

# Discounts and Markups

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## Overview

Discounts and markups allow you to adjust the pricing of items on your proposals or invoices, giving you flexibility to reward customers, account for special circumstances, or adjust for costs. In this section, we'll guide you step by step on how to create a discount or markup, apply it to individual items or your entire proposal, and use bulk pricing to save time when working with multiple items.

Whether you want to offer a percentage off, increase a price, or apply pricing adjustments across multiple items, this guide will show you how to do it efficiently and accurately.

This article will review:

- [Create a Discount or Markup](#)
- [Bulk Apply Pricing](#)

## Video Tutorial

Your browser does not support HTML5 video.

## Create a Discount or Markup

You need to create a part that will be used for your discount or markup.

1. Go to **Control Panel > Parts**, click **Add**. Give your part a name and description.



[Parts/Add-Ons](#)

Manage parts/add-ons, templates and solutions for proposals and appointments.

Name*	<input type="text" value="Referral Discount"/>
Active	<input checked="" type="checkbox"/>
Description*	<input type="text" value="Get 10% off for mentioning who referred you to our business."/>

2. Go to your proposal or invoice and add the part you just created. In the **Quantity** field you're going to add your percentage then hit tab, the discount or markup will then auto calculate in the rate field.

- For a 10% discount enter **10%**
- For a 10% markup enter **-10%**

Option	Item	Description	Quantity	Rate	Amount
Select a template...	Test Service	Sample description of service.	1	0	\$0.00
		<input type="checkbox"/> Taxable			
⋮ ×	-option-	Example Part 1	2	100	\$200.00
⋮ ×	-option-	Example Part 2	2	200	\$400.00
⋮ ×	-option-	Example Part 3	2	50	\$100.00
⋮ ×	-option-	-part- <input type="text" value="Search..."/>			
Subtotal					\$700.00
Tax					\$0.00
Total					\$700.00

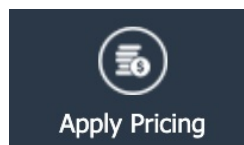


If you also have **Options** on your proposal and you want the discount/markup to apply to **all items** on the proposal (options and regular items) you need to add the discount/markup part **twice**. Once without text in the option field and once with the matching option name in the field.

Option	Item	Description	Quantity	Rate	Amount
Select a template...	Test Service	Sample description of service.	1	0	\$0.00
		<input type="checkbox"/> Taxable			
⋮ ×	-option-	Example Part 1	2	100	\$200.00
⋮ ×	-option-	Example Part 2	2	200	\$400.00
⋮ ×	-option-	Discount	1	-60	-\$60.00
⋮ ×	Option A	Example Part 3	2	50	\$100.00
⋮ ×	Option A	Discount	1	-10	-\$10.00

## Bulk Apply Pricing

When you create a Discount. At the bottom of the Part Details page, you will see the **Apply Pricing** button.



Selecting that option will open a section allowing you to specify how you want to bulk apply that price.

### Bulk Apply Pricing

- Backlog Appointments ☐
- Backlog Appointments ☐
- Expired Proposals ☐
- Expired Proposals ☐
- Open Proposals ☐
- Open Proposals ☐

Choose to apply the pricing to any of the following that have that part on them:

- Backlog Appointments
- Expired Proposals
- Open Proposals

This will work the same way if you are using a part tied to an offer code for email marketing. Learn more about [Offer Codes](#).

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