

Automatic Discount

Automatic Discount works differently in Webatar than in the main system.

Setup automatic discount on customer setup

Debtors Module> Configuration> Debtor Setup> Account Details Tab

The tick indicates that this discount needs to be applied. If a tick is off, a discount is not applied to documents or line items

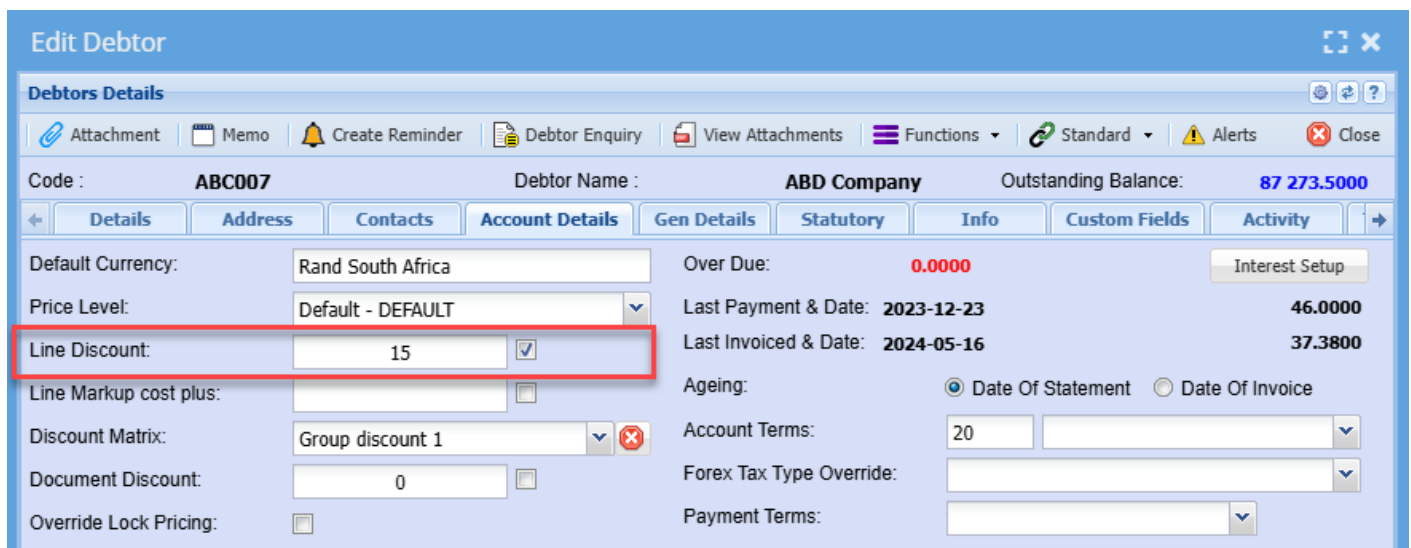
There are three types of Discounts namely:

1. Line Discount
2. Discount Matrix
3. Document Discount

Line Discount

Line discount allows a user to put a discount on all items that have been marked to allow line discount.

If an item is not marked to allow line discount it will not add the discount to the line.



The screenshot shows the 'Edit Debtor' window for 'ABC007' (ABD Company). The 'Account Details' tab is active. The 'Line Discount' field is set to '15' and has a checked checkbox. Other fields include 'Default Currency' (Rand South Africa), 'Price Level' (Default - DEFAULT), 'Over Due' (0.0000), 'Last Payment & Date' (2023-12-23), 'Last Invoiced & Date' (2024-05-16), 'Discount Matrix' (Group discount 1), 'Document Discount' (0), and 'Override Lock Pricing' (unchecked).

If you don't wish for a specific item to be included in the line discount you need to add a tick to No discount

Go to **Inventory module> Configuration> Inventory Setup> Pricing levels**

Them put a tick on the No Discount Tickbox

Edit Inventory Item

Inventory Detail

AttachmentMemoInfoSuppliersWarehousesAlertsInventory OverviewFunctionsClose

Inventory Code: 04-04/15S290Description: Driver bit No2 x 90mm Square

General DetailsMore DetailsPricing LevelsPropertiesComment / ReplaceBill of MaterialCustom Field

AddEditDeleteCostsClone

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#	Status	PS Code	Pricing Level	Cost Price	Sell Price %	Sell Price	Price I	Sell Method
1		DEFAULT	Default	110.0000	0	110	12...	Percentage

Sales Tax Type: 01 Invoice VATPricing Level: Default

Supplier Tax Type: 04 GRV VATLock Pricing: Item Created: 2021-02-15

No Discount:

Pricing Override:Overriding Level:On Promotion:Valid From:Valid To:

Save & NewSave & CloseSaveCloseRecalculate Item

Discount Matrix

Edit Debtor

Debtors Details

AttachmentMemoCreate ReminderDebtor EnquiryView AttachmentsFunctionsStandardAlertsClose

Code : ABC007Debtor Name : ABD CompanyOutstanding Balance: 87 273.5000

DetailsAddressContactsAccount DetailsGen DetailsStatutoryInfoCustom FieldsActivity

Default Currency: Rand South AfricaOver Due: 0.0000Interest Setup

Price Level: Default - DEFAULTLast Payment & Date: 2023-12-2346.0000

Line Discount: 15Last Invoiced & Date: 2024-05-1637.3800

Line Markup cost plus:Ageing: Date Of StatementDate Of Invoice

Discount Matrix: Group discount 1Account Terms: 20Forex Tax Type Override:Payment Terms:

Document Discount: 0Override Lock Pricing:

Document Discount

Document Discount will give a dis

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Supplier Tax Type: 04 GRV VATLock Pricing: Item Created: 2021-02-15

No Discount: ☒

Pricing Override:On Promotion:Valid From:Valid To:

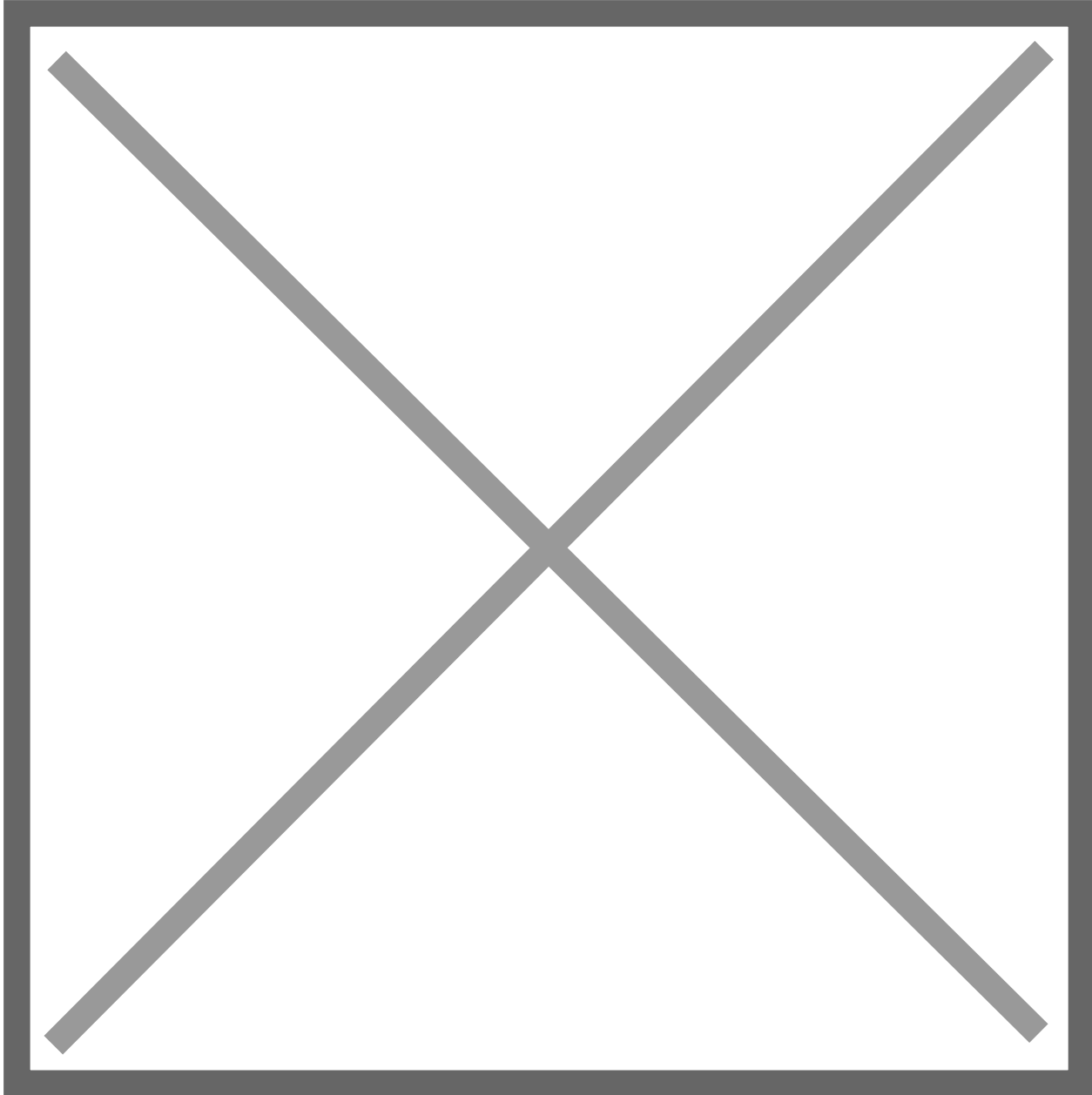
Save & NewSave & CloseSaveCloseRecalculate Item

NOTE:

That when adding new items to the document in Webaccounting after a sync from Webatar.

There will be no discount applied to the new lines added.

This is because when you first open up the document in Webaccounting, discount is applied to the whole document.



Revision #8

Created 19 July 2023 13:36:08 by Paige

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