

Date	September 9, 2024
Subject	Discount Function in Invoice Detail

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Overview

Miscellaneous Table

a. Discounts configuration

i. *What is the option Model Discount?*

1. Allows the linking of the discount to the model. By selecting this option, the misc code will appear in the drop down.

ii. *Why is it used?*

1. Model profit analysis
2. Auto calculate % discounts

iii. *List \$ and List %*

1. List % of Model Selling Price
 - a. **Example** : Model Selling Price (\$1000) x List % (10%) = Rebate (\$100)

iv. *Cost \$ and Cost %*

1. Cost % is primarily used in rebate examples where the manufacturer gives you only a cut of the rebate.
 - a. **Example** : Rebate \$100 X Cost (75%) = \$75 expected recovery of rebate from manufacturer

v. *What is the option “Applies to Each Model Qty”?*

1. This option multiplies the misc codes by the model Qty. This option is only available when the discount / rebate is a \$ value.
 - a. **Example** : Refer to Invoice S03550842
 - i. 2 models will have a total of 2 x \$500 (Discount) = \$1,000.00.

vi. *What is the option “Applies to Original Model Selling Price”?*

1. This option calculates multiple discounts linked to one model using the model selling price. By default, discounts are calculated on the net sell price.
 - a. **Example** : Offer customer 10% discount and 20% Rebate
 - i. Original Model Selling Price (\$1000) x Discount (10%) = \$100 discount
 - ii. Original Model Selling Price (\$1000) x Rebate (20%) = \$200 discount

- iii. Original Model Selling Price (\$1000) – Discount (\$100) – Rebate (\$200) = Final Sell Price (\$700)

Invoice Type (Settings 4)

a. “Use Misc Discounts” Checkbox

- i. In order to use a miscellaneous discount that has “Model Discount” selected, you must enable “Use Misc Discount Codes” in Invoice Type Settings 4.

b. GM on Model Line Incl (Misc)

- i. Option to choose the misc types to include as part of the model line GM calculation.

Security overrides

a. Expired misc code

- i. Override Misc Date Range

b. Selecting this checkbox allows the user to discount below minimum sell price. The user will still need to provide a reason.

- i. Discounting Below Minimum (Invoice)
- ii. Discounting Below Minimum (Estimate)
- iii. Discounting Below Minimum (UMRP Brand)

Discounts function on invoice detail

a. Review how to add discounts / rebate to an invoice

- i. In order to use a miscellaneous discount that has “Model Discount” selected, you must enable “Use Misc Discount Codes” in Invoice Type Settings 4.

Reporting



- a. Refer to document [DiscountLinking and InvoiceWarranty.xlsx](#)

Lesson Notes

Miscellaneous Table

How to set up code to appear in the drop down option?

Setup

	The Miscellaneous Code will appear as an option in the “Discount” function in Invoice Detail.
	The Miscellaneous Code will not appear as an option in the “Miscellaneous” tab drop down in Invoice Detail.

Edit Misc Charge REBATE10 Inventory Blowout 07/28-08/31

Code: REBATE10

Description: Inventory Blowout 07/28-08/31

% of Model: 10.0000 % Of Model Selling Price
 Do Not Allow Price Reduction

Cost %: 75.0000 Do Not Allow Price Change
 Cost is a % of Misc Selling Price

G/L Revenue: 4073 Add Profit Center
 G/L Cost Debit: 5052 Add Profit Center
 G/L Cost Credit: Add Profit Center

Qualification:

Start Date - Sale: 7/28/22 End Date: 8/31/22
 Start Date - Quote: 7/28/22 End Date: 8/31/22

Warranty: From Invoice Type Misc Type: REBATE

EDI Format: Points: 0

Link:

Prompt:

Time (in minutes): 0.00

Installation: Link To Model Taxes With Installation: Tax 1 Tax 2 Tax 3

Taxes: Use Branch Taxes
 Tax 1
 Tax 2
 Tax 3

Update History
 Show in ePASS Mobile Tech
 Obsolete
 Require Note on Invoice
 Do Not Allow Finish **2**
 Do Not Show in Invoice Detail
 Do Not Allow Description Change
 Rebate **1**
 Model Discount
 Applies to Each Model Qty
 Applies to Original Model Selling Price
 Satisfies Min Deposit Line Requirement
 Show Credit Reason
 Require Credit Reason
 Do Not Attach Related Misc when it is a Pickup

Gift Card Type:

Created: 00/00/00
 Modified: 02950 7/20/22

You must also enable Invoice Type - Use Misc Discount Codes to use a Model Discount.

Use

The Miscellaneous Code appears as an option in the drop down when using the “Discounts” function in Invoice Detail.

Invoice # S03550847 - Ali, Imam - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	SO		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Warranty	No	6549		4 Yr 2 Appliance Combo \$3500 - \$749...	1	851.00	No	Yes	Yes	

Discount Running Total: 0.00 Will be distributed to all selected models.

Invoice Total: 7,088.53
GM %: 27.8

The Miscellaneous Code does not appear as an option in the Miscellaneous tab in Invoice Detail.

Invoice # S03550847 - Ali, Imam - Add Misc

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	SO		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Warranty	No	6549		4 Yr 2 Appliance Combo \$3500 - \$749...	1	851.00	No	Yes	Yes	

Discount Running Total: 0.00 Will be distributed to all selected models.

Invoice Total: 7,088.53
GM %: 27.8

What is % of Model and Cost %?

Definition

1	<p>% of Model calculates the % of the original selling price of the model. Example : Model Selling Price (\$1,000) x List % (10%) = Rebate (\$100)</p>
2	<p>Cost % calculates the % of the value calculated from the % of Model Example : Rebate \$100 X Cost (75%) = Approximate recovery from manufacturer (\$75)</p>

Setup

1 % of Model

2 Cost %

You must also enable Invoice Type - Use Misc Discount Codes to use a Model Discount.

Use



Model Sell Price (\$5,595.98) x **Rebate10** (10%) = **Rebate** (\$559.60)

Invoice # 503550847 - Ali, Imam - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	SO		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Warranty	No	6549		4 Yr 2 Appliance Combo \$3500 - \$749...	1	851.00	No	Yes	Yes	

Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	KRMF706EBS	~36 FRENCH DOOR, BL SS	Ordered	1	5,595.98	Package	Trip# 1	
Location	190	Burnaby Warehouse	Shipped	0	Total	5,595.98	23.9 Spiff	22.00
SKU #		Serial	Location	QOH	0 / 1	Std. Cost	4,322.00	Delivery
Equip			Not Avail	1			8/23/22	
Brand	KITCHENAID		QOO	1 / 3				Status
Product	FRENCH DOOR FF	Color	Black Stainless	Written	4 / 8			Committed
Mfr Wty	12	Features		Inventory Type	APPL			Created
PO #								
Branch	Default							
Note	UNIT REQUIRES DM EXTERIOR WATER A							

Invoice Discount

Discount Code: **REBATE10** | Inventory Blowout 07/28-08/31

Discount: 10.0000

Selected	Model	Qty	Price	Discount	Disc Price	Override Required
<input checked="" type="checkbox"/>	KRMF706EBS	1	5595.98	559.6	5036.38	REQUIRED

Discount Running Total: 559.60 Will be distributed to all selected models.

2 **Rebate (\$559.60) x Cost % (75%) = Approximate recovery from manufacturer \$419.70**

Invoice # S03550847 - Ali, Imam - Review Misc

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	REBATE10		Inventory Blowout 07/28-08/31	-1	-559.60	No	Yes	Yes	
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	SO		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Warranty	No	6549		4 Yr 2 Appliance Combo \$3500 - \$749...	1	851.00	No	Yes	Yes	

Model Labor **Misc** Comment Warranty Payment Tax Package Signature

Misc: REBATE10 | Inventory Blowout 07/28-08/31 | Qty: -1 | Amount: 559.60 | Cost: 419.70 | Total: -559.60

Note: [] | Warranty: No

G/L Rev: 4073 | Cost Db: 5052 | Branch: Default

Misc. Link: [] | Comment: []

Package: [] | Trip#: 1 | Rebate Submitted: 00/00/00 | Credited: 00/00/00

Commission: [] | Created: L 8/23/22 | Modified: 00/00/00

Buttons: Commit, Discount, Serial, Split Line, Header, Add, Edit, Delete, Exit, Add From Cart

Invoice Total: 6,500.95 | GM %: 28.1

What is the option “Applies to Each Model Qty”?

Definition

This option multiplies the misc codes by the model Qty. This option is only available when the discount / rebate is a \$ value.

Setup

Edit Misc Charge DISCOUNT Discount
— □ ×

Code:

Description:

List: % Of Model Selling Price

Cost: Do Not Allow Price Reduction

Do Not Allow Price Change

Cost is a % of Misc Selling Price

G/L Revenue: Add Profit Center

G/L Cost Debit: Add Profit Center

G/L Cost Credit: Add Profit Center

Comment Code:

Qualification:

Start Date - Sale: End Date:

Start Date - Quote: End Date:

Warranty: Misc Type:

EDI Format: Points:

[Link](#)

Prompt:

Time (in minutes):

Installation

Link To Model

Taxes With Installation

Tax 1

Tax 2

Tax 3

Taxes Use Branch Taxes

Tax 1

Tax 2

Tax 3

Update History

Show in ePASS Mobile Tech

Obsolete

Require Note on Invoice

Do Not Allow Finish

Do Not Show in Invoice Detail

Do Not Allow Description Change

Rebate

Model Discount

Applies to Each Model Qty

Applies to Original Model Selling Price

Satisfies Min Deposit Line Requirement

Show Credit Reason

Require Credit Reason

Do Not Attach Related Misc when it is a Pickup

Gift Card Type:

Created:

Modified:

You must also enable Invoice Type - Use Misc Discount Codes to use a Model Discount.

Use

Invoice # 503550847 - Alt, Imam - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	REBATE10		Inventory Blowout 07/28-08/31	-1	-559.60	No	Yes	Yes	
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	SD		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Warranty	No	6549		4 Yr 2 Appliance Combo \$3500 - \$749...	1	851.00	No	Yes	Yes	
Model	No	KDFE204KPS	190	~ 24 DISHWASHER, 39 DBA, SS	2	3,191.96	No	Yes	Yes	Committed

Model Invoice Discount

Discount Code: Discount

Discount: % \$

Selected	Model	Qty	Price	Discount	Disc Price	Override Required
<input type="checkbox"/>	KRMF706EBS	1	5036.38	0	5036.38	REQUIRED
<input checked="" type="checkbox"/>	KDFE204KPS	2	1595.98	250	1345.98	REQUIRED

Discount Running Total: 500.00 Will be applied to each model quantity.

The discount is multiplied by the quantity.

What is the option "Applies to Original Model Selling Price"?

Definition

This option calculates multiple discounts linked to one model using the model selling price. By default, discounts are calculated on the net sell price.

Setup

Edit Misc Charge REBATE5 Inventory Blowout 07/28-08/31
— □ ×

Code:

Description:

% of Model: % Of Model Selling Price

Cost %: Do Not Allow Price Reduction

Do Not Allow Price Change

Cost is a % of Misc Selling Price

G/L Revenue: Add Profit Center

G/L Cost Debit: Add Profit Center

G/L Cost Credit: Add Profit Center

Comment Code:

Qualification:

Start Date - Sale: End Date:

Start Date - Quote: End Date:

Warranty: Misc Type:

EDI Format: Points:

Link:

Prompt:

Time (in minutes):

Taxes Use Branch Taxes

Tax 1

Tax 2

Tax 3

Update History

Show in ePASS Mobile Tech

Obsolete

Require Note on Invoice

Do Not Allow Finish

Do Not Show in Invoice Detail

Do Not Allow Description Change

Rebate

Model Discount

Applies to Each Model Qty

Applies to Original Model Selling Price

Satisfies Min Deposit Line Requirement

Show Credit Reason

Require Credit Reason

Do Not Attach Related Misc when it is a Pickup

Gift Card Type:

Created	02950	7/27/22
Modified		00/00/00

Installation

Link To Model

Taxes With Installation

Tax 1

Tax 2

Tax 3

You must also enable Invoice Type - Use Misc Discount Codes to use a Model Discount.

Use

The screenshot shows an invoice review window with the following table:

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	REBATE10		Inventory Blowout 07/28-08/31	-1	-559.60	No	Yes	Yes	
Misc	No	STA032091		MANUFACTURERS PROMOTION	1	0.00	No	Yes	Yes	
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUPDL		Please note that this model has a const...	0	0.00				
Comment	No	CP		Special Order - Max Returnable This...	0	0.00				

The 'Invoice Discount' dialog box is open, showing:

- Discount Code: REBATE5
- Discount: 5.0000%
- Selected Models Table:

Selected	Model	Qty	Price	Discount	Disc Price	Override Required
<input checked="" type="checkbox"/>	KRMF706EBS	1	5036.38	279.8	4756.58	REQUIRED
<input type="checkbox"/>	KDFE204KPS	2	1345.98	0	1345.98	REQUIRED

Discount Running Total: 279.80 Will be distributed to all selected models.

Callout: Discount is calculated on the model selling price \$5,595.98 * Rebate5 5% = \$279.80

Invoice Type (Settings 4)

“Use Misc Discounts” Checkbox

Definition

Misc Discount Codes are available to use for the invoice type when this checkbox is selected.

Setup

Review Invoice Type RE Retail

Settings 1 Settings 2 Settings 3 **Settings 4** Required Fields G/L Allocation Printing

Show Standard Cost in Detail
 Show Landed Cost in Detail
 Show Replacement Cost in Detail
 Show Original Cost in Detail
 Show QOH/QOO/Res by Loc/Total

Update Standard/Landed/Replacement/Original Cost on Model During Edit/Finish
 Update Standard/Landed/Replacement/Original Cost on Copy
 Update Spiff on Model During Edit/Finish
 Update Spiff on Copy
 Customer Service Ticket

Cost Used for Serial GM
 Enable Follow Up Date Default Follow Up Days

Invoice GM Item Misc Wty Labor
 Include: Only rebates and discounts Use Misc Discount Codes
 [Specific Misc Types](#) Do Not Add Related Misc Rebates

[GM on Model Line Incl \[Misc\]](#)

Update Warranty Return Sales
 Update Warranty Returns Credits
 Do not order on PO-12

Standard Cost Code
 Secondary Standard Cost Code
 Landed Cost Code
 Replacement Cost Code
 Original Cost Code
 Spiff Number
 Minimum Selling Price

Require lines to be verified
 Verified GM

Disable Min Selling Price Rules

OK

Use

Invoice Service Dispatching Invoice Cont. Warranty Documents Notepad

View Print History Related Invoices Invoice Date: 8/23/22 Follow Up: 8/25/22 OK

Invoice #: S03550847 Schedule Date: 9/01/22 Pick up: 00/00/00 Cancel

Invoice Type: **RE** Retail Job Status: UNCONFIRMED UNCONFIRMED DELV Detail

Payment Type: COD PAYMENT BEFORE DELIVER Reference: OK

Ship To: 39450 History Bill To: 39450 History A/R Balance Credit

Customer Notepad: Ali, Imam, 225 Chestnut Drive Sw, Calgary, Ab, T3B 1G8, (403) 700-2417, imamzafar321@gmail.com

Salesperson 1: 03501 Danielle Schlechte Total: 9,327.51 Created: 8/23/22 13:02

Salesperson 2: %: 0.000 Status: Open Modified: 00/00/00

Sale Referral: WALK Walk In / Drive By Finished: 00/00/00

Min Deposit: 25.00 % Posted: 00/00/00

Invoice Audit Trail

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Misc	No	350-450 LBS		Weight surcharge 350 - 450 lbs	1	175.00	No	Yes	No	
Comment	No	SUFDL		Please note that this model has a const...	0	0.00				
Comment	No	SD		Special Order - Non Returnable - This ...	0	0.00				
Misc	No	FREIGHT		Delivery	1	129.00	No	Yes	No	
Comment	No	FRT		Delivery Includes Fuel Surcharge	0	0.00				
Misc	No	FRM		Lead Generation - Min \$100	1	65.00	No	Yes	No	

Discount Dialog Box:

Discount Code: discd

Code	Description
DISCOUNT	Discount
30 DAY WARRANTY	30 Day Warranty
DBOOKS	Lead Generation - Min \$100
FLOORMODEL	Floor Model Discount
PRODUCTDISCOUNT	Product Discount
PROMOCORRECTION	Promo Correction Discount
REBABBY10	10% Off 11/25/12/22

Model Selected: DISCOUNT

Location: KR

SKU #: KD

Discount Running Total: 0.00

GM on Model Line Incl (Misc)

Definition

This option allows the user to choose which Misc Types to include in the model gross margin (gm) calculation.

Setup

reference	Bill To Customer	Bill To C
0J3020UV	K8075	MONDIA
icking Kits	81000	SUMMIT
26692	59216	GABLEC
	36948	STARLK
	182688	HAMZA
	187036	TAYLOF
	191343	Skroce
	20592	SUSSEX
	600310	WEEKS
	Y1741	318168
	KK912	

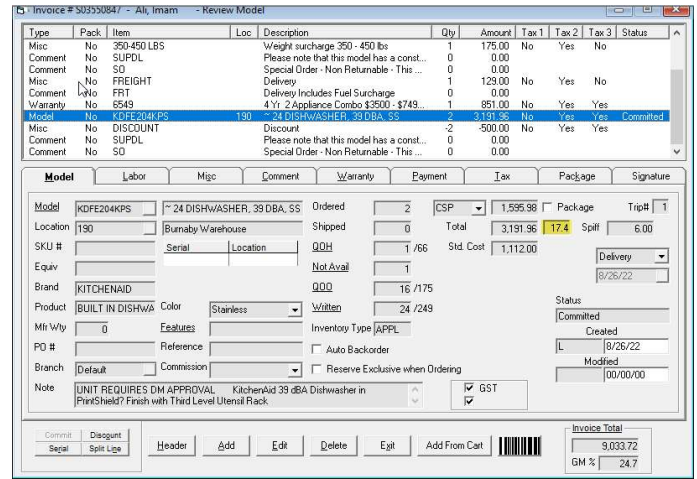
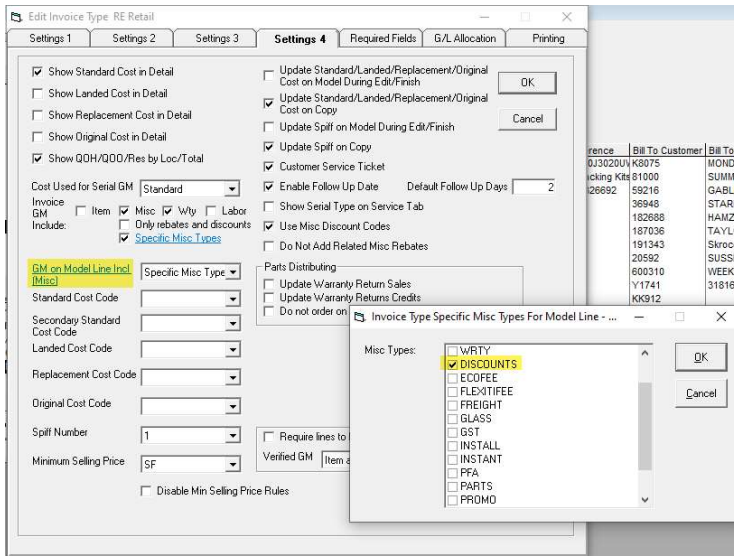
Use

Gross margin calculation takes into account the “Discounts”.

Model Sell Price Total (\$3,191.96) – Discounts (\$500) = Net Sell Price (\$2,691.96)

Standard Cost (\$2,224)

$((\text{Net Sell Price } (\$2,691.96) - \text{Standard Cost } (\$2,224)) / \text{Net Sell Price } (\$2,691.96)) * 100\% = \text{Gross Margin } (17.4\%)$



Security Overrides

Discount Below Min

Definition

These overrides allow the user to discount the sell price below minimum.

Setup

If the minimum sell price rules apply on the Invoice Type, then in order for the user to discount below minimum without USER ID and password, these override security settings need to be selected.

Review Invoice Type RE Retail

Settings 1 Settings 2 Settings 3 **Settings 4** Required Fields G/L Allocation Printing

Show Standard Cost in Detail
 Show Landed Cost in Detail
 Show Replacement Cost in Detail
 Show Original Cost in Detail
 Show QOH/QDO/Res by Loc/Total

Cost Used for Serial GM **Standard**

Invoice GM Item Misc Wty Labor
 Include: Only rebates and discounts
 [Specific Misc Types](#)

[GM on Model Line Incl \(Misc\)](#) **Specific Misc Type**

Standard Cost Code
 Secondary Standard Cost Code
 Landed Cost Code
 Replacement Cost Code
 Original Cost Code

Spiff Number **1**

Minimum Selling Price **SF**

Disable Min Selling Price Rules

Update Standard/Landed/Replacement/Original Cost on Model During Edit/Finish
 Update Standard/Landed/Replacement/Original Cost on Copy
 Update Spiff on Model During Edit/Finish
 Update Spiff on Copy
 Customer Service Ticket
 Enable Follow Up Date Default Follow Up Days **2**
 Show Serial Type on Service Tab
 Use Misc Discount Codes
 Do Not Add Related Misc Rebates

Parts Distributing
 Update Warranty Return Sales
 Update Warranty Returns Credits
 Do not order on PO-12

Require lines to be verified
 Verified GM **Item and Model lines only**

Security for User: Liza

Search for Security Options
 Keyword **discount**

Invoicing Serial Inventory Overrides	Security Option
	<input checked="" type="checkbox"/> INV: Discount Below Minimum (Invoice)
	<input checked="" type="checkbox"/> INV: Discount Below Minimum (Estimate)
	<input checked="" type="checkbox"/> INV: Discount Below Minimum (UMRP Brand)

OK
 Cancel
 Select All
 Deselect All
 Power User
 Add Security

Use

Add reason for discount code.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	DISCOUNT		Discount	-1	-1,399.00	No	Yes	Yes	

Invoice Discount

Discount Code: **DISCOUNT** Discount

Discount: **100.00**

Discount Below Minimum (Invoice)

Price of Model Code 'KRMF706EBS' entered is below minimum selling price, enter password to continue!

User Name
 Password
 Reason: **Family and Friends' discount**

Discount Running Total: **100.00** Will be applied to each model quantity.

Commit Discont
 Serial Split Line

Header Add Edit Delete Exit Add From Cart

Invoice total
4,700.62
 GM % **-3.0**

Expired Misc Discount

Definition

The user is able to use expired misc discounts.

Setup

To over ride the expired miscellaneous code without USER ID and password, ensure that the override security is selected.

Review Misc Charge DISCOUNT Discount

Code: DISCOUNT
Description: Discount

List: 0.00 % Of Model Selling Price
Cost: 0.00 Do Not Allow Price Reduction
 Do Not Allow Price Change
 Cost is a % of Misc Selling Price

G/L Revenue: 4050 Add Profit Center
G/L Cost Debit: Add Profit Center
G/L Cost Credit: Add Profit Center

Qualification:

Start Date - Sale: 7/17/22 End Date: 7/17/22
Start Date - Quote: 7/17/22 End Date: 7/17/22

Warranty: From Invoice Type Misc Type: DISCOUNTS
EDI Format: Points: 0

Link:

Prompt:

Time (in minutes): 0.00

Taxes: Use Branch Taxes
 Tax 1
 Tax 2
 Tax 3

Update History
 Show in ePASS Mobile Tech
 Obsolete
 Require Note on Invoice
 Do Not Allow Finish
 Do Not Show in Invoice Detail
 Do Not Allow Description Change
 Rebate
 Model Discount
 Applies to Each Model Qty
 Applies to Original Model Selling Price
 Satisfies Min Deposit Line Requirement
 Show Credit Reason
 Require Credit Reason
 Do Not Attach Related Misc when it is a Pickup

Gift Card Type:

Created: 00/00/00
Modified: L 8/24/22

You must also enable Invoice Type - Use Misc Discount Codes to use a Model Discount.

Security for User: Liza

Search for Security Options:
Keyword: misc d

Overrides	Security Option
<input checked="" type="checkbox"/>	INV: Override Misc Date Range

Buttons: OK, Cancel, Select All, Deselect All, Power User, Add Security

Use

Enter the reason and click OK.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	DISCOUNT		Discount	-1	-1,399.00	No	Yes	Yes	

Invoice Discount

Discount Code: Discount

Discount:

Override Misc Date Range

Misc Code can only be sold between 7/17/22 and 7/17/22 , enter password to continue!

User Name:

Password:

Reason:

Discount Running Total: 100.00 Will be applied to each model quantity.

Commit Discount
Serial Split Line

Header Add Edit Delete Exit Add From Cart

Invoice total: 4,700.62
GM %: -3.0

Discount Function on Invoice Detail

Click the "Discount" button and type the discount to be applied.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed

Model

Model: KRMF706EBS
 Location: 190
 SKU #:
 Equiv:
 Brand: KITCHENAI
 Product: FRENCH DO
 Mfr Wty: 12
 PO #:
 Branch: Default
 Note: UNIT REQU
 EXTERIOR WATER AND ICE, LED LIGHTING, TITANED #4000 STABLE

Invoice Discount

Discount Code: discou

Code	Description
90 DAY WARRANTY	90 Day Warranty
DBOOK5	Lead Generation - Min \$100
DISCOUNT	Discount
FLOORMODEL	Floor Model Discount
PRODUCTDISCOUNT	Product Discount
PROMOCORRECTION	Promo Correction Discount
REBABBY10	10% Off 11/25-12/22

Discount Running Total: 0.00

Buttons: **1** Discount, Split Line, Header, Add, Edit, Delete, Exit, Add From Cart, Barcode

Invoice Total: 6,267.50
GM %: 22.8

Select %, enter the value, apply it to the model and click OK.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed

Invoice Discount

Discount Code: Discount

Discount: % \$

Selected	Model	Qty	Price	Discount	Disc Price	Override Required
<input checked="" type="checkbox"/>	KRMF706EBS	1	5595.98	1399	4196.98	REQUIRED

Discount Running Total: 1,399.00 *Will be applied to each model quantity.*

Commit	Discont	Header	Add	Edit	Delete	Exit	Add From Cart	Barcode	Invoice Total
Serial	Split Line								6,267.50
									GM % 22.8

Add the reason for using the expired miscellaneous code.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed

Invoice Discount

Discount Code: Discount

Discount: % \$

Override Misc Date Range

Misc Code can only be sold between 7/17/22 and 7/17/22 . enter password to continue!

User Name

Password

Reason

Discount Running Total: 1,399.00 *Will be applied to each model quantity.*

Model: KRMF706EB, Location: 190, Brand: KITCHENAI, Product: FRENCH DO, Mfr Wty: 12, PO #: , Branch: Default, Note: UNIT REQU, EXTERIOR

Commit Discont, Serial Split Line, Header Add Edit Delete Exit Add From Cart, Invoice Total: 6,267.50, GM %: 22.8

Add the reason for discounting below minimum sell price.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed

Model

Model: KRMF706EBS
 Location: 190
 SKU #:
 Equip:
 Brand: KITCHENAI
 Product: FRENCH DO
 Mfr Wty: 12
 PO #:
 Branch: Default
 Note: UNIT REQU
 EXTERIOR

Invoice Discount

Discount Code: DISCOUNT Discount

Discount: % \$ 25.0000

OK Cancel

Discount Below Minimum (Invoice)

Price of Model Code 'KRMF706EBS' entered is below minimum selling price, enter password to continue!

User Name:

Password:

Reason: Family and Friends' Discount

OK Cancel

Discount Running Total: 1,399.00 Will be applied to each model quantity.

Commit Discont
Serial Split Line

Header Add Edit Delete Exit Add From Cart

Invoice Total: 6,267.50
GM %: 22.8

The model has now been discounted.

Invoice # S03550848 - ANDERSON, LIZA - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax 1	Tax 2	Tax 3	Status
Model	No	KRMF706EBS	190	~36 FRENCH DOOR, BL SS	1	5,595.98	No	Yes	Yes	Committed
Misc	No	DISCOUNT		Discount	-1	-1,399.00	No	Yes	Yes	

Model | Labor | Misc | Comment | Warranty | Payment | Tax | Package | Signature

Model: ~36 FRENCH DOOR, BL SS Ordered Qty: Amount: Package Trip#:

Location: Burnaby Warehouse Shipped Qty: Total: -3.0 Spiff:

SKU #: Serial: Location: QOH: / 1 Std. Cost: Delivery:

Equip: Not Avail Qty:

Brand: QOO: / 3


Product: Color: Written: / 9 Status:

Mfr Wty: Features: Inventory Type: Created:

PO #: Reference: Auto Backorder Modified:

Branch: Commission: Reserve Exclusive when Ordering

Note: UNIT REQUIRES DM APPROVAL 25.8 CU FT., 5 DOOR, PRESERVA®, EXTERIOR WATER AND ICE, LED LIGHTING, 1 FIXED/ 4 ADJUSTABLE BCP GST

Commit | Discont | Serial | Split Line | Header | Add | Edit | Delete | Exit | Add From Cart |  Invoice Total: GM %:

Reporting

The user is able to create a report on profit margin analysis with this information. Follow the link to the report :
[Model Profit Analysis](#)