

# Discounts and Markups

09/04/2024 11:44 am CDT

## Overview

In this section we will walk you through how to create and add a discount and/or markup to your proposal or invoice.

## Video Tutorial

[CLICK HERE](#) to watch a video about creating discounts and markups.

## 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\*

Active

Description\*

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 type **10%**
- For a 10% markup type **-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

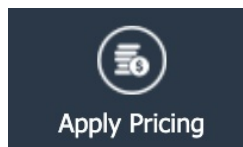


proposal (options and regular items) you need to add the discount/markup part **twice**. Once without text in the option field and once with the matching option name in the field.

Option	Item	Description	Quantity	Rate	Amount
Select a template...	Test Service	Sample description of service.	1	0	\$0.00
-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. 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 one or several options and click **Apply**.

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](#).