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Category	Product
Course	Discount Wizard
Version	1.0
Client	Generic
Software	2.15.9

Hints and Tips

- ✓ 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 the value of discount (which is converted into dollars by [sum of included products] x [percent discount]).
 - Refunds are excluded.
 - A4 receipts and reports will always show the apportioned sale value, regardless of the POS configuration selected.
- ✓ **Priority is important** if a customer is eligible for multiple non-exclusive transaction discounts (you usually make transaction discounts non-exclusive (at step 18), so that they all always apply).
 - The discount amount is always calculated off the total after higher priority/older transaction discounts. So setting a lower priority means less dollar saving if other transaction discounts have been applied first.


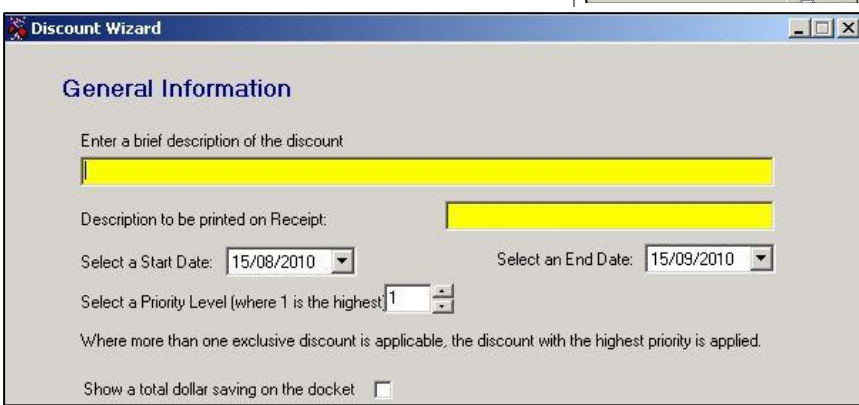

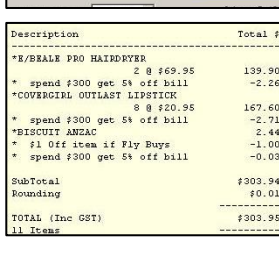
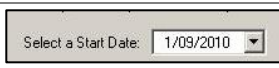
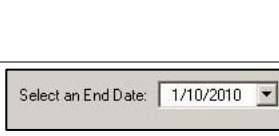

Percentage Off Transaction Discount

Examples of Percentage Off Transactions:

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

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

Procedure to Create a Percentage Off Transaction Discount

1.	From the HOS/BOS Tools menu, select Discount Wizard .	
2.	Click  .	
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>	
		

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Hints and Tips

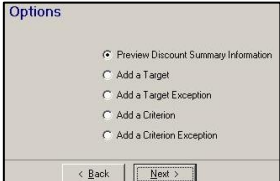
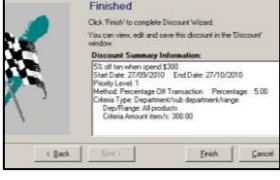

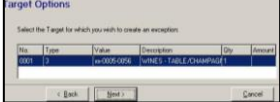



- ✓ For transaction discounts, the **amount saved** prints on the receipt as a separate total (unless apportioning is enabled), and also in the total 'you have saved...' if you have a savings message configured for receipts.
- ✓ Function buttons:
 - **Back:** to check/edit selection/s on the previous 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](#).
 - If the transaction discount is **triggered by a \$ spend amount** (5% off the bill when you **spend \$300 or more** (C)), this is based on the total after all item discounts / overrides have been applied - this means the discount might not be triggered; e.g. if a multi-buy reduces the total below the minimum spend.
 - 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 if the customer can choose from several products, or a product has multiple EAN/s packaging, and they don't necessarily have to buy every product 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.

<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 Next >.</p>	
<p>10. In the Select Discount Method field, select Percentage Off Transaction.</p>	
<p>11. Type the percentage value of the discount. <i>*E.g. enter 5% as 500, 10% as 1000, 50% as 5000.*</i></p>	
<p>12. Click Next >.</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. <i>*E.g. for store-wide discount you usually select A Department, if they have to show a coupon you choose An Item, and to limit it to staff etc you will also usually select a Customer Group.*</i> b. Click Next >. 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 \$300 store-wide (...All products check box) to get a discount (e.g. to get 5% off the transaction).</i> d. Click Next >. <i>*The Options screen is displayed.*</i> 	



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).
 - Prior to v2.13, you can't add target exclusions to this type of discount; use the **% off item** discount method instead if you have target exclusions.

<p>14.</p>	<p>To: view a summary of the discount, or finish</p> <p>then: select Preview Discount Summary Information.</p> <p>Click Finish and go to step 17, or click Back to return to the Options screen.</p> <hr/> <p>exclude certain products from getting the discount (available from 2.13.0.0 onwards) <i>*See Hints and Tips.*</i></p> <p>then: select Add a Target Exception option. Go to step 15.</p> <hr/> <p>add additional conditions</p> <p>then: select Add a Criterion. Return to step 13.</p> <hr/> <p>exclude certain products from a being used to trigger the discount</p> <p>then: you'll use the Add a Criterion Exception option. Go to step 16.</p> <hr/> <p><i>*The Add a Target option isn't used in this type of discount; by default, the transaction is the target.*</i></p>	 
<p>15.</p>	<p>Complete the following steps to add a target exception: (available from 2.13.0.0 onwards)</p> <ol style="list-style-type: none"> 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. <i>*Use the same method as selecting the criterion in step 13.*</i> <i>*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.*</i> 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. 5% 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).
 - 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 a \$300 spend to get 5% off the txn.
 - h. Click **Next >**.
 - i. A summary of the exception is displayed.
The Options screen is displayed.
 - j. Click **Next >**. A summary is displayed.
 - k. Click **Next >**.
 - l. Return to step 14.

No.	Type	Value	Description
1200	12	ex-0005	WINE'S TABLE

Exception Type	Seq ID	Set Type	Value
2	2	Dep/Range	ex-0012

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.**



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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 Fly Buys card to get 3% off the transaction, and they spend \$200 so are also eligible to get 5% off the bill, they should get both discounts.
An exclusive transaction discount won't apply if another (higher priority or older) exclusive transaction discount has already been applied to the transaction (but it will still apply even if a higher priority or older exclusive item discount has already been applied).
 - **Apply on top of price overrides:** doesn't apply to this type of discount. The system automatically applies this logic in the background, calculating the percentage off amount off the current price after any item or higher priority transaction level discounts/overrides.
 - **Exclude selected automatic discounts:** this stops the discount from applying to items that also receive a discount flagged with no further discounts.

<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. If required, in the Options section, select the Exclude selected automatic discounts check box.</p>	
<p>20. 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>21. Click </p>	
<p>22. To: create another discount finish (BOS user) finish (HOS user)</p> <p>then: return to step 2. click Click click Activate the discount/s for the applicable store/s. <i>*Refer to the PRO-3f Activate a Discount Fact Sheet.*</i></p> <p><i>*The discount is effective at POS on the nominated date.*</i></p>	