

Creating and applying discounts in Angel Paw

This manual outlines the four-step workflow for creating a new discount type in the system, configuring it for specific accounts, and applying it to an order.

Step 1: Create the Discount Item

Before a discount can be used, it must exist in the system as an "Item."

1. Navigate to **Corporate Settings** on the main menu.
2. Click on **Settings** (Below your Care Center Name).
3. Click the **Click here to add an item/service** button.
4. Fill in the required fields:
 - **Item/Service Name:** Enter a clear name (e.g., "50% Employee Discount").
 - **SKU:** Assign a unique SKU code.
 - **Category: Crucial:** You must select **"Discount"** from the dropdown menu.
 - **Price:** Set to **0**.
 - **Weight Start/End:** Set to **0**.
5. Click **Save Product**.

New Item/Service

Item/Service Name
50% Employee Discount

Description
50% Employee Discount

SKU
50EDC

Category
Discount

Price
0

Weight Start
0

Weight End
0

Save Product **Cancel**

Step 2: Verify Catalog Entry

Ensure the system has registered the new item correctly.

1. Click on the **Catalog** tab in the side menu.
2. Search for the item name you just created.
3. Verify it appears in the list with the correct Category ("Discount").

The screenshot shows the 'Items' management interface. At the top, there's a 'Category' dropdown set to 'Discount' and a 'Search Items' input field. Below this is a 'Download Catalog' button. The main area is a table with columns: Name, Image, SKU, Weight Start, Weight End, Accounting Category, and Base Price. A single item is listed: '50% Employee Discount' with an 'Upload Picture' button, SKU '50PCED', and a base price of '0.00'. The 'Accounting Category' is 'Discount'. A pagination bar at the bottom shows '0 - 20 of 1'.

Step 3: Configure Discount Logic

Now you must define how the discount works (percentage vs. flat fee) and which accounts are allowed to use it.

1. Click on the **Accounts** tab in the main menu.
2. Select the specific **Account** (e.g., a specific Vet Clinic or "Walk-In") you want the discount to be available for..
3. On the right-hand details panel, click the **Discounts** button.

The screenshot shows the 'Account' configuration page. The left sidebar contains a menu with options like Home, Create Order, Reports, Audit, Care Center, Follow Up Tasks, Corporate Settings, Users, Accounts, Catalog, Vehicles & Stations, Invoices, Routes, and Supply orders. The main area is divided into two panels. The left panel shows account details for 'Demo Care Center 2025 Direct Sales', including fields for Name, Print Name, External Account ID, Email, and address. The right panel contains configuration options for 'Default Bill to', 'Service Options', 'Default Pickup Method', 'Default Return Method', 'Default Payment Method', 'Show Prices to', 'Pickup/Return Methods', 'Notifications', 'Discount(s)', 'Pickup/Return (Ecommerce)', and various toggle switches for 'Enabled', 'Show in ecommerce as pickup/delivery option', 'Referral Orders Only', 'Allow pet parent payment capture on create order screen', 'Order Edits Require Approval', and '2 Step Flow'. A blue arrow points to the 'Discount(s)' button in the right panel.

4. In the pop-up window, toggle the switch for **Add a New Discount**.
5. Configure the settings:
 - **Discount Name:** The display name for the discount.
 - **Discount Type:** Select "Percent" or "Amount" (Fixed dollar value).
 - **Discount Rate/Amount:** Enter the value (e.g., "50" for 50%).
 - **Discount Scope:** Choose whether this applies to the **Order (subtotal)** or a specific **Service Item**.
 - **Item:** Select the "50% Employee Discount" item you created in Step 1 from the list.
 - **Access Level:** Choose who can apply this (All, Vet, or Vet Staff).
6. Click **Add Discount to Account**. You will see it appear in the "Active" list at the bottom of the window.

The screenshot shows a 'Discounts:' pop-up window with a close button (X) in the top right corner. Inside the window, there is a toggle switch labeled 'Add a New Discount' which is currently turned on. Below this, there are several form fields with labels and dropdown menus:

- Discount Name:** A text input field containing '50% Employee Discount'.
- Discount Type:** A dropdown menu with 'Percent' selected.
- Discount Rate/Amount:** A text input field containing '50'.
- Discount Scope:** A dropdown menu with 'Order (subtotal)' selected.
- Item:** A dropdown menu with '50% Employee Discount' selected.
- Access Level:** A dropdown menu with 'All' selected.

Below these fields is a small note: '*Note: Regardless of the item catalog configuration, these settings will be applied to the order when this discount is added.' Underneath the note is a blue button labeled 'Add Discount to Account'.

At the bottom of the window, there is a table-like structure showing the active discount:

ACTIVE	50% Employee Discount	Percent	50.00	all	50% Employee Discount	Click here to Remove
--------	-----------------------	---------	-------	-----	-----------------------	----------------------

Step 4: Apply Discount to an Order

Finally, test the discount on a live or test order.

1. Navigate to **Create Order**.
2. Fill out the Pet Parent and Pet Information as usual.
3. Select a Package and any Additional Items.
4. Scroll down to the bottom section labeled **Add a Discount**.
5. Click the **Plus (+)** icon.
6. Select your discount (e.g., "50% Employee Discount") from the dropdown list.
7. Select who receives the discount in the **Bill To** field (e.g., "Pet Parent").

8. If you select a discount for a specific service or item you will be able to select which item the discount will be applied to.

Create Order

Pet Parent: 210004, Name: 000Z - Urn, Bamboo, M, Description: Urn, Bamboo, M, 1, \$0, \$0

New Item
Add Custom Item

Add a Discount

Discount: 50% Off Item, Apply to Item: 000G - Private Cremation - 30-40 lbs, Bill To: Pet Parent, \$26.88

Pet Parent - Payment
Payment method (*): Capture Payment Later

Pet Parent Totals
Subtotal: \$ 103.76
Tax: \$ 0
Discount: \$ 26.88

9. Verify the calculation in the **Pet Parent Totals** section on the right to ensure the discount amount is deducted from the subtotal.

Create Order

Pet Parent: 210003, Name: 000Z - Urn, Bamboo, S, Description: Urn, Bamboo, S, 1, \$0, \$0

New Item
Add Custom Item

Add a Discount

Discount: 50% Employee Discount, Apply to Item: 000G - Private Cremation - 30-40 lbs, Bill To: Pet Parent, \$40.85

Pet Parent - Payment
Payment method (*): Capture Payment Later

Pet Parent Totals
Subtotal: \$ 81.71
Tax: \$ 0
Discount: \$ 40.85