

Apply a discount to an invoice

Introduction

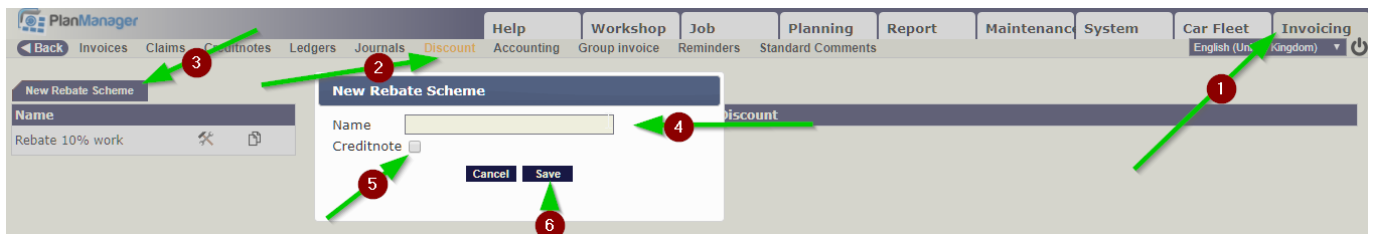
In PlanManager discounts are granted based on discount schemes. There are two types of discount schemes.

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

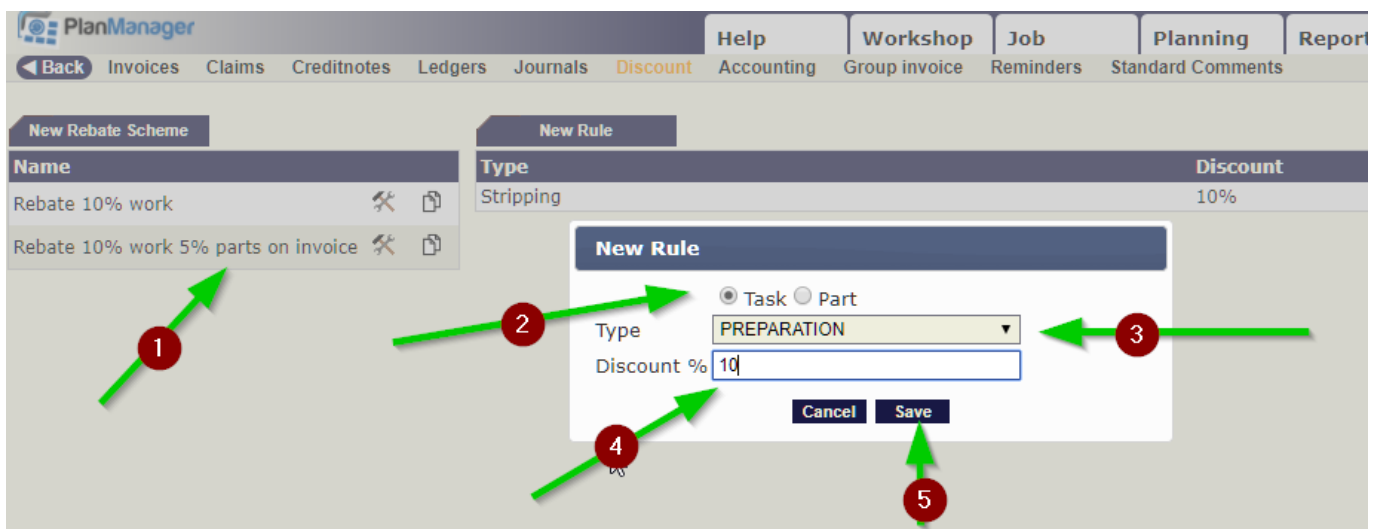
Through “Invoicing ① - Discount ②” you can create your own discount schemes.

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

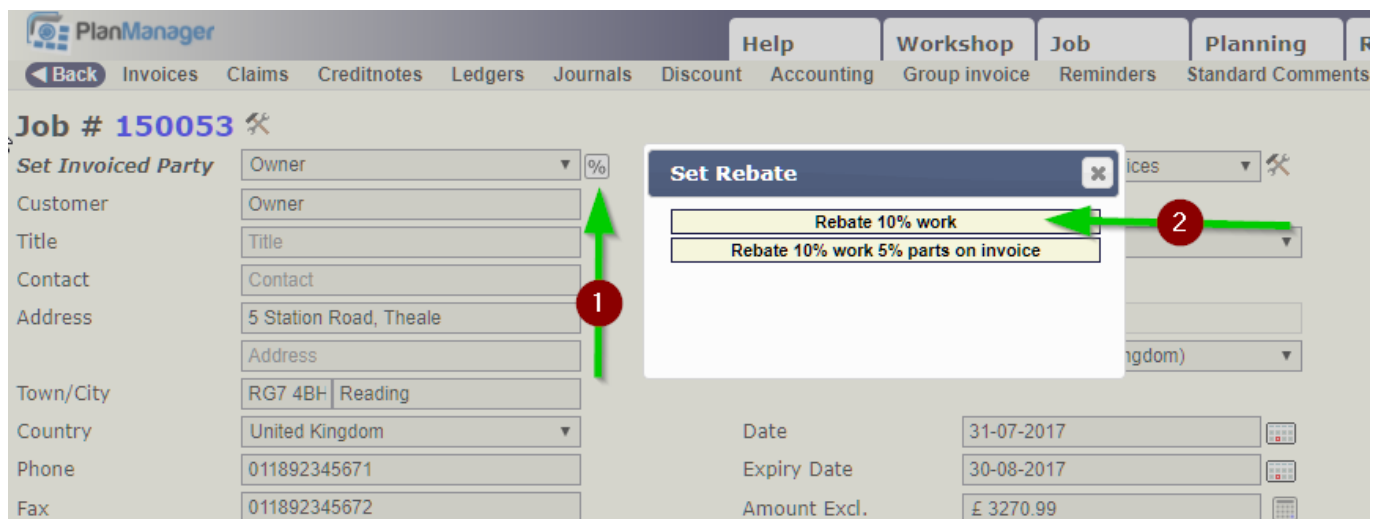
wether it's a task or a part ②, then you choose the type ③ and you enter the discount value ④ and click on save ⑤.

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.



PlanManager

Help Workshop Job Planning

Back Invoices Claims Creditnotes Ledgers Journals Discount Accounting Group invoice Reminders Standard Comments

Job # 150053 

Set Invoiced Party

Owner %

Customer Owner

Title Title

Contact Contact

Address 5 Station Road, Theale

Town/City RG7 4BH Reading

Country United Kingdom

Phone 011892345671

Fax 011892345672

Date 31-07-2017

Expiry Date 30-08-2017

Amount Excl. £ 3270.99

Set Rebate

Rebate 10% work

Rebate 10% work 5% parts on invoice

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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