

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 menu, 'Discount' is highlighted with a red circle ②. The 'Discount' dropdown menu is open, showing various discount schemes like '20% op alles credit', '25% FOR JM', etc. On the right, the 'Create rebate scheme' form is visible. The 'Create rebate scheme' button is highlighted with a red circle ③. The 'Name' field is highlighted with a red circle ④. The 'Creditnote' checkbox is highlighted with a red circle ⑤. The 'Save' button is highlighted with a red circle ⑥. Below the form is a table with columns '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.

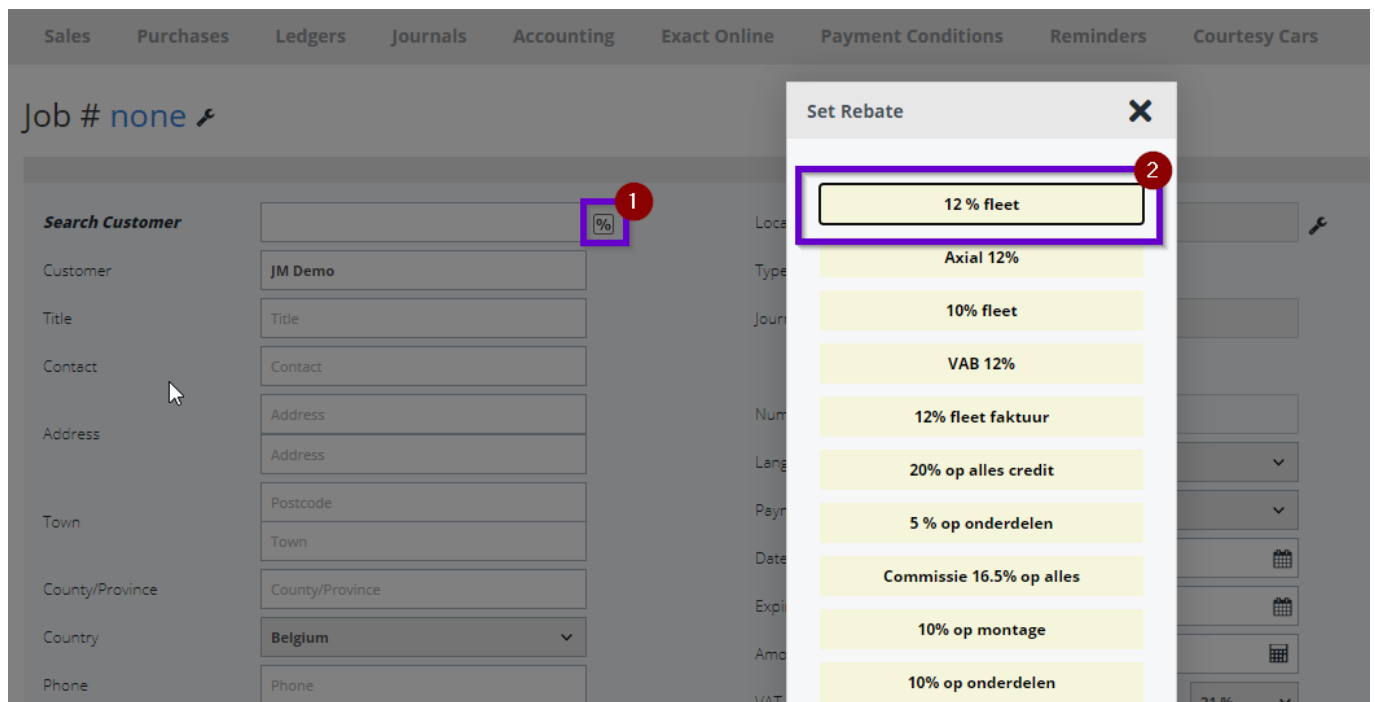
To add these rules, click on the rebate scheme ①, then New Rule. You choose whether it's a task or a part ②, then you choose the type ③ and you enter the discount value ④ and click on save ⑤.

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.



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.

Unique solution ID: #1524

Author: Jean-Marie

Last update: 2022-05-03 14:17