

Invoicing

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 Rebate Scheme ③ button to create a new one.

The screenshot shows the PlanManager software interface. On the left is a dark sidebar with a menu. The 'INVOICING' option is highlighted with a red circle ①. In the main area, the 'Discount' option in the left-hand menu is highlighted with a red circle ②. The 'Create rebate scheme' form is visible on the right, with several elements highlighted by red circles: the 'Create rebate scheme' button (③), the 'Name' input field (④), the 'Creditnote' checkbox (⑤), and the 'Save' button (⑥). Below the form is a table for 'New Rule' with columns for 'Type' and 'Type'.

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.

Invoicing

New Rebate Scheme

Edit rebate scheme

Name

Creditnote ☒

Save **Remove**

New Rule

New Rule

Type ☐ Task ☒ Part

Type

Type ☒ Percentage


Discount %

Cancel **Save**

Type	Discount
Anti-Corrosion	10,00 %
Percentage	10,00 %
percentage	10,00 %
percentage	10,00 %
percentage	10,00 %
percentage	10,00 %
percentage	10,00 %

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

Invoicing

The screenshot shows the 'Invoicing' software interface. At the top, there is a navigation bar with tabs: Sales, Purchases, Ledgers, Journals, Accounting, Exact Online, Payment Conditions, Reminders, and Courtesy Cars. Below this, the main area is divided into two sections. On the left, there is a 'Search Customer' form with fields for Customer (JM Demo), Title, Contact, Address, Town, County/Province, Country (Belgium), and Phone. A red circle with the number '1' is placed over the '%' icon in the search bar. On the right, a 'Set Rebate' dialog box is open, showing a list of rebate options. A red circle with the number '2' is placed over the '12 % fleet' option. The dialog box also includes a close button (X) and a list of other rebate options: Axial 12%, 10% fleet, VAB 12%, 12% fleet faktuur, 20% op alles credit, 5 % op onderdelen, Commissie 16.5% op alles, 10% op montage, and 10% op onderdelen.

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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