



Entering Discounts and Surcharges

If your company ever wants to give Discounts to customers or add Surcharges to Work Orders or Invoices, it's quite easy to do with PestaRoo! The following shows how this can be done.

Discounts and Surcharges

PestaRoo's Work Orders and Invoices have a field where a discount or surcharge can be added. There is also a label field so the discount or surcharge type can be noted.

Discounts

Maybe your company offers a 10% discount if someone pays a year in advance. If this was the case, the discount amount could be entered on the Work Order and then carried forward to the Invoice. The Work Order would be created with the full amount of the charge (let's say \$1,000) and then in the field below Amt of Charge, the amount of the discount would be entered as a negative amount (-100.00).

To the left of the Amt of Discount or Surcharge field is a field that helps you keep track of the reason for that Discount or Surcharge. In this case, we would enter "10% Discount". The Total would then automatically factor in the Discount.

Surcharges

In the case of a surcharge, maybe you have a customer that lives outside your normal area and you need to charge an extra amount to pay for fuel costs. For surcharges, a positive amount would be entered in the Amt of Discount or Surcharge field (30.00) and the label field would say something like Fuel Charge.

Work Orders vs Invoices

It's important to note that if you add Discounts or Surcharges at the Work Order level, they **will** be carried to the Invoice. However, if you add Discounts or Surcharges at the Invoice level, they **will not** be reflected on the related Work Order, so you may want to go back to the Work Order and update it to reflect the actual cost, or you can leave it untouched. Since we only report on the Invoices and Payments in PestaRoo, there's really no good reason to go back and update a Work Order after the fact.

Summary

These are only 2 examples of how these fields can be used, but it shows that it's possible to add or subtract from the Amt of Charge and either pass on a savings to your customer or charge them more for overhead.