

# Client Discounts

14/07/2025 1:53 pm BST

## Summary

The Client Discounts screen is used to process monthly discounts for clients between dates specified.

## Details

This screen can be accessed via the 'Finance' button from the Primary Navigation on the left-hand side.

The screenshot shows the 'Client Discounts' interface. At the top, there are three buttons: 'Clear', 'Run', and 'Apply Discount'. Below these are four filter fields: 'From:' (20/06/2025), 'To:' (14/07/2025), 'Client Site:' (All), and 'Discount Date' (14/07/2025). There is also a 'Run ID:' field. Below the filters are two checkboxes: 'Exclude Bad Debtors' and 'Select All/None'. At the bottom, there is a table header with columns: Client Name, Address, Work Carried Out, Rate %, Discount Value, Include, and Last Di...

Monthly Discount levels (percentage) must be specified for each client before they can be applied via the Client Discounts Screen.

## Assigning a Monthly Discount % to a Client

1. Navigate to the Reception Screen (Reception button from the Primary Navigation).
2. Search for and select a client, then navigate to the client's [Additional Information](#) screen.
3. Enter a percentage figure into the 'Monthly Discount %' field.
4. Repeat steps 1 to 3 for all eligible clients.

## Applying Client Discounts

1. Enter the Client Discounts Screen (Finance > Client Discounts).
2. Specify the item date range ('From' and 'To') you wish to apply discounts for.
3. Select a Client Site (Client's registered site).
4. Specify a Discount Date (defaults to today's date)
5. Tick to exclude any clients that are flagged as a 'Bad Debtor'
6. Select 'Run' to display all clients who meet the specified criteria.

This screenshot is similar to the one above, but the 'Run' button is highlighted with a red rectangle. The filters are the same: 'From:' (20/06/2025), 'To:' (14/07/2025), 'Client Site:' (All), and 'Discount Date' (14/07/2025). The 'Exclude Bad Debtors' checkbox is also visible.

7. If you want to exclude any client/s from receiving a discount, then deselect the tick in the 'include' box on that clients row.
8. To apply the discount to the clients listed (with include selected), select the 'Apply Discount' button.
9. A prompt will appear asking if you want to apply the discount (non-reversible), select 'Yes' to continue or 'No' to cancel.
10. You will receive a message informing the discount was applied. This discount activity will display within the clients account screen.

