DS0566

Customer-Level Trade Discount Account

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Problem Definition

Problem Definition	**CCDA**
ACME Co. posts SOP Invoices based on pre-determined Customer Accounts. They currently must update the Trade Discount Account manually for each Customer as Dynamics GP provides only one Global Trade Discount Setting. ACME. would like to be able to set a Trade Discount per Customer to default during the SOP Invoicing process.	

Solution Overview

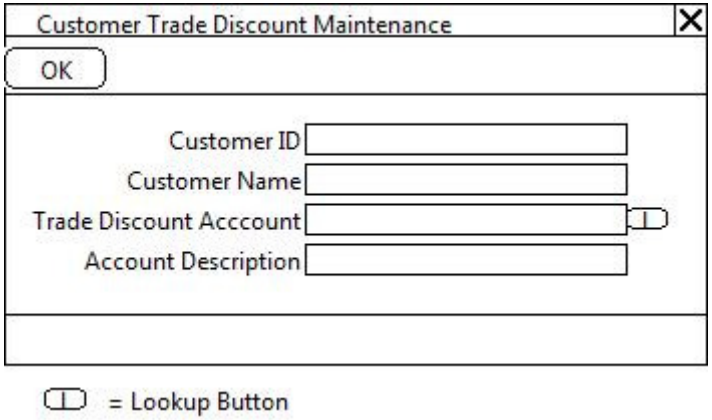
Solution Overview	**CCDA**
Please see the Design Features section below.	

Design Features

Setup	CCDA

Navigation: Cards>>Sales>>Customer Maintenance>> Accounts Button>>Customer Account Maintenance>>Additional>>Customer Trade Discount Maintenance

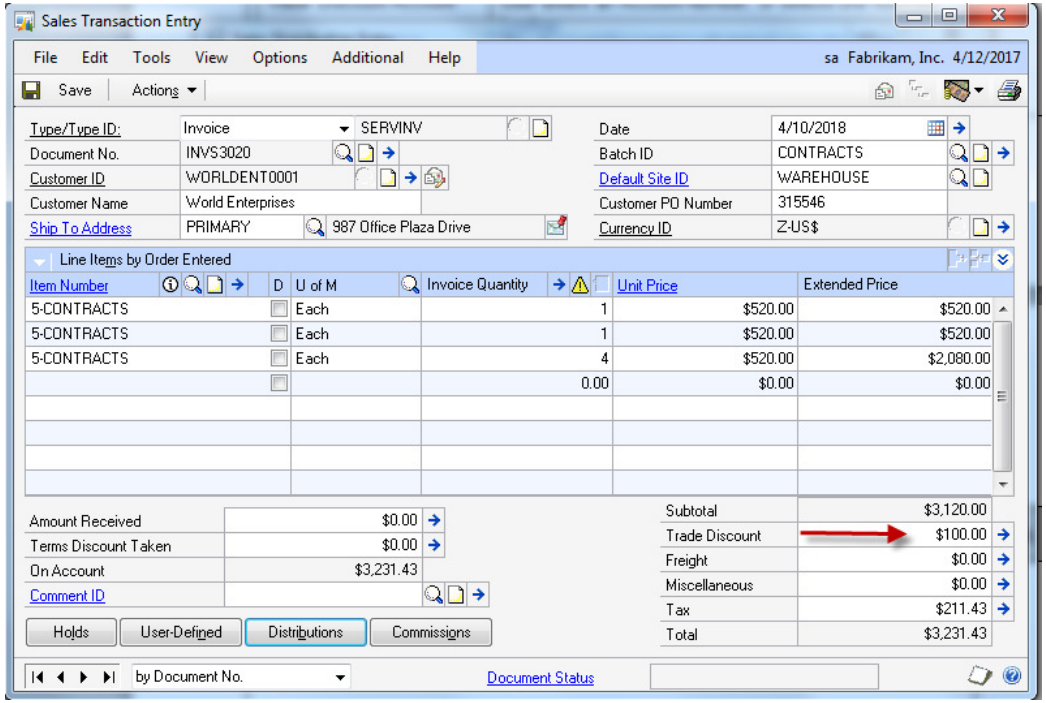
This window is used to create a Customer ID and Trade Discount Account link.



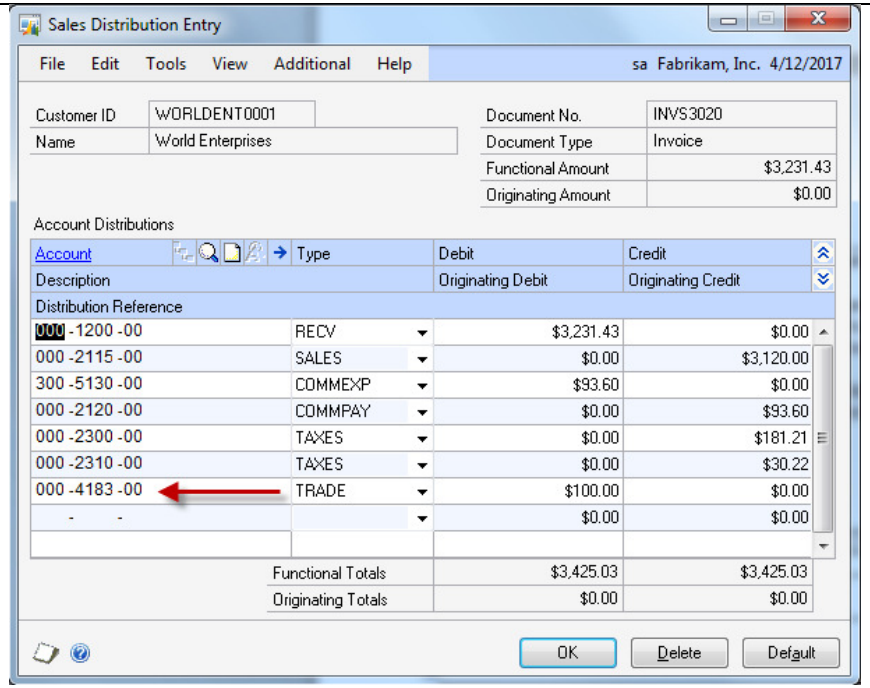
Field	Function
Customer ID	The Customer ID will default
Customer Name	The Customer Name will default
Trade Discount Account	User enters an Account Number, or selects one from the Lookup
Account Description	The Account Description will default once the Trade Discount Account is set

Sales Transaction Entry	CCDA

Navigation: Transactions >>Sales >> Sales Transaction Entry >>Invoice or Return Document>>Distributions Button>>TRADE Account



If a Trade Discount amount is entered on a SOP Invoice or SOP Return document as illustrated above, the system will review the Customer Trade Discount Maintenance Card and populate the Sales Document's Trade Discount Account in the following manner:



- If the Customer Trade Discount Maintenance Card has an account selected, it will populate the TRADE Account.
- If the Customer Trade Discount Maintenance Card does not have an account selected, but there is a Trade Discount Account selected in the Tools>>Setup>>Posting>>Posting Accounts>>Sales>>Trade Discounts field, it will populate the TRADE Account.
- If neither the Customer Trade Discount Maintenance Card nor the Posting Accounts>>Sales>>Trade Discounts field contains an Account, the TRADE Account will be blank.

The user may modify the TRADE Account at any time prior to posting the Sales Invoice or Sales Return document.