

How to Add Terms

Terms can be added on Standard, Date Driven or Specific Date tabs.

Terms

Close

Standard

Date Driven

Specific Date

Open Selected

New

Export

Columns

View

24 records

Terms

Contains

Add Filter

Clear Filters

Terms	Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Interest	Allow EFT on Invoices	Include Tax on Discount	Active
<input type="checkbox"/> Net 30	1	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 15	2	1.00%	5	15	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 20	3	1.00%	5	20	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 10, Net 30	4	1.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Due on Receipt	5	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 15	6	0.00%	0	15	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> CAD	99	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> -3%, 10, Net 30	50	-3.00%	10	30	18.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> -5%, 30, Net 100	51	-5.00%	30	100	18.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> -2%, 90, Net 150	52	-2.00%	90	150	18.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> APR, Net 30	56	0.00%	0	30	18.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> APR, Net 90	57	0.00%	0	90	24.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> APR, Net 180	58	0.00%	0	180	28.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net cash against d...	10	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net cash 75 days af...	75	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net cash against in...	30	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Against Irrevocable...	45	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 6% 10, Net 30	55	0.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

0.07s

Ready

Refresh

STANDARD TERMS

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. On the **Standard** tab, click the New button
3. Enter the necessary data

Terms - Net 30

New

Save

Search

Delete

Undo

Close

Details

Audit Log

Report Translations

Terms

Net 30

Terms Code

1

Type

Standard

Discount for Early Payment

10.000

Discount Days

2

Balance Due

30

APR for Interest

0.000

Allow EFT on Invoices

☒

Include Tax on Discount

☐

Energy Trac

☐

Active

☒

0.54s

Edited

1 of 1

Refresh

4. Click the **Save** toolbar button

Terms	A description name field used to describe the type of terms. An example might be "COD", "2% 10 Net 30" or "Company Check".
Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Type	A read only field that shows what type of term - Standard

Discount for Early Payment	Enter the actual discount percent given if the payment is made within the number of Discount Days. If you want your customer to get a 2% discount for paying within the Discount Days field then enter 2 in this field.
Discount Days	Enter the number of days given to receive a discount for paying an invoice early in the Receivables or Payables screens.
Balance Due	Enter the number of days that the payment must be received before it is considered late.
APR for Interest	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Balance Due Days field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. i21 will charge interest based on each month the customer is late when entering Receivables.
Include Tax on Discount	If checked, include tax, if not checked do not include. Discount calculation on the invoice and receive payments will calculate discount based on this setting
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

DATE DRIVEN TERMS

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Go to **Date Driven** tab and click the New button
3. Enter the necessary data
4. Click the **Save** toolbar button

Terms - 20th of the month

New Save Search Delete Undo Close

Details Audit Log Report Translations

Terms 20th of the month

Terms Code 20th of the month

Type Date Driven

Discount for Early Payment 0.000

Discount Days 0

Discount Due Next Month 0

Day of the Month Due 20

Cutoff Days 30

APR for Interest 3.500

Allow EFT on Invoices ☒

Include Tax on Discount ☐

Deferred Pay ☒

Energy Trac ☐

Active ☒

? 0.41s Ready 1 of 1 Refresh

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Type	A read only field that shows what type of term - Date Driven
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.

Discount Day	Enter the day where discount would be valid. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the discount day of your customer to be on the 10th of the month, then enter 10 in this field. When the invoice is paid on or before the 10th of the month, then the customer gets to avail a 2% discount.
Day of Month Due	(Net due before the ___ the day of the month) - is used to enter the day where payment must be received before it is considered late. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the due date of the invoice to be on the 30th of the month, enter 30 in this field. When the invoice is not paid on or before the 30th of the month, there will be interest charged on that invoice.
Cutoff Days	The cutoff day is used to determine whether to use next month or the following next month. By entering 30, this means any invoices dated between the 1st thru the 30th of any month will have a due date of following month. Invoice dates after the 30th, will have a due date of plus two months
APR for Interest	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Include Tax on Discount	If checked, include tax, if not checked do not include. Discount calculation on the invoice and receive payments will calculate discount based on this setting
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

SPECIFIC DATE TERMS

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Go to **Specific Date** tab and click the New button
3. Enter the necessary data

The screenshot shows a software window titled "Terms - 1/1/2017". It has a menu bar with "New", "Save", "Search", "Delete", "Undo", and "Close". Below the menu bar are three tabs: "Details", "Audit Log", and "Report Translations". The "Details" tab is selected, displaying a form with the following fields and values:

- Terms: 1/1/2017
- Terms Code: 9
- Type: Specific Date
- Discount Date: 01/01/2017
- Discount for Early Payment: 0.000
- Due Date: 01/01/2017
- APR for Interest: 0.000
- Allow EFT on Invoices: ☒
- Include Tax on Discount: ☐
- Deferred Pay: ☐
- Energy Trac: ☐
- Active: ☒

The bottom status bar indicates "0.52s | Ready" and "1 of 1" with navigation icons and a "Refresh" button.

4. Click the **Save** toolbar button

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Type	A read only field that shows what type of term - Specific Date

Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount date	Enter the full date mm/dd/yyyy when the discount expires.Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
APR for Interest	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Due Date	Enter the full date mm/dd/yyyy of the due date. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
Allow EFT for invoices	Checkbox used in the origin application.
Include Tax on Discount	If checked, include tax, if not checked do not include. Discount calculation on the invoice and receive payments will calculate discount based on this setting
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Input details on the new blank row in **Standard** tab

The screenshot shows the 'Terms' application window with the following table:

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
<input type="checkbox"/> COD	99	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 15	6	0.00%	0	15	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Due on Receipt	5	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 10, Net 30	4	1.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 20	3	1.00%	5	20	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> 1% 5, Net 15	2	1.00%	5	15	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Net 30	1	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		0.00%	0	0	0.00%	<input type="checkbox"/>	<input type="checkbox"/>

Terms	A description name field used to describe the type of terms. An example might be "COD", "2% 10 Net 30" or "Company Check".
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the number of Discount Days. If you want your customer to get a 2% discount for paying within the Discount Days field then enter 2 in this field.
Balance Due	Enter the number of days that the payment must be received before it is considered late.
Discount Days	Enter the number of days given to receive a discount for paying an invoice early in the Receivables or Payables screens.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Balance Due Days field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. i21 will charge interest based on each month the customer is late when entering Receivables.

Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

3. Go to **Date Driven** tab and input the details on the blank row

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Day of the Month Due	Due Next Month	APR for Late Payment	Allow EFT on Invoices
<input checked="" type="checkbox"/>		0.00%	0	0	0	0.00%	<input type="checkbox"/>

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount Day	Enter the day where discount would be valid. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the discount day of your customer to be on the 10th of the month, then enter 10 in this field. When the invoice is paid on or before the 10th of the month, then the customer gets to avail a 2% discount.
Day of Month Due	(Net due before the __ the day of the month) - is used to enter the day where payment must be received before it is considered late. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the due date of the invoice to be on the 30th of the month, enter 30 in this field. When the invoice is not paid on or before the 30th of the month, there will be interest charged on that invoice.
Due Next Month	(Due next month if issued within __ days of the due date) - can be used to set the number of days from the Due Date, which will determine if the invoice is due next month. If the invoice is issued within the set days, then the invoice is due next month. For example, if 15 is entered in this field, and terms is "2% 10th net 30th", when the invoice is issued within 15 days from the Due date, that invoice will be due next month.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

4. Go to **Specific Date's** tab and input the details on the blank row

Terms	Terms Code	Discount Date	Due Date	APR for Interest	Allow EFT on Invoices	Energy Trac	Deferred Pay	Active
<input type="checkbox"/>	1/1/2017	9	01/01/2017	01/01/2017	0.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	12/31/2017A	11	12/31/2098	12/29/2016	2.00%	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Jan Pay 2019	15	02/02/2018	01/01/2019	2.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>					0.00%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Terms Code	The terms id
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.

Discount date	Enter the full date mm/dd/yyyy when the discount expires. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.
Specific Due Date	Enter the full date mm/dd/yyyy of the due date. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
Allow EFT for invoices	Checkbox used in the origin application.
Deferred Pay	Checkbox to allow terms to be used for Deferred Pay

5. Click **Save** toolbar button

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Input details on the new blank row in **Standard** tab

The screenshot shows the 'Terms' application window. At the top, there are buttons for 'Save', 'Undo', and 'Close'. Below these are tabs for 'Standard', 'Date Driven', and 'Specific Date'. The 'Standard' tab is active. Below the tabs is a toolbar with 'X Remove', 'Layout', and a search icon with the text 'Filter Records (F3)'. The main area contains a table with the following columns: 'Terms', 'Origin Terms Code', 'Discount for Early Payment', 'Discount Days', 'Balance Due', 'APR for Late Payment', 'Allow EFT on Invoices', and 'Active'. The table lists several existing terms like 'COD', 'Net 15', 'Due on Receipt', etc. A new row is added at the bottom, highlighted in blue, and a red rectangle is drawn around it. This new row has a checked checkbox in the 'Terms' column, an empty text field for 'Origin Terms Code', and zeros for 'Discount for Early Payment', 'Discount Days', and 'Balance Due'. The 'APR for Late Payment' is 0.00%, 'Allow EFT on Invoices' is unchecked, and 'Active' is unchecked.

Terms	A description name field used to describe the type of terms. An example might be "COD", "2% 10 Net 30" or "Company Check".
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the number of Discount Days. If you want your customer to get a 2% discount for paying within the Discount Days field then enter 2 in this field.
Balance Due	Enter the number of days that the payment must be received before it is considered late.
Discount Days	Enter the number of days given to receive a discount for paying an invoice early in the Receivables or Payables screens.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Balance Due Days field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. i21 will charge interest based on each month the customer is late when entering Receivables.
Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

3. Go to **Date Driven** tab and input the details on the blank row

The screenshot shows the 'Terms' window with the 'Date Driven' tab active. The table below represents the data visible in the window:

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Day of the Month Due	Due Next Month	APR for Late Payment	Allow EFT on Invoices
		0.00%	0	0	0	0.00%	<input type="checkbox"/>

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount Day	Enter the day where discount would be valid. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the discount day of your customer to be on the 10th of the month, then enter 10 in this field. When the invoice is paid on or before the 10th of the month, then the customer gets to avail a 2% discount.
Day of Month Due	(Net due before the __ the day of the month) - is used to enter the day where payment must be received before it is considered late. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the due date of the invoice to be on the 30th of the month, enter 30 in this field. When the invoice is not paid on or before the 30th of the month, there will be interest charged on that invoice.
Due Next Month	(Due next month if issued within __ days of the due date) - can be used to set the number of days from the Due Date, which will determine if the invoice is due next month. If the invoice is issued within the set days, then the invoice is due next month. For example, if 15 is entered in this field, and terms is "2% 10th net 30th", when the invoice is issued within 15 days from the Due date, that invoice will be due next month.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

4. Go to **Specific Date's** tab and input the details on the blank row

The screenshot shows the 'Terms' window with the 'Specific Date' tab active. The table below represents the data visible in the window:

Terms	Origin Terms Code	Discount Date	Discount for Early Payment	Due Date	APR for Late Payment	Allow EFT on Invoices	Active
			0.00%		0.00%	<input type="checkbox"/>	<input type="checkbox"/>

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Terms Code	The terms id
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount date	Enter the full date mm/dd/yyyy when the discount expires.Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.

APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.
Specific Due Date	Enter the full date mm/dd/yyyy of the due date. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
Allow EFT for invoices	Checkbox used in the origin application.

5. Click **Save** toolbar button

1. On the user's menu panel go to **Common Info** folder then click **Terms**
2. Input details on the new blank row in **Standard** tab

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
Due on Receipt	None	1.89%	5	5	8.07%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NET 30	None-2	3.32%	6	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2/10 Net 30	None-1	3.32%	8	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		0.00%	0	0	0.00%	<input type="checkbox"/>	<input type="checkbox"/>

Terms	A description name field used to describe the type of terms. An example might be "COD", "2% 10 Net 30" or "Company Check".
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the number of Discount Days. If you want your customer to get a 2% discount for paying within the Discount Days field then enter 2 in this field.
Balance Due	Enter the number of days that the payment must be received before it is considered late.
Discount Days	Enter the number of days given to receive a discount for paying an invoice early in the Receivables or Payables screens.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Balance Due Days field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. i21 will charge interest based on each month the customer is late when entering Receivables.
Terms code	This is the Origin terms code for integration and replication to AR terms in origin system.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

3. Go to **Date Driven** tab and input the details on the blank row

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Day of the Month Due	Due Next Month	APR for Late Payment	Allow EFT on Invoices	Active
NET 30 - None-63	63	0.00%	30	25	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		0.00%	0	0	0	0.00%	<input type="checkbox"/>	<input type="checkbox"/>

Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
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Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount Day	Enter the day where discount would be valid. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the discount day of your customer to be on the 10th of the month, then enter 10 in this field. When the invoice is paid on or before the 10th of the month, then the customer gets to avail a 2% discount.
Day of Month Due	(Net due before the __ the day of the month) - is used to enter the day where payment must be received before it is considered late. Allowed value in this field is 1 to 31 only, which represents calendar days. For example, the terms is "2% 10th net 30th", if you want to set the due date of the invoice to be on the 30th of the month, enter 30 in this field. When the invoice is not paid on or before the 30th of the month, there will be interest charged on that invoice.
Due Next Month	(Due next month if issued within __ days of the due date) - can be used to set the number of days from the Due Date, which will determine if the invoice is due next month. If the invoice is issued within the set days, then the invoice is due next month. For example, if 15 is entered in this field, and terms is "2% 10th net 30th", when the invoice is issued within 15 days from the Due date, that invoice will be due next month.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.

4. Go to **Specific Date's** tab and input the details on the blank row

The screenshot shows the 'Terms' window with the 'Specific Date' tab active. The table below represents the data visible in the window:

Terms	Origin Terms Code	Discount Date	Discount for Early Payment	Due Date	APR for Late Payment	Allow EFT on Invoices	Active
<input type="checkbox"/>	10%	33	08/26/2015	3.23%	08/04/2015	12.32%	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>			0.00%			0.00%	<input type="checkbox"/>

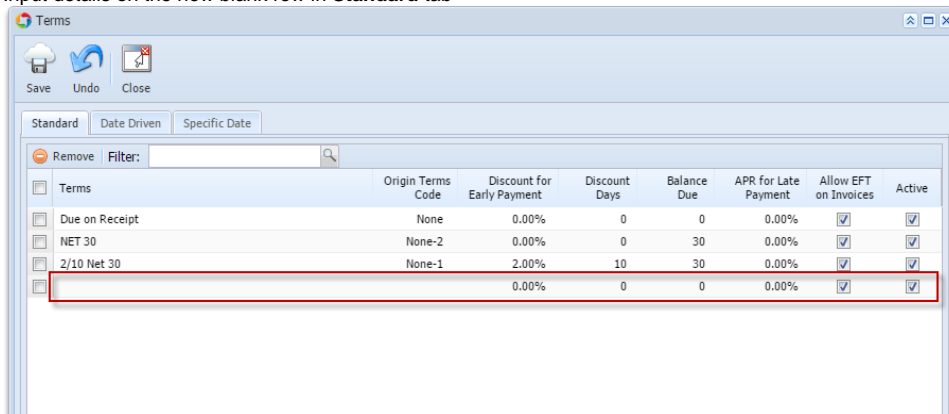
Terms	A description name field used to describe the type of term. An example might be "2% 10th net 30th".
Terms Code	The terms id
Discount for Early Payment	Enter the actual discount percent given if the payment is made within the setup date. For example, the terms is "2% 10th net 30th", if you want your customer to get a 2% discount for paying on or before the 10th of the month, then enter 2 in this field.
Discount date	Enter the full date mm/dd/yyyy when the discount expires. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.
APR for Late Payment	Enter a yearly percent if you want to charge a late fee when the payment is not received within the Day of Month Due field. If you want to charge 2% each month on late charges then make sure you enter the yearly equivalent (APR) of 24% in this field. VisionCore will charge interest based on each month the customer is late when entering Receivables.
Active	Used to make a term active or inactive. When the active check box is deselected, the term will in effect be disabled and you will not be able to use it.
Specific Due Date	Enter the full date mm/dd/yyyy of the due date. Gives the specific dates due for any bill with this terms selected. This is used for farmers that may have a harvest and the customer would like to make the invoices due after harvest. This is a pegged date not relative to when the invoice is entered - it is a specific date. If the user selects a specific due date then the due days should be disabled for that line.

Allow EFT for invoices

Checkbox used in the origin application.

5. Click **Save** toolbar button

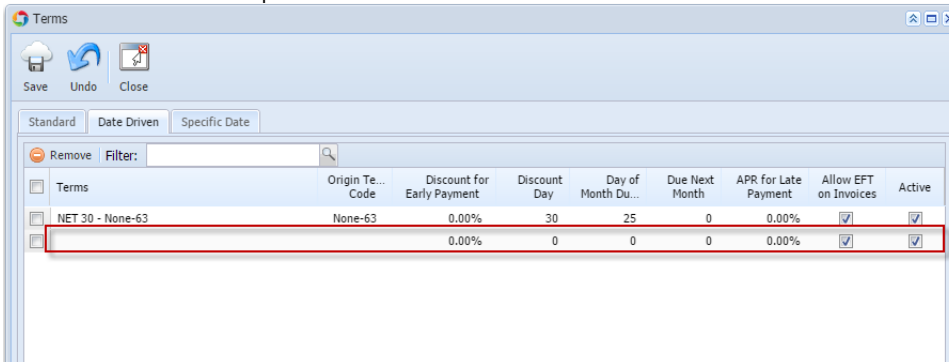
1. On the user's menu panel go to **Common Info** folder then double click **Terms**
2. Input details on the new blank row in **Standard** tab



The screenshot shows the 'Terms' window with the 'Standard' tab selected. The table contains the following data:

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
Due on Receipt	None	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NET 30	None-2	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2/10 Net 30	None-1	2.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

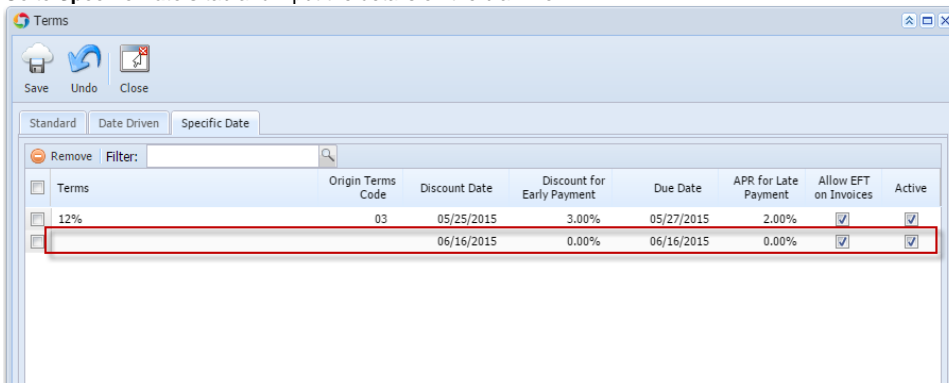
3. Go to **Date Driven** tab and input the details on the blank row



The screenshot shows the 'Terms' window with the 'Date Driven' tab selected. The table contains the following data:

Terms	Origin Te... Code	Discount for Early Payment	Discount Day	Day of Month Du...	Due Next Month	APR for Late Payment	Allow EFT on Invoices	Active
NET 30 - None-63	None-63	0.00%	30	25	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

4. Go to **Specific Date's** tab and input the details on the blank row



The screenshot shows the 'Terms' window with the 'Specific Date's' tab selected. The table contains the following data:

Terms	Origin Terms Code	Discount Date	Discount for Early Payment	Due Date	APR for Late Payment	Allow EFT on Invoices	Active
12%	03	05/25/2015	3.00%	05/27/2015	2.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		06/16/2015	0.00%	06/16/2015	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Click **Save** toolbar button

1. On the user's menu panel go to **Common Info** folder then double click **Terms**

2. Input details on the new blank row in **Standard** tab

Terms

Save Undo Close

Standard Date Driven Specific Date

Remove Filter:

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
Due on Receipt	None	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NET 30	None-2	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2/10 Net 30	None-1	2.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Ready

3. Go to **Date Driven** tab and input the details on the blank row

Terms

Save Undo Close

Standard Date Driven Specific Date

Remove Filter:

Terms	Origin Te... Code	Discount for Early Payment	Discount Day	Day of Month Du...	Due Next Month	APR for Late Payment	Allow EFT on Invoices	Active
NET 30 - None-63	None-63	0.00%	30	25	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Ready

4. Go to **Specific Date's** tab and input the details on the blank row

Terms	Origin Terms Code	Discount Date	Discount for Early Payment	Due Date	APR for Late Payment	Allow EFT on Invoices	Active
		03/05/2015	0.00%	03/05/2015	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5. Click **Save** toolbar button

1. On the user's menu panel go to **Common Info** folder then double click **Terms**
2. Input details on the new blank row in **Standard** tab

Terms	Origin Terms Code	Discount for Early Payment	Discount Days	Balance Due	APR for Late Payment	Allow EFT on Invoices	Active
Due on Receipt	None	0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NET 30	None-2	0.00%	0	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2/10 Net 30	None-1	2.00%	10	30	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Go to **Date Driven** tab and input the details on the blank row

Terms

Save Undo Close

Standard Date Driven Specific Date

Delete Filter:

Terms	Origin Te... Code	Discount for Early Payment	Discount Day	Day of Month Du...	Due Next Month	APR for Late Payment	Allow EFT on Invoices	Active
NET 30 - None-63	None-63	0.00%	30	25	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00%	0	0	0	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Ready

4. Go to **Specific Date's** tab and input the details on the blank row

Terms

Save Undo Close

Standard Date Driven Specific Date's

Delete Filter:

Terms	Origin Terms Code	Discount Date	Discount for Early Payment	Due Date	APR for Late Payment	Allow EFT on Invoices	Active
		03/05/2015	0.00%	03/05/2015	0.00%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Ready

5. Click **Save** toolbar button