T1), Priority (None).
- Address Information:** Address ID (PRIMARY), Contact (Bob Fitz), Address (One Microsoft Way), City (Redmond), State (WA), ZIP Code (98052-6399), Country Code (USA), Country (USA).
- Shipping Information:** Phone 1, 2, 3, Fax, UPS Zone, Shipping Method (LOCAL DELIVERY), Tax Schedule ID (USASTCITY-6*), Ship Complete Documents (checkbox).
- Comments:** Comment 1 (Prefer rush ship), Comment 2.
- Trade Discount:** Trade Discount (3.00%) - highlighted with a red box.
- Payment Terms:** Payment Terms (NET 30), Discount Grace Period (0), Due Date Grace Period (0).
- Price Level:** Price Level (RETAIL).

At the bottom, there are buttons for Accounts, Address, Options, and E-mail, and a search bar with the text 'by Customer ID'.

To set the Trade Discount in SalesPad, you can change the field on the Customer Overview, as shown below:

Customer Search [X] Customer: [AARONFIT0001]

Close Refresh Save Print

Customer Properties

Customer:	AARONFIT0001
Customer Name:	Aaron Fitz Electrical ...
Short Name:	Aaron Fitz Elec ...
Cust Class:	USA-ILMO-T1 ▾ X
Price Level:	▾ X
Pay Terms:	NET 30 ▾ X
Sales Rep:	West, Paul ...
Sales Terr:	... X
Currency:	Z-US\$
Trade Discount:	3.00%
Tax Reg Num:	

On a sales document, the Trade Discount appears in the Discount % field on the sales document:

Totals - GM: [\$0.00] [0.00%]

Misc Charge:	\$0.000
Discount:	\$0.000
Discount %	3.00%
Freight:	... \$0.000
Tax:	\$0.000
Total:	\$0.000
Payment:	<u>0.00</u>

If not visible, the Discount % field may need to be applied to the layout by right-clicking and selecting Customize Layout (See: SalesPad's [Customizing Layouts](#) document).

The Trade Discount percentage displayed on the customer card will automatically be applied to that customer's sales documents, after sales line discounts are applied. When the Trade Discount is applied, the dollar amount will be added to the Discount field (above the Discount % field) and will be recalculated each time the Total changes (Discount % will remain the same).

Totals - GM: [-\$18.40] [-13.98%]	
Misc Charge:	\$0.000
Discount:	\$8.4
Discount %	6.00 %
Freight:	... 0.00
Tax:	\$0.000
Total:	\$131.600
Payment:	<u>0.00</u>

If a dollar amount is entered into the Discounts field, the Discount % field will update accordingly as the total changes (dollar amount Discount will remain the same). This works in the same way that Markdown Percent and Markdown Amount work on the Sales Line Item.