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Category	Product
Course	Discount Wizard
Version	1.0
Client	Generic
Software	2.15.9

Hints and Tips

- ✓ Set-up is required to identify the customers who will receive this discount; refer to:
 - [TECH-2r Configure Senior Discount Fact Sheet](#)
 - [TECH-2s Configure Staff Discount Fact Sheet](#)

- ✓ Staff discount can be set-up using other discount methods.
 - However, this method gives the most options to exclude products and loyalty points (at steps 8)

method	Amount off is calculated off:	The saving on the receipt:
staff	original prices	shows as a separate total OR only in the 'you have saved...' message if this is enabled.
% off item	original OR current prices (apply on top of price overrides)	shows under each item & in 'you have saved...' if enabled.
% off txn	current prices	shows as a separate total & in 'you have saved...' if enabled.

- ✓ **Priority** isn't applicable:
 - This discount is always the LAST item discount applied.
 - You select if the discount applies to products that have already been discounted (at step 8).
- ✓ Function buttons:
 - **Back:** to check/edit selection/s on the previous screen.
 - **Next:** to go to the next screen.
 - **Cancel:** to cancel the discount.


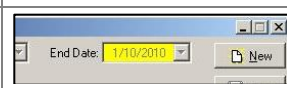
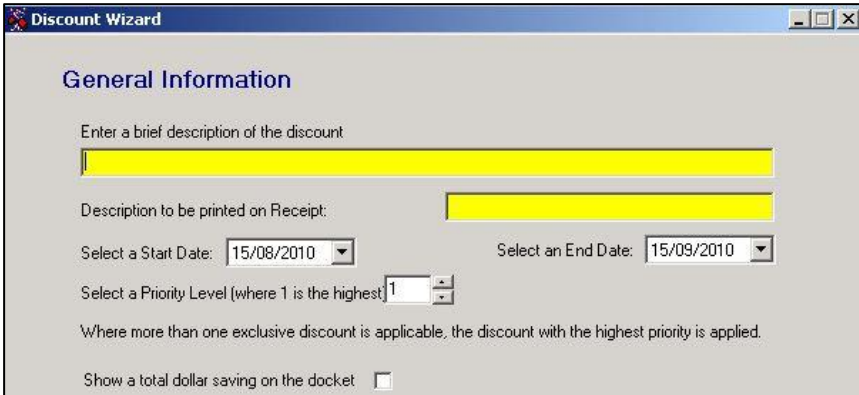

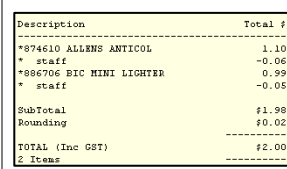


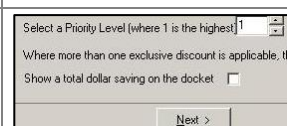

Staff (and Other Privilege) Discount

Use this discount to manage any discount triggered by a membership to a certain customer group or price level.

Examples of discounts:

- 10% off liquor when your staff card is scanned in a sale (excludes non-scans, markdowns, & promotional lines)
- 5% off grocery when your pension card is scanned in a sale **and** you spend \$20 or more.

Procedure to Create a Staff % off Items 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 next to the discount amount (if enabled at step 16; it prints below the target products). <i>*Maximum 30 characters.*</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>	
7.	Priority isn't applicable for this discount. <i>*See Hints and Tips.*</i>	
		

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Hints and Tips

- ✓ The discount won't apply to products with a selected **Exclude Options** characteristic:
 - Products with a barcoded **Markdown** sticker attached.
 - Products which the operator has given a **Manual Price Change**.
 - Products which the operator has given a **Manual Item** or **Transaction Discount** at POS.
 - Products (targets) in an active **Automatic Item** or **Transaction** level discount.
 - **Non-scans** (where price is entered by the POS operator)
 - Products that are **Criteria in an Auto Discount**; e.g. buy one (criteria) get one free (target).
 - **Selected automatic discounts**: this stops the discount from applying to items that also receive a discount flagged with no further discounts.
- ✓ You select how the discount applies to products on promotion:
 - **Don't apply discount**: no products on promotion will receive the discount.
 - **Apply discount on top**: all products on promotion will receive the discount.
 - **Top up to discount %**: only products on a promotion that's less than this discount amount will be discounted, to bring the amount off up to the value of the discount.

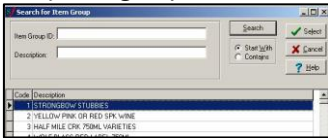
<p>8. Select the Show a total dollar saving... check box if you want the discount & total amount saved to print at the end of the receipt. <i>*If a generic savings message has been configured for all receipts, this is displayed and includes the discount saving instead.*</i></p>	
<p>9. Click <input type="button" value="Next >"/>.</p>	
<p>10. In the Select Discount Method field, select Staff Discount.</p>	
<p>11. Type the percentage value of the discount in cents. <i>*E.g. enter 5% as 500, 10% as 1000, 50% as 5000.*</i></p>	
<p>12. Click <input type="button" value="Next >"/>.</p>	
<p>13. In the Exclude Options section, select the check box against the option/s that won't receive this discount. <i>*See Hints and Tips.*</i></p>	
<p>14. In the Discounts On Normal Promotions section, select how the discount will apply to products on promotion. <i>*See Hints and Tips.*</i></p>	
<p>15. In the Discounts on Loyalty Promotions section, select how the discount will apply to products on a loyalty price promotion. <i>*Only applies if you use loyalty price levels.*</i> <i>*See Hints and Tips.*</i></p>	
<p>16. In the Other Options section, select the check box against the applicable options. <i>*See Hints and Tips.*</i></p>	
<p>17. Click <input type="button" value="Next >"/>.</p>	



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Hints and Tips

- ✓ Use an **Item Group** target to discount several products (or departments), when the customer doesn't necessarily have to buy every target to get the discount.
- ✓ Refer to the [PRO-3b Item Groups Fact Sheet](#).
- ✓ An item group can consist of a combination of individual products, departments, and/or sub-ranges.
- ✓ If you don't know the **Group ID**, click to search for it; click **Search** to retrieve a list of every item group created.



- ✓ To only give the discount **once the customer spends a certain amount** of money in the transaction, enter the amount at step 19 in the **How much must be spent on the items** field.
 - E.g. 5% off products in the grocery department if you spend \$20 or more.
 - **Important!** This is based on the **reduced total** after all other eligible item-level discounts / price overrides/AR discounts have been applied – this means staff discount might not be triggered (e.g. if a multi-buy reduces the total below the minimum spend).

<p>18. Select the target that will be discounted: <i>*Usually you select department level.*</i></p> <table border="1"> <tr> <th>To discount:</th> <th>Then:</th> </tr> <tr> <td>a single product (use A Group of Item if there are multiple EANs)</td> <td>select An Item. Click . Type or search for the EAN. Go to step 19.</td> </tr> <tr> <td>every product in a selected department, sub department or range, or every product store-wide</td> <td>select A Department/Sub department/Range. Click . Select the required department tree OR select the All products check box. Go to step 19.</td> </tr> <tr> <td>every product in a selected sub-range</td> <td>select A Subrange. Click . Select the required sub range. Go to step 19.</td> </tr> <tr> <td>a specific group of products</td> <td>select A Group of Items. Click . In the Group ID field, type or search for the group OR click New to create a new group. <i>*See Hints & Tips.*</i> Go to step 19.</td> </tr> </table>	To discount:	Then:	a single product (use A Group of Item if there are multiple EANs)	select An Item . Click . Type or search for the EAN. Go to step 19.	every product in a selected department, sub department or range, or every product store-wide	select A Department/Sub department/Range . Click . Select the required department tree OR select the All products check box. Go to step 19.	every product in a selected sub-range	select A Subrange . Click . Select the required sub range. Go to step 19.	a specific group of products	select A Group of Items . Click . In the Group ID field, type or search for the group OR click New to create a new group. <i>*See Hints & Tips.*</i> Go to step 19.	
To discount:	Then:										
a single product (use A Group of Item if there are multiple EANs)	select An Item . Click . Type or search for the EAN. Go to step 19.										
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every product in a selected sub-range	select A Subrange . Click . Select the required sub range. Go to step 19.										
a specific group of products	select A Group of Items . Click . In the Group ID field, type or search for the group OR click New to create a new group. <i>*See Hints & Tips.*</i> Go to step 19.										
<p>19. Nominate the quantity that the customer must buy to trigger/receive the discount: <i>*You must select How Many.. or How Much..; you can type [1] product or [1] cent as the minimum.*</i></p> <table border="1"> <tr> <th>If the discount only applies if the customer:</th> <th>then:</th> </tr> <tr> <td>buys different products in the category (doesn't display for An Item)</td> <td>select the Customer must buy different items from (in) the selected category check box.</td> </tr> <tr> <td>buys a minimum quantity of the product/s</td> <td>select How many..., and type the number of units that must be purchased.</td> </tr> <tr> <td>spends a minimum dollar amount <i>*See Hints/Tips.*</i></td> <td>select How much..., and type the amount. <i>*Enter the amount in cents. E.g. type \$5.00 as 500.*</i></td> </tr> </table>	If the discount only applies if the customer:	then:	buys different products in the category (doesn't display for An Item)	select the Customer must buy different items from (in) the selected category check box.	buys a minimum quantity of the product/s	select How many... , and type the number of units that must be purchased.	spends a minimum dollar amount <i>*See Hints/Tips.*</i>	select How much... , and type the amount. <i>*Enter the amount in cents. E.g. type \$5.00 as 500.*</i>			
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spends a minimum dollar amount <i>*See Hints/Tips.*</i>	select How much... , and type the amount. <i>*Enter the amount in cents. E.g. type \$5.00 as 500.*</i>										



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- Hints and Tips**
- ✓ **Criterion** is extra conditions that the purchase has to meet to get the discount. For this discount method, use **Criterion** to limit who receives the discount.
 - Refer to the [PRO-3c Adding Criterion Fact Sheet](#).
 - E.g. 10% discount (T) when you present a card linked to the 'staff' customer group (C).
 - ✓ Set-up is required to identify the customers who will receive this discount; refer to:
 - [TECH-2r Configure Senior Discount Fact Sheet](#)
 - [TECH-2s Configure Staff Discount Fact Sheet](#)

<p>20. Click <input type="button" value="Next >"/>.</p> <p><i>*The Options screen is displayed.*</i></p>											
<p>21. Click Add a Criterion.</p>											
<p>22. Click <input type="button" value="Next >"/>.</p>											
<p>23. Select the type of object that the customer has to purchase or produce.</p> <p><i>*For this discount, you usually select either: A Customer Group, A Group of Customer Group, or A Price Level, whichever way you identify the privilege customer.*</i></p>											
<p>24. Click <input type="button" value="Next >"/>.</p>											
<p>25. Select the specific product/object required, and the criterion rules.</p> <p><i>*See Hints and Tips.*</i></p> <p><i>*The adjacent Customer Group screen example shows a discount where a customer has to produce a card or AR membership linked to the customer group 'staff' to receive the discount off the target products.*</i></p>											
<p>26. Click <input type="button" value="Next >"/>.</p> <p><i>*The Options screen is displayed.*</i></p> <table border="1" data-bbox="619 1249 1181 1899"> <tr> <td>To:</td> <td>then:</td> </tr> <tr> <td>view a summary of the discount, or finish</td> <td>select Preview Discount Summary Information. Click <input type="button" value="Finish"/> and go to step 28, OR click Back to return to the Options screen.</td> </tr> <tr> <td>add another target</td> <td>select Add a Target. Return to step 18.</td> </tr> <tr> <td>exclude certain products from the discount</td> <td>use the Add a Target Exception option. Go to step 27.</td> </tr> <tr> <td>add another criterion <i>*not normally done*</i></td> <td>select the Add a Criterion option. Return to step 22.</td> </tr> </table> <p><i>*Add a criterion exclusion isn't usually used, as you're unlikely to add departments/products as criterion for staff discount.*</i></p>	To:	then:	view a summary of the discount, or finish	select Preview Discount Summary Information . Click <input type="button" value="Finish"/> and go to step 28, OR click Back to return to the Options screen.	add another target	select Add a Target . Return to step 18.	exclude certain products from the discount	use the Add a Target Exception option. Go to step 27.	add another criterion <i>*not normally done*</i>	select the Add a Criterion option. Return to step 22.	
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Hints and Tips

- ✓ **Target Exceptions** are products in the target that won't get the discount.
 - E.g. 5% off store-wide (T) when your staff card is scanned (C), **excluding cigarettes** (TE) (these won't be discounted).
 - Don't use exceptions when the target is a single item, as the only thing to exclude would be that item!
 - Don't use the **...All products** check box; this would cancel out the discount offered!
- ✓ **Print Discount Description on Each Line:** the discount description (at step 4) will display against each product.
- ✓ **No Loyalty Points for Discounted Items:** if your business runs a loyalty points program, no points will be earned for products that receive this discount.
- ✓ **Limit Per Customer options:**
 - **Max Benefit amount:** the maximum saving amount in dollars; e.g. if [\$10], a discount of '5% off products' will stop being applied after the 5% adds up to \$10 saving.
 - **Max number of items:** the maximum number of target products that can benefit from the discount; e.g. 'limit 5 per customer/transaction'.
 - **Max number of applications:** not used in this discount.
- ✓ **Options Check Boxes:**
 - **Force discount to more than the req. Targets:** not used.
 - **Discount triggered for each set of Criteria:** Not used.
 - **Non-exclusive:** this discount is automatically non-exclusive (you exclude products from the discount at step 8).
 - **Apply on top of price overrides:** this discount method automatically calculates the percentage off using the original prices of products, not the reduced price reduced from other discounts or price overrides.

27. Complete the following steps to add a target exception:
- On the Options screen, select **Add a Target Exception**.
 - Click
 - If there's more than one target listed, click the target that will have the exclusion.
 - Click
 - Select the type of exception.
 - Click
 - Select the EAN or the category to exclude. **Use the same method as selecting the target in step 18.**
 - Click . A summary is displayed.
 - Click
 - Return to step 26.

Target Options

No.	Type	Value	Description
0001	2	0	All Products

Exception Type

What will be the exception?

An Item
 A Department or Range
 A Subrange

Exceptions

Exception Type	Seq ID	Sel Type	Value
1	0	Dept/Range	xx0012
1	4	Dept/Range	xx0000

28. Once you've clicked (at step 26), review and edit the details as required.

Discount

Discount ID: 407 Start Date: 15/11/2011 End Date: 6/01/2012

Description: staff discount

Method: Staff Discount Value: 10 Priority Level: 1

No Loyalty Points For Discounted Items
 Print Discount Description On Each Line

Options

Nth Item is the 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 dischts
 Apply on top of price overrides
 Show a total dollar saving on the docket
 No further discount (selected discounts)

29. Select the following options as required:
- Limit loyalty points.
 - Print a discount description.
 - Limit the benefit per customer.
- *See Hints and Tips.**

No Loyalty Points For Discounted Items
 Print Discount Description On Each Line

Limit Per Customer

Max Benefit Amount:
 Max number of Items:
 Max number of Applications:

30. Click .

31. **To:** finish (BOS user) **then:** click .
 click .
- finish (HOS user) **then:** click .
 Activate the discount.
- *Refer to the [PRO-3f Activate a Discount Fact Sheet](#).**
- *The discount is effective on the nominated date.**

