

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:

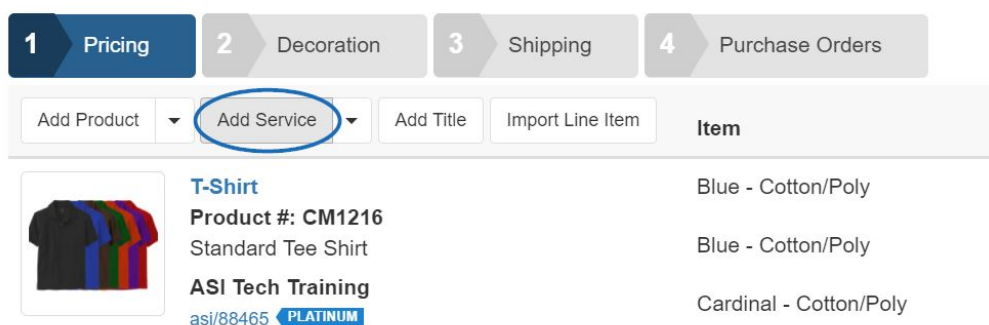
1. Log into ESP and click on the Orders tab.



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 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.

1Pricing

2Decoration

3Shipping

4Purchase Orders

Create Invoice

Add Product

Add Service

Add Title

Import Line Item

T-Shirt

Product #: CM1216

Standard Tee Shirt

ASI Tech Training

asi/88465

PLATINUM

Item	Qty	Cost	Price	Total Cost	Total Price	Margin	Tax
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%
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		

Customer Loyalty Discount

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
4800 Street Rd
Fredericktown, PA 19033
US
support@agitechnical.com
au190301

Quote #		ASI-320696
Total		\$1,197.88

Sales Person SOP User ABC Customer Company July 4800 S Street Rd Fredericktown, PA 19033 United States sales@abccompany.com 800-649-1330	Quote Date 07/19/2021	Ship Date 07/19/2021	In-Hand Date 07/23/2021
		Ship To John Doe ABC Customer Company July 4800 Street Rd Fredericktown, PA 19033 United States john@abccompany.com 215-653-3400	

T-Shirt		Product #: CPN-001506303		
Standard Tee Shirt		Quantity	Price	Total Price
	Blue - Cotton/Poly	10	\$14.00	\$140.00
	Product Color: Blue Size: Large Material: Cotton/Poly			
	Cardinal - Cotton/Poly	10	\$14.00	\$140.00
Product Color: Cardinal Size: Large Material: Cotton/Poly				
Total Units		20		
Product Total (USD)				\$1,088.00

Decoration Details

Proof Required: No - Proof Email Address: info@abccompany.com

Customer Loyalty Discount			
	Quantity	Price	Total
Discount	1	\$10.00	\$10.00
Subtotal			\$1,138.00
Sales Tax			\$47.88
Total			\$1,197.88

Quote End



AGI Tech Training
4800 Street Rd
Fredericktown, PA 19033
US
support@agitechnical.com
au190301

Invoice #		ASI-320697
Order #		ASI-320696
Amount Due		\$1,197.88

Sales Person SOP User ABC Customer Company July 4800 S Street Rd Fredericktown, PA 19033 United States sales@abccompany.com 800-649-1330	Invoice Date 07/19/2021	Ship Date 07/19/2021	In-Hand Date 07/23/2021
		Bill To John Doe ABC Customer Company July 4800 Street Rd Fredericktown, PA 19033 United States john@abccompany.com 800-649-1330	Ship To John Doe ABC Customer Company July 4800 Street Rd Fredericktown, PA 19033 United States john@abccompany.com 215-653-3400

T-Shirt		Product #: CPN-001506303		
Standard Tee Shirt		Quantity	Price	Total Price
	Blue - Cotton/Poly	10	\$14.00	\$140.00
	Product Color: Blue Size: Large Material: Cotton/Poly			
	Cardinal - Cotton/Poly	10	\$14.00	\$140.00
Product Color: Cardinal Size: Large Material: Cotton/Poly				
Total Units		20		
Product Total (USD)				\$1,088.00

Decoration Details

Proof Required: No - Proof Email Address: info@abccompany.com

Customer Loyalty Discount			
	Quantity	Price	Total
Discount	1	\$10.00	\$10.00
Subtotal			\$1,138.00
Sales Tax			\$47.88
Total Amount			\$1,197.88
Amount Paid			\$0.00
Amount Due			\$1,197.88

Quote End