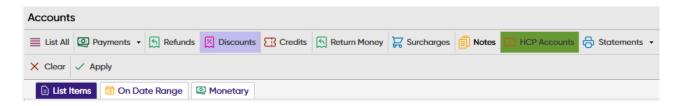
Discounts

14/07/2025 2:25 pm BST

The Discount screen allows you to apply discounts to a client's account.

Details

To perform a discount, enter the Accounts Screen and select the 'Discounts' button. The Discounts Screen consists of three tabs: List Items, On Date Range and Monetary.

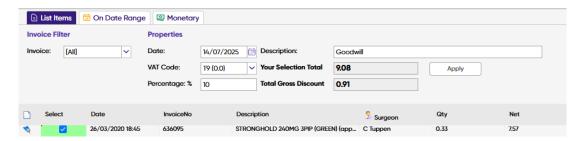


List Items tab

This tab allows you to discount particular items from an invoice number by a percentage amount.

Discounting Items

1. Select the item/s you want to discount by placing a tick in the 'Select' column.



- 2. Enter the Date, a Description, VAT Code and Percentage amount.
- 3. Select the 'Apply' button.
- 4. The discounts will be added to the Clients Account.

On Date Range tab

This tab allows you to discount items between a specified date range by a percentage amount.

Discounting by Date Range

- 1. Select Dates From and To.
- 2. Select the item/s you want to discount by placing a tick in the 'Select' column.
- 3. Enter the Date, a Description, VAT Code and Percentage amount.



- 4. Select the 'Apply' button.
- 5. The discounts will be added to the Clients Account.

Monetary tab

This tab allows you to discount a Client's account by a monetary value.

Discounts can be applied by a manual value entered by the user or by a pre-defined value. Pre-defined discounts can be configured by system administrators. For more information see the Finance Administration page.

Monetary Discounting

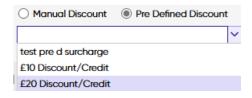
- 1. Enter a Date, a Description (e.g. Voucher) and Discount Amount.
- 2. Select the items you wish to allocate the discount against. (Not selecting items will allocate the discount against the oldest outstanding invoices).



- 3. Select the 'Apply' button.
- 4. The discounts will be added to the Clients Account.

Pre-Defined Discounting

- 1. Select the 'Pre-Defined Discount' option.
- 2. Select a pre-defined discount from the drop-down list. These are pre-created within Accounts Libraries.
- 3. Select the items you wish to allocate the discount against. (Not selecting items will allocate the discount against the oldest outstanding invoices).



- 4. Select the 'Apply' button.
- 5. The discounts will be added to the Clients Account.

