


Defining Discounts in Accounts Receivable

Use the Define Lists window to create discounts that you can assign to customer records. You can define the discount as a percentage or in dollars and cents. If you update this amount, the change is applied automatically in all affected customer records.

If you [track family records](#), mass billing code invoices and manual invoices are charged to record types of "Student" or "Other" when they qualify. Therefore, if you assign discounts to records with one of those types, the discounts are applied automatically to applicable mass billing codes as they are assigned to the records. You can also reorder discounts in the drop down lists.

1. Under Advanced Tools, click the **Define Lists** tab.
2. Select **Accounts Receivable** from the drop-down list and click **Go** .
3. Click **Discounts**, then click **Add**.
4. Enter a **Discount Description** such as "Member Discount."
5. Select whether the discount is a dollar amount or percentage and enter the corresponding value. If it is a percentage, select **Round to the nearest dollar** to round the amount.
6. To add additional discounts, select **Add Another**.
7. Click **OK**.