Discounts and Markups

01/15/2026 8:16 am CST

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
> - Discount Behavior on Per-Appointment Payment Plans

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.

Add a New Part or Add-On

Main	Main
Service Reminder Overrides	Name*
Skills	Referral Discount
Drips	☑ Active?
Summarization	Description*
Part Distribution	Get 10% for mentioning who referred you to our business.
Package Consumption	

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. ■ Taxable | ✎	1	0	$0.00
⠿ ⊗ -option-	Example Part 1	Example Part 1 ✎	2	100	$200.00
⠿ ⊗ -option-	Example Part 2	Example Part 2 ✎	2	200	$400.00
⠿ ⊗ -option-	Example Part 3	Example Part 3 ✎	2	50	$100.00
⠿ ⊗ -option-	-part-	Search...			
		Subtotal			$700.00
		Tax	Example State Tax ▼		$60.41
		Total			$760.41
		Labor Hours	1 hours 20 r		

🔔 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. ■ Taxable | ✎	1	0	$0.00
⠿ ⊗ -option-	Example Part 1	Example Part 1 ✎	2	100	$200.00
⠿ ⊗ -option-	Example Part 2	Example Part 2 ✎	2	200	$400.00
⠿ ⊗ -option-	Discount	Discount ✎	1	-60	-$60.00
⠿ ⊗ Option A	Example Part 3	Example Part 3 ✎	2	50	$100.00
⠿ ⊗ Option A	Discount	Discount ✎	1	-10	-$10.00

Bulk Apply Pricing

When you create a Discount part. you will see the **Apply Pricing** button at the bottom of the Part Details page.
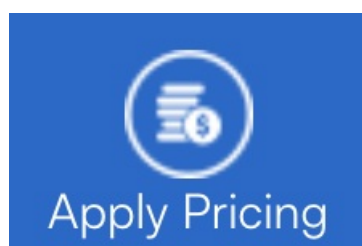
Selecting that option will open a section allowing you to specify how you want to bulk apply that price.

Bulk Apply Pricing

Backlog Appointments

☐ Backlog Appointments

Expired Proposals

☐ Expired Proposals

Open Proposals

☐ Open Proposals

Apply **Cancel**

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.

Discount Behavior on Per-Appointment Payment Plans

When a proposal uses a **per-appointment payment plan** with a **duration- or count-based deposit**, percentage-based discounts are applied only while available credits remain.

When an appointment is completed, the system checks for available credits, credit memos, or deposits. If **no remaining credits are available** at either the **proposal** or **contact** level:
- The **percentage-based discount is removed from the completed appointment**
- The **discount is also removed from any future scheduled appointments** tied to that proposal
- This occurs whether the appointment finishes with a remaining balance due or simply no remaining credit

This behavior applies only when **all** of the following are true:
- The appointment includes a **percentage-based discount**
- The appointment is linked to a proposal with a **per-appointment payment plan**
- The payment plan uses a **duration- or count-based deposit**
- There are **no open credits, credit memos, or deposits** remaining

This ensures discounts are not applied beyond the value of the original credits or deposits and prevents unintended discounts on future appointments once prepaid value has been fully used.

Learn more about Payment Plans.