



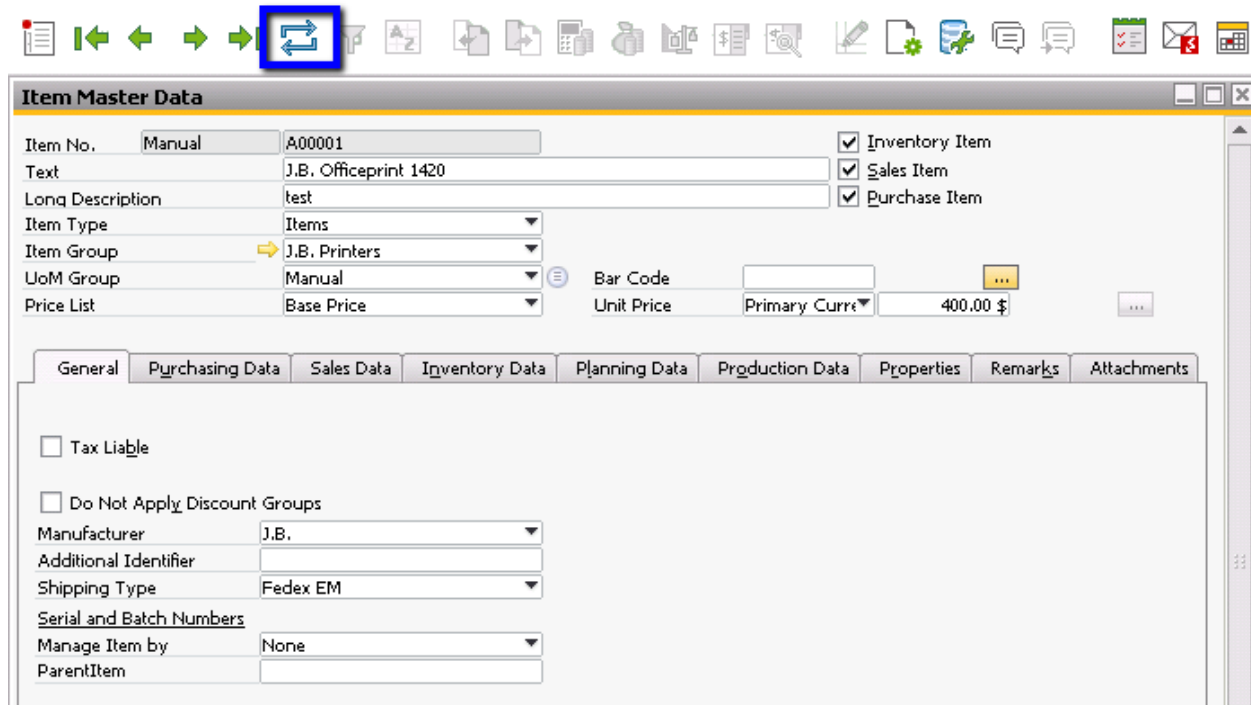
## Coffee Break & Learn: Tip of the Week – August 31, 2017 Three More Tips for SAP Business One Success

### Background

The following will cover tips related refreshing documents, cancelling documents, and identifying the price source in marketing documents.

#### *It's Time to Refresh!*

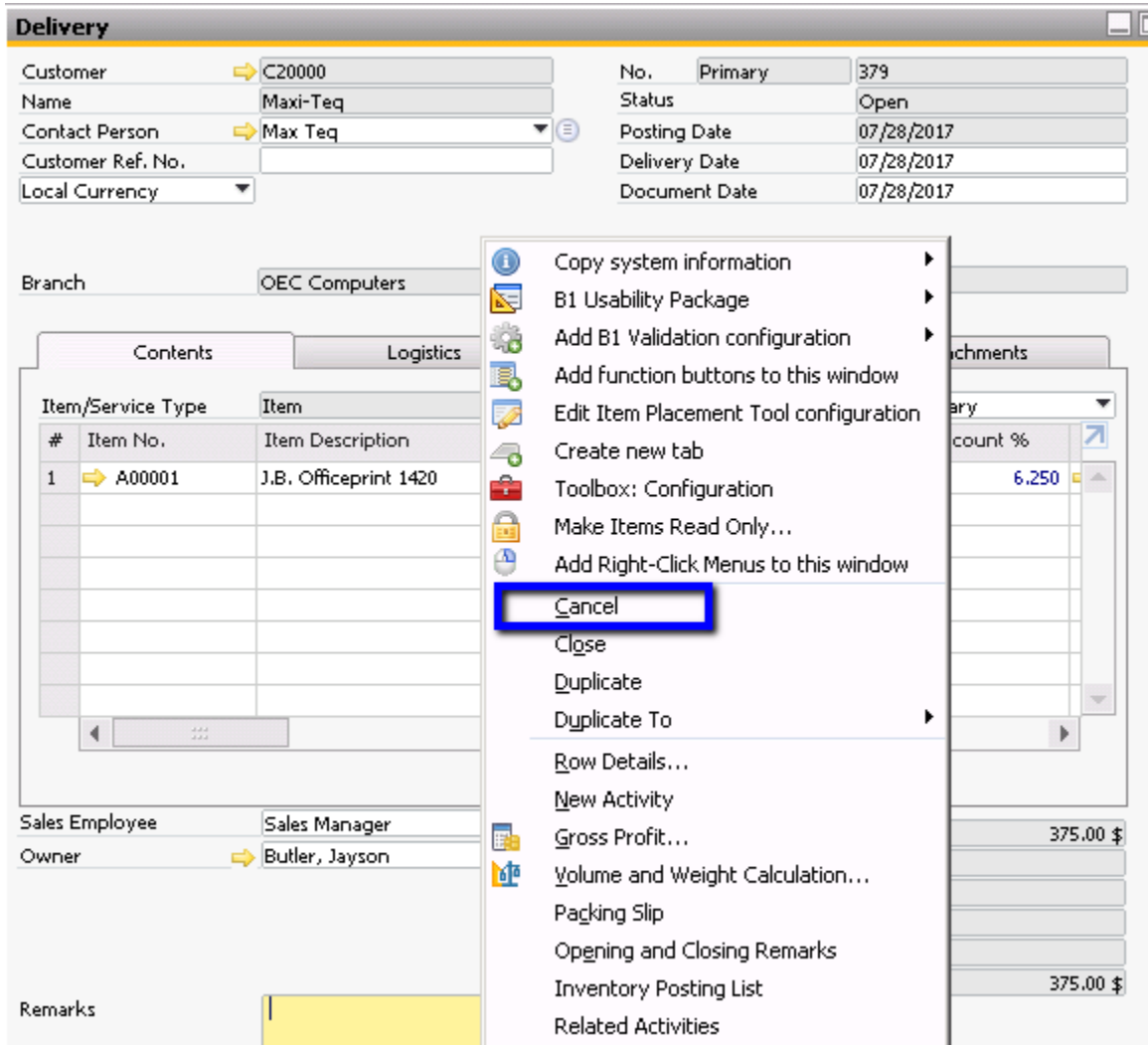
Have you ever opened a master data record or a document to find that it may have been updated or changed concurrently? In earlier versions, you may have had to click Previous Record and Next Record to refresh the data or the record you are currently working with. Starting in version SAP Business One version 9.1, you can simply click the Refresh Record icon in the tool bar in order to view the most up to date information.



#### *Cancelling Documents Gets Easier*

Have you ever added a marketing document in production while thinking you were in sandbox? Perhaps you drafted a document, but instead of saving it as a draft, you click the “Add” button. Previously, depending on the document type, you may have had to go through the entire cancellation process by creating reversal documents.

Starting in SAP Business One version 9.0, you have the option to cancel marketing documents from the context menu. You can simply display the the document you have added by mistake, right click, and select “Cancel”.

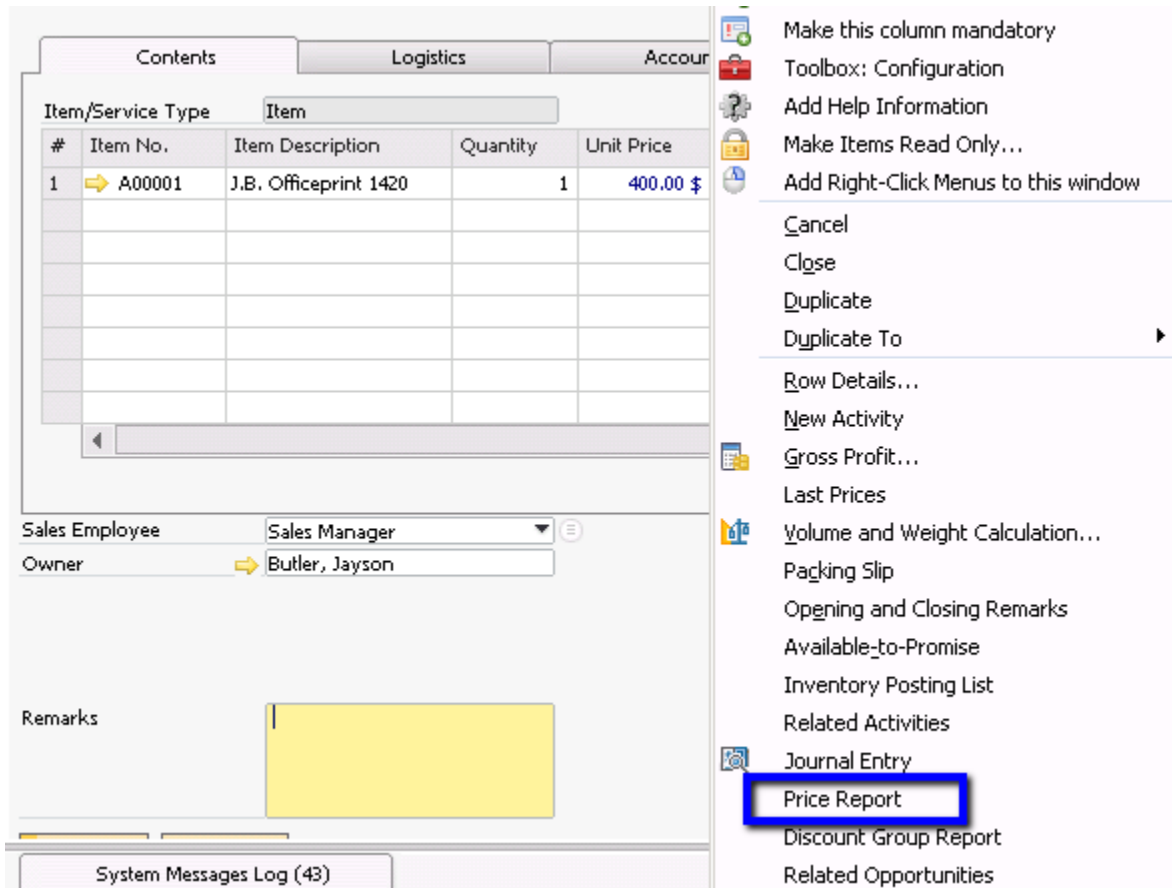


SAP Business One will then create a cancellation document as well as a reversing journal entry to reflect the cancellation. This cancellation feature becomes more versatile, as you may customize authorizations regarding cancellation aspects, such as who may cancel documents, the date range in which document cancellation is allowed, and whether to include cancellation documents in the reports.

*Price Report – The Details Behind the Discount*

Have you ever created a pricing structure so complex that you are unsure from where a certain price originated in a sales order? You can now discover the details behind the price discount through the price field in a document.

In the marketing document, right click on the Unit Price field and select Price Report.



The system will display the Price Report window which shows information regarding pricing and discount rules, thus clarifying the value populated on the document line.

**Price Report**

#	Source of Price	Item No.	Item Description	BP Code	BP Name	Base Price List	Factor	Primary Currency - Unit Price	Ad...
1	➔ Last Evaluated Price	A00001	J.B. Officeprint 1420			Last Evaluated Price	1.000	298.93 \$	
2	➔ Last Purchase Price	A00001	J.B. Officeprint 1420			Last Purchase Price	1.000	400.00 \$	
3	➔ Base Price	A00001	J.B. Officeprint 1420			Base Price	1.000	400.00 \$	
4	➔ Discount Purchase Price	A00001	J.B. Officeprint 1420			Base Price	0.500	200.00 \$	
5	➔ Regular Purchase Price	A00001	J.B. Officeprint 1420			Base Price	0.750	300.00 \$	
6	➔ Distributor Sales Price	A00001	J.B. Officeprint 1420			Base Price	1.250	500.00 \$	
7	➔ Regular Sales Price	A00001	J.B. Officeprint 1420			Base Price	1.500	600.00 \$	
8	➔ Small Account Sales Price	A00001	J.B. Officeprint 1420			Base Price	1.750	700.00 \$	
9	➔ Test Price	A00001	J.B. Officeprint 1420			Base Price	1.000	400.00 \$	
10	➔ Period and Volume Discount	A00001	J.B. Officeprint 1420			Regular Sales Price		600.00 \$	
11	➔ Special Prices for BP	A00001	J.B. Officeprint 1420	C20000	Maxi-Teq	Base Price			
12	➔ Period and Volume Discount	A00001	J.B. Officeprint 1420			Regular Sales Price		600.00 \$	
13	➔ Special Prices for BP	A00001	J.B. Officeprint 1420	C20000	Maxi-Teq	Base Price		375.00 \$	
14	➔ Period and Volume Discount	A00001	J.B. Officeprint 1420			Regular Sales Price		540.00 \$	

OK

Additionally a more high-level flag can be seen in the Price Source column.

**Delivery**

Customer: C20000  
 Name: Maxi-Teq  
 Contact Person: Max Teq  
 Customer Ref. No.:  
 Local Currency:

Branch: OEC Computers

Contents | Logistics | Accounting | Attachments

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Price Source	Item Cost
1	➔ A00001	J.B. Officeprint 1420	1	400.00 \$	6.250	➔ Exempt	375.00 \$	Special Prices for Business Partner	50.00 \$

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