

Apply a discount to an invoice

Introduction

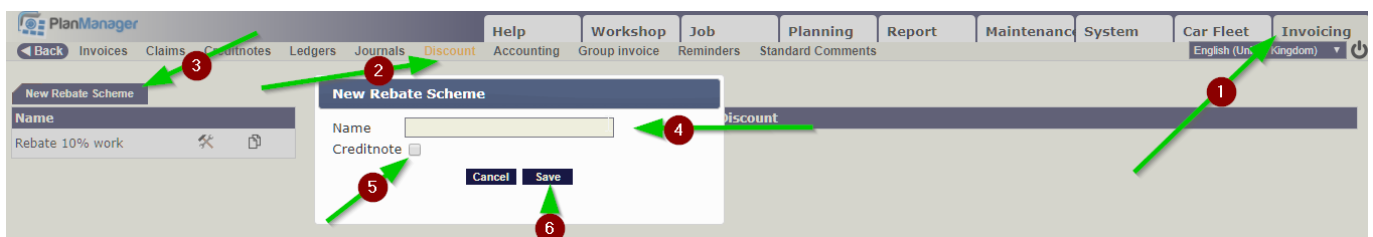
In PlanManager discounts are granted based on discount schemes. There are two types of discount schemes.

The credit note discount scheme will create a credit note to the value of the discount. The second type will apply the discount on the invoice itself.

Managing discount schemes

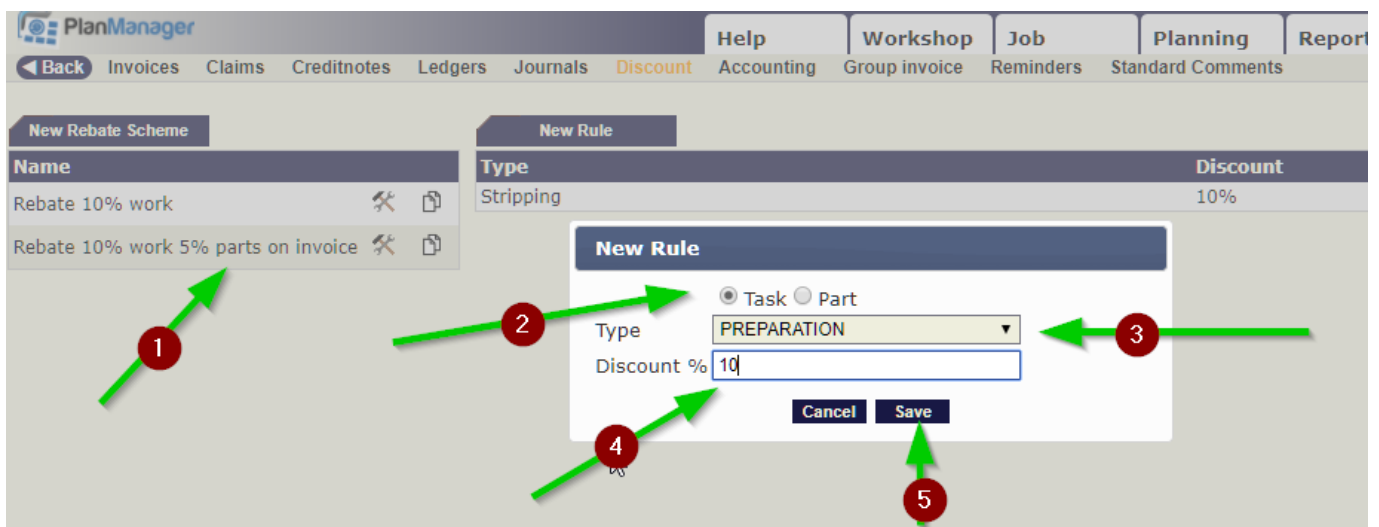
Through “Invoicing ① - Discount ②” you can create your own discount schemes.

Click the New Rabate Scheme ③ button to create a new one.



Enter a name for the rebate scheme ④ and indicate whether the scheme should create a credit note when applying the discount or not ⑤. Then click save ⑥.

Then you can create discount rules. Discount Rules determine which job types and part types are used to get a discount and how much. So you can give 10% discount for disassembly and 5% on spraying, or 10% on tasks and 5% on parts.



To add these rules, click on the rebate scheme ①, then New Rule. You choose

wether it's a task or a part ②, then you choose the type ③ and you enter the discount value ④ and click on save ⑤.

Discount scheme Editing

To edit an existing discount scheme, you can click the name of the discount scheme. All the rules will appear on the right. If you want to change the name of the discount scheme, you can use the hammer and wrench icon. 🛠️

Discount scheme used

in an invoice, you will see a small % sign besides the client name ①. If you click there, you get to choose from all your created rebate schemes ②. If the customer in question has a standard discount schedule, this is indicated in a tan. Clicking on one of the discount schemes according to the rules described the discount will be applied on your invoice or credit note.

The screenshot shows the PlanManager software interface. At the top, there are navigation tabs: Help, Workshop, Job, Planning, and a partially visible 'R'. Below these are sub-tabs: Back, Invoices, Claims, Creditnotes, Ledgers, Journals, Discount, Accounting, Group invoice, Reminders, and Standard Comments. The main content area is titled 'Job # 150053' with a hammer and wrench icon. On the left, there is a form for 'Set Invoiced Party' with fields for Owner, Customer, Title, Contact, Address, Town/City, Country, Phone, and Fax. A green arrow labeled '1' points to the '%' sign next to the 'Owner' field. On the right, there is a 'Set Rebate' dialog box with two options: 'Rebate 10% work' and 'Rebate 10% work 5% parts on invoice'. A green arrow labeled '2' points to the 'Rebate 10% work' option. Below the dialog box, there are fields for Date (31-07-2017), Expiry Date (30-08-2017), and Amount Excl. (£ 3270.99).

Standard discount schedule assigned to a customer.

Through the menu maintenance - third parties - owners you can retrieve your customer list. You can designate a client what is his / her standard discount scheme. This is then referred to, in the billing screen with a tan.

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