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Category	Product
Course	Discount Wizard
Version	1.0
Client	Generic
Software	2.15.9

Hints and Tips

- ✓ Use this discount to give customers a dollar-amount off the total bill when certain conditions are met.
- ✓ From 2.13.0.0, receipts can show the discount amount apportioned across each included product; this makes refunds easier to calculate if there's a receipt.
 - The POS Config. -> **Discounts** tab **Allow Txn Discount Apportioning** check box must be selected.
 - The amounts are calculated as: [extended price after any other applicable discounts] / [value of all included products after any other applicable discounts], multiplied by value of discount.
 - A4 invoices only display the discounted price after apportioning.
 - Refunds are excluded.
 - Reports will always show the apportioned sale value, regardless of the POS configuration selected.
- ✓ **Priority** is more important for transaction discounts that are non-exclusive and triggered by a \$ spend amount; these are based on the current total after item discounts/overrides have been applied, so setting a lower priority may mean the discount won't be triggered.
 - Quantity based discounts are triggered off original prices.

Amount Off Transaction Discount

Examples of Amount Off Transactions:

- \$10 off the bill when you spend \$200 or more store-wide (excludes gift cards and cigarettes).
- \$2 off the bill when you produce a supa-saver coupon.
- \$5 off the bill when you show a Fly Buys card.

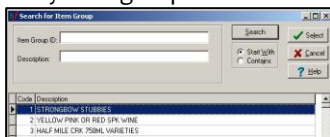
i POS only applies the full value of the dollar-off discount if the final transaction amount due will be greater than or equal to \$0.00 (excluding refunds).

Procedure to Create an Amount Off Transaction Discount

1.	From the HOS/BOS Tools menu, select Discount Wizard .	
2.	Click New .	
3.	Type a brief description of the discount. <i>*Maximum 80 characters.*</i>	
4.	Type a description that will print on the customers receipt (<i>below the subtotal, or under each target if apportioning is enabled</i>). <i>*Maximum 30 characters.*</i> <i>*As a lesser discount will apply if the total due falls to \$0.00, you don't usually include the value of the discount.*</i>	
5.	Select the Start Date that the discount is effective in stores. <i>*Defaults to today's date.*</i>	
6.	Select the End Date for the discount; the last day that customers can get the discount. <i>*Defaults to one month from today's date.*</i>	

Hints and Tips

- ✓ For transaction discounts, the **amount saved** prints on the receipt as a separate total (unless apportioning is enabled), and also in the total 'you have saved...' if you have a savings message enabled.
- ✓ Function buttons:
 - **Back:** to check/edit selection/s on the previous screen.
 - **Next:** to go to the next screen.
 - **Cancel:** to cancel the discount.
- ✓ **Criterion** is the conditions that the customers purchase has to meet to get the discount off the transaction.
 - Refer to the [PRO-3c Adding Criterion Fact Sheet](#).
 - E.g. Get \$10 off the bill when you **spend \$200 or more** (C).
 - The criterion isn't always a product; the customer may have to produce a coupon, a customer card, or belong to a certain customer group.
- ✓ Use an **Item Group** as criterion when the customer doesn't necessarily have to buy every product in a selection to get the discount.
 - Refer to the [PRO-3b Item Groups Fact Sheet](#).
 - An item group can consist of a combination of products and department hierarchies.
 - If you don't know the **Group ID**, click to search for it; click **Search** to retrieve a list of every item group created.



<p>7. Select the Priority Level for this discount. <i>*[1] is the highest priority; set a higher priority for discounts that provide better value for customers.*</i></p>	
<p>8. Select the Show a total dollar saving... check box if you want the discount & total amount saved to print at the end of the receipt. <i>*If a generic savings message has been configured for all receipts, this includes the saving instead.*</i></p>	
<p>9. Click </p>	
<p>10. In the Select Discount Method field, select Amount Off Transaction.</p>	
<p>11. Type the dollar value of the discount in cents. <i>*E.g. enter 50¢ as 50, \$1 as 100, \$10 as 1000.*</i></p>	
<p>12. Click </p>	
<p>13. Complete the following steps to specify the conditions that the customers transaction has to meet to get the discount:</p> <ol style="list-style-type: none"> a. Select the type of object that the customer has to purchase or produce. b. Click . c. Select the specific product/object required, and the criterion rules. <i>*Refer to the PRO-3c Adding Criterion Fact Sheet for full instructions to add criterion.*</i> <i>*The adjacent screen example shows a discount where a customer has to spend \$200 store-wide (...All products check box) to get a discount (e.g. to get \$10 off the transaction).</i> d. Click . <p><i>*The Options screen is displayed.*</i></p>	

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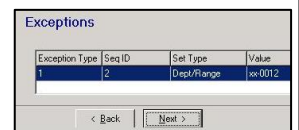
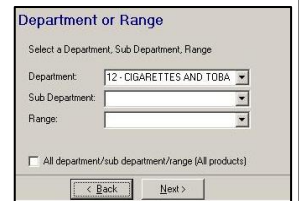
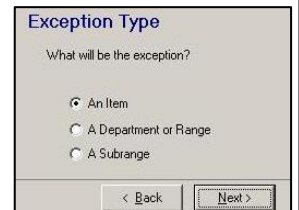
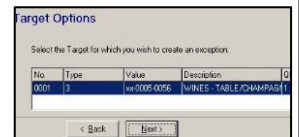
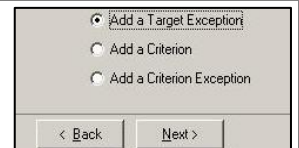
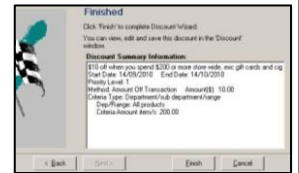
Hints and Tips

- ✓ From 2.13.0.0, you can add a **Target Exception** if you want to exclude certain products or categories from being apportioned any of the transaction discount amount if the discount triggers.
- By default, a target exception is also treated as a criterion exclusion in this type of discount; it won't count towards meeting the conditions to trigger the discount (**this means you don't add it as a criterion exception separately**).
- E.g. \$10 off the bill when you spend \$200 or more store-wide, excluding cigarettes (buying cigarettes won't count towards the \$200, and they won't be apportioned any of the discount – so if they're refunded with a receipt, the customer gets the full price refunded).

14.	To: view a summary of the discount, or finish	then: select Preview Discount Summary Information . Click Next > . Click Finish and go to step 17, or click Back to return to the Options screen.
	exclude certain products from the discount (available from 2.13.0.0 onwards)	you'll use the Add a Target Exception option. Go to step 15.
	add additional conditions	select Add a Criterion . Return to step 13.
	exclude certain products from a condition	you'll use the Add a Criterion Exception option. Go to step 16.

The **Add a Target option isn't used in this type of discount; by default, the transaction is the target.**

15. Complete the following steps to add a target exception:
- Select **Add a Target Exception**.
 - Click **Next >**.
 - If there's more than one target listed, click the target that will have the exclusion.
 - Click **Next >**.
 - Select the type of exception.
 - Click **Next >**.
 - Select the EAN or the category to exclude.
Use the same method as selecting the criterion in step 13.
The adjacent screen example shows a discount where the cigarette department won't be apportioned the discount, and won't count towards triggering the discount.
 - Click **Next >**. A summary is displayed; **Exception Type 1** represents a target exception.
 - Click **Next >**. The Options screen is displayed.
 - Return to step 9.



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Hints and Tips

- ✓ **Criterion Exceptions** are specific products in the criterion group (selected in step 13) that you don't want to be used as criterion; think of it as filtering out products when you've used broad criterion.
 - E.g. \$10 off the bill when you spend \$200 or more store-wide, **excludes gift cards and cigarettes** (buying cigarettes or gift cards won't count towards the \$200, but they'll still be apportioned the discount).
 - Don't use exceptions if the criterion is a single item.
 - Don't use the **...All products** check box; this would exclude all the criteria!

16. Complete the following steps to add a criterion exception:
 - a. On the Options screen, select **Add a Criterion Exception**.
 - b. Click **Next >**.
 - c. If there's more than one criterion, click the one that you want to add an exception for.
 - d. Click **Next >**.
 - e. Select the type of exception.
 - f. Click **Next >**.
 - g. Select the EAN or category to exclude.
 - *Use the same method as selecting the criterion in step 13.*
 - *The adjacent screen example shows a discount where cigarettes won't count towards triggering the discount (e.g. spend \$200 to get \$10 off the transaction).*
 - h. Click **Next >**. A summary of the exception is displayed.
 - *The Options screen is displayed.*
 - i. Click **Next >**. A summary is displayed.
 - j. Click **Next >**. The Options screen is displayed.
 - k. Return to step 14.

The screenshots show the following steps:

- Initial screen with radio buttons for "Add a Criterion" and "Add a Criterion Exception".
- "Criterion Options" screen with a table:

No	Type	Value	Description
0000	13	10.000	W/NEE TABLE
- "Exception Type" screen with radio buttons for "An Item", "A Department or Range", and "A Subrange".
- "Department or Range" screen with dropdowns for Department (12 - CIGARETTES AND TOBA), Sub Department, and Range. Includes a checkbox for "All department/sub department/range (All products)".
- "Exceptions" screen with a table:

Exception Type	Seq ID	Set Type	Value
2	2	Dept/Range	0000012

17. Once you've clicked **Finish** (at step 14), review and change the details of the discount as required.
 - *Click the **Criteria** tab to view the detailed parameters.*

The screenshot shows the "Discount" window with the following details:

- Discount ID: 391
- Start Date: 14/09/2010
- End Date: 14/10/2010
- Method: Amount Off Transaction
- Value: 1000
- Priority Level: 1
- Description: Spend \$200 get \$10 off txn, excl gift cards and cigarettes
- Description to be printed on Receipt: Spend \$200 get \$10 off txn
- Options:
 - Nth Item is the Least expensive (Most expensive item will get discount first)
 - Force discount to more than the req. targets
 - Discount triggered for each set of criteria
 - Non-exclusive: apply on top of other discounts
 - Apply on top of price overrides
 - Show a total dollar saving on the docket
 - No further discount (selected discounts)
- Summary: Spend \$200 get \$10 off txn, excl gift cards and cigarettes



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Hints and Tips

- ✓ The **Limit Per Customer** options are not used in this type of discount.
- ✓ **Options check boxes:**
 - **Nth Item is the [x] expensive:** doesn't apply to this type of discount.
 - **Force discount to more than the req. Targets:** doesn't apply to this type of discount.
 - **Discount triggered for each set of Criteria:** Not used.
 - **Non-exclusive- apply on top of other disnts:** You usually select this for transaction discounts, so that the customer receives every transaction discount they're eligible for (in order of priority or discount ID); e.g. if a customer has a coupon to get \$2 off the transaction, and they spend \$200 so are also eligible to get \$10 off the bill, they should get both discounts.
An exclusive transaction discount won't apply if another exclusive item or transaction discount has already been applied to the transaction.
 - **Apply on top of price overrides:** doesn't apply to this type of discount.

<p>18. In the Options section, select the Non-exclusive... check box. <i>*The Force discount... and the Apply on top of price overrides check boxes aren't used in this type of discount.*</i></p>	
<p>19. As required, click the Labels tab to design a shelf ticket for this discount. <i>*Refer to the PRO-3d Add a Discount Ticket Fact Sheet.*</i></p>	
<p>20. Click </p>	
<p>21. To: create another discount then: return to step 2.</p> <hr/> <p>finish (BOS user) click </p> <p>click </p> <hr/> <p>finish (HOS user) click </p> <p>Activate the discount/s for the applicable store/s. <i>*Refer to the PRO-3f Activate a Discount Fact Sheet.*</i></p> <hr/> <p><i>*The discount is effective at POS on the nominated date.*</i></p>	