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Category	Product
Course	Discount Wizard
Version	1.0
Client	Generic
Software	2.14.100

Adding Criterion

Criterion is extra conditions or purchase rules that the customers purchase has to meet to get the discount.

- E.g. buy one bottle of Bourbon *(item criterion)* and get a 1.25 L coke for free *(target)*.
- If you add multiple criteria, they must all be met to get the discount (unless you put them in an **Item Group**, which uses 'OR' logic).
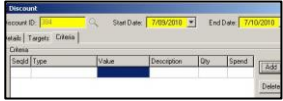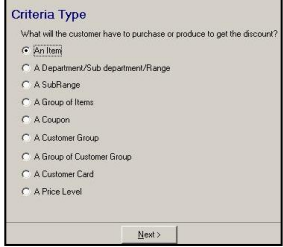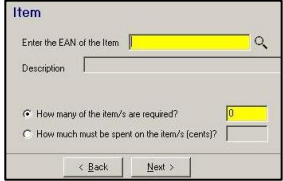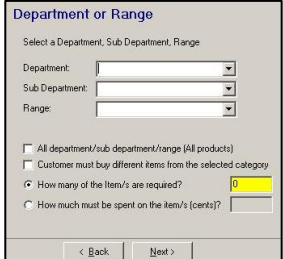
Procedure to Add Criterion to a Discount
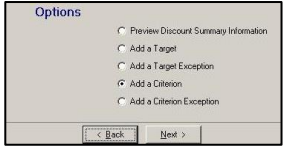
Hints and Tips

✓ Criterion is extra conditions on top of the target criterion already added to the discount.

✓ In most <u>item</u> level discounts, additional criterion units have to be bought to trigger the discount a $2^{nd}/3^{rd}/4^{th}$ time. The only time every target product is discounted once the criterion is shown once is:
  - when the criterion is a customer group or price level
  - for the New Price for Item Group discount method
  - if you select the **Force discount to more than the required targets** option on the Detail tab (only applicable for some discounts).

✓ The requirement may be to purchase another product, to purchase from a particular Department/Sub-Dept/Range or Sub Range, or to purchase from a group of products.
  - E.g. get 0.50¢ off Dove moisturiser 85gm *(T)* when you buy a Dove cleanser 1L *(C)*.

✓ If the target and the criterion are the same product (or overlap department hierarchies), POS finds the criterion first; this means that these units of the product *can't be used as a target (discounted)* in the same discount.

✓ The criterion can belong to a different department structure to the target.
  - E.g. Get a free Nescafe Frappe Caramel 10pk *(target)* when you buy 4 of these coffee glass mugs *(item criterion)*.
  - E.g. Buy one bottle of Bourbon *(item criterion)* and get a 1.25 L coke free *(target)*.

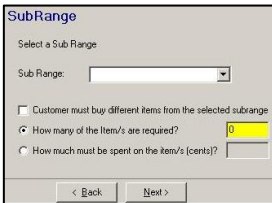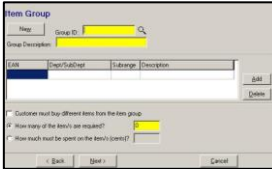| 1.	**To add criterion:**	**Then:**	
	to a new discount *(once you reach the Options screen)*	from the **Options** screen, select **Add a Criterion.** Click **Next.**	
	to an existing (saved) discount	type or search for the **Discount ID** to edit (if it's not already populated). Click the **Criteria** tab. Click **Add.**	
2.	Select the type of object that the customer has to purchase or produce in order to get the discount:		
	To restrict the discount to customers who:	**then:**	
	buy another specific product *(or produce a coupon with a barcode that they got in a catalogue)*	select **An Item.** Click **Next.** Type or search for the EAN. Press **Enter** if you typed the EAN. Go to step 3.	
	buy another product from a specific department, sub department or range, **or** any other product in the store	select **A Department/Sub department/Range.** Click **Next.** Select the required department tree **or** select the **All products** check box. **You can select only the **Range** to auto-populate the hierarchy above it.** Go to step 3.	

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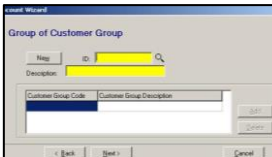
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Hints and Tips

✓ Criterion isn't always a product; the customer may have to produce a coupon, a customer card, or belong to a certain customer group.
  - E.g. 50¢ off Coke 2L when you produce a supa-saver coupon.
  - E.g. 5% off the bill when a staff card is scanned.

✓ **Coupons** are processed at POS the same way as a product, by scanning or keying a coupon barcode; the coupon is listed as a $0.00 'item' on the receipt.

```
Description                Total $
------------------------------------
*PANTENE S/POO CLSSIC CARE
                 2 @ $4.69      9.38
*  #1 PANTENE M/B WITH CPN     -2.38
   PANTENE MULTIBUY             0.00
                             ----------
TOTAL (Inc GST)              $7.00
3 Items                      ----------
```

✓ To use a coupon as criterion, you first need to create a stock record for it:
  - Set up a generic warehouse, supplier, and department hierarchy for reporting on coupons, and decide on a range of stock code numbers
  - Use a short EAN
  - Set to **Stocked**
  - Set the **Retail** to **$0.00**. POS will prompt the operator to enter a price; they should enter $0, because the discount handles the price reduction of the product. You could add a stock message against the coupon to remind the operator about this (refer to the Tech-2h Configure Stock Messages Fact Sheet.
  - Set **Cost** and **GST** to zero.

✓ Use **A Customer Group** or **A Price Level** as criterion when you want to give a discount only to customers who produce a specific customer card or AR code that's entered at POS.
  - Refer to TECH-2d Configure Customer Cards Fact Sheet and the TECH-4d Configure Special Customer Pricing Fact Sheet.
  - E.g. a Fly Buys discount that gives 10% off when the customer spends $300+, or a discount that's only issued when a staff card is scanned.

To restrict the discount to customers who:	then:
buy another product from a specific sub range	select **A Subrange**. Click **Next**. Select the required sub range. Go to step 3.
buy something from a specific group of products *(or if there's multiple EANs/packaging of the same product you want to make them buy)*	select **A Group of Items**. Click **Next**. In the **Group ID** field, type or search for the group to discount; press **Enter** if you typed the ID. *Refer to the PRO-3b Item Groups Fact Sheet if you have to create a new group.* Go to step 3.
produce a coupon *(that they got from a catalogue)*	the **A Coupon** option isn't used anymore. Use the **Add an Item** option.
belong to a specific group (linked to a specific customer card or an AR account code) *(this replaces the A Customer Card option, which isn't used anymore)*	select **A Customer Group**. Click **Next**. Type or search for the **Customer Group** code. Press **Enter** if you typed the code. Go to step 4.
belong to one of several specified customer groups	select **A Group of Customer Group**. Click **Next**. In the **ID** field, type or search for the group code. Press **Enter** if you typed the ID. Go to step 4.
belong to a specific price level (linked to a customer card or an AR account)	select **A Price Level**. Click **Next**. Select the applicable **Price Level** code. Go to step 4.

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Hints and Tips

✓ You don't just select the object that the customer has to buy/produce to get the discount; you also have to specify **how many** they need to buy/produce, or **how much** they need to spend.

✓ POS can be configured to consider all products in the customers shopping basket as eligible criteria for calculating discounts, even if the unit of product has been used to meet criteria in a different discount.

  ● The POS Config. **Item -> Discount** tab **Allow Criteria re-use in Discounts** check box must be selected.

  ● If criteria re-use is not allowed, POS will ignore that unit of the product once it's been used as criterion to satisfy one discount.

  ● You can only offer 3-tier or more discounts if you <u>don't</u> allow criteria re-use, so that the system calculates the discounts that apply correctly (e.g. 1 for $3, 2 for $4, or 3 for $6)

  ● You can offer a 2-tier discount and allow criteria re-use, so long as you make one tier a 1-for.

3.	Nominate the conditions that the criterion object must meet to obtain the discount:		
	If the discount only applies if the customer:	**then:**	
	buys assorted products from the selected category *(not displayed for all criterion)*	select the **Customer must buy different items from the…** check box.	☐ Customer must buy different items from the item group
	buys/produces a certain quantity	select **How many…**, and type the number of units that must be purchased/produced.	⦿ How many of the item/s are required? [0] ○ How much must be spent on the item/s (cents)?
	spends a certain dollar amount on the product/s	select **How much…**, and type the amount. *Enter the amount in cents, no decimal place. E.g. type $5.00 as 500.*	○ How many of the item/s are required? ⦿ How much must be spent on the item/s (cents)?
	You must select one option; type either [1] product or [1] cent as the minimum condition.		
4.	Press **Next**. *The Options screen is displayed.*		**Options** ⦿ Preview Discount Summary Information ○ Add a Target ○ Add a Target Exception ○ Add a Criterion ○ Add a Criterion Exception < Back Next >
5.	Continue to create the discount.		
			❑