Customer Discounts

Cavallo Support - 2026-04-03 - Sales

Overview

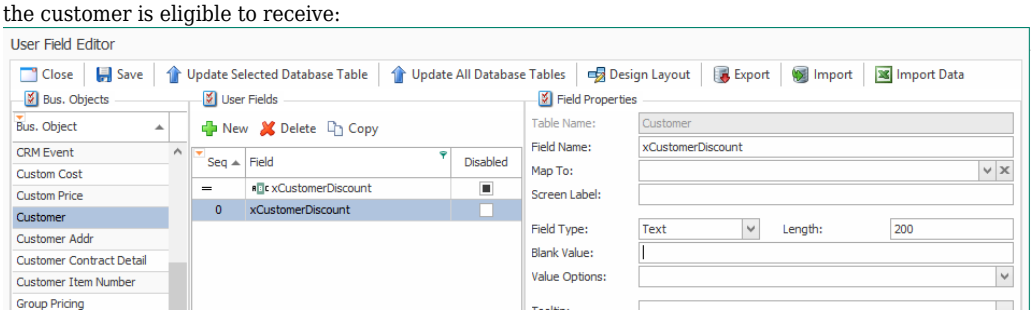
The Customer Discounts module allows users to set up discount percentages for selected time frames. Discounts can then be assigned to customers in the Customer Discount Maintenance module or on a customer card. These discounts are then applied to sales documents for those customers.

Setup

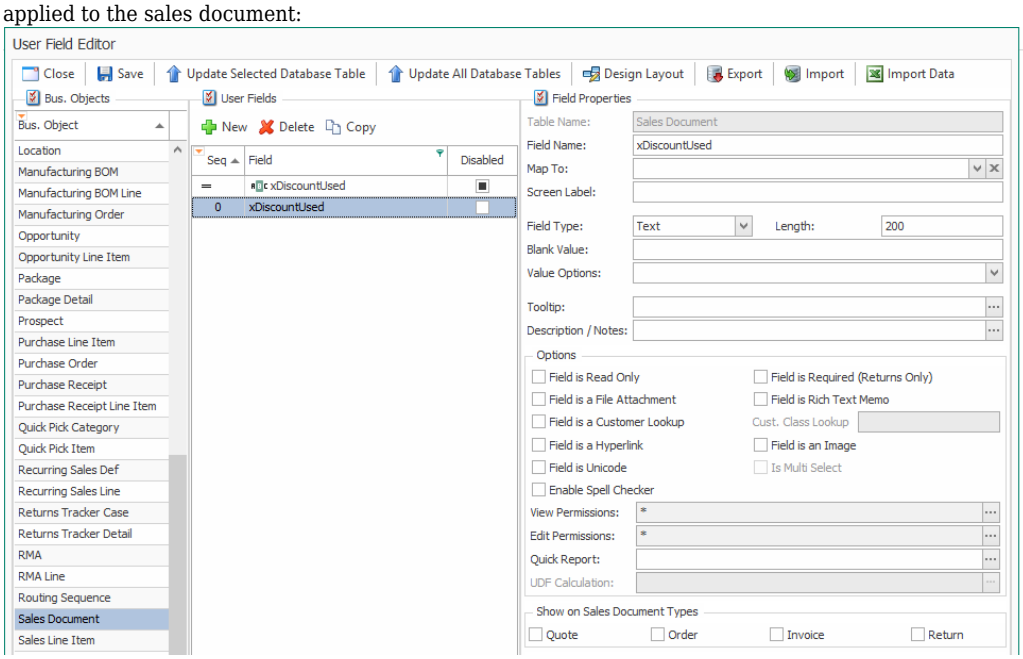
1) Create your User Fields

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.). THese fields will store the discount information on customers, orders, and items, enabling this functionality.

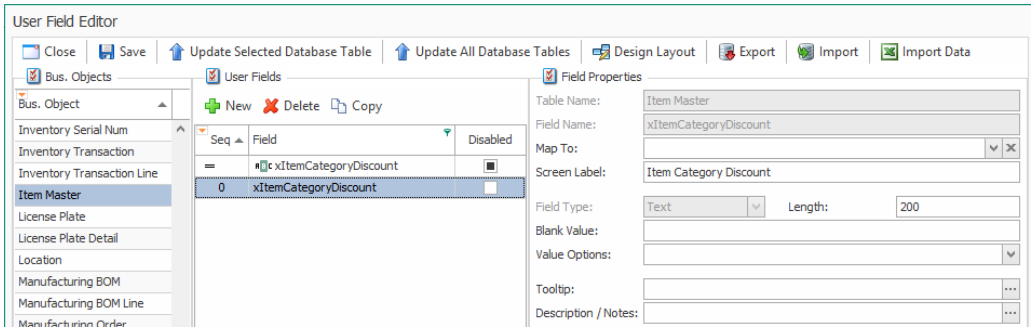
- A Customer user defined field as shown below (ex: xCustomerDiscount), used to track what discount(s) the customer is eligible to receive:



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



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

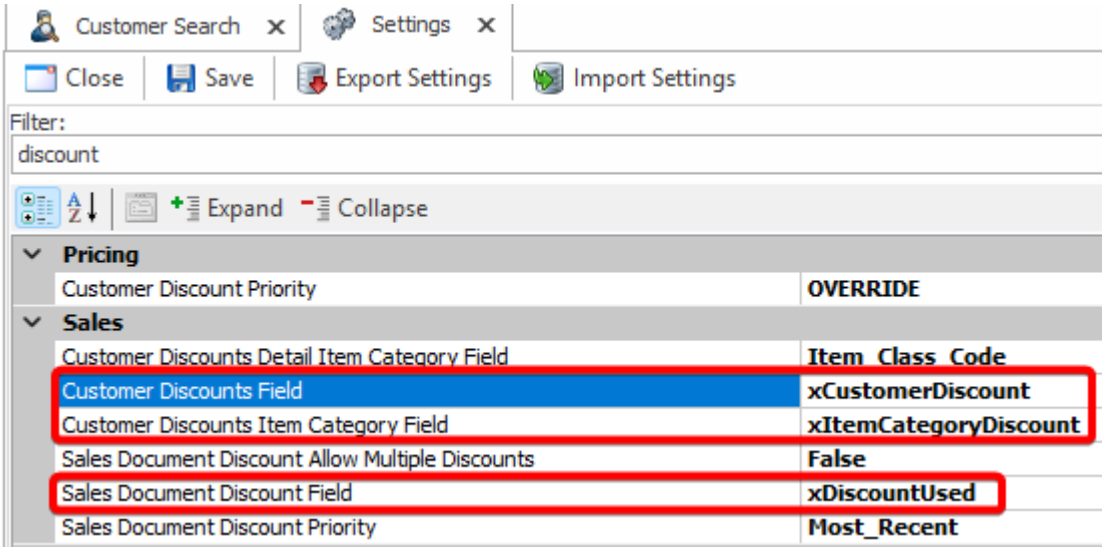


Note: Be sure to click Update All Database Tables after saving each User Defined Field, or click Update Selected Database Table for Customer, Sales Document, and Item Master.

2) Configure Settings

Click the Cavallo icon on the top left of SalesPad and open Settings. There are 3 settings that tell SalesPad which UDF to check for discounts in. Here you will set these settings with the name of the UDFs created above in step 1.

- Sales >> Customer Discounts Field: xCustomerDiscount
- Sales >> Customer Discounts Item Category Field: xItemCategoryDiscount
- Sales >> Sales Document Discount Field: xDiscountUsed



The following option settings will allow you to configure how you would like SalesPad to handle scenarios when there are multiple valid discounts available.

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

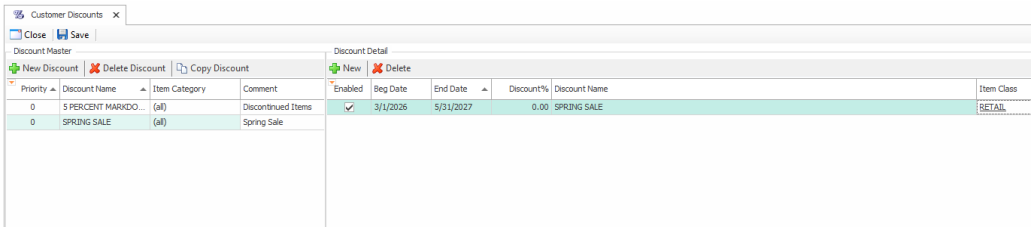
The following optional setting determines which field is used to deliminate your item categories.

- *Customer Discounts Item Category Field* - Stores the name of the Item Master user field(ex: xItemCategoryDiscount). Leave this setting blank to disable item category discounts.

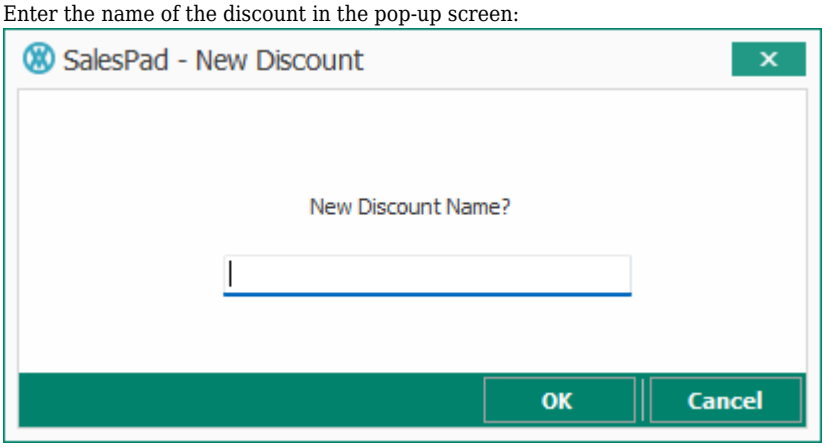
3) Creating a Customer Discount

To create a discount:

1. Go to Sales > Customer Discounts



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



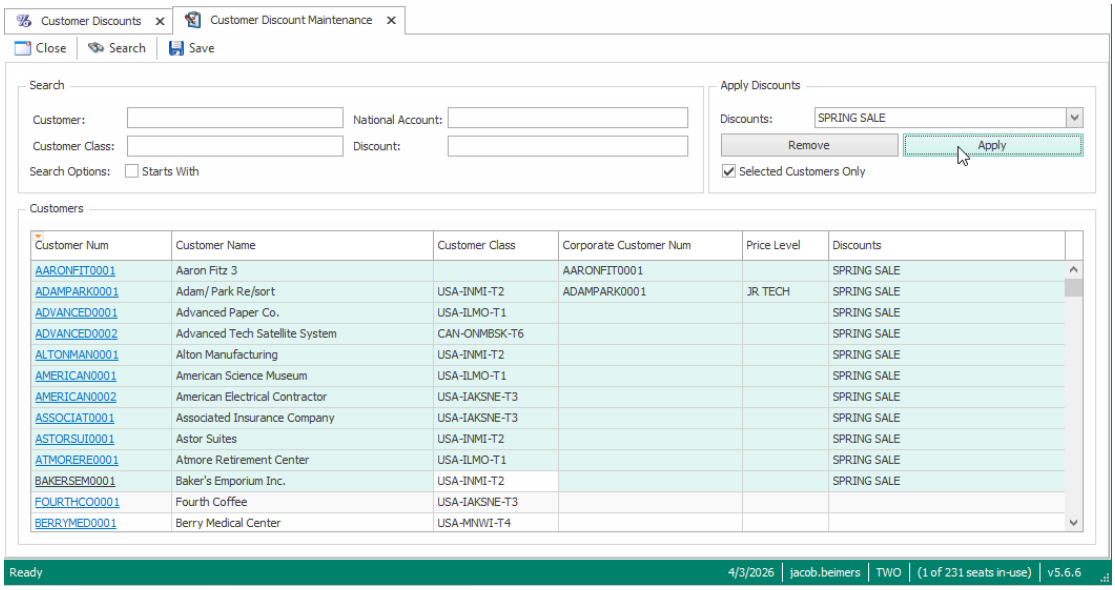
4. Click **OK**
5. Under the Discount Detail area on the right, click **New**
6. Enter the Begin Date, End Date, and Discount %. The Discount Name should automatically fill with the selected Discount Master name.
7. Enter the applicable details of the discount (Item Category, Comment, Beginning and End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

Assignment

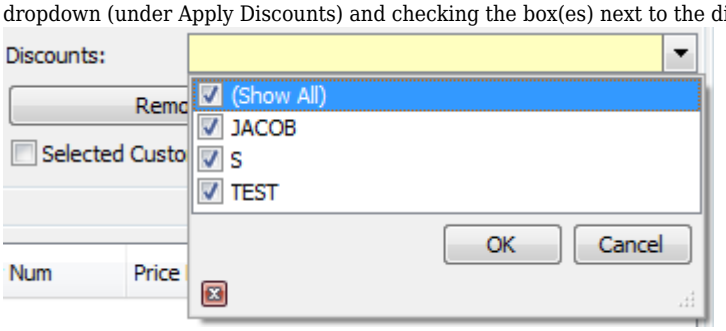
Discounts may be assigned to customers directly on the customer card or in mass by using Customer Discount Maintenance.

Method 1: Customer Discount Maintenance

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



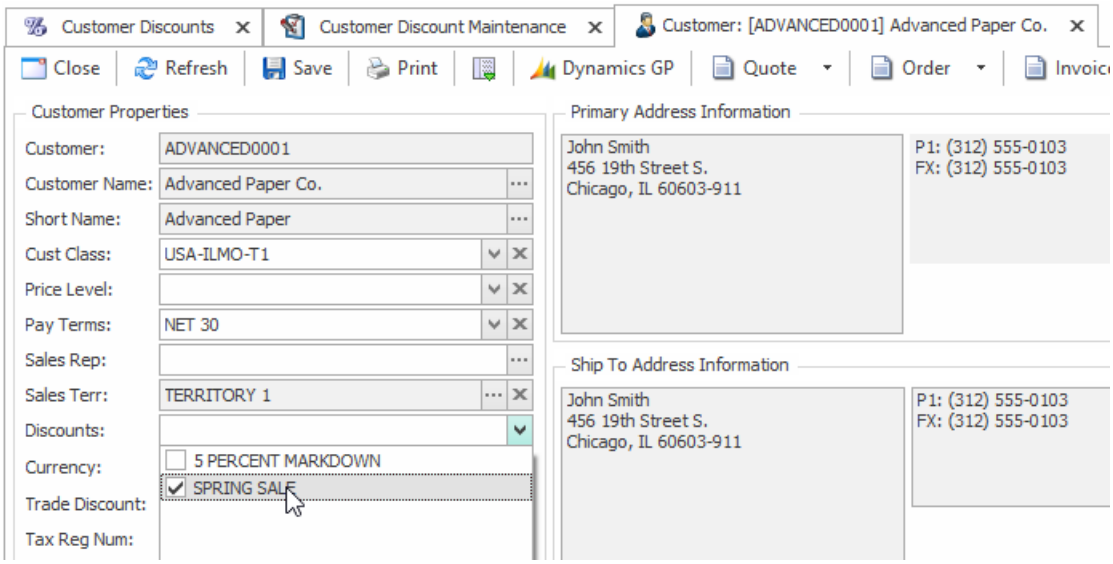
1. Search for the customer(s) you wish to apply the discount to. You may also use the following keyboard shortcuts to be more selective the customers returned from your search results.
    1. SHIFT + Click: Select a group of customers. This highlights all customers from your previously selected row to your shift clicked row.
    2. CTRL + Click: Multi-select. This highlights a new row in addition to anything currently highlighted.
    3. Be sure to have Selected Customers Only checked on the header in order for only your highlighted rows to be updated.
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).



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.

Method 2: Directly on the Customer Card

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

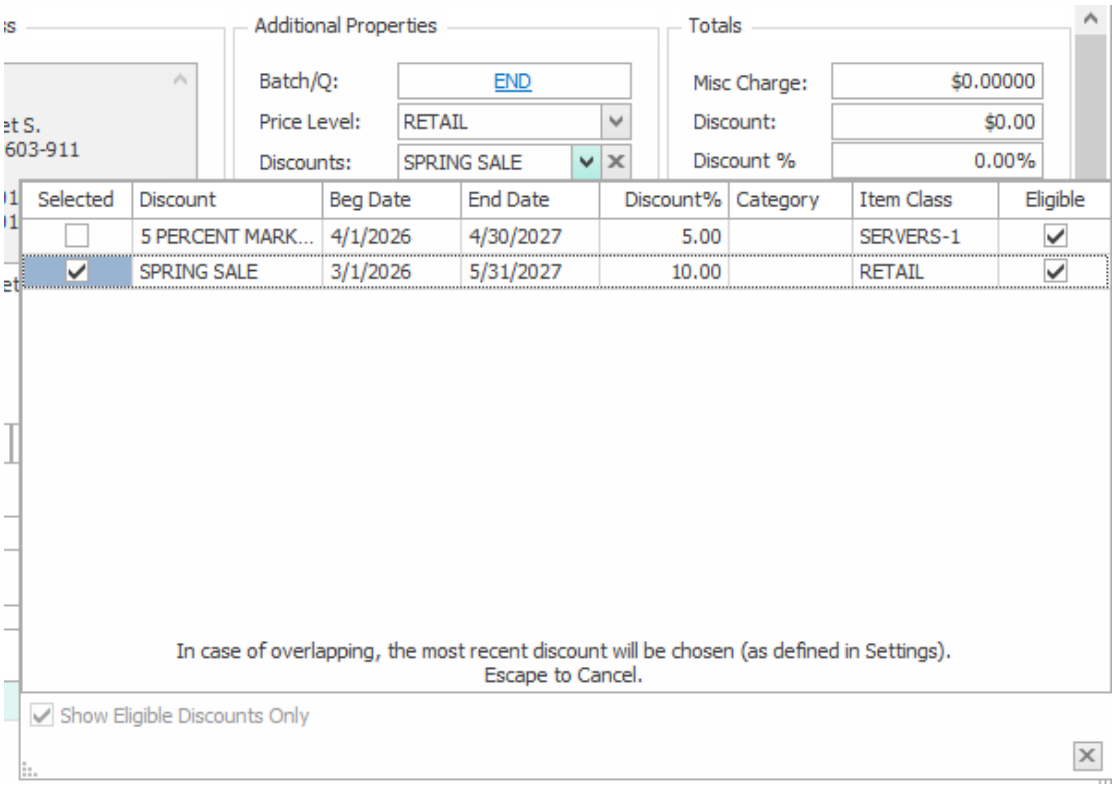


Select which discounts to apply to the customer.

Usage and selecting a Customer Discount

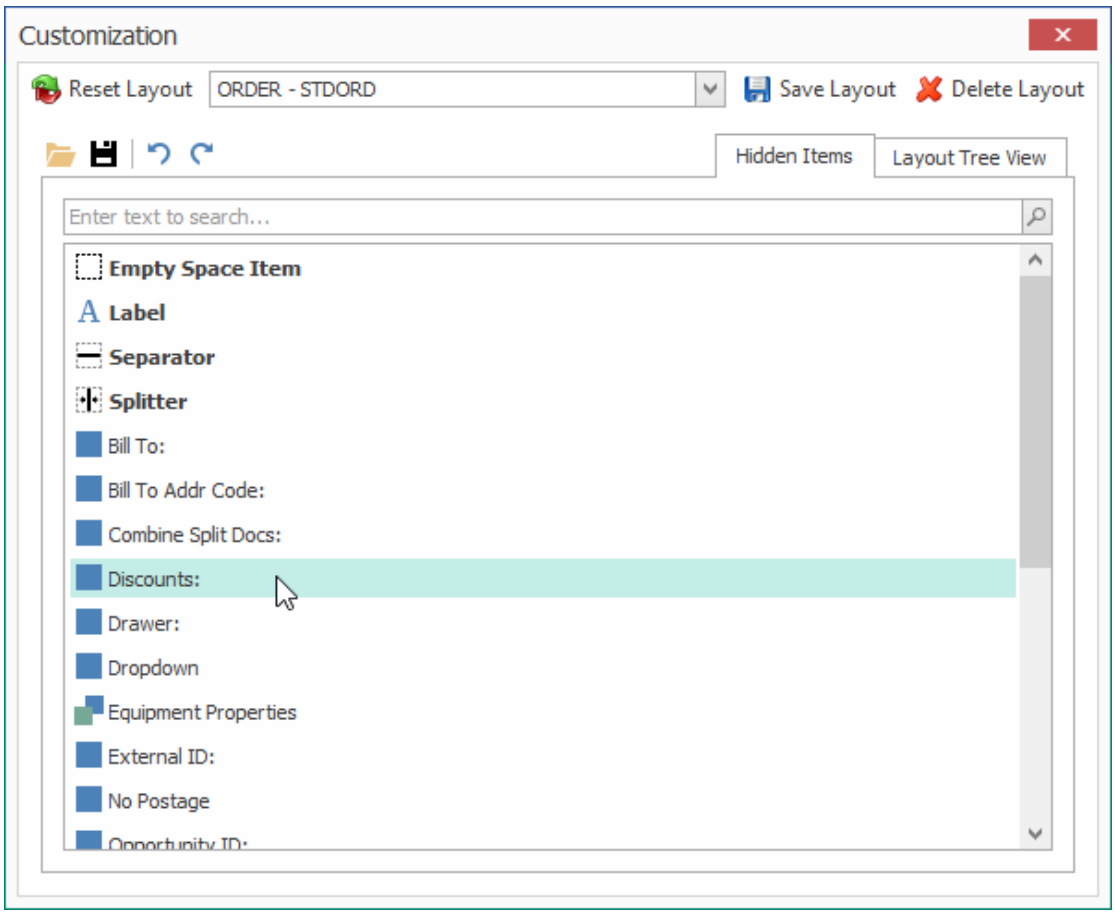
Once assigned to a customer, discounts can be selected on a sales document.

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



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.



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.