# Client Discounts

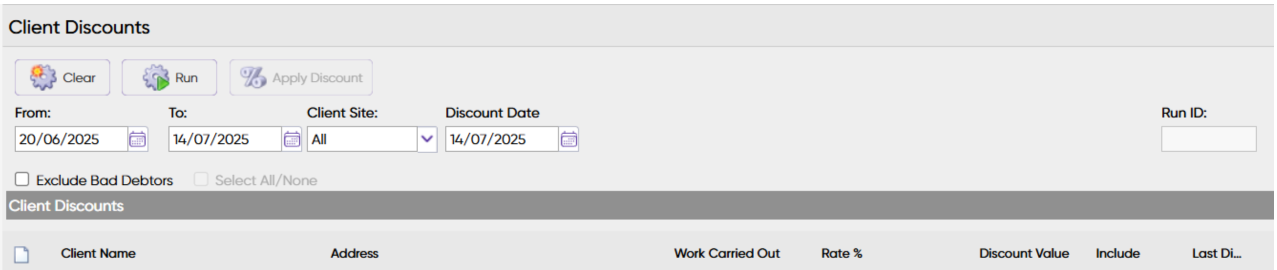
14/07/2025 1:53 pm BST

## 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.



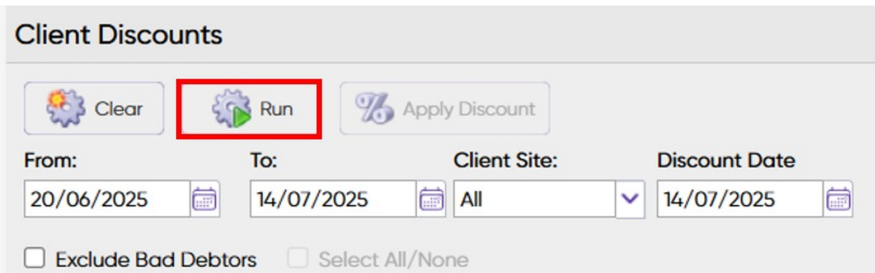

Monthly Discount levels (percentage) must be specified for each client before they can be applied via the Client Discounts Screen.

## 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.



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.