Discounting in Rentalpoint
Rentalpoint V11

There are several discounting options within RentalPoint. Each of these options can be combined with several other options which can result in complex discounting operations. This document attempts to describe each option available in RentalPoint. Options that rely on other options will contain a link in the description so you can easily navigate to the description of the additional options.

Parameters

Pricing #9 – Apply Customer Discount as Line Item Discount

Each customer can be configured with a default rental discount rate (the **Rental discount rate %** textbox located on the Financials tab of a customer record). When adding rental items to a booking, the rental discount rate is automatically applied to the **%disc** column in the equipment grid and the extended price of the line is updated accordingly. If the item has accessories, the discount is automatically applied to the accessories as well. If the customer on the booking changes to a different customer, the operator is prompted to apply the new customers' rental discount rate to all rental lines in the booking.

Limitations
The line item discount does not apply:
- When editing a rental item.
- To sales items.
- When the customer rental discount rate exceeds the Operator Maximum Discount Rate.
- When the item is a package and Pricing #13 - Discount Package Deals is disabled.
- When the item is flagged as a cross rental and Pricing #14 - Discount Cross Rented Items is disabled.
- When the item is outside supplied and Pricing #15 - Discount Outside Supplied Items is disabled.
- When the Item is Not Allowed to be Discounted.

Pricing #13 - Discount Package Deals

Items that are set as a **PAK** (package) are not allowed to be discounted. This applies to rental items and sales items. It applies to bookings, cross rentals and transfers (when invoicing transfers functionality is enabled).

Pricing #14 - Discount Cross Rented Items

Items that have a value greater than 0 in the **Cross Rental** column in the equipment grid are not allowed to be discounted. Items that are assigned to a cross rental in the **Stat** column of the equipment grid are not allowed to be discounted. This only applies to rental items. This only applies to bookings.

Pricing #15 - Discount Outside Supplied Items

Items that are under a heading that is set to **Outside Supplied** are not allowed to be discounted. This applies to rental and sales items. This only applies to bookings.

Pricing #16 – Truncate Discount Cents

The 'cents' portion of the discount value is removed. For example, a discount value of 225.48 will become 225.00. This applies to rental and sales discount values throughout the entire system including reports, custom printouts, standard printouts and values displayed on screen.

Pricing #43 – Allow Auto Discount of Sales Items

When the booking price is locked, the rental discount is adjusted in an attempt to maintain the booking price. However, if the rental discount reaches 100% and the price cannot be maintained, the system adjusts the sales discount in an attempt to maintain the booking price.

Limitations
The auto discount does not apply:
- When the sales item is a package and Pricing #13 - Discount Package Deals is disabled.
- When the sales item is outside supplied and Pricing #15 - Discount Outside Supplied Items is disabled.
- When the sales Item is Not Allowed to be Discounted.

Pricing #58 – Double Discount Project

When using project invoicing, this option allows bookings to be double discounted. The booking discounts are applied first, then the project discounts are applied.

Limitations
The double discounting does not apply:
- When the item is a package and Pricing #13 - Discount Package Deals is disabled.
- When the item is flagged as a cross rental and Pricing #14 - Discount Cross Rented Items is disabled.
- When the item is outside supplied and Pricing #15 - Discount Outside Supplied Items is disabled.
- When the Item is Not Allowed to be Discounted.

Pricing #69 – Default Discount Percentage for Backup Equipment

Rental items can be flagged as backup equipment from within the equipment grid or when they are added at checkout. An automatic line item discount is applied to the line. This applies to rental items. This only applies to bookings.

Limitations
The backup discount does not apply:
- When the item is a package and Pricing #13 - Discount Package Deals is disabled.
- When the item is flagged as a cross rental and Pricing #14 - Discount Cross Rented Items is disabled.
- When the item is outside supplied and Pricing #15 - Discount Outside Supplied Items is disabled.
- When the Item is Not Allowed to be Discounted.

Invoicing #34 – Print Discount on Delivery Sheet

This option prints the discount percentage and value in the totals area of the Standard Delivery Sheet.

Custom Printing #9 – Show Discount Subtotals

When printing an equipment list with subtotals, print a line for the discount percentage and value in the subtotals area.

Custom Printing #11 – Project Invoice Totals

When printing a project invoice, this option determines what the totals should consist of. The totals can either be the rental amount minus rental discount, or all values on the booking.

Booking Hardcopy #9 – Print Total Undiscounted Amount

Print the total of the equipment that is not allowed to be discounted in the totals area of a Standard Booking Hardcopy.

Operational #9 – Enable Discount Column in Equipment Grid.

Enable a discount column in the equipment grid so operators can enter line item discounts for rental and sales items. This applies to bookings, cross rentals and transfers (when invoicing transfers functionality is enabled).

Limitations
The discount does not apply:
- When the item is a package and Pricing #13 - Discount Package Deals is disabled.
- When the item is flagged as a cross rental and Pricing #14 - Discount Cross Rented Items is disabled.
- When the item is outside supplied and Pricing #15 - Discount Outside Supplied Items is disabled.
- When the Item is Not Allowed to be Discounted.

Additional Options and Functionality

Operator Maximum Discount Rate

Each operator has a **Maximum Rental Discount %** and a **Maximum Sales Discount %** in his or her operator record. An operator cannot enter a discount percentage that is greater than his or her maximum rate. An operator can still open an order that has a discount that is greater than his or her max discount rate. This max rate option only applies if an operator attempts to change a discount percentage that has already been saved. This applies to bookings, cross rentals and transfers (when invoicing transfers functionality is enabled).

Item is Not Allowed to be Discounted

Each rental and sales item can be excluded from discounting by using the **Don't allow product to be discounted** option in the product properties. This applies to bookings, cross rentals and transfers (when invoicing transfers functionality is enabled).

Custom Template Insert Fields

There are several custom template insert fields that are used with discounting.

Customer

Field	Insert Field	Description
Customer Discount Rate Percentage	&CDiscN&	Rental discount rate from the customer properties.
Customer 'Bill To' Discount Rate Percentage	&WBDISRN&	If a Bill To customer is used on a booking, this insert field displays the rental discount rate from the customer properties of the bill to customer.

Booking Totals

Field	Insert Field	Description
Rental Discount Rate	&BdiscRN&	Rental discount rate on the booking.
Rental Discount Amount	&discamtN&	Rental discount amount on the booking.
Rental Total After Discount	&eqtotdN&	Rental total on the booking after the rental discount has been applied.
Sales Discount Rate	&SaledisN&	Sales discount rate on the booking.
Sales Discount Amount	&SDISCAMN&	Sales discount amount on the booking.
Sales Total After Discount	&SALESTDN&	Sales total on the booking after the sales discount has been applied.
Line Item Discount Amount	&DISCLITN&	Total of all line item discounts on the booking.
Discount Grand Total	&DISCGRAN&	Total of all line item discounts and overall discounts on the booking.
Undiscounted Grand Total	&UNDISCGN&	Total of all line items that cannot be discounted.
Total Invoice Amount Undiscounted	&tpundisN&	Total invoice amount with no discounts applied.
Total Invoice Amount, No Tax No Discounts	&TNTNDISN&	Total invoice amount with no tax and no discounts applied.
Total Booking Price Including Package Components, Undiscounted Amount	&TOTCOMPN&	Total of all items that cannot be discounted, including components.
Booking Total No Discount	&BTNODISN&	Total booking amount with no discounts applied.
Rental and Sales, No Discount	&RSNODN&	Total of rental and sales items, no discounts applied.
Rental, Sales and Sundry, No Discount	&RSSNODN&	Total of rental, sales and sundry items, no discounts applied.
Rental, Sales, Sundry, All Discounts	&RSSADN&	Total of rental, sales and sundry items: line item discounts and overall discounts included.
Total Invoice Amount Undiscounted Minus Payments	&TIAUMPN&	Total invoice amount with no discounts applied, minus any payments on the invoice.

Heading Totals

Field	Insert Field	Description
Rental Discount Percentage	&hhdpercN&	
Rental Discount Amount	&hhdamtN&	
Rental Total After Discount	&heqtotdN&	
Rental Amount Undiscounted	&hundiscN&	
Sales Discount Percentage	&hsdpercN&	
Sales Discount Amount	&hsdamtN&	

Line Item Values

Field	Insert Field	Description
Line Item Discount Percentage	&LIDISCN&	Discount percentage applied to the line item.
Line Item Discount Amount	&LIDISCAN&	Discount value applied to the line item.
Booking Discount Applied to Line Item	&LIBDISAN&	Apply the booking discount to the line item, as if it was a line item discount. This insert field displays the value of the discount.
Line Item Extended Price with Booking Discount	&LIEXWBDN&	The extended price of the line when the booking discount is applied to it.
Undiscounted Unit Price	&UNUNITN&	The value of the unit rate when it's undiscounted.

Project Totals

Field	Insert Field	Description
Rental Discount Amount	&PRDISCAN&	Total rental discount amount when the project rental discount is applied.
Rental Discount Percent	&PRDISCPN&	Project rental discount percentage.
Sales Discount Amount	&PSDISCAN&	Total sales discount amount when the project sales discount is applied.
Sales Discount Percent	&PSDISCPN&	Project sales discount percentage.
Total of Line Item Discounts	&PRTOLIDN&	Total of all line item discounts in the project.
Subtotal Plus All Discounts	&PRGTMLIN&	Subtotal of the project, including all line item discounts and all overall discounts.

Purchase Order Totals

Field	Insert Field	Description
Discount Percentage	&PDISCN&	Rental discount percentage.
PO Overall Discount Amount	&TOTDISCN&	Total of all line item discounts and overall discount.
PO Subtotal Before Discount	&STOTNDIN&	Subtotal of PO before rental discount is applied.
PO Subtotal After Discount, No Freight	&STADINFN&	Subtotal of PO, after discount, before freight.
PO Line Item Discount	&POLIDTN&	Line item discount percentage (used in the equipment list).
CR Discount Rate	&CRDISRN&	Cross rental discount rate.

Miscellaneous

Field	Insert Field	Description
Suppress Discount From Discount Subtotals	&SUPDISTC&	Don't print the discount percentage in the subtotals area.
Suppress Discount From FootingC	&SUPDIFTC&	Don't print the discounts in the FootingC insert field.
Heading Totals After Discount	&HEADINGC&	List of all heading totals on the booking, after discount.
Heading Totals Before Discount	&HEADPREC&	List of all heading totals on the booking, before discount.
Heading Subtotals Less Discount	&STNODISC&	When printing subtotals for headings, include the discount.
Suppress Discount Subtotals	&SUPDSTC&	Don't print the discount line in the subtotals area.
Include Sales, Sundries and Labour in the Discount Subtotals	&INCALLC&	When printing subtotals, include the sales, sundry and labour amounts.
Include Sales Discount Line in Discount Subtotals	&INCSALSC&	When printing subtotals, include a line for sales discount.
Print Total Discount In Subtotal	&TOTDIONC&	When printing subtotals, include a line for the total of all discounts.
Suppress Rental Discount in Subtotal	&SUPRENTC&	When printing subtotals, don't print the rental discount line.