

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, a sidebar menu has 'INVOICING' highlighted with a red circle ①. Below it, a sub-menu is open, and 'Discount' is highlighted with a red circle ②. The main area shows a 'Create rebate scheme' form with a red circle ③ on the title. The form has two input fields: 'Name' (with a red circle ④) and 'Creditnote' (with a red circle ⑤). A 'Save' button is highlighted with a red circle ⑥. Below the form, there is a 'New Rule' button and 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.

Invoicing

New Rebate Scheme

Edit rebate scheme

Name

Creditnote ☒

Save **Remove**

New Rule

Type ☐ Task ☒ Part

Type

Type ☒ Percentage


Discount %

Cancel **Save**

Type	Discount	percentage
Anti-Corrosion	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

Job # none

Search Customer

Customer: JM Demo

Title: Title

Contact: Contact

Address: Address

Town: Postcode

County/Province: County/Province

Country: Belgium

Phone: Phone

Set Rebate

- 12 % fleet
- Axial 12%
- 10% fleet
- VAB 12%
- 12% fleet faktuur
- 20% op alles credit
- 5 % op onderdelen
- Commissie 16.5% op alles
- 10% op montage
- 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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