Discount Program Setup

Last Modified on 08/07/2023 1:55 pm CDT

Any number of Discount Programs can be established and maintained. Each one is set up independently with its own effective dates and list of eligible products.

Because the discount is shown on the Invoice as a line item, a product must be established for each type of Discount Program being used. This discount product may be added in the department that it is relates to or may be added into Miscellaneous or a special department for discounts. The following establishes the discount rules.

At *Accounting / AR / Manage Discount Programs*, select **Setup Disc**. This is displayed at any of the three reports listed.

A window displays the Discount Programs previously set up. Existing Discount Programs may be replicated by choosing **Replicate**. To add a new Discount Program, select **Add**.

Fill in the *Add a Discount Program* screen to establish the discount criteria.

- **Description** – Name it in such a way that it can easily be identified in a list of Discount Programs.
- **Invoice/Booking/Plan Effective Dates** – These dates are important because they determine the date range of information included when displaying qualifying transactions and calculating the discount earned.
- **Discount Type** – Indicate whether this discount should be based on *Percentage* of dollars sold, *Volume* (quantity) sold to the customer, or a combination of the two, which is the *Percentage-Quantity* option.
- **Statement Subtotal Group** – This input allows the discounts to be layered on the Program Discount statement. Discounts applied for one level can be subtracted prior to calculating the discounts for the next level.
- **Invoice Additional Dataset** – If Invoices from a prior fiscal year are to be included in the calculation, select

the additional dataset to include.

- **Discount Billing Products** – Select the discount product or products to be used to apply the discounts on Invoices and Bookings.
- **Levels** – Indicate the various qualifying levels and the discount associated with each. The inputs depend on the *Discount Type.*
  - **Percentage** – *At or Over* is the total dollar amount of the Booked/Invoiced product. *Amount* is the percent of discount given at this level. Enter 2.5% as 2.50.
  - **Volume** – *At or Over* is the total quantity of Booked/Invoiced product. Amount is the per unit discount amount given for each unit at the specified level. Enter $0.30 per unit as .30.
  - **Percentage-Quantity** – *At or Over* is the total quantity of Booked/Invoiced product. *Amount* is the percent of discount at that level. Enter 2.5% as 2.50.
- **Eligible Products** – Select the products that qualify for this discount. When adding new products to the inventory that apply to the program discount, it is important they also get added to this list.
  Note: Volume discounts calculate accurately when eligible products have the same inventory unit of measure.
- **Class and Sub Class** – Optionally set a *Class* or *Subclass* to further classify the eligible products. These are available as sorting options on reports. Double-clicking in a cell under either of these headings displays a list of existing Class and Sub Class categories and an opportunity to add to the list.

Save the Discount Setup by selecting **Save**.

The Discount Program List is a report that summarizes the program discount setup.