Discount

Overview

The Discount profile list allows you to come up with general discounts that can be applied to specific orders. This differs from the Price Levels discounts, as it is applied to the *entire order*, and can in fact be *combined with* price level reductions.

Discount set up

To access the Discount settings, click on the Gear icon in the upper right corner of the screen. Under the General section, click on **Profile Lists**. On the **Profile Lists**, under the Sales section click on **Discount**.

- Specify a *Name* for the Discount, a *Percentage* off to give from the order total, specify which *Tax Code* the Discount utilities, choose the *Income Account* from which the Discount will be deducted, from the drop-down menu and select if the Discount is *Active.*
- If the Discount is Active box is **NOT** checked, then the discount will **NOT** be available for selection on the Discount drop-down list on Sales Quotes and Sales Orders, though it will still be retained in the database.
- Click on **Save** when done.

Once you have saved the discount you can apply it to Sales Orders, Quotes and Ship Docs.   A discount can be added when a sales document is no 'ready only' (e.g. Status is Processing). Click on the Discount hyperlink in the Summary section then select your discount code.

Learn more about Customer Management with Order Time