

Recalculate Pricing on Sales Order

Last Modified on 05/18/2022 10:59 am EDT

Overview:

If a Customer has its price level updated and there is an open Sales Order there is a way to force the prices of the Items to update accordingly.

Solution:

Sometimes a Sales Order is entered and then there is a realization that the Customers Price Level has not been updated. Instead of setting the price level and restarting the Sales Order there is now a Recalculate Pricing button at the top of the Sales Order.

The screenshot shows a web interface for a Sales Order. At the top, there is a breadcrumb trail: Sales > Sales Orders > Sale Order. Below this, the title 'Sales Order - 2112' is followed by three buttons: 'EDIT', 'ALLOCATE', and 'RECALCULATE PRICING'. The 'RECALCULATE PRICING' button is highlighted with a red rectangle. To the right of these buttons are three dropdown menus: 'Create PDF', 'Export', and 'Print Label'. The main content area is divided into two columns. The left column is titled 'General' and contains the following information: No. 2112, Customer 1111 Nelson Brothers - test (with a 'Change' link), Date 5/10/2022, Promise Date 5/10/2022, Customer PO, Contact, and Total Margin 98.590 % Percentage. The right column is titled 'Bill Address map' and contains: 1111 NELSON BROTHERS, 2580 WYATT STREET FLOOR/SUITE, BILL CARE OF, WEST PALM BEACH, FL J2KJ89, and Total Weight 1.25. Below the main content area is a navigation bar with tabs: 'Items', 'Details', 'Memo & Instructions', 'Custom', 'Payments', 'Ship Docs', 'Dependency', and 'Attachments'. The 'Ship Docs' tab is currently selected. Below the navigation bar are three icons: a gear, a printer, and a share icon. At the bottom, there is a table header with columns: 'NO.', 'DATE', 'SHIP TO', 'LOCATION', 'TRACKING NO', and 'CUSTOMER'.