

# Client Discounts

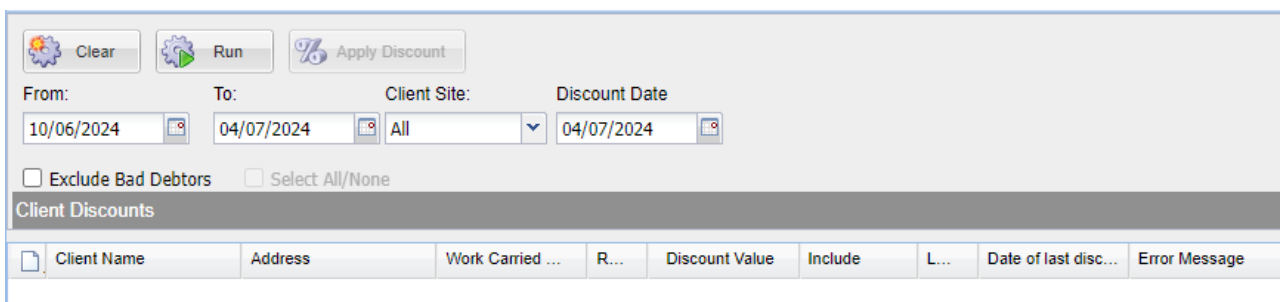
23/10/2024 4:28 pm BST

## Summary

The Client Discounts screen is used to process monthly discounts for clients between dates specified.

## Details

This screen can be accessed via the top menu Finance > Client Discounts.



The screenshot shows the 'Client Discounts' screen. At the top, there are three buttons: 'Clear' (with a gear icon), 'Run' (with a green play icon), and 'Apply Discount' (with a percentage icon). Below these are four input fields: 'From:' with a date picker set to '10/06/2024', 'To:' with a date picker set to '04/07/2024', 'Client Site:' with a dropdown menu set to 'All', and 'Discount Date' with a date picker set to '04/07/2024'. Below the input fields are two checkboxes: 'Exclude Bad Debtors' and 'Select All/None'. A dark grey header bar with the text 'Client Discounts' is below the checkboxes. At the bottom, there is a table with the following columns: 'Client Name', 'Address', 'Work Carried ...', 'R...', 'Discount Value', 'Include', 'L...', 'Date of last disc...', and 'Error Message'.

Monthly Discount levels (percentage) must be specified for each Client before they can be applied via the Client Discounts Screen.

## Assigning a Monthly Discount % to a Client

1. Navigate to the Reception Screen (Reception button from main menu).
2. Search for and select a client, then navigate to the client's [Additional Information](#) screen.
3. Enter a percentage figure into the 'Monthly Discount %' field.
4. Repeat steps 1 to 3 for all eligible clients.

## Applying Client Discounts

1. Enter the **Client Discounts Screen** (Finance > Client Discounts).
2. Specify the item date range ('**From**' and '**To**') you wish to apply discounts for.
3. Select a **Client Site** (Client's registered site).
4. Specify a **Discount Date** (defaults to today's date)
5. Tick to exclude any clients that are flagged as a 'Bad Debtor'
6. Select '**Run**' to display all clients who meet the specified criteria.

Clear Run Apply Discount

From: 01/06/2024 To: 04/07/2024 Client Site: All Discount Date: 04/07/2024

☒ Exclude Bad Debtors ☐ Select All/None

Client Discounts

7. If you want to exclude any client/s from receiving a discount, then deselect the tick in the 'include' box on that clients row.
8. To apply the discount to the clients listed (with include selected), select the **'Apply Discount'** button.
9. A prompt will appear asking if you want to apply the discount (non-reversible), select **'Yes'** to continue or 'No' to cancel.
10. You will receive a message informing the discount was applied. This discount activity will display within the clients account screen.

