

Creating a Discount with the defined code



You need to follow these steps to add the discount.

Step 1. Click on the [+] sign to open a New Record.

Step 2. Search for the discount code that you created already.

Step 3. Search for the sequence to enter manually. For example, you can enter 1 or 2 etc.

Step 4. In the **[Discount By]** field you will have two options as follows:

- Percent
- Amount

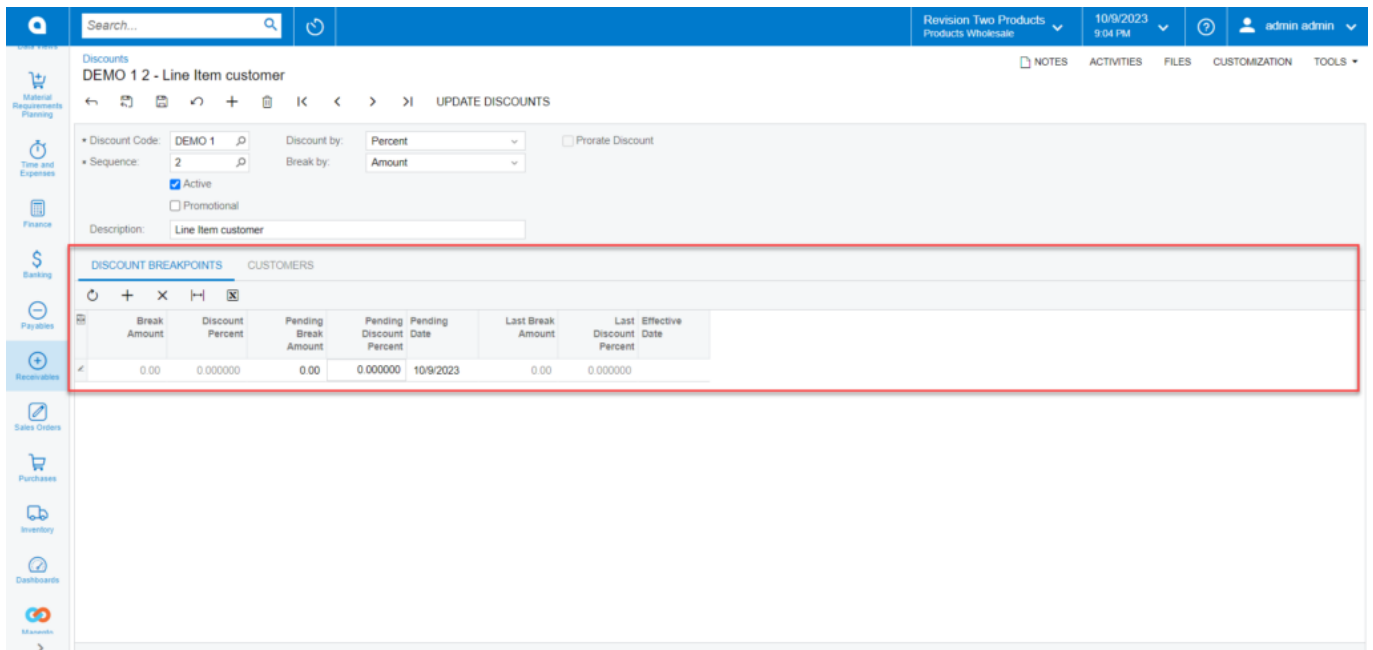
If you are allowing a discount by percentage, you must select it from the drop-down.

Step 5. Break By: You will get two options in the break by drop-down.

- Percent
- Amount

Step 6. Click on the [+] button below the [Discount Break Points].

Step 7. A new row will be created on the screen. This row will include the following columns.




Discounts
DEMO 12 - Line Item customer


Discount Code: DEMO 1 Discount by: Percent
Sequence: 2 Break by: Amount
☒ Active
☐ Promotional
Description: Line Item customer

Break Amount	Discount Percent	Pending Break Amount	Pending Discount Percent	Pending Date	Last Break Amount	Last Effective Discount Percent
0.00	0.000000	0.00	0.000000	10/9/2023	0.00	0.000000

Discount grid details


Step 8. Add [Pending Break Amount] which is the same as the Qty added in the Sales Order of CKITS.





When you enter the Sales Order Quantity only the Pending Discount Percentage will apply to the Sales order in the CKITs Item or the Stock Item.

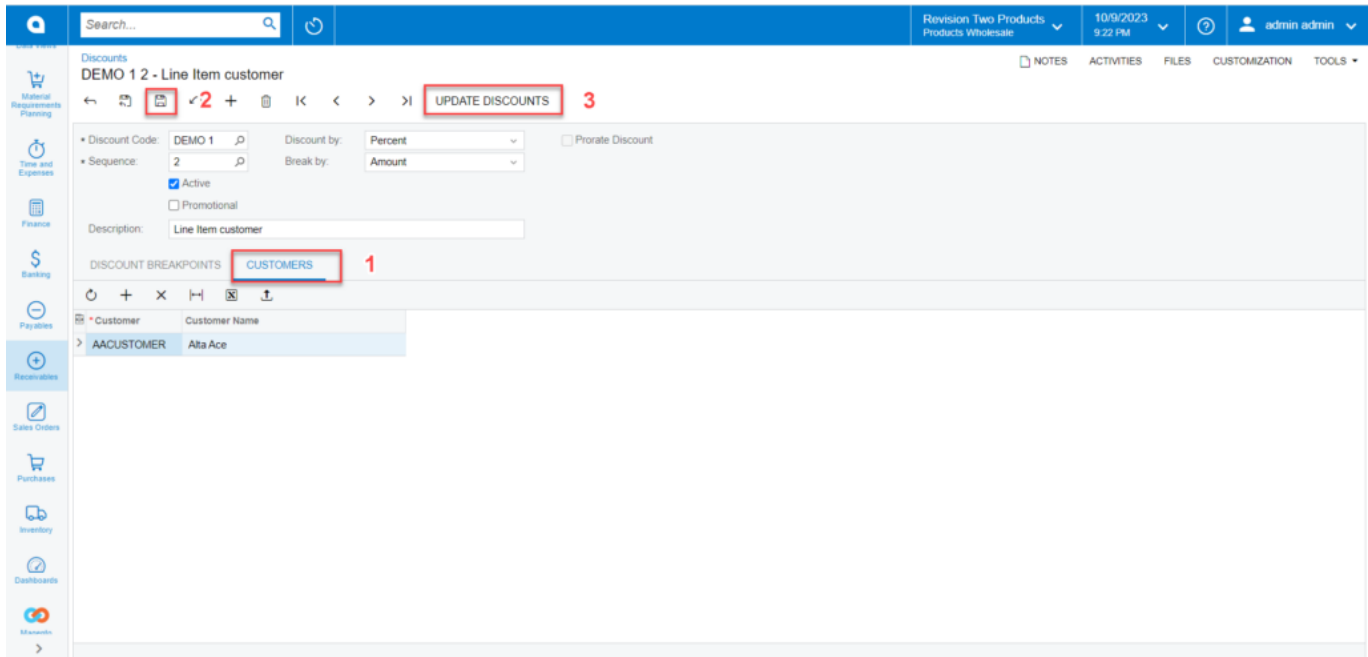
Step 9. Add the percentage in the [Pending Discount Percentage] column.



As you select the customer applicable to in the Discount Codes you will get the Customer column in the Discount.

Step 10. Click on the **[Customer]** tab click on the new [+] sign and search for the customer. This is a mandatory step to apply the Discount to the Sales Order.

Step 11. Upon selecting the [Customer] save the screen and click on [Update Discount].



Search...

Revision Two Products
Products Wholesale

10/9/2023
9:22 PM

admin admin

NOTES ACTIVITIES FILES CUSTOMIZATION TOOLS

Discounts
DEMO 1 2 - Line Item customer

UPDATE DISCOUNTS 3

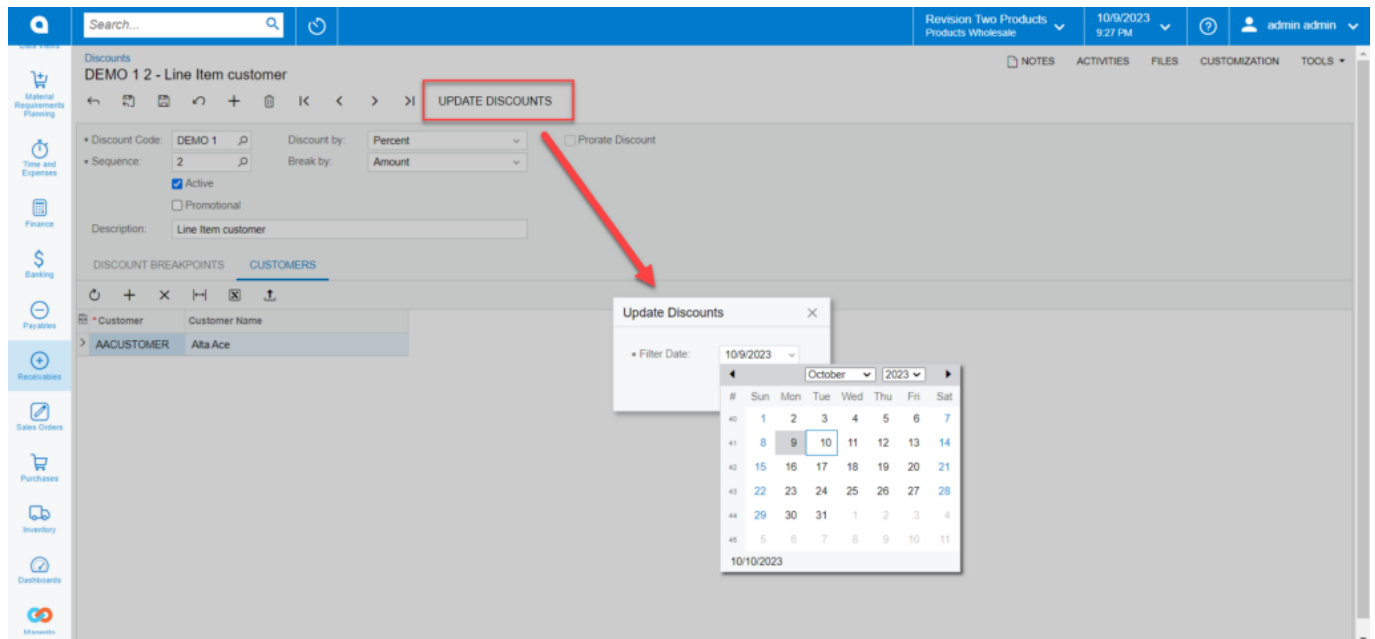
Discount Code: DEMO 1 Discount by: Percent
Sequence: 2 Break by: Amount
Active
Promotional
Description: Line Item customer

DISCOUNT BREAKPOINTS CUSTOMERS 1

Customer	Customer Name
AACUSTOMER	Alta Ace

Select Customer and Save

Step 12. Upon clicking [Update Discount] you will get a pop-up on the screen with a filter date with a calendar. Choose the date and click on **[OK]**. **By default, the current date is displayed.**



The screenshot shows the 'Discounts' section for 'DEMO 12 - Line Item customer'. A red box highlights the 'UPDATE DISCOUNTS' button. A red arrow points from this button to a pop-up 'Update Discounts' dialog. The dialog has a 'Filter Date' dropdown set to '10/9/2023' and a calendar view for October 2023. The calendar shows the 10th as the selected date.

Discounts
DEMO 12 - Line Item customer

UPDATE DISCOUNTS

Discount Code: DEMO 1
Sequence: 2
Discount by: Percent
Break by: Amount
Active
Promotional
Description: Line item customer

DISCOUNT BREAKPOINTS CUSTOMERS

Customer Customer Name
AACUSTOMER Alta Ace

Update Discounts

Filter Date: 10/9/2023

#	Sun	Mon	Tue	Wed	Thu	Fri	Sat
40	1	2	3	4	5	6	7
41	8	9	10	11	12	13	14
42	15	16	17	18	19	20	21
43	22	23	24	25	26	27	28
44	29	30	31	1	2	3	4
45	5	6	7	8	9	10	11

10/10/2023

Select the Date to Update the Discount