Apply Early Settlement Discounts

24/07/2025 10:44 am BST

Summary

The Debtors Screen can be used to calculate and attribute Early Settlement Discounts (ESD).

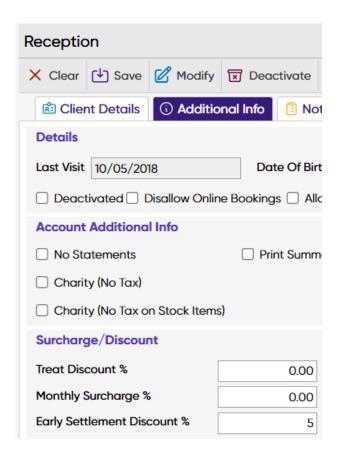
This feature enables you to reward your clients (with a discount) for early payment.

Details

Early Settlement Discount levels (the actual percentages to be assigned to each client) must be specified for each client before they can be applied via the Debtors Screen.

Assigning an ESD level to a Client

- 1. Navigate to the Reception Screen (Reception button from main menu).
- 2. Search for and select a client, then navigate to the client's Additional Information screen.
- 3. Enter a percentage figure into the 'Early Settlement Discount' field.
- 4. Repeat steps 1 to 3 for all eligible client's.



1. When running debtors (See: Run Debtors) tick the 'Calculate ESD' checkbox.

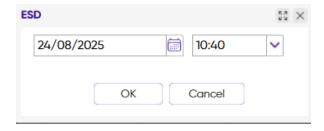


- 2. The ESD figures will be displayed in the 'Early Settlement Discount' column for each client.
- 3. To apply the discount, select the highlighted 'Commit Early Settlement Discount' button.





1. You will be prompted to enter an an expiry date.



This will limit how long the ESD's are valid for. Once this date has passed, you will not be able to apply the ESD at the time of payment.

Applying ESD when taking payment

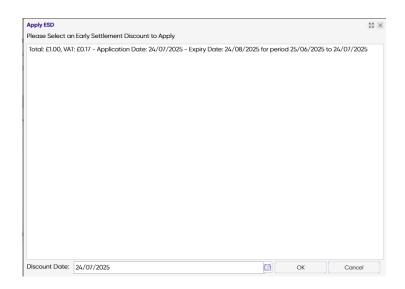
When taking a payment, there is a button called 'Apply ESD'.



If a client is eligible for an ESD, this button will be available to select. If the Client is not eligible, the button is greyed out and cannot be selected.

To apply ESD when taking payment:

- 1. Select the 'Apply ESD' button
- 2. You are prompted to select the appropriate ESD for this client. Click 'Ok'.



3. The ESD is then displayed within the accounts screen as a discount.

