

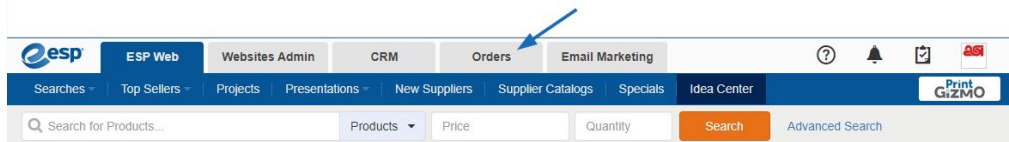


ESP Quick Tip #14: Adding a Customer Discount to an ESP Order

2021-07-15 - Jennifer M - 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:

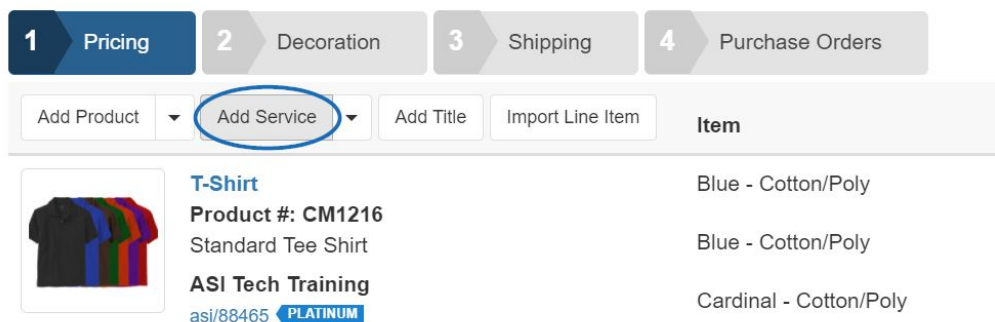
1. Log into ESP and click on the Orders tab.



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: 90%;" 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; gap: 10px;"> <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; gap: 10px; margin-top: 10px;"> <div> <p>Customer Loyalty Discount</p> </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 #	AGI-320898
Total	\$1,197.88

Sales Person	Quote Date	Ship Date	In-Hands Date
ESP User	07/19/2021	07/19/2021	07/23/2021
ABC Customer Company July 4800 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		Quantity	Price	Total Price
Standard Tee Shirt				
	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	\$90.00	\$90.00
Subtotal			\$1,138.00
Sales Tax			\$59.88
Total:			\$1,197.88

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

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

Sales Person	Invoice Date	Ship Date	In-Hands Date
ESP User	07/19/2021	07/19/2021	07/23/2021
ABC Customer Company July 4800 S Street Rd Feasterville-Township, PA 19053 United States sales@abccompany.com 800-649-1330		Bill To John Doe ABC Customer Company July 4800 Street Rd Feasterville-Township, PA 19053 United States john@abccompany.com 800-649-1330	
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T-Shirt		Quantity	Price	Total Price
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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	\$90.00	\$90.00
Subtotal			\$1,138.00
Sales Tax			\$59.88
Total Amount			\$1,197.88
Amount Paid			\$0.00
Amount Due			\$1,197.88

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