

Discounts

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The Discount screen allows you to apply discounts to a client's account to reduce the amount being charged for a product or service.

Details

To perform a discount, enter the Accounts Screen and select the 'Discounts' button. The Discounts Screen consists of three tabs: List Items, On Date Range and Monetary.

The screenshot shows the 'Accounts' screen with a top navigation bar containing buttons for 'List All', 'Payments', 'Refunds', 'Discounts' (highlighted), 'Credits', 'Return Money', 'Surcharges', 'Notes', 'HCP Accounts', and 'Statements'. Below this is a 'Clear' button and an 'Apply' button. At the bottom, there are three tabs: 'List Items' (highlighted), 'On Date Range', and 'Monetary'.

List Items tab

This tab allows you to discount particular items from an invoice number by a percentage amount.

Discounting Items

1. Select the item/s you want to discount by placing a tick in the 'Select' column.

The screenshot shows the 'List Items' tab with the following fields: 'Invoice Filter' (set to 'All'), 'Date' (14/07/2025), 'Description' (Goodwill), 'VAT Code' (T9 (0.0)), 'Your Selection Total' (9.08), 'Percentage: %' (10), and 'Total Gross Discount' (0.91). There is an 'Apply' button. Below these fields is a table with columns: Select, Date, InvoiceNo, Description, Surgeon, Qty, and Net. The first row shows a selected item (checkbox checked) with Date 26/03/2020 18:45, InvoiceNo 636095, Description STRONGHOLD 240MG 3PIP (GREEN) (app..., Surgeon C Tuppen, Qty 0.33, and Net 757.

2. Enter the Date, a Description, VAT Code and Percentage amount.
3. Select the 'Apply' button.
4. The discounts will be added to the Clients Account.

On Date Range tab

This tab allows you to discount items between a specified date range by a percentage amount.

Discounting by Date Range

1. Select Dates From and To.
2. Select the item/s you want to discount by placing a tick in the 'Select' column.
3. Enter the Date, a Description, VAT Code and Percentage amount.

4. Select the 'Apply' button.
5. The discounts will be added to the Clients Account.

Monetary tab

This tab allows you to discount a Client's account by a monetary value.

Discounts can be applied by a manual value entered by the user or by a pre-defined value. Pre-defined discounts can be configured by system administrators. For more information see the Finance Administration page.

Monetary Discounting

1. Enter a Date, a Description (e.g. Voucher) and Discount Amount.
2. Select the items you wish to allocate the discount against. (Not selecting items will allocate the discount against the oldest outstanding invoices).

3. Select the 'Apply' button.
4. The discounts will be added to the Clients Account.

Pre-Defined Discounting

1. Select the 'Pre-Defined Discount' option.
2. Select a pre-defined discount from the drop-down list. These are pre-created within Accounts Libraries.
3. Select the items you wish to allocate the discount against. (Not selecting items will allocate the discount against the oldest outstanding invoices).

4. Select the 'Apply' button.
5. The discounts will be added to the Clients Account.

