



Plan Line Discounts

Applying Discounts and Surcharges at Booking Level

Applying Plan Line Discounts/Surcharges

Plan Line Discounts apply to **all bookings associated with a specific plan line**.

To add a Plan Line Discount:

1. Open the plan line **options** menu ()
2. Select **Line > Plan Line Discounts**
3. Select the **Add (+) icon** to add a new line
4. Choose the **Gross/Nett, Pre/Post Rate, Discount Type** and enter the relevant value or percentage
5. Select **Save** () to apply



When saving, the user can choose:

- Whether the discount applies to the **Client**, the **Vendor**, or **both**
- Whether the discount should be applied to **existing bookings** on the line

If **Yes** is selected, the discount updates all existing bookings on the plan line. If **No** is selected, the discount applies only to bookings created after the discount was added.

Modifying Plan Line Discounts

To modify a Plan Line Discount:

1. Select the **edit icon** () on the discount line
2. Apply the modification
3. Select **Save** () to apply

When saving, the user can choose:

- Whether to update existing discounts (**Existing bookings**)
- Whether to update all discounts (**Existing and new bookings**)

- Whether to update none (**No changes are made**)

Removing Plan Line Discounts

To delete a Plan Line Discount:

1. Select the **delete icon** () the discount line

The discount will be removed from both the Plan Line Discounts menu and all affected bookings.

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