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Customer Discounts

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Overview

The Customer Discounts module allows users to set up discount percentages and time frames. Discounts can then be associated with a specific customer or customers in the Customer Discount Maintenance module or on a customer card, and used on those customers' sales documents.

User Fields

Create the following user defined fields. For each of the fields, set the Field Type to Text and the Length to 200. (Refer to the [User Defined Fields](#) document for more information on setting up user fields.):

- A Customer user defined field as shown below (ex: xCustomerDiscount), used to track what discount(s) the customer is eligible to receive:

The screenshot shows the 'User Field Editor' window. On the left, the 'Bus. Objects' list includes 'Customer', 'Customer Addr', 'Inventory Serial Number', 'Item Master', 'Purchase Line Item', 'Purchase Order', 'Sales Document', 'Sales Line Item', 'Vendor', and 'Vendor Addr'. The 'Customer' object is selected. In the center, the 'User Fields' table lists two fields: 'udf_CustTest' (Seq 0) and 'xCustomerDiscount' (Seq 0). The 'xCustomerDiscount' field is selected. On the right, the 'Field Properties' panel shows: Table Name: Customer, Field Name: xCustomerDiscount, Map To: (empty), Screen Label: Customer Discount, Field Type: Text, Length: 200, Default Value: (empty), Value Options: (empty). The 'Options' section has checkboxes for 'Field is Read Only', 'Field is Required (Returns Only)', 'Field is a File Attachment', 'Field is Rich Text Memo', 'Field is a Customer Lookup', 'Field is an Image', and 'Field is a Hyperlink'. The 'Quick Report' field is empty.

- A Sales Document user field as shown below (ex: xDiscountUsed), used to track what discount is being applied to the sales document:

The screenshot shows the 'User Field Editor' window. On the left, the 'Bus. Objects' list includes 'Customer', 'Customer Addr', 'Inventory Serial Number', 'Item Master', 'Purchase Line Item', 'Purchase Order', 'Sales Document', 'Sales Line Item', 'Vendor', and 'Vendor Addr'. The 'Sales Document' object is selected. In the center, the 'User Fields' table lists multiple fields, including 'xDiscountUsed' (Seq 1). The 'xDiscountUsed' field is selected. On the right, the 'Field Properties' panel shows: Table Name: Sales Document, Field Name: xDiscountUsed, Map To: (empty), Screen Label: Discount Used:, Field Type: Text, Length: 200, Default Value: (empty), Value Options: (empty). The 'Options' section has checkboxes for 'Field is Read Only', 'Field is Required (Returns Only)', 'Field is a File Attachment', 'Field is Rich Text Memo', 'Field is a Customer Lookup', 'Field is an Image', and 'Field is a Hyperlink'. The 'Quick Report' field is empty. At the bottom, the 'Show on Sales Document Types' section has checkboxes for 'Quote', 'Order', 'Invoice', and 'Return', all of which are checked.

- Optional: an Item Master user field (ex: xItemCategoryDiscount), used to categorize items for discounting:

User Field Editor

Close Save Update Database Table Design Layout Export Import

Bus. Objects User Fields New Delete Field Properties

Bus. Object	Seq	Field	Disabled
Customer	0	uf_ItemMasterLong	<input type="checkbox"/>
Customer Addr	0	uf_ItemOptions	<input type="checkbox"/>
Inventory Serial Number	0	uf_Test	<input type="checkbox"/>
Item Master	0	xItemCategoryDiscount	<input type="checkbox"/>
Purchase Line Item	0	xProfitTempCost	<input type="checkbox"/>
Purchase Order	0	xTempCost	<input checked="" type="checkbox"/>
Sales Document			
Sales Line Item			
Vendor			
Vendor Addr			

Field Properties

Table Name: Item Master

Field Name: xItemCategoryDiscount

Map To:

Screen Label: Item Category Discount

Field Type: Text Length: 200

Default Value:

Value Options:

Options

☐ Field is Read Only ☐ Field is Required (Returns Only)

☐ Field is a File Attachment ☐ Field is Rich Text Memo

☐ Field is a Customer Lookup ☐ Field is an Image

☐ Field is a Hyperlink

Quick Report:

Creating a Customer Discount

To create a discount,

1. Go to Sales > Customer Discounts

Discount Master

Close Save

New Discount Delete Discount Copy Discount

Priority	Discount Name	Item Category	Comment
0	5% ALL ITEMS	(all)	
0	SPRING SALE	(all)	Spring 2010
0	TEST	Y	

Discount Detail

New Delete

Enabled	Beg Date	End Date	Discount%	Discount Name	Item Class
<input checked="" type="checkbox"/>	8/24/2010	8/25/2010	99.00	TEST	RETAIL

2. Under Discount Master, click **New Discount**
3. Enter the name of the discount in the pop-up screen:

SalesPad - New Discount

New Discount Name?

OK Cancel

4. Click **OK**
5. Under the Discount Detail area on the right, click **New**
6. Enter the Begin Date, End Date, and Discount %. The Discount Name should automatically fill with the selected Discount Master name.
7. Enter the applicable details of the discount (Item Category, Comment, Beginning and End Dates, and Discount) and check **Enabled** to enable the discount
8. Click **Save**

Assigning Discounts to Customers

Discounts can be assigned to multiple customers at once in the Customer Discount Maintenance module. Complete the following steps in Sales > Customer Discount Maintenance

Close Search Save

Search
 Customer: National Account:
 Customer Class: Discount:
 Search Options: ☐ Starts With

Apply Discounts
 Discounts: A1
 Remove Apply
☐ Selected Customers Only

Customers

Customer Num	Customer Name	Customer Class	Corporate Customer Num	Price Level	Discounts
100199	Hollstein Enterprises, Inc.	PROSPECT		RETAIL	A1;TEST
100211	Salespad	USA-INMI-T2		RETAIL	
100207	Alvin Smith	PROSPECT	ADAMPARK0001	RETAIL	
100206	Terrence Cook	PROSPECT	ADAMPARK0001	RETAIL	
100205	Robert Crescenzi	PROSPECT		RETAIL	
TEST3	Curr. Ass. Test	CAN-ONMBSK-T6		RETAIL	
100202	Baker Auto	PROSPECT		RETAIL	
TEST2	Curr. Ass. Test	CAN-ONMBSK-T6		RETAIL	
TEST	Curr. Ass. Test	CAN-ONMBSK-T6		RETAIL	
ZZTSH	Tim Hollstein	USA-INMI-T2		RETAIL	
BOSTONSCIEV01	Boston Scientific Corporation	USA-INMI-T2		RETAIL	
100212	Steve Me 123	STANDARD		STD	

1. Search for the customer(s) you wish to apply the discount to
2. Once you have the customer(s) on the grid, select the discount(s) to allow by clicking the **Discounts** dropdown (under Apply Discounts) and checking the box(es) next to the discount(s)

Discounts:

Remove

☐ Selected Customers Only

Num Price

OK Cancel

(Show All)
 JACOB
 S
 TEST

3. Click **Apply**.
- Note:** First check the **Selected Customers Only** box to only apply the discount to customers highlighted in the grid. If the box is unchecked, the discount will be added to all customers in the grid.

CUSTOMER CARD

Discounts can be assigned to a customer from the Customer card from the **Discounts** dropdown under Customer Properties:

Card: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Dynamics GP

Customer Properties

Customer: AARONFIT0001

Customer Name: Aaron Fitz Electrical

Cust Class: AUSTRALIA-T8

Price Level: RETAIL

Pay Terms: NET 30

Sales Rep:

Sales Terr:

Discounts: 15% OFF; 25% OFF; 5...

Currency:

Primary Account

Bob Fitz
One Micro
Redmond,

Default Shipping Method

☐ Ship Co
☐ On Hold

Contact Addresses

Customer Item Class

+ New Class

Item Class

Discounts:

- ☐ 0% OFF
- ☒ 15% OFF
- ☒ 25% OFF
- ☒ 50% OFF
- ☐ 75% OFF
- ☐ CABINETS
- ☒ RETAIL
- ☒ SERVERS-1

Select which discounts to apply to the customer.

Selecting a Customer Discount

Once assigned to a customer, discounts can be selected on a sales document.

1. Open a sales order and select an item for discount
2. From the **Discount** dropdown under Additional Properties, select the appropriate discounts for the customer and selected item

Ship | **RELEASE**

Shipping Address
 Aaron Fitz Electrical
 Bob Fitz
 11403 45 St. South
 Chicago, IL 60603-0776
 P:(312) 555-0102

Additional Properties
 Batch/Q: SHIPPING MODE
 Price Level: RETAIL ▼
 Discount: RETAIL ▼ ×

Totals - GM: [-\$6,365,626.03] [-13,9
 Misc Charge: 0.00
 Discount: 0.00
 Freight: 0.00

Selected	Discount	Beg Date	End Date	Discount%	Category	Item Class	Eligible
<input checked="" type="checkbox"/>	SERVERS-1	7/5/2000	7/5/2012	25.00		SERVERS-1	<input checked="" type="checkbox"/>
7/5/2000		7/5/2012	50.00		SERVERS-1	<input checked="" type="checkbox"/>	
7/5/2000		7/5/2012	75.00		SERVERS-1	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	50% OFF	7/1/2005	7/1/2012	50.00		RETAIL	<input checked="" type="checkbox"/>
7/5/2005		7/5/2012	50.00		SERVERS-1	<input checked="" type="checkbox"/>	
7/5/2005		7/5/2012	50.00		CATALOG	<input checked="" type="checkbox"/>	
7/5/2005		7/5/2012	50.00		COMPONENTS	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	25% OFF	7/1/2010	7/5/2012	25.00		CATALOG	<input checked="" type="checkbox"/>
7/1/2000		7/5/2012	25.00		COMPONENTS	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	RETAIL	7/5/2000	7/5/2012	25.00		RETAIL	<input checked="" type="checkbox"/>
7/5/2000		7/5/2012	50.00		RETAIL	<input checked="" type="checkbox"/>	
7/5/2000		7/5/2012	75.00		RETAIL	<input checked="" type="checkbox"/>	

In case of overlapping, the discount with lowest percent will be chosen (as defined in Settings).
Escape to Cancel.

☒ Show Eligible Discounts Only

The selected discount(s) will be applied to the items matching the defined classes.

Note: If the Discount field does not appear under Additional Properties, right-click under Price Level and select Customize Layout. Then find Discount in the Customization pop-up and drag-and-drop it onto the sales document form under Price Level. Be sure to save the layout when finished.

Customization
✕

Reset Layout
 Save Layout
✕

Hidden Items
Layout Tree View

☐ Empty Space Item

A

Label

Separator

Splitter

Account

Bill To

Blind Ship

Buyers Premium

Security and Settings

Security

Customer Discount Maintenance - Allows users to access the Customer Discount Maintenance module.

Customer Discounts - Allows users to access the Customer Discounts module, allowing users to create new

discount types for customers.

Note: You must log out and then back in for security changes to take effect.

Note: If sub-setting *Can Use Eligible Discounts Only* is set to True under the security setting *Sales Document Properties* (or under *Counter Sales Document Properties*, when using Counter Sales), only eligible discounts will display on a sales document.

Settings

Customer Discounts Field - Stores the name of the Customer user defined field (ex: xCustomerDiscount).

Sales Document Discount Field - Stores the name of the Sales document user defined field (ex: xDiscountUsed).

Customer Discounts Item Category Field - Stores the name of the Item Master user field(ex: xItemCategoryDiscount).

- Leave blank to disable item category discounts

Sales Document Discount Allow Multiple Discounts - Allow multiple discounts per sales document. In the case that more than one discount applies to the same item, only one will be chosen, according to the priority rule defined in the Sales Document Discount Priority setting (highest_percent, lowest_percent, or most_recent).

Sales Document Discount Priority - Sets discount priority in case of overlapping discounts.