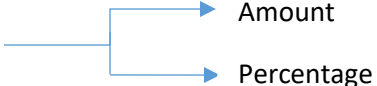
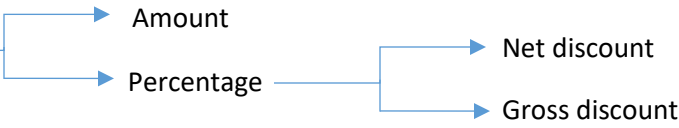
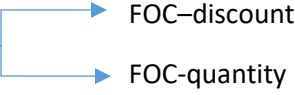


DISCOUNTS

CONTENT

➤ OBJECTIVES

➤ TYPES OF DISCOUNT OPTIONS

- Transaction time discount
 - 1. Discount before tax 
 - Amount
 - Percentage
 - 2. Discount after tax 
 - Amount
 - Percentage
 - Net discount
 - Gross discount
 - 3. FOC 
 - FOC-discount
 - FOC-quantity
 - Pre-defined discount
 - 1 Pricelist-wise discount
 - 2 Account-wise discount
 - 3 BUY nX GET mY
- Comparison between discount before tax and discount after tax

OBJECTIVES

Discount is a type of sales promotion. It often used to motivate consumers to try new products and services. The main objective of discounts is to bring an increase in the demand pattern of products and services. It provides important marketing information to the potential buyers. The specific objectives of discounts are:-

- ❖ To introduce new products or services
- ❖ To attract new customers
- ❖ To give rise in existing customers to buy more
- ❖ To increase sales and business in off-seasons

TYPES OF DISCOUNT OPTIONS

- Transaction time discount
- Pre-defined discount

Transaction time discount

Discount decides and provide during the transaction time. They are:-

- Discount before tax
- Discount after tax
- FOC-Discount
- FOC-Quantity

Pre-defined discount

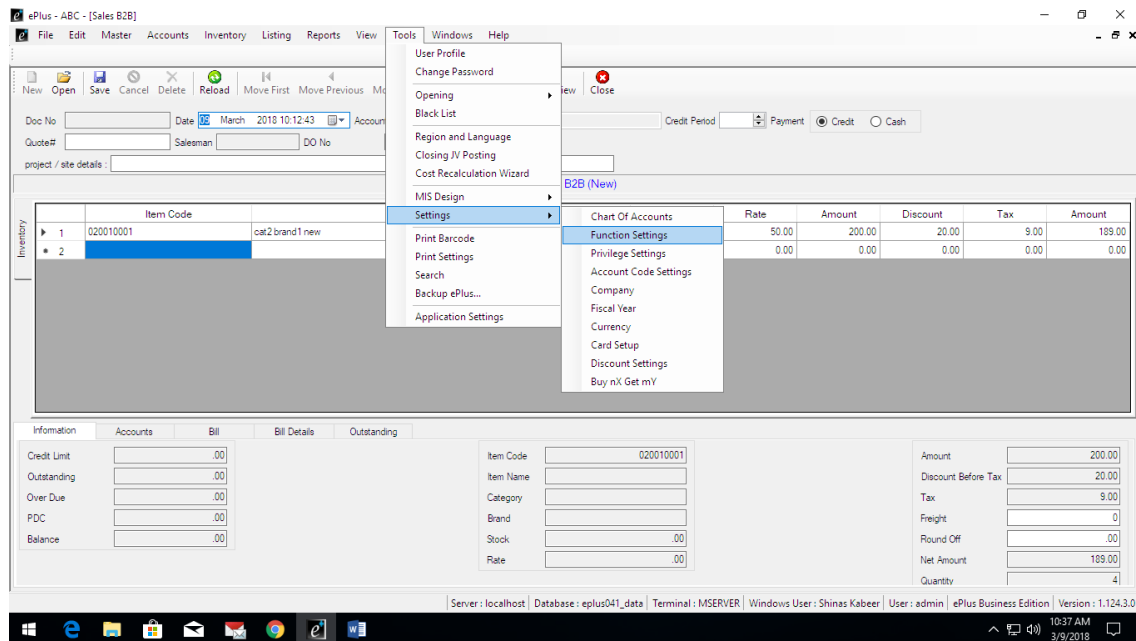
- Pre-defined discount
- Account-wise discount
- Buy nX Get mY

Discount before tax

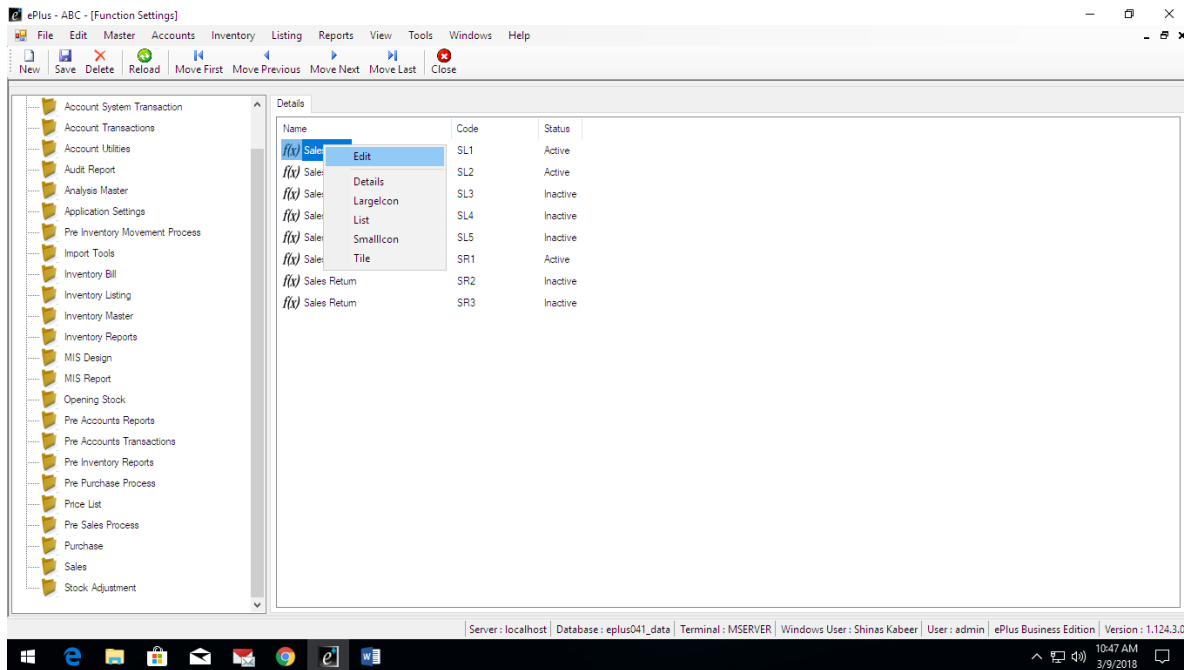
- Discount are subtracted from the amount before including tax. .
- Tax are calculated from amount that discount subtracted from it.
- We can set discount before tax in two ways:-
 - Amount
 - percentage

Amount

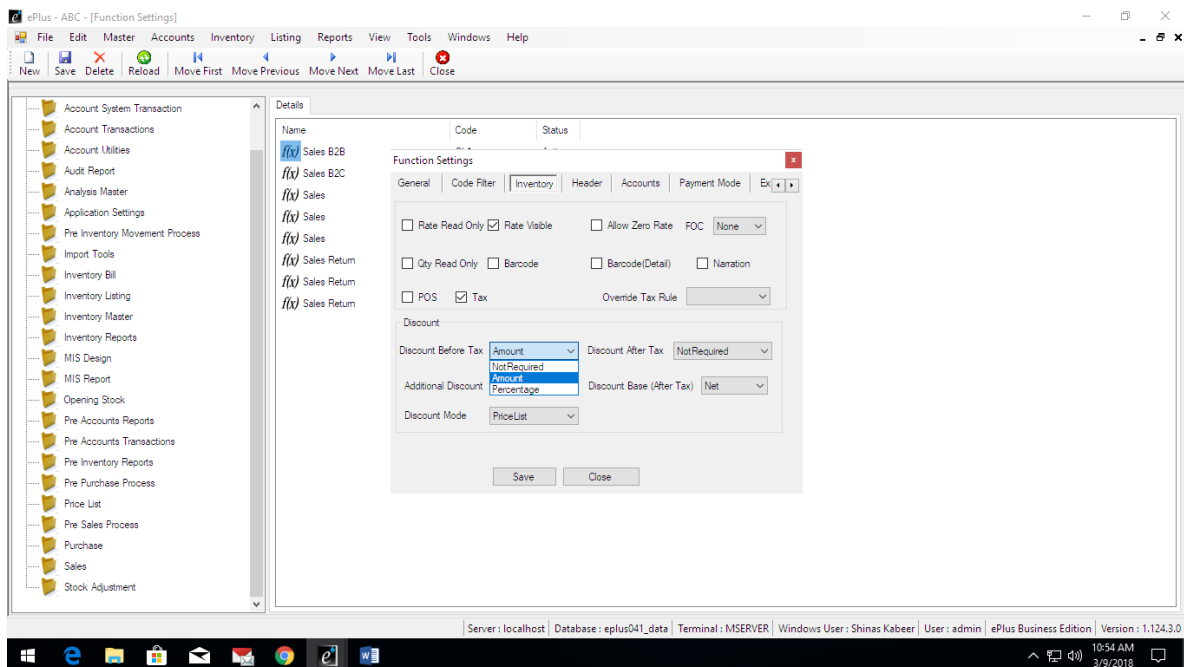
- To set discount before tax :-
1. Select tools -> settings -> function settings



2. Select Sales on left -> select sales on right -> right click -> edit



- 3 Select inventory from the obtained box-> **discount before tax**:- Change the drop down list to 'amount'(change other fields to not required) and save.



- 4 Select inventory from the tool bar-> sales B2B

ePlus - ABC - [Sales B2B]

File Edit Master Accounts Inventory Listing Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Doc No: [] Date: 09 March 2018 10:56:11 Account: 120201T00001 test Credit Period: [] Payment: ☒ Credit ☐ Cash

Quote#: [] Salesman: Sales Executive DO No: []

project / site details: []

Sales B2B (New)

Item Code	Item Name	Qty	Rate	Amount	Discount	Tax	Amount
1 020010001	cat2 brand1 new	2	25.00	50.00	5.00	2.26	47.26
2		0	0.00	0.00	0.00	0.00	0.00

Information Accounts Bill Bill Details Outstanding

Credit Limit: .00
 Outstanding: 74.00
 Over Due: 74.00
 PDC: .00
 Balance: 74.00

Item Code: 020010001
 Item Name: cat2 brand1 new
 Category: cat2
 Brand: brand1
 Stock: .00
 Rate: .00

Amount: 50.00
 Discount Before Tax: 5.00
 Tax: 2.26
 Freight: 0
 Round Off: -.26
 Net Amount: 47.00
 Quantity: 2

Server: localhost Database: eplus041_data Terminal: MSERVER Windows User: Shinas Kabeer User: admin ePlus Business Edition Version: 1.124.3.0

10:58 AM 3/9/2018

Qty	Rate	Amount	Discount	Tax	Grand Amount
2	25	50	5	2.26	47.26

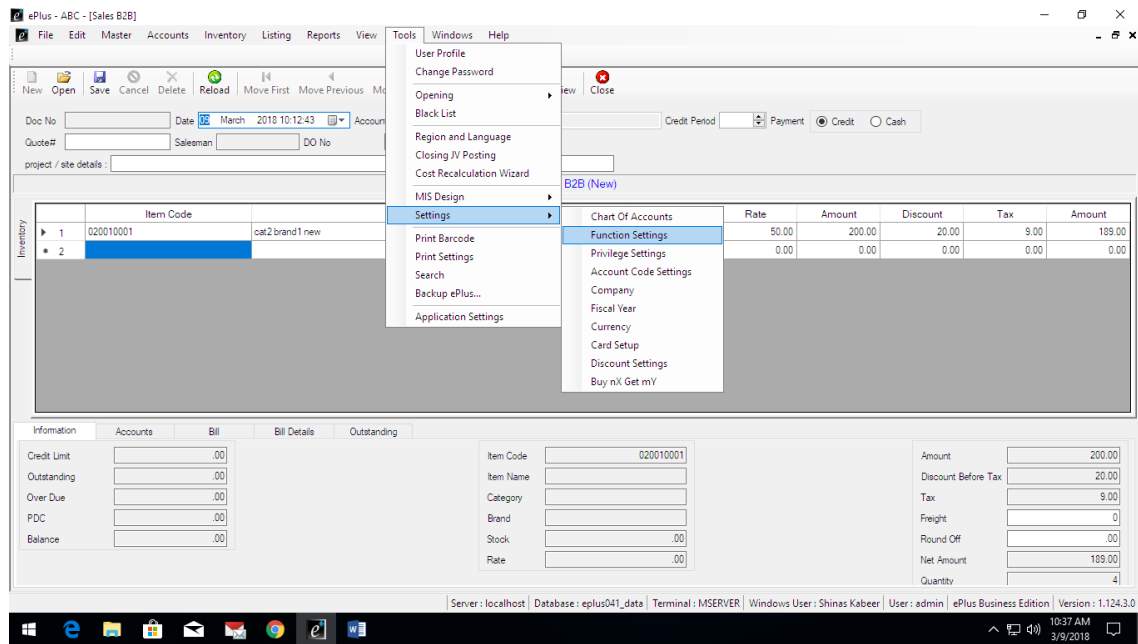
We can see discount field before the tax (discount gives for each items)

Discount subtracts from the total amount of the items, add tax to it and provide the grand total

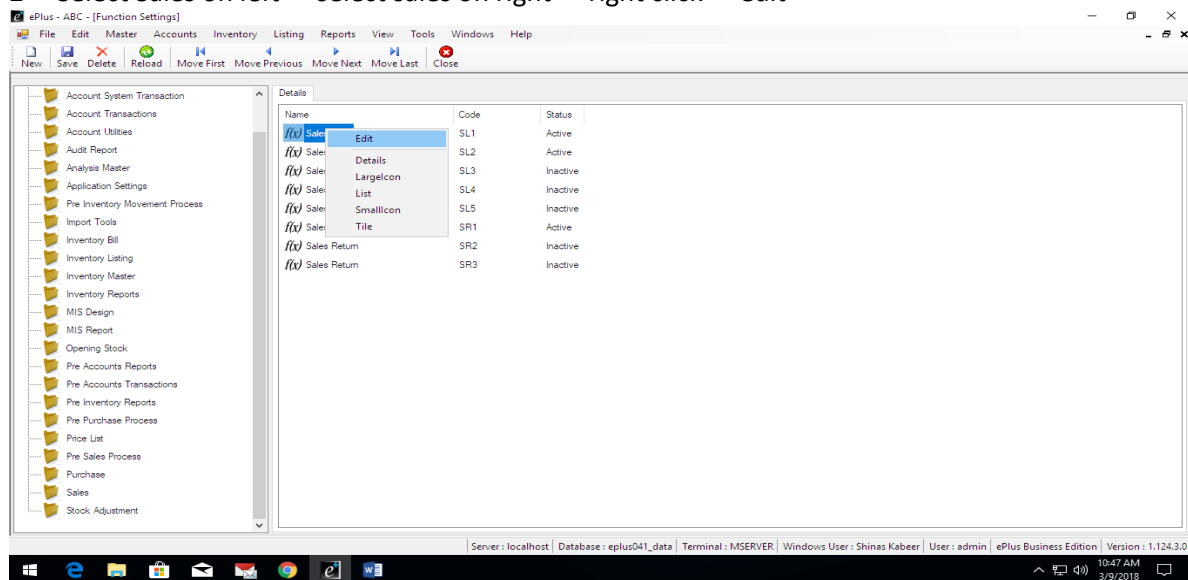
Percentage

- To set discount before tax :-

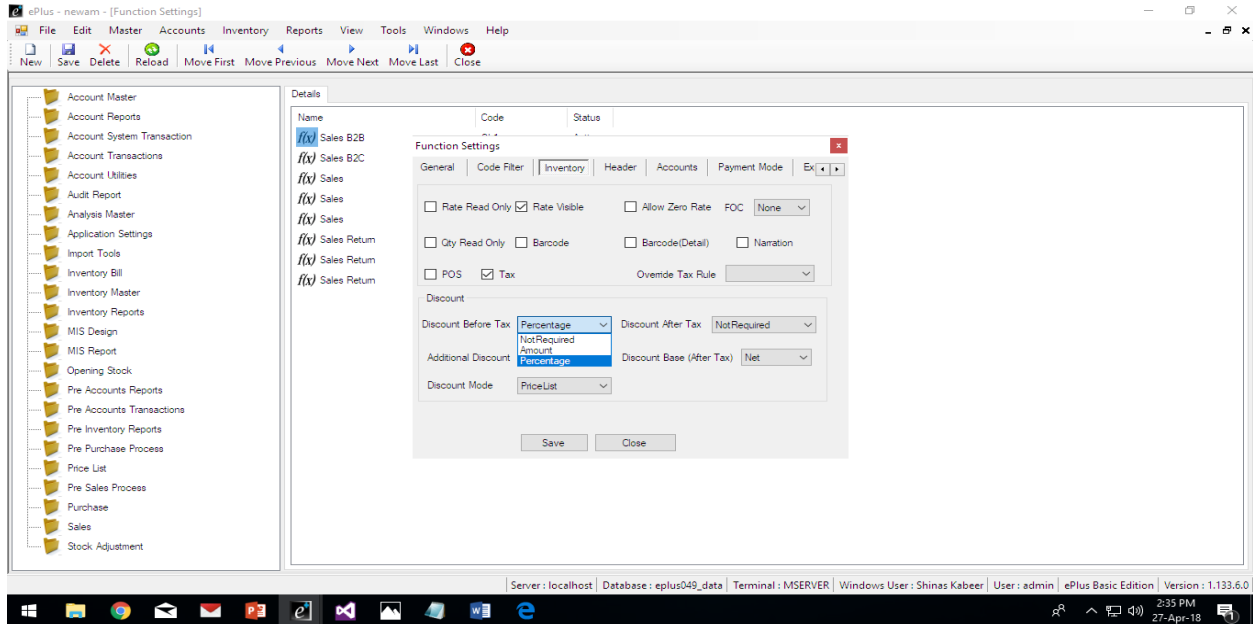
1. Select tools -> settings -> function settings



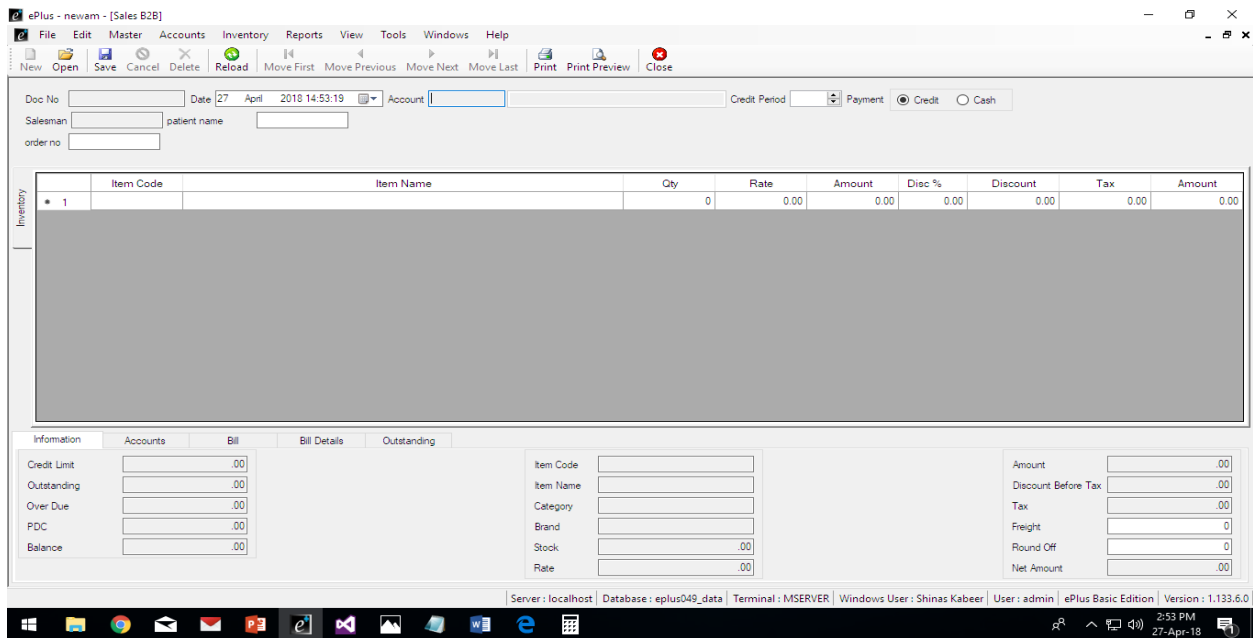
2 Select Sales on left -> select sales on right -> right click -> edit



3 Select inventory from the obtained box-> **discount before tax**:- Change the drop down list to 'percentage'(change other fields to not required) and save.



4 Select inventory from the tool bar-> sales B2B



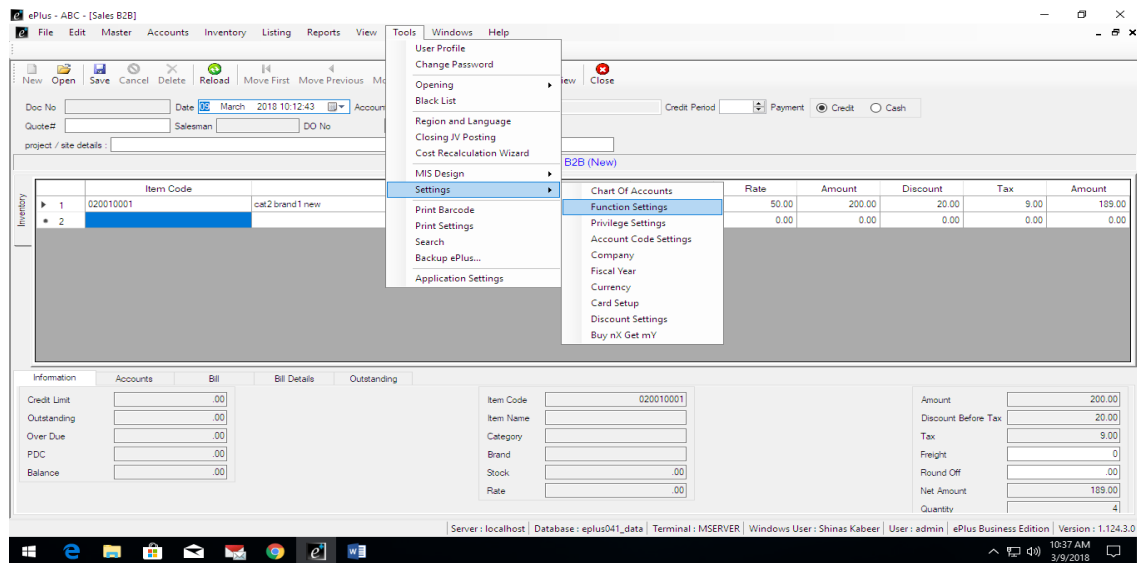
Qty	Rate	Amount	Disc %	Discount	Tax	Grand Amount
2	25	50	20	5	2.26	47.26

Discount after tax

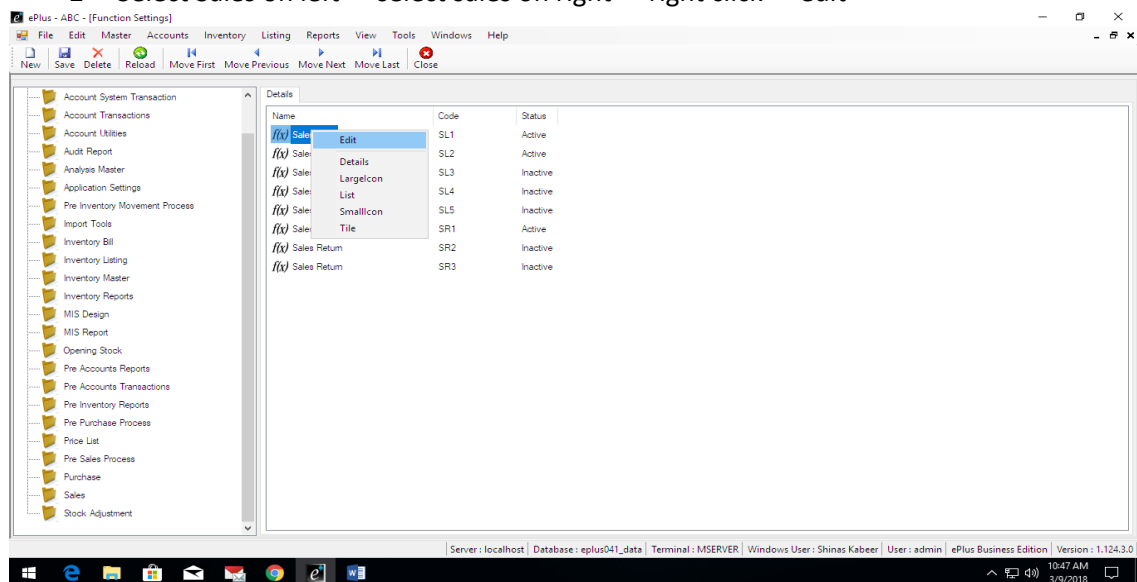
- Discount are subtracting from amount after adding the Tax
- We can set discount after tax in two ways:-
 - Amount
 - Percentage

Amount

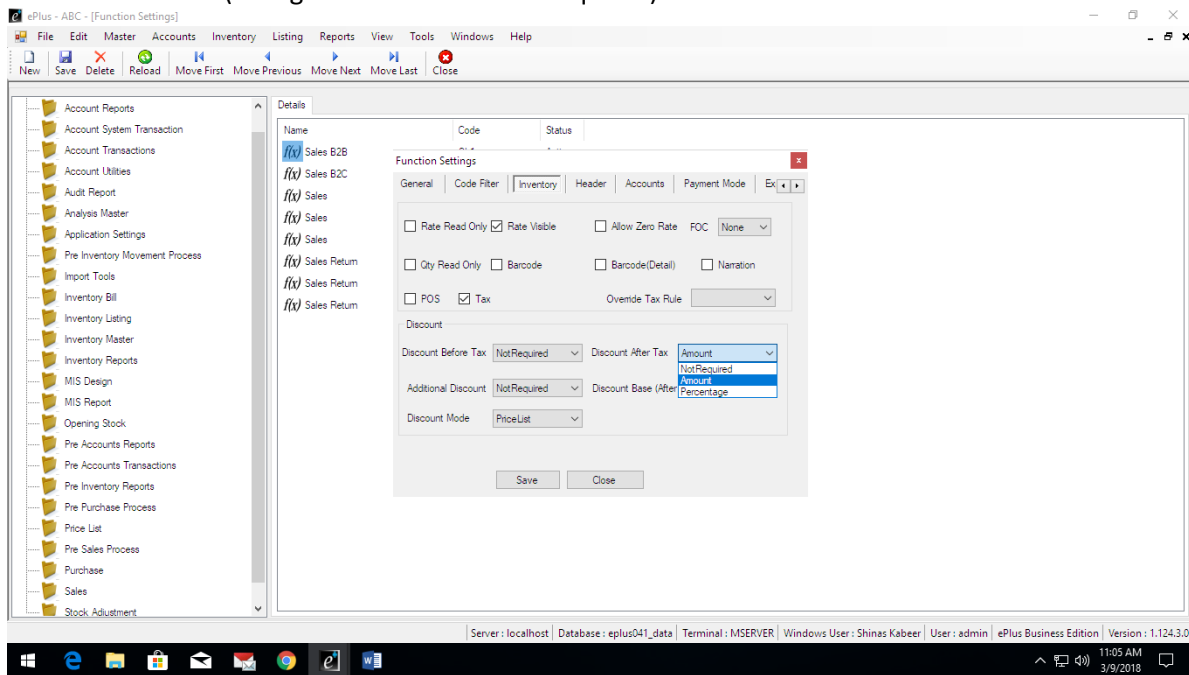
- To set discount after tax:-
 - 1 Select tools -> settings -> function settings



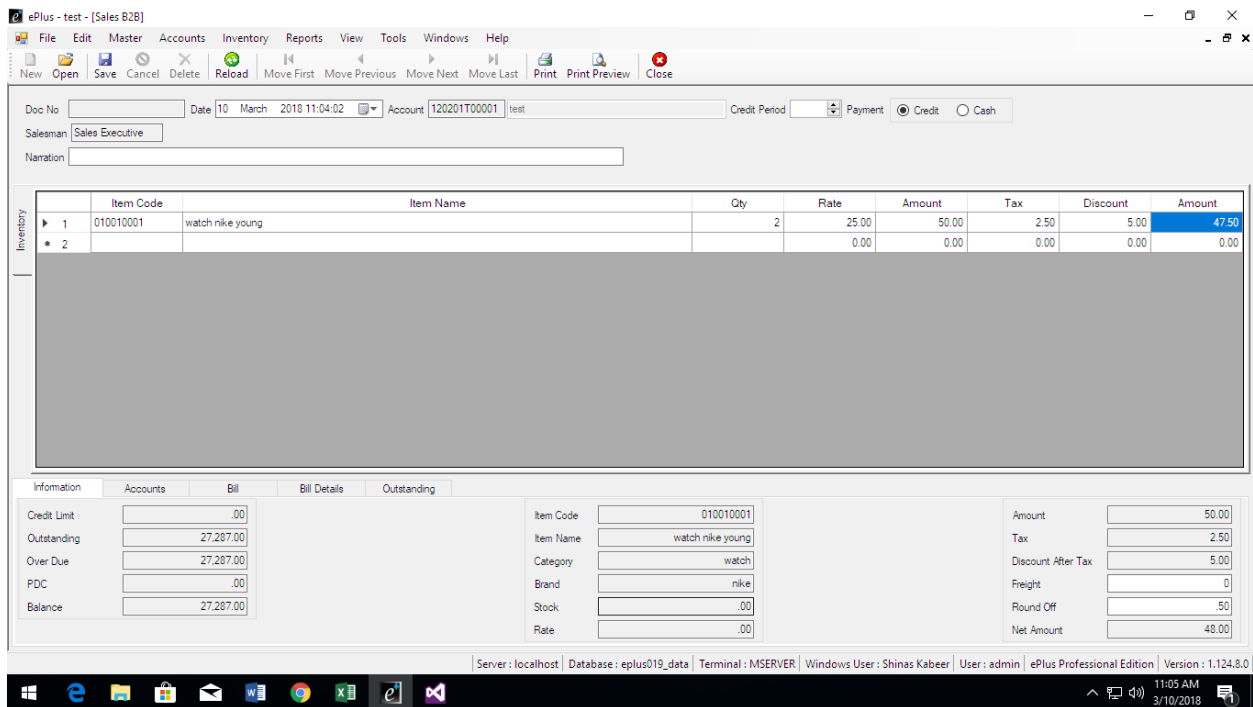
- 2 Select Sales on left -> select sales on right -> right click -> edit



- 3 Select inventory from the obtained box-> **discount after tax**:-change the drop down list to 'amount'(change other fields to not required) and save.



- 4 Select inventory from the tool bar-> sales B2B



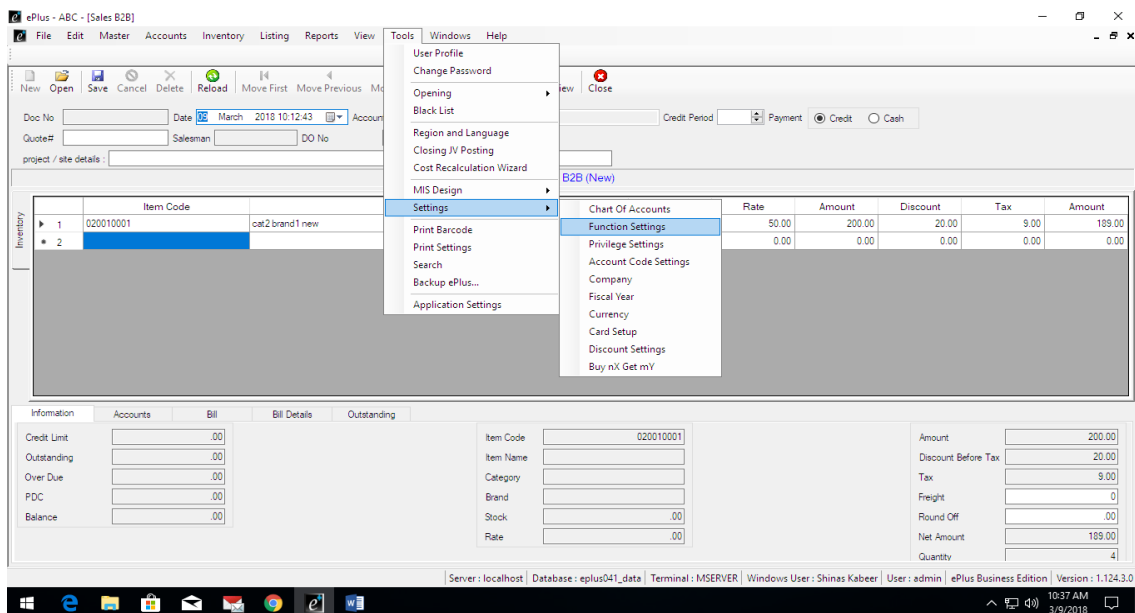
Now we can see discount field after the tax.

Qty	Rate	Amount	tax	discount	Grand Amount
2	25	50	2.50	5	47.50

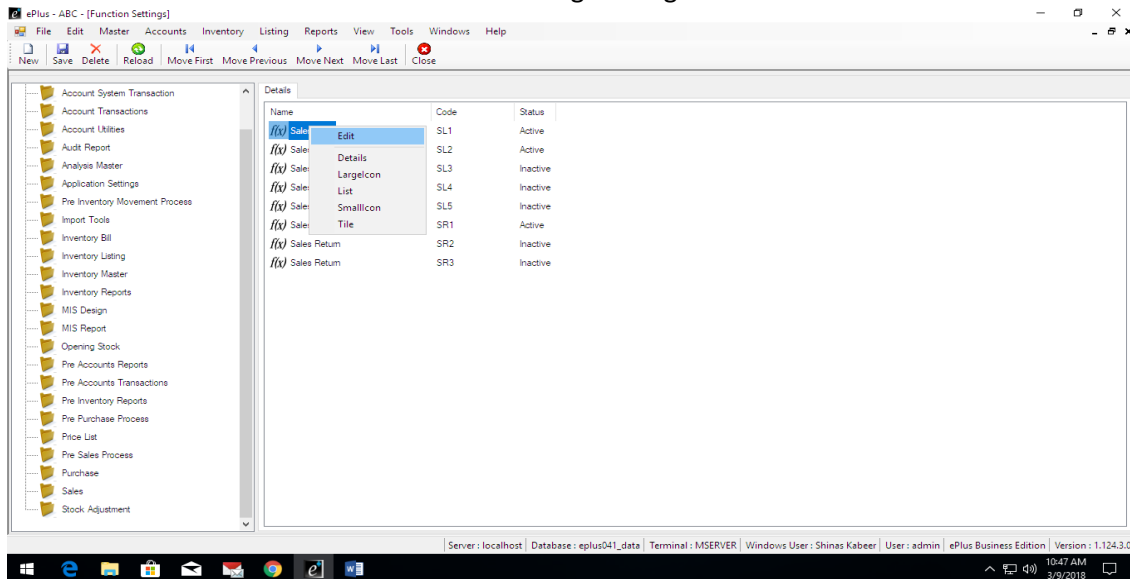
Add tax to the total amount of the items, then subtract the discount and provides total amount.

Percentage

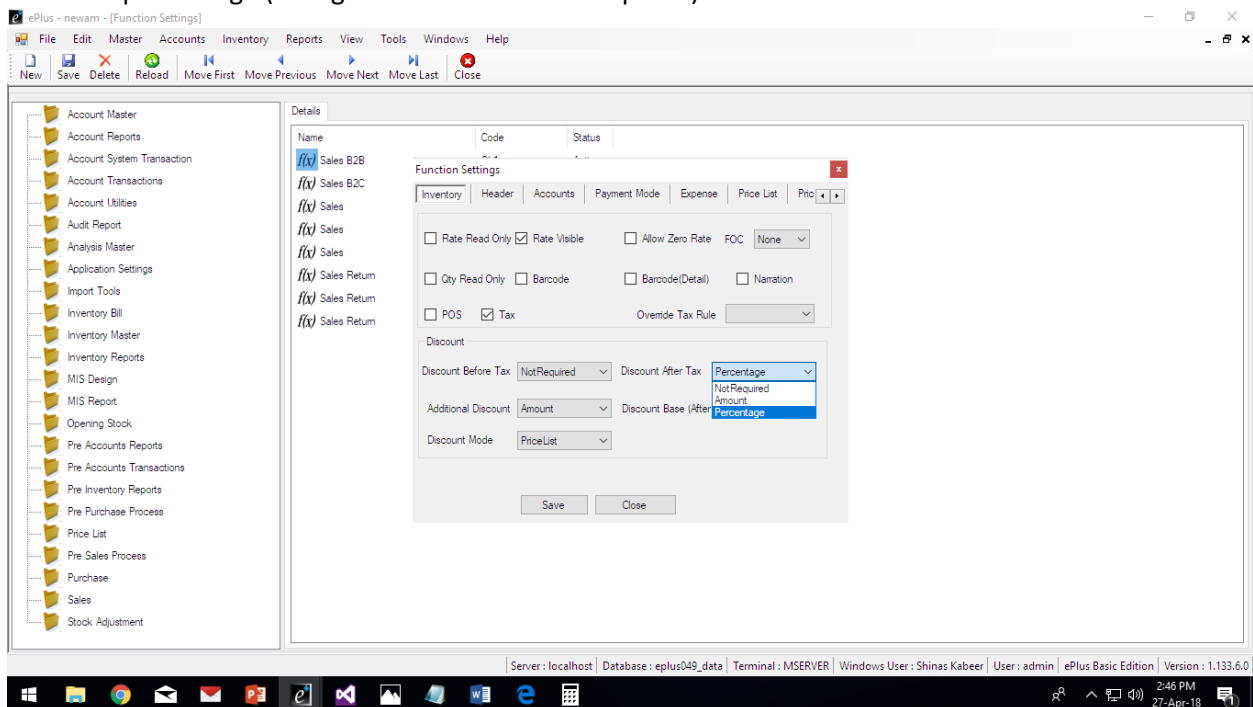
- To set discount after tax:-
- 1 Select tools -> settings -> function settings



2 Select Sales on left -> select sales on right -> right click -> edit



3 Select inventory from the obtained box-> discount after tax:-change the drop down list to 'percentage'(change other fields to not required) and save.



4 Select inventory from the tool bar-> sales B2B

ePlus - newam : [Sales B2B]

File Edit Master Accounts Inventory Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Doc No: [] Date: 27 April 2018 14:56:24 Account: [] Credit Period: [] Payment: ☒ Credit ☐ Cash

Salesman: [] patient name: [] order no: []

Item Code	Item Name	Qty	Rate	Amount	Tax	Disc %	Discount	Amount
* 1		0	0.00	0.00	0.00	0.00	0.00	0.00

Information Accounts Bill Bill Details Outstanding

Credit Limit: [] Outstanding: [] Over Due: [] PDC: [] Balance: []

Item Code: [] Item Name: [] Category: [] Brand: [] Stock: [] Rate: []

Amount: [] Tax: [] Discount After Tax: [] Freight: [] Round Off: [] Net Amount: []

Server: localhost Database: eplus049_data Terminal: MSERVER Windows User: Shinas Kabeer User: admin ePlus Basic Edition Version: 1.133.6.0

2:56 PM 27-Apr-18

Qty	Rate	Amount	Tax	Disc %	Discount	Grand Amount
2	25	50	2.5	20	5	47.26

Another two types in percentage of discount after tax. They are:-

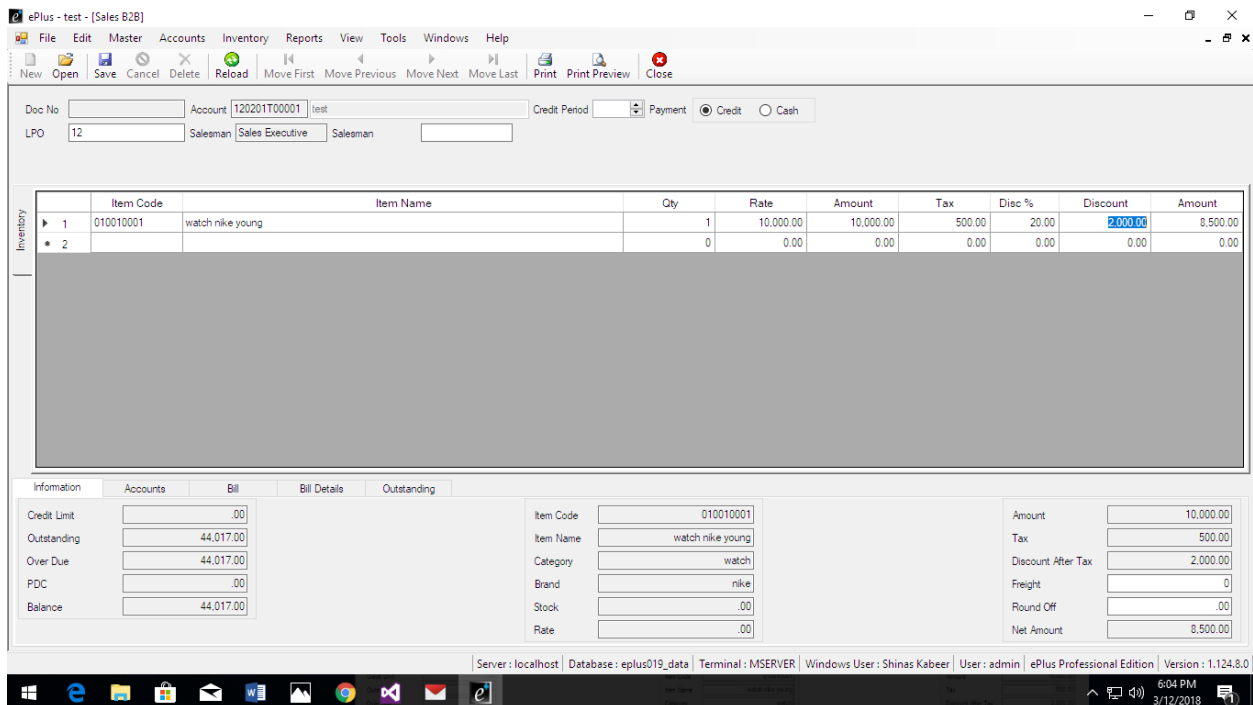
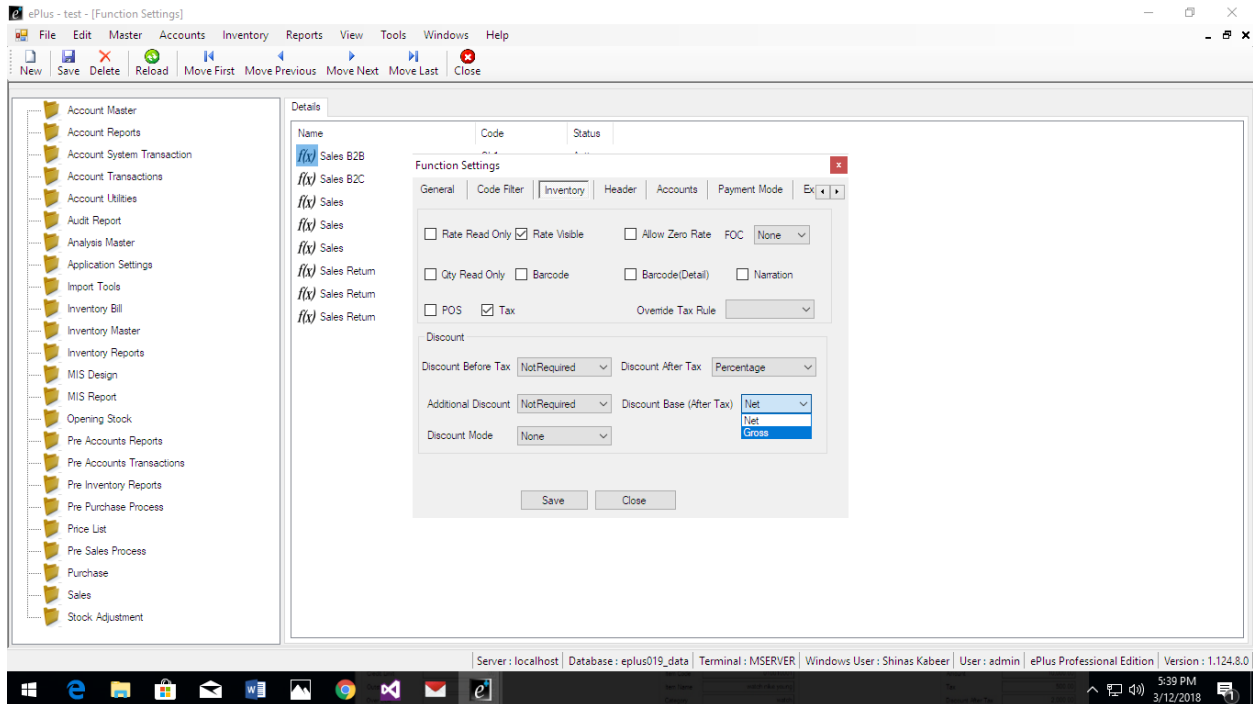
- Net discount
- Gross discount

Net discount

1. Tools-> settings-> functional setting-> sales-> salesB2B->right click-> edit->select inventory->
Discount base:- select 'net' from the drop down list
Discount after tax:-select 'percentage' from the drop down list

Gross discount

- Tools-> settings-> functional setting-> sales-> salesB2B->right click-> edit->select inventory->
Discount base:- select 'Gross' from the drop down list
Discount after tax:-select 'percentage' from the drop down list



Qty	Rate	Amount	Tax	Disc%	Discount	Amount
1	10000	10000	500	20	2000	8500

Here,

Discount is calculated from item's total amount without tax (amount).

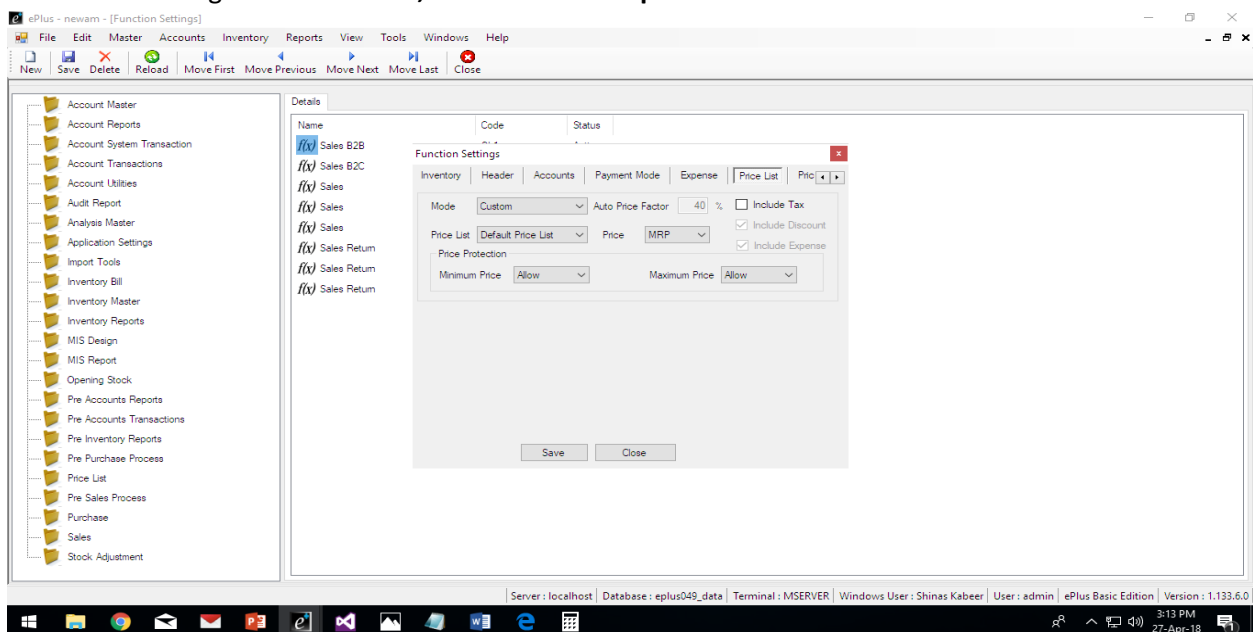
Comparison between discount before tax and discount after tax

DISCOUNT BEFORE TAX:-	DISCOUNT AFTER TAX
After calculating the total amount of the items, subtract discount from the total and we add the tax, then provide the grand total	After calculating the total amount of the items, we add tax to the total and subtract the discount ,then provides the grand total

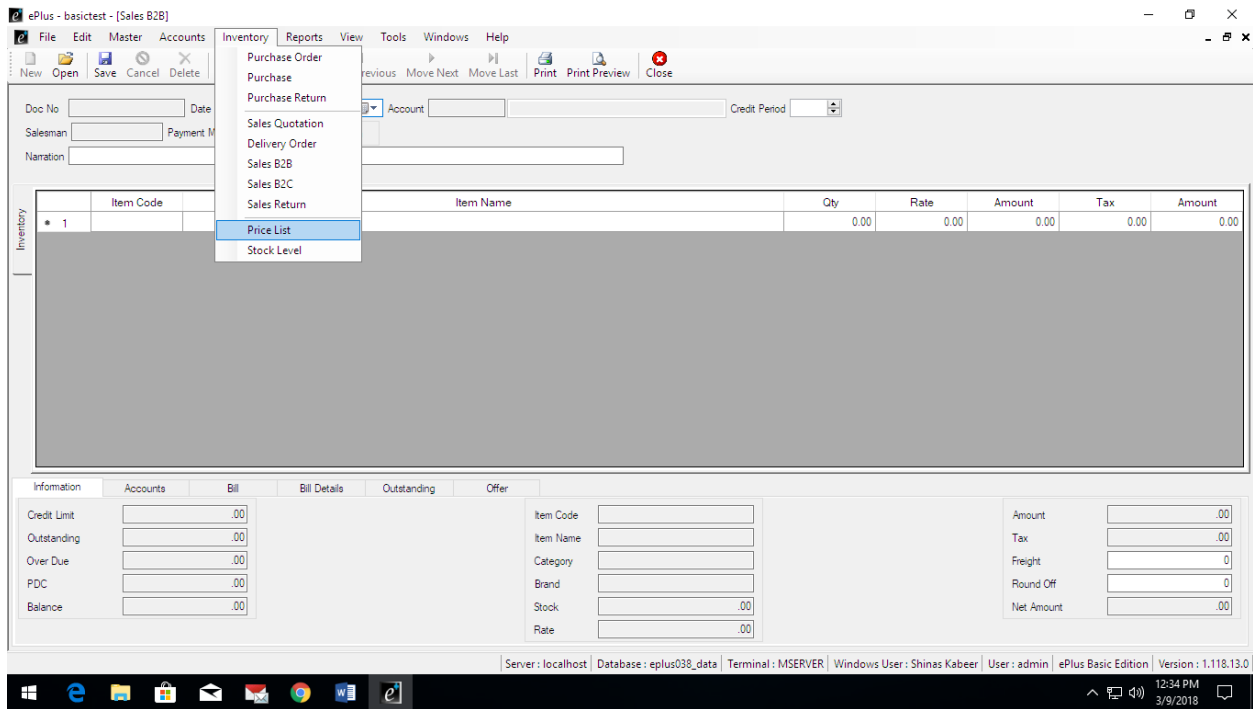
Pricelist-wise discount

- It helps to set the discount early to each items, no need to type manually at every time.

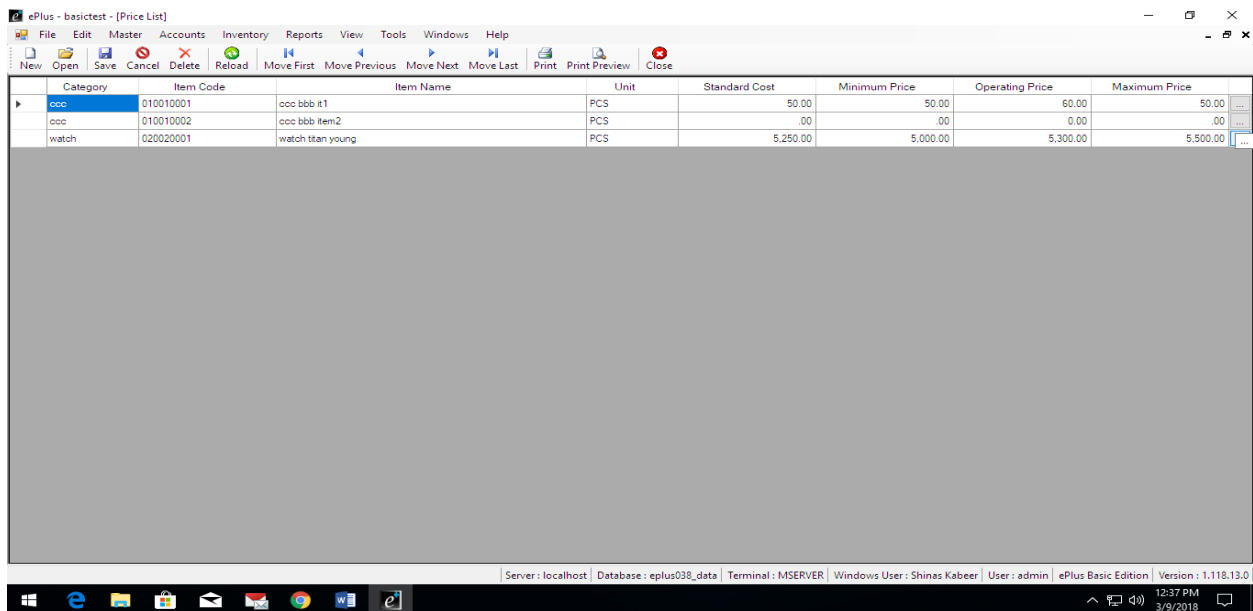
- 1 Select tools-> Settings-> function settings->sales-> select sales(active)->select price list-> change **mode: custom, Pricelist: Default pricelist**



2 Select inventory from the tool bar-> price list



3 We can see the item names, now select more (...)



4 We can set both discount and save it.

ePlus - basictest - [Price List]

File Edit Master Accounts Inventory Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Category	Item Code	Item Name	Unit	Standard Cost	Minimum Price	Operating Price	Maximum Price
ccc	010010001	ccc bbb #1	PCS	50.00	50.00	60.00	50.00
ccc	010010002	ccc bbb item2	PCS	.00	.00	0.00	.00
watch	020020001	watch titan young	PCS	5,250.00	5,000.00	5,300.00	5,500.00

Price List

General

Item Code: 020020001 Item Name: watch titan young

Lowest: 0 Average: 0 Highest: 0

LPP: 0

Min. Price: 5,000.00 Net: 5,250.00

Price: 5,300.00 Net: 5,565.00

Max. Price: 5,500.00 Net: 5,775.00

Discount % Before Tax: 10.00 Discount % After Tax: 20.00

Save Close

Server: localhost Database: eplus038_data Terminal: MSERVER Windows User: Shinas Kabear User: admin ePlus Basic Edition Version: 1.118.13.0

12:38 PM 3/9/2018

5 Now in sales the discounts will enter automatically

ePlus - newam - [Sales B2B]

File Edit Master Accounts Inventory Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Doc No: Date: 27 April 2018 15:12:12 Account: 120201S00002 shinas Credit Period: Payment: ☒ Credit ☐ Cash

Salesman: Sales Executive patient name: order no:

Item Code	Item Name	Qty	Rate	Amount	Tax	Disc %	Discount	Amount
1 010010001	item1 ystffhfg	1	0.00	.00	.00	20.00	.00	.00
2		0	0.00	0.00	0.00	0.00	0.00	0.00

Information Accounts Bill Bill Details Outstanding

Credit Limit: .00

Outstanding: 25,253.00

Over Due: 25,253.00

PDC: .00

Balance: 25,253.00

Item Code: 010010001

Item Name: item1 ystffhfg

Category: bbb

Brand: ccc

Stock: -2.00

Rate: .00

Amount: .00

Tax: .00

Discount After Tax: .00

Freight: 0

Round Off: .00

Net Amount: .00

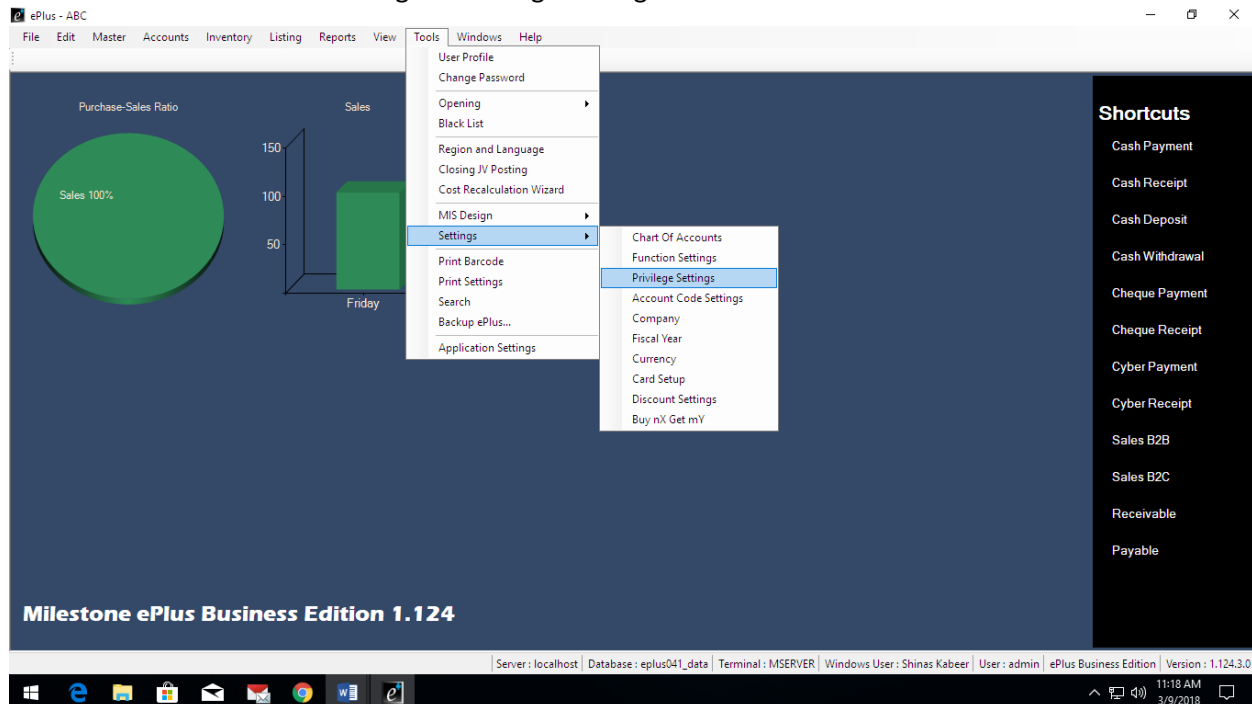
Server: localhost Database: eplus049_data Terminal: MSERVER Windows User: Shinas Kabear User: admin ePlus Basic Edition Version: 1.133.6.0

3:12 PM 27-Apr-18

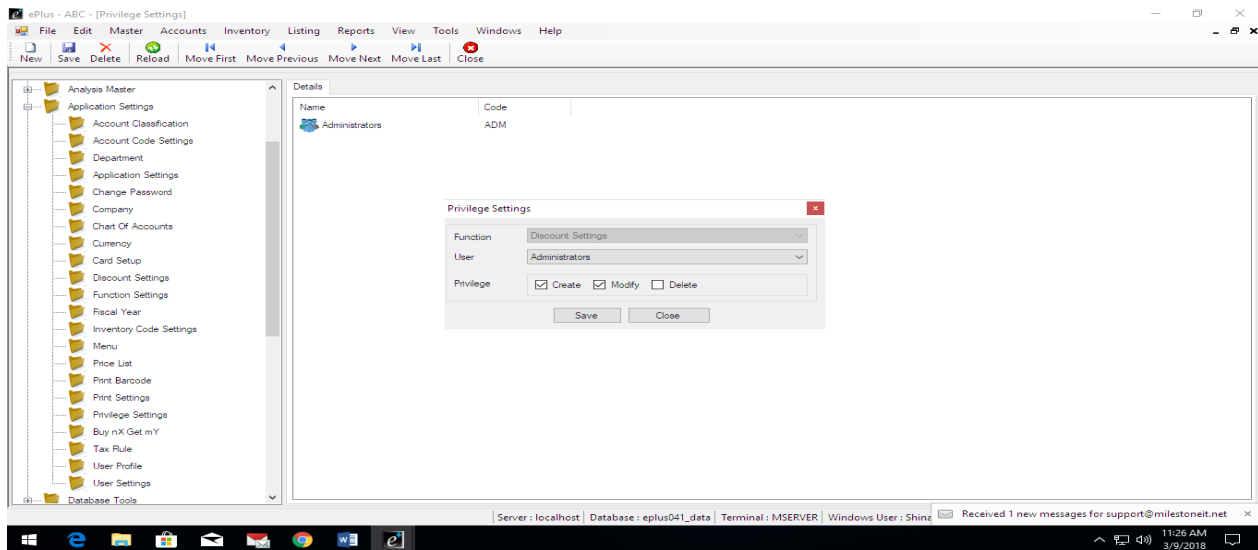
Account-wise discount

- It helps to set different discount amounts to different customers. For example, we need to give more discount to a regular customer, we can use this discount type.
- We can create a group and add the customer to it. Later on billing, when we give the customer account code or account name, the discount comes automatically.
- To set account-wise discounts:-

1 Select tools -> settings -> Privilege settings



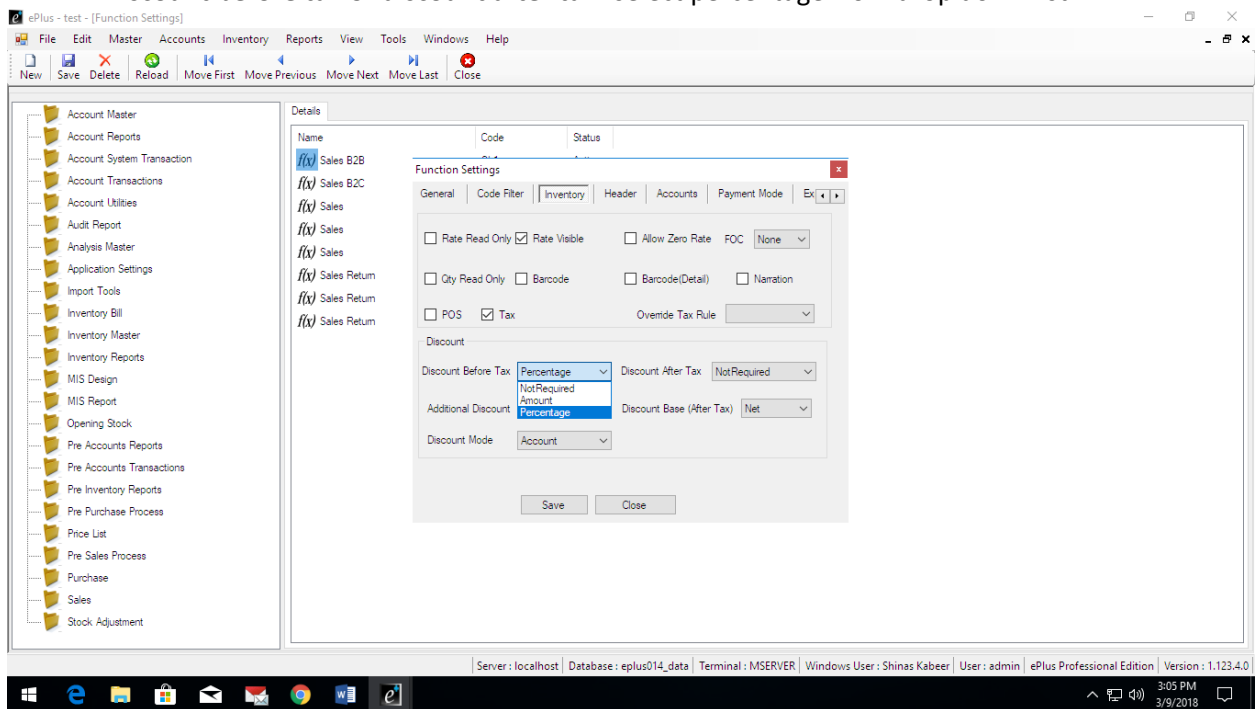
- ### 2 Select application settings-> expand-> select discount settings (left)-> right click-> new -> **USER:-** select drop down list to administrator



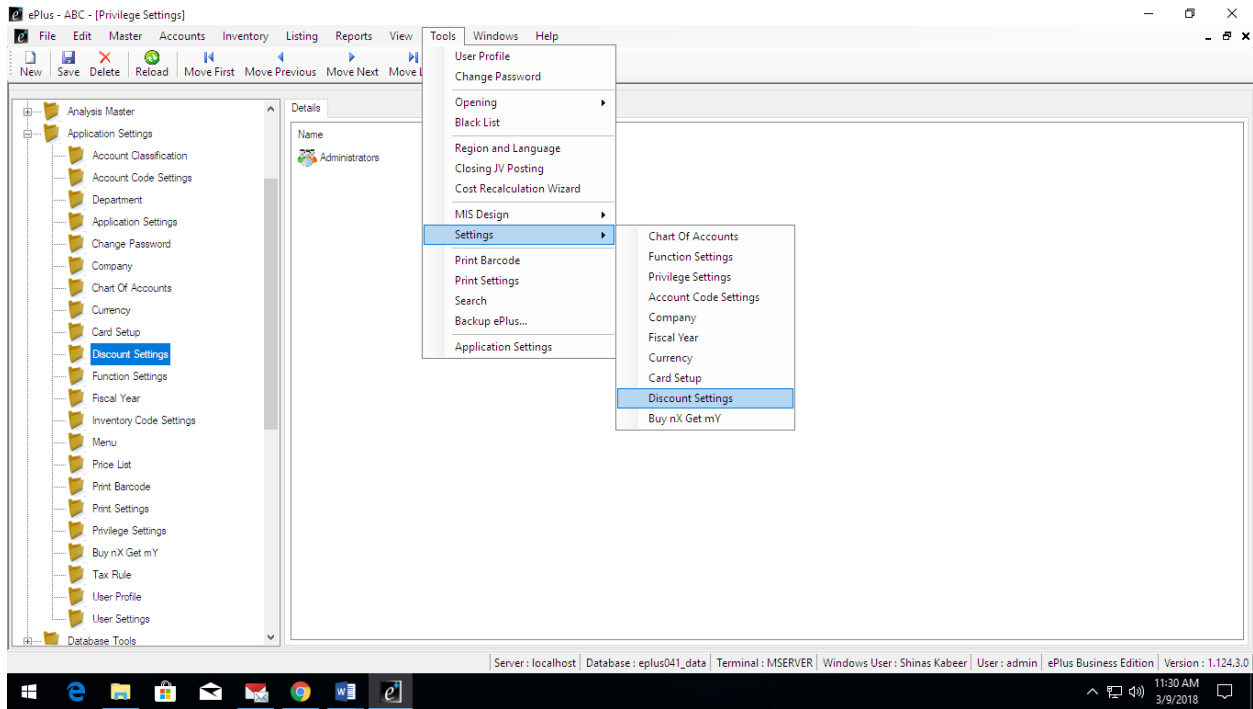
- 3 Check 'create' and 'modify' on the same window and save
- 4 Select tools on the tool bar-> settings-> function settings-> sales-> salesB2B(right)-> right click -> edit-> select inventory ->

Discount mode:-select accounts from the drop down list

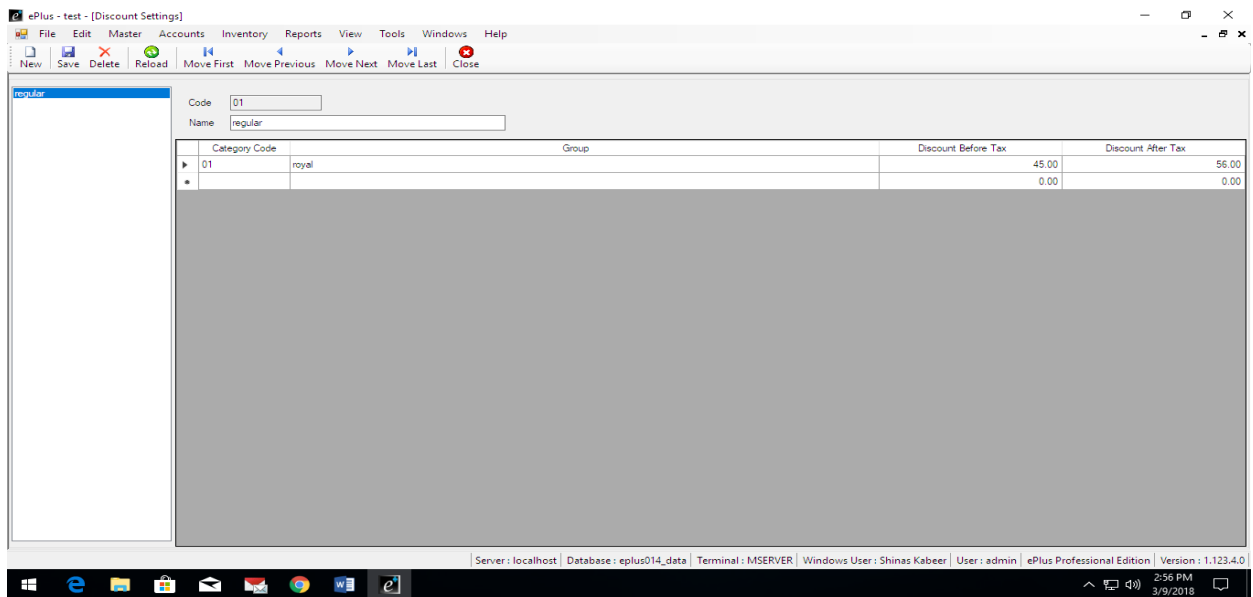
Discount before tax or discount after tax:-select percentage from drop down list



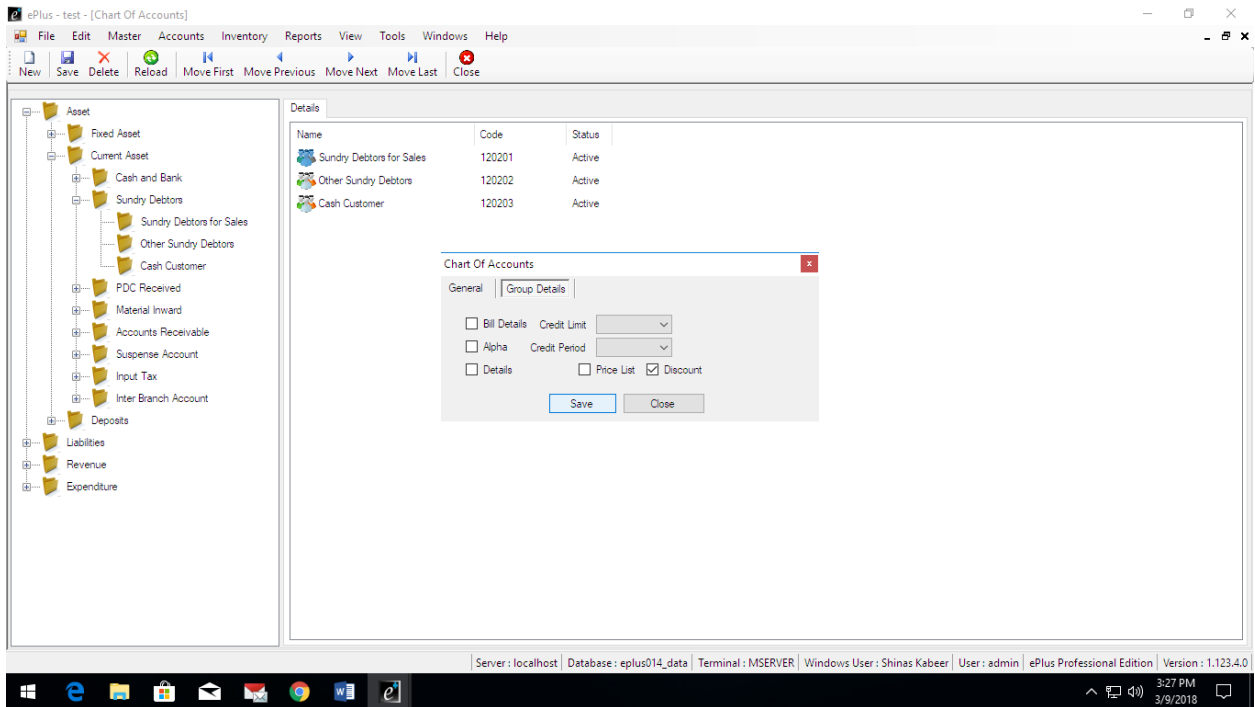
- 5 Select tools from the tool bar-> settings-> discount setting



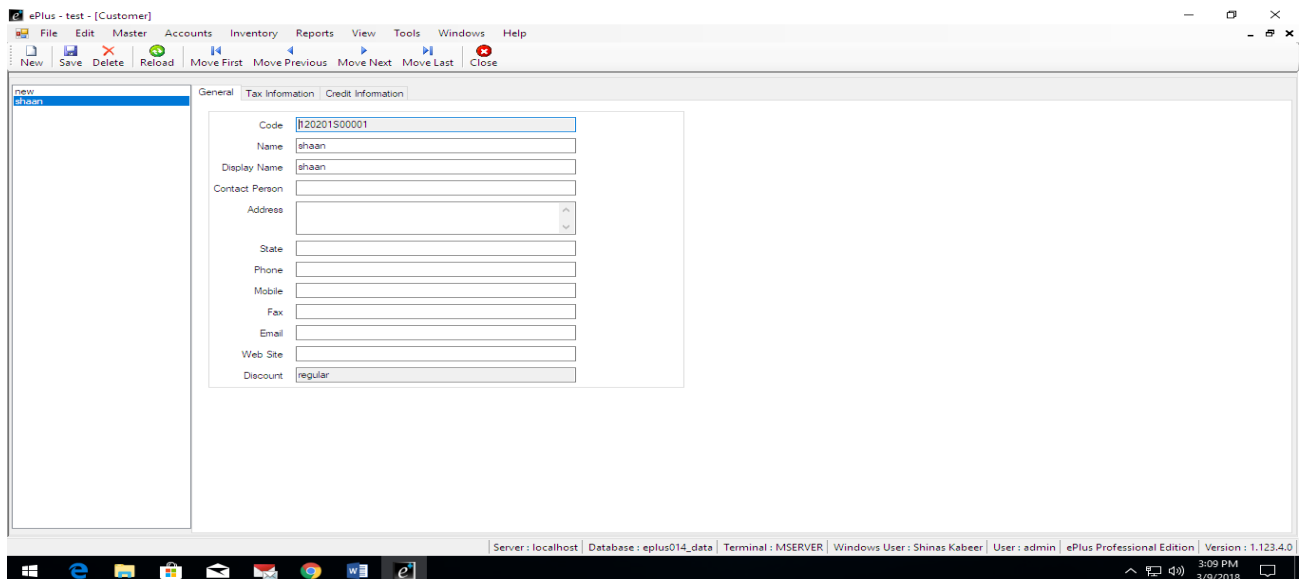
6 Add type of the discounts and add them to the groups and set discounts and save.



- 7 Select tools-> settings-> chart of accounts-> assets-> current assets -> sundry debtors-> sundry debtors on sales-> right click edit -> group details-> check discount -> save



- 8 Add discount type to the customer (select master from toolbar->customer) and save.



ePlus - test - [Sales B2B]

File Edit Master Accounts Inventory Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Doc No: [] Date: 09 March 2018 15:12:22 Account: 120201500001 ihaan Credit Period: [] Payment: ☒ Credit ☐ Cash

Salesman: Sales Executive

Narration: []

	Item Code	Item Name	Qty	Rate	Amount	Disc %	Discount	Tax	Amount
▶ 1	010010001	royal asd test	2	45.00	90.00	45.00	40.50	2.48	51.98
* 2			0	0.00	0.00	0.00	0.00	0.00	0.00

Information Accounts Bill Bill Details Outstanding

Credit Limit: [] .00
 Outstanding: [] .00
 Over Due: [] .00
 PDC: [] .00
 Balance: [] .00

Item Code: [] 010010001
 Item Name: [] royal asd test
 Category: [] royal
 Brand: [] asd
 Stock: [] .00
 Rate: [] .00

Amount: [] 90.00
 Discount Before Tax: [] 40.50
 Tax: [] 2.48
 Freight: [] 0
 Round Off: [] .02
 Net Amount: [] 52.00

Server: localhost | Database: eplus014_data | Terminal: MSERVER | Windows User: Shinas Kabeer | User: admin | ePlus Professional Edition | Version: 1.123.4.0

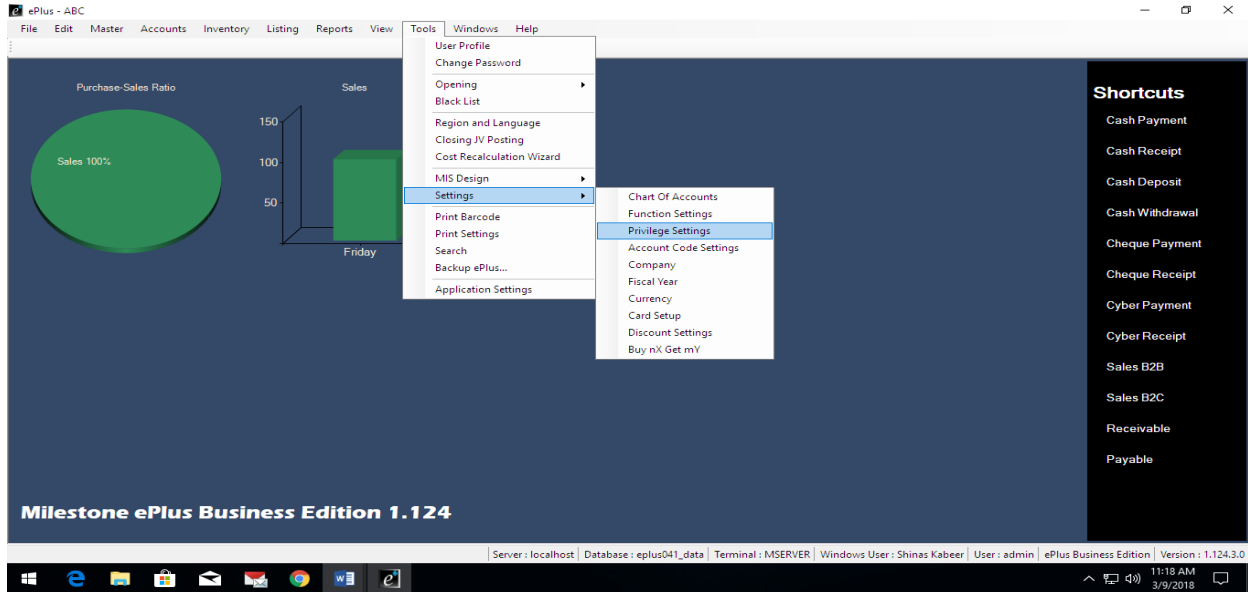
3:12 PM 3/9/2018

Now we can see the discount percentage field

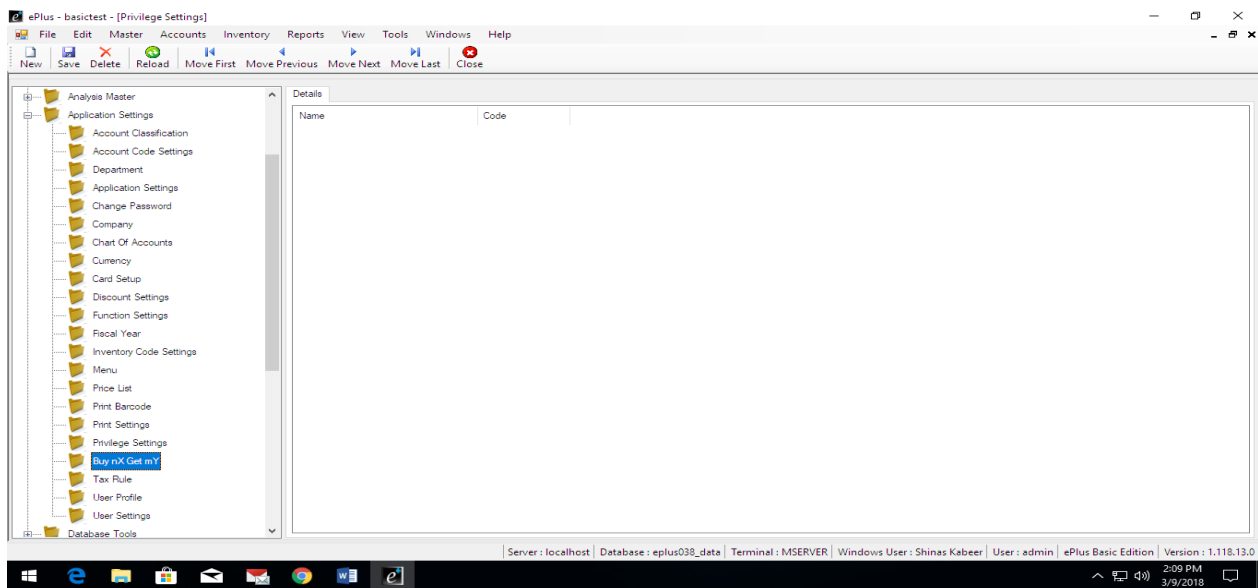
BUY nX GET mY

- It helps to set" buy 2 get 1" like offers to the customers.
- To set buy nX get mY:-

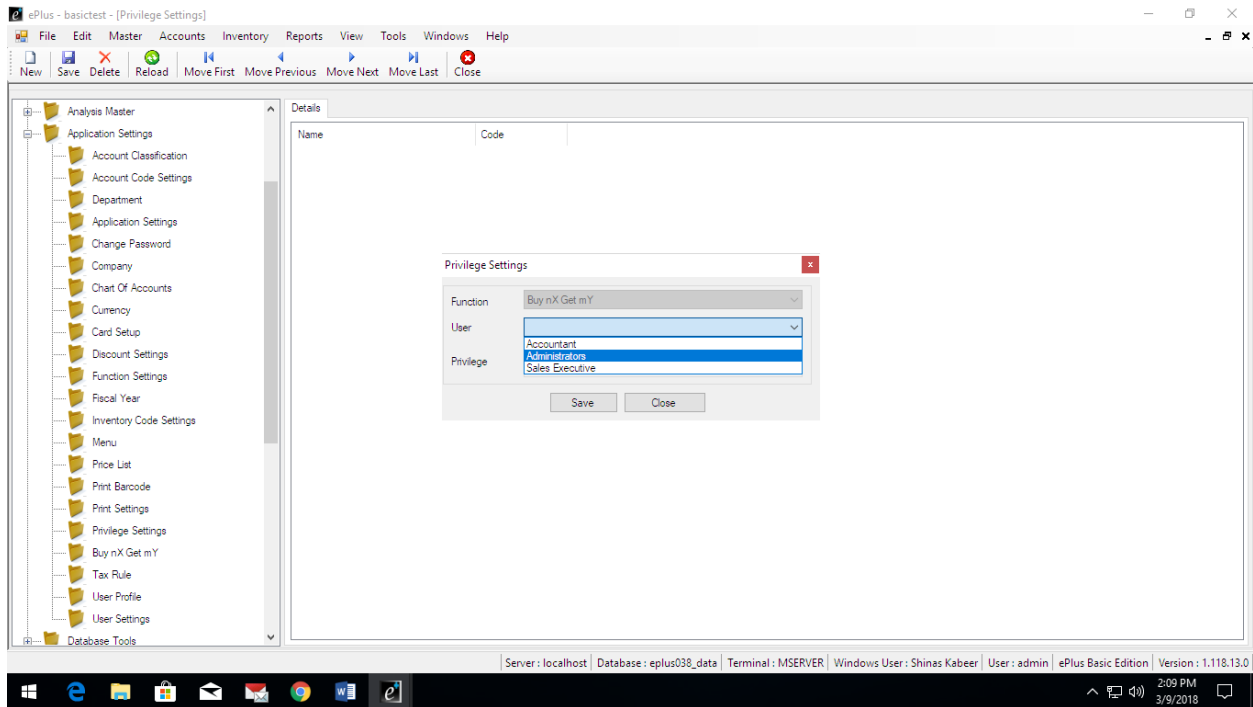
1. Select tools -> settings -> Privilege settings



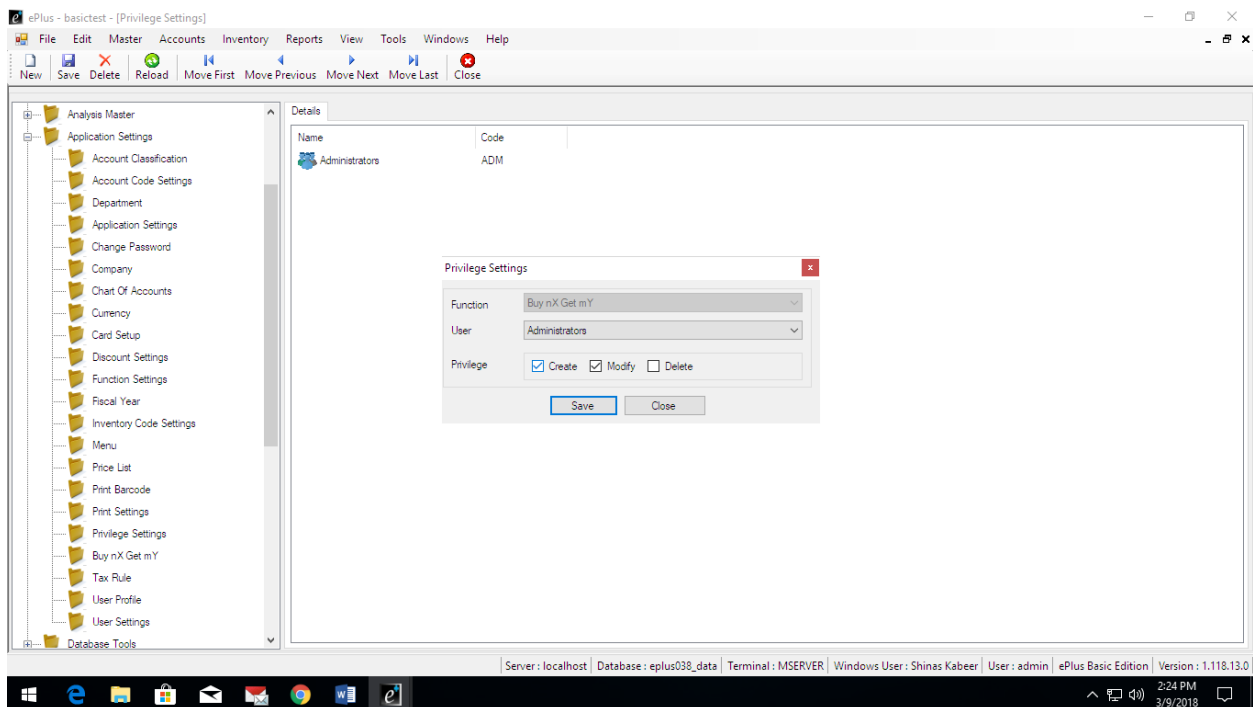
2. Select application settings-> buy nX get mY



3. Right click-> new->USER:- select administrator from drop down list



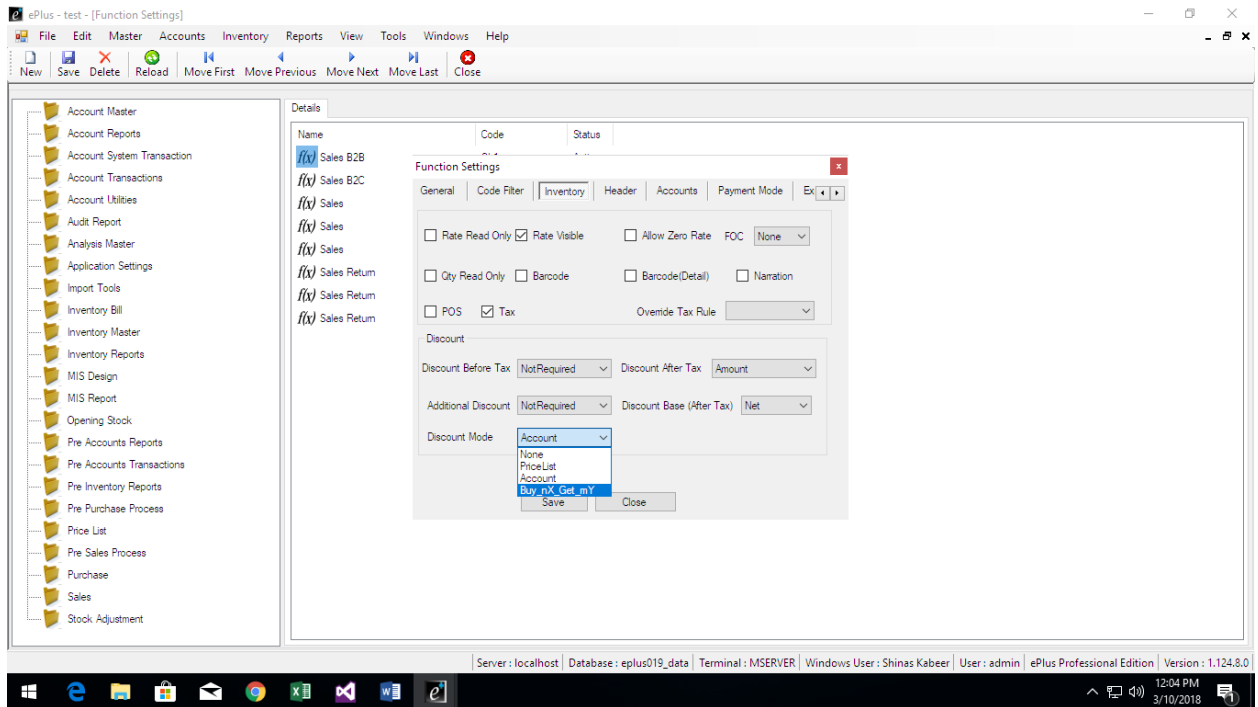
4. Check 'create' and 'modify' on the window and save



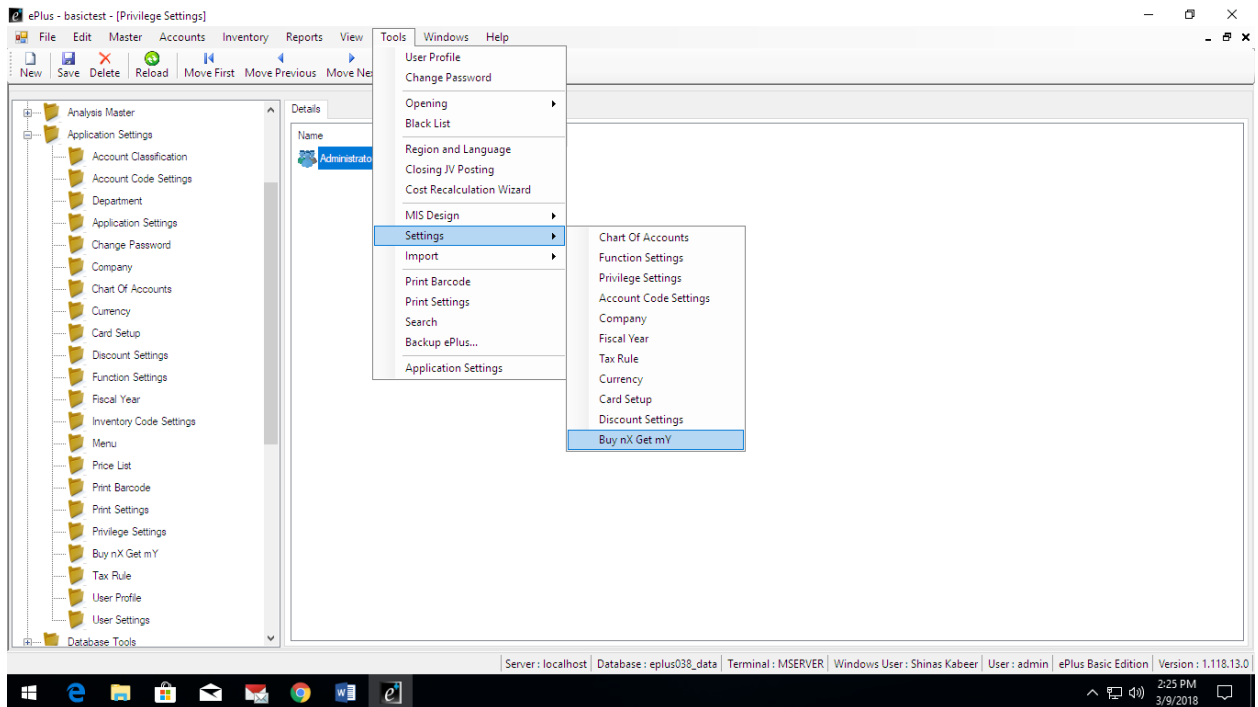
5. Select tools on the tool bar-> settings-> function settings-> sales-> salesB2B(right)-> right click -> edit-> select inventory ->

Discount mode:-select buy nX and get mY from the drop down list

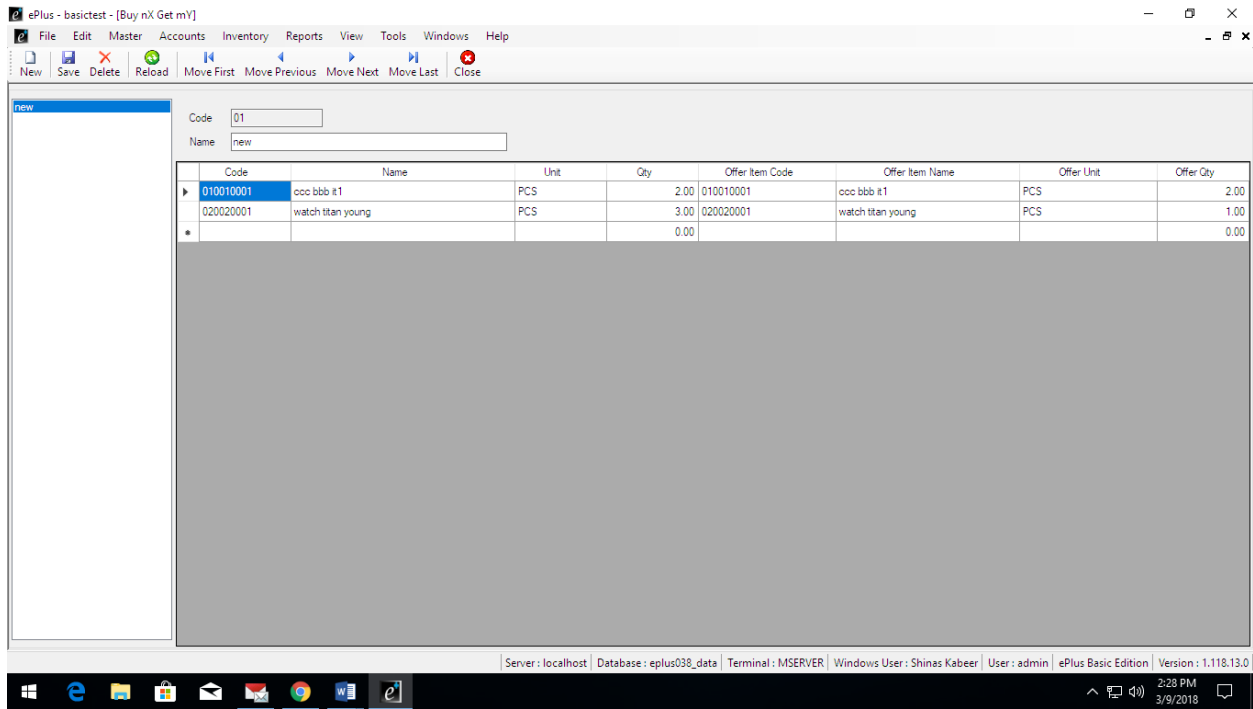
Discount before tax or discount after tax:-select amount from drop down list



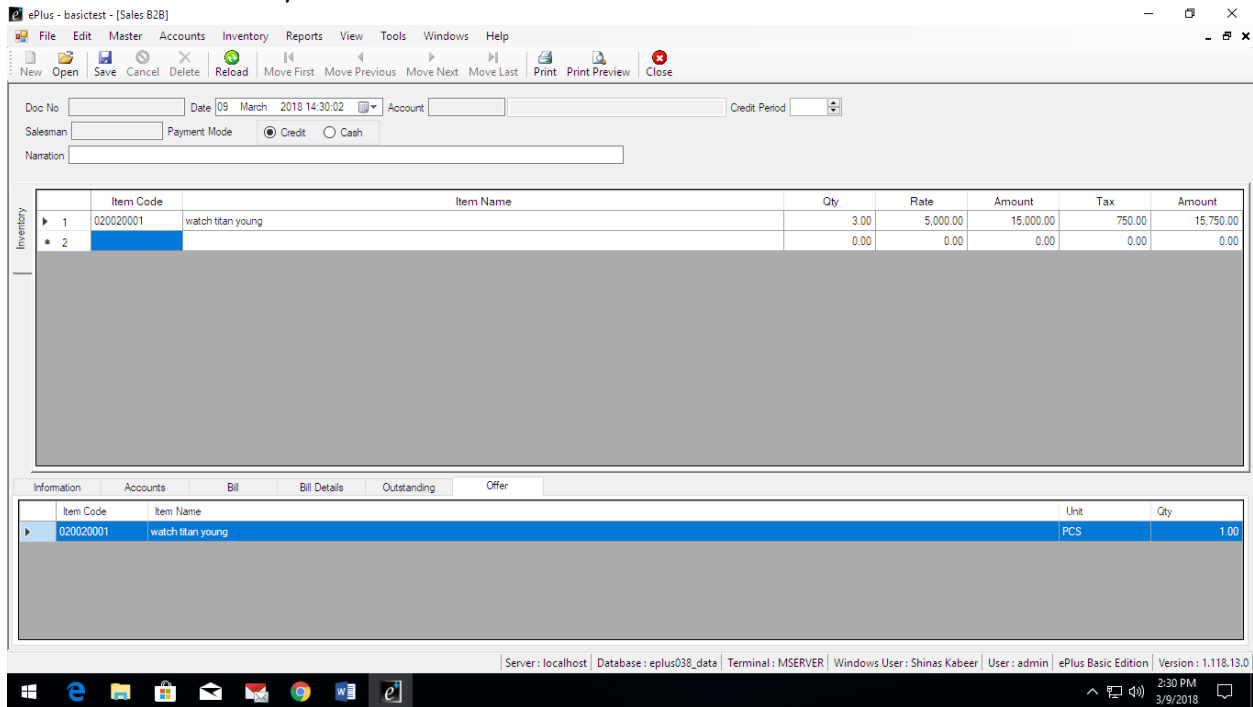
6. Select tools from tool bar-> settings-> buy nX get mY



7. We can add item name and offer quantity



8. Select inventory from the tool bar-> sales B2B



Now we can see the offer.

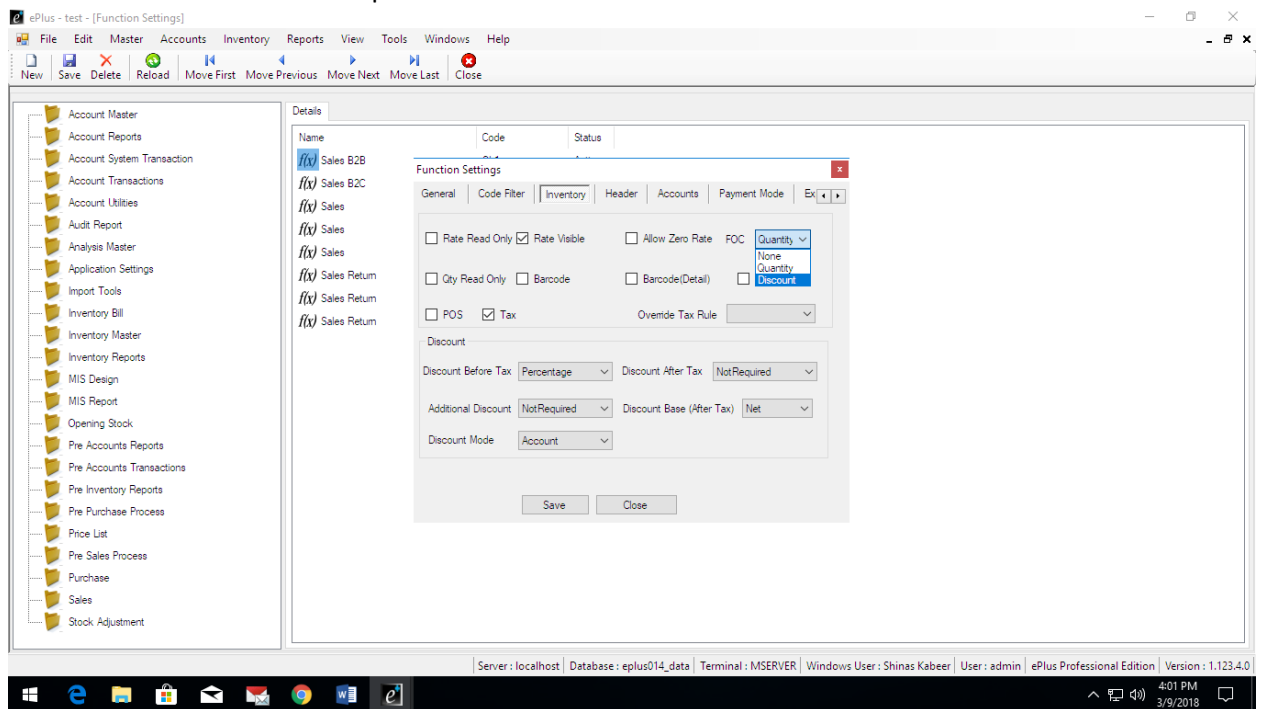
FOC

FOC stands for 'Free of cost' or 'Free of charge'. This type is same as buy nX get mY, but it processes during transaction time not pre-defined. There are two types of FOC:-

- FOC-discount
- FOC-quantity

FOC-discount

1. Select tools-> settings -> function settings-> sales -> salesB2B-> right click-> edit-> inventory -> **FOC:-** select discount from dropdown list-> save



Doc No: [] Date: 09 March 2018 18:18:26 Account: 120201T00001 test Credit Period: [] Payment: ☒ Credit ☐ Cash

Salesman: Sales Executive Narration: []

Item Code	Item Name	Qty	FOC	Rate	Amount	Tax	Discount	Amount
1 010010001	watch nike young	5	1	100.00	500.00	30.00	0.00	530.00
2				0.00	0.00	0.00	0.00	0.00

Information: Accounts: Bill: Bill Details: Outstanding

Credit Limit: [] Outstanding: 27,025.00 Over Due: 27,025.00 PDC: [] Balance: 27,025.00

Item Code: 010010001 Item Name: watch nike young Category: watch Brand: nike Stock: [] Rate: []

Amount: 500.00 Tax: 30.00 Discount After Tax: [] Freight: [] Round Off: [] Net Amount: 530.00

Server: localhost | Database: eplus019_data | Terminal: MSERVER | Windows User: Shinas Kabbeer | User: admin | ePlus Professional Edition | Version: 1.124.6.0

Here,

Qty	FOC	Rate	Amount	Tax	Discount	Amount
5	1	100	500	30	0	530

6 items sold and 1 for free, but it includes 6 item's tax

FOC-quantity

- 1 Select tools-> settings -> function settings-> sales -> salesB2B-> right click-> edit-> inventory -> **FOC**-select quantity from dropdown list-> save

Account Master Account Reports Account System Transaction Account Transactions Audit Report Analysis Master Application Settings Import Tools Inventory Bill Inventory Master Inventory Reports MIS Design MIS Report Opening Stock Pre Accounts Reports Pre Accounts Transactions Pre Inventory Reports Pre Inventory Process Price List Pre Sales Process Purchase Sales Stock Adjustment

Details: Name: Sales B2B Code: [] Status: []

Function Settings: General Code Filter Inventory Header Accounts Payment Mode Ex: []

☐ Rate Read Only ☒ Rate Visible ☐ Allow Zero Rate FOC: **Quantity**

☐ Qty Read Only ☐ Barcode ☐ Barcode(Detail) ☐ Discount

☐ POS ☒ Tax Override Tax Rule: []

Discount: Discount Before Tax: Percentage Discount After Tax: NotRequired

Additional Discount: NotRequired Discount Base (After Tax): Net

Discount Mode: Account

Save Close

Server: localhost | Database: eplus014_data | Terminal: MSERVER | Windows User: Shinas Kabbeer | User: admin | ePlus Professional Edition | Version: 1.123.4.0

ePlus - test - [Sales B2B]

File Edit Master Accounts Inventory Reports View Tools Windows Help

New Open Save Cancel Delete Reload Move First Move Previous Move Next Move Last Print Print Preview Close

Doc No: TESTHO1718-A00002 Date: 09 March 2018 18:16:04 Account: H20201T00001 test Credit Period: 0 Payment: ☒ Credit ☐ Cash

Salesman: Sales Executive Narration:

Item Code	Item Name	Qty	FOC	Rate	Amount	Tax	Discount	Amount
1 010010001	watch nike young	5	1	100.00	500.00	25.00	.00	525.00
2				0.00	0.00	0.00	0.00	0.00

Information Accounts Bill Bill Details Outstanding

Credit Limit	.00	Item Code	010010001	Amount	500.00
Outstanding	27,025.00	Item Name	watch nike young	Tax	25.00
Over Due	27,025.00	Category	watch	Discount After Tax	.00
PDC	.00	Brand	nike	Freight	.00
Balance	27,025.00	Stock	.00	Round Off	.00
		Rate	.00	Net Amount	525.00

Server: localhost Database: eplus019_data Terminal: MSERVER Windows User: Shinas Kabear User: admin ePlus Professional Edition Version: 1.124.6.0

6:17 PM 3/9/2018

Here,

Qty	FOC	Rate	Amount	Tax	Discount	Amount
5	1	100	500	25	0	525

5 items has sold and one for free, but includes only 5 item's tax.