

Manage Discount Programs

Last Modified on 09/20/2023 10:09 am CDT

The *Manage Discount Programs* feature is designed to help manage various discount programs offered to customers. Two different reporting options, called the *Statement of Account* and the *Program Discount Reconciliation* are included. The setup of the discount program determines how the reports behave.

In the *Manage Discount Programs* area, tiered discounts can be managed, an unlimited number of user defined discount programs can be set up, and program reports can be printed or previewed. These reports include the Statement report and the Program Reconciliation report.

The Statement report offers a summary of a customer's business for month/year, and a season-end reconciliation. The Program Reconciliation report offers a real-time evaluation of a customer's account and is useful for figuring discounts on a current transaction.

Note: This function does not flow information into Bookings. It will calculate based on the discountable product(s) set up. Selecting **Discount Programs** at invoicing will cause discounts to default into the Invoice based on setup and previous invoice activity. Selecting **Discount Programs** at invoicing when returning product will cause the discounts to default into the Invoice. The quantity will default in as a positive quantity so in most cases this will need to be changed to a negative prior to saving.

Once set up, the two reports help monitor the status of each customer's discount availability. If the Discount Program settles up at the end of the selling season, then the Statement report is recommended. If the program being managed allots the discounts throughout the selling season as they are earned, then the Program Reconciliation is helpful. The Program Reconciliation report not only shows how much discount a customer is entitled to but also shows how much has been given to the customer on Invoices and Bookings.