Discount Recurring Lines

Negative Recurring lines may be created to track services that are discounted to a customer or for services that are being provided to a customer at no charge. Discounts may continue indefinitely or may be setup to end on a particular date. These limited discounts may be used when your company offers free services for a certain period of time, then begin invoicing the customer without a discount on a future date. Instructions for each of these situations are provided below.

Note: The total amount of discount recurring lines may not exceed the positive value recurring lines. If the total of the discount and non-discount recurring lines nets to zero, a cycle invoice will be created during the Cycle Invoicing process with a net due amount of zero.

1. Open the Customer Explorer record for which a new discount recurring line will be created.

2. From the Customer Tree, expand the customer tree below the Site and System where the recurring line will be setup. Highlight the Recurring option within the System tree; right-click and select the New Recurring option.

3. The New Recurring Item form will be displayed as shown below. Enter the information according to your company policies and procedures except in the RMR amount field enter a negative amount then click the Save button located at the lower right of the form. If this is to be a permanent discount for the customer, this is the end of your process steps. If the discount will end on a future date, continue on to step 4 on the next page.

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4. To end a recurring line discount with a future date, the discount recurring line will be canceled with future end date. Highlight the discount recurring line, right-click and select the Cancel RMR option.

The RMR Cancellation form will be displayed.

- Select the RMR Reason Code from the drop-down list.
- Enter the Cycle Ending Date.
- The Reduce RMR field will automatically fill in with the monthly amount of the recurring line.
- You may enter comments into the Comments field if desired.

In the example below, the recurring line is billed monthly and the next cycle date is 03/01/2014. We want this discount to stop at the end of the year, so the Cycle Ending Date entered is 12/31/2014. If you were to enter a cycle ending date of 01/01/2015, the customer would bill for the remainder of the year plus one day in January 2015 before the recurring line would stop.

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