

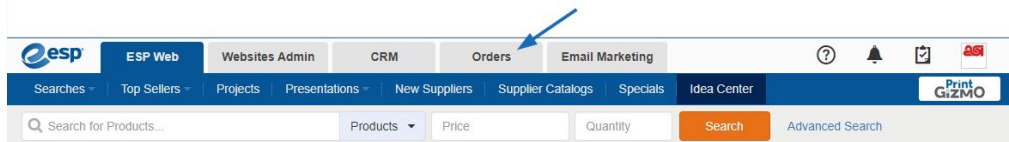


ESP Quick Tip #14: Adding a Customer Discount to an ESP Order

2021-07-15 - Jennifer S - ESP Quick Tips

If you created an order in ESP and now need to show a discount or coupon for the customer, you can do so by taking the following steps:

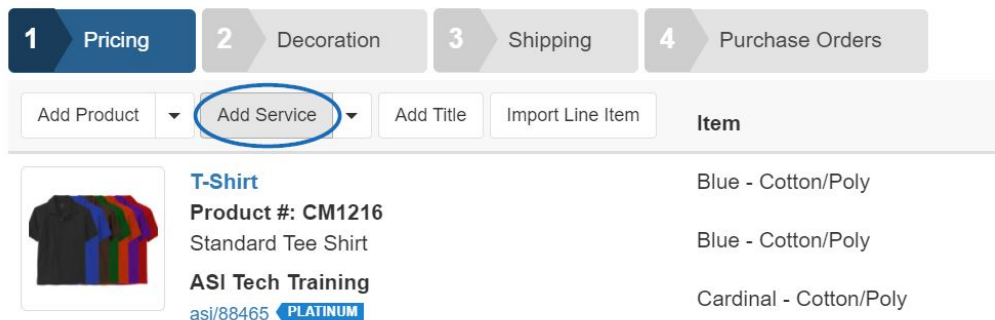
1. Log into ESP and click on the Orders tab.



2. Locate the order for which you would like to add the discount and click on the order number.



3. Once the order opens, scroll down until you see the tabs for Pricing, Decoration, Shipping, and Purchase Orders. Then, click on the "Add Service" button.



4. Configure the line item as needed. You can enter any information in the available fields. When you are finished, click on Save.

Add Service ✕

Configuration

Title

Type

General Service
▼

Vendor

Enter or Select Company
▼

Vendor Notes Visible

Description	Visible	Qty	Net Cost	Margin	Price	
<input style="width: 95%;" type="text"/>	<input checked="" type="checkbox"/>	1	\$0.0000	0.00%	\$0.0000	⚙

Sales Tax ⓘ

Type	Name		Rate
+ Add Tax Rate		Combined Rate	0.00%

The discount will be added as its own line item on the order.

1 Pricing

2 Decoration

3 Shipping

4 Purchase Orders

Create Invoice

	Add Product	Add Service	Add Title	Import Line Item	Item	Qty	Cost	Price	Total Cost	Total Price	Margin	Tax
<div style="display: flex; align-items: center;"> <div> <p>T-Shirt</p> <p>Product #: CM1216</p> <p>Standard Tee Shirt</p> <p>ASI Tech Training</p> <p>asl/88465 PLATINUM</p> </div> </div>					Blue - Cotton/Poly	10	\$27.0000	\$54.0000	\$270.0000	\$540.0000	50.00%	<input checked="" type="checkbox"/>
					Blue - Cotton/Poly	10	\$30.0000	\$60.0000	\$300.0000	\$600.0000	50.00%	<input checked="" type="checkbox"/>
					Cardinal - Cotton/Poly	10	\$27.0000	\$54.0000	\$270.0000	\$540.0000	50.00%	<input checked="" type="checkbox"/>
					Cardinal - Cotton/Poly	10	\$30.0000	\$60.0000	\$300.0000	\$600.0000	50.00%	<input checked="" type="checkbox"/>
					Total Units	40						
					Total (USD)				\$1,140.00	\$2,280.00	\$1,140.00	6.00%
<div style="display: flex; align-items: center; margin-left: 20px;"> <div style="width: 20px; height: 10px; background-color: #2c5e8c; margin-right: 5px;"></div> <div style="font-size: 12px; color: #2c5e8c;">Customer Loyalty Discount</div> </div>					Discount	1	\$25.0000	\$50.0000	\$25.0000	\$50.0000	50.00%	<input checked="" type="checkbox"/>
					Total (USD)				\$25.00	\$50.00	\$25.00	6.00%
Subtotal:									\$1,165.00	\$2,330.00		

Hover on the discount line item to display the Edit, Copy, or Delete options. Click on the thumbnail to see a preview of how this information will be displayed on a quotes and/or invoice:



AGI Tech Training
 8820 Street Rd
 Feasterville-Township, PA 19053
 US
 support@agitechnical.com
 au960201

Quote # **ASI-320898**
 Total **\$1,197.88**

Sales Person ESP User	Quote Date 07/19/2021	Ship Date 07/19/2021	In-Hand Date 07/23/2021
ABC Customer Company July 4803 S Street Rd Feasterville-Township, PA 19053 United States sales@abccompany.com 800-649-1330		Ship To John Doe ABC Customer Company July 8820 Street Rd Feasterville-Township, PA 19053 United States john@abccompany.com 215-953-3400	

T-Shirt				Product # CPN-001506303
Standard Tee Shirt				
	Quantity	Price	Total Price	
Blue - Cotton/Poly Product Color: Blue/Blue Large Material: Cotton/Poly	10	\$34.00	\$340.00	
Cardinal - Cotton/Poly Product Color: Cardinal Blue Large Material: Cotton/Poly	10	\$34.00	\$340.00	
Total Units	20			
Product Total (USD)			\$1,080.00	

Decoration Details
 Proof Required: Email Proof Email Address: esd@abccompany.com

Customer Loyalty Discount			
	Quantity	Price	Total
Discount	1	\$92.00	\$92.00
Subtotal			\$1,038.00
Sales Tax			\$59.88
Total:			\$1,197.88

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 8820 Street Rd
 Feasterville-Township, PA 19053
 US
 support@agitechnical.com
 au960201

Invoice # **ASI-320897**
 Order # **ASI-320898**
 Amount Due **\$1,197.88**

Sales Person ESP User	Invoice Date 07/19/2021	Ship Date 07/19/2021	In-Hand Date 07/23/2021
ABC Customer Company July 4803 S Street Rd Feasterville-Township, PA 19053 United States sales@abccompany.com 800-649-1330		Ship To John Doe ABC Customer Company July 8820 Street Rd Feasterville-Township, PA 19053 United States john@abccompany.com 215-953-3400	

T-Shirt				Product # CPN-001506303
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Decoration Details
 Proof Required: Email Proof Email Address: esd@abccompany.com

Customer Loyalty Discount			
	Quantity	Price	Total
Discount	1	\$92.00	\$92.00
Subtotal			\$1,038.00
Sales Tax			\$59.88
Total Amount			\$1,197.88
Amount Paid			\$0.00
Amount Due			\$1,197.88

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