SUREfire SYSTEM

TECH- 2s	*Page 1 of 2*
Category	Technical
Course	POS Config.
Version	1.0
Client	Generic
Software	2.14.100

Configure Staff Discount

Staff discount is usually managed by creating an AR account for each staff member, and adding the privilege against their account (so that you can easily delete it if they leave your business).

Procedure to Configure Staff Discount

Hints and Tips

- ✓ To extend the discount to family members of staff:
  - use the same account, **or**
  - create an account for each person (you can use '**Bill To**' to link their transactions to the staff account, but you must still enter the discount against each account).

- ✓ There are two ways to add staff discount to an account:
  - As an **AR transaction discount**.
    - At POS, the discount applies as you scan products.
  - Via **Discount Wizard**; a 'staff' customer group is added to each account, and used as the criterion to trigger the discount.
    - At POS, the discount only applies once you reach the payment screen.
    - If a staff member belongs to multiple groups (e.g. VIP and Staff), they'll receive all eligible discounts.
    - This method gives more control over what products are discounted, and you can make the discount only trigger after they spend a certain $ amount.
    - You can use the **Sales** -> **Discounts** report to see how much money you've 'losing' to staff discount

- ✓ If a **staff member leaves** your business, you can either:
  - **delete** the account, or
  - only remove the staff privilege on the **Loyalty** tab (if they'll still belong to your customer loyalty program).

1.	Create an AR account for each staff member.	
	Refer to either the BGEN-2a New Credit Customer Account Fact Sheet or the BGEN-2b New Cash-Only or Loyalty Customer Account Fact Sheet (depending on what type of account you want to allow).	
	If you already run a loyalty program that staff can join, they should keep their existing AR account, rather than create another account.	
	If you're creating new accounts and will issue staff cards, it's recommended that you start each account with the same prefix; you can then configure POS to know this prefix, so that the account can be scanned or entered at POS like a product (rather than having to search via the Customer ID screen). This is covered at step 3.	

2.	When you reach the step in the fact sheet where you click the **Loyalty** tab, decide how you'll add the discount to the AR account (choose ONE option):	
	See Hints and Tips.	

To:	then:	
offer a set percentage off every product *(basic method)*	select the **Status** option **Discount (Customer)**. In the **Customer Discount** % field, select **Off Retail Price**, and type the discount amount. Click **Save**.	
have much greater control over when the discount is applied	first create a **Customer Group** for staff; e.g. code: 200, description: STAFF. *Refer to the Tech-4c Configure Customer Groups Fact Sheet. * Back in the account, add this group on the **Loyalty** tab.	

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Hints and Tips

✓ **Configuring the card prefix** makes it quicker to add the account against a sale (from the Item Menu screen).
 • It's up to you if you issue scannable cards, or just have operators type the code.

✓ **Discount Wizard** has three methods you can use to give staff discount.
 • In all methods, if you only offer staff discount after they spend $x or more, this is based on the reduced total after item discounts / price overrides/AR discounts – this means staff discount might not be triggered (remember, exclusive item discounts apply first, non-exclusive discounts apply in order of priority or discount ID, & transaction discounts always apply last).
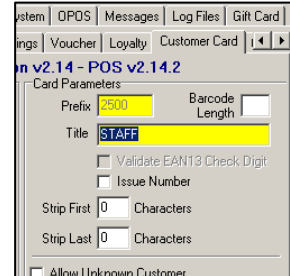
method	Amount off is calculated off:	The saving on the receipt:
staff	original prices	shows as a separate total **OR** only in 'you have saved…' if this is enabled.
% off item	original OR current prices	is listed under each item & in 'you have saved…'.
% off txn	current prices	shows as a separate total and in 'you have saved…'.

```
Description                    Total $
----------------------------------------
*DISHMATIQUE REFILL XTR DT        6.32

SubTotal                         $6.32
STAFF DISCOUNT
          $6.32 @ 5%             -$0.32
                              ----------
TOTAL (Inc GST)                  $6.00
1 Item                        ----------
STAFF Card             2500
Money Tendered                   $6.00
Change Due                       $0.00
GST Amount                       $0.55

* Signifies item(s) with GST

SUPASTORE have saved you          $0.32
```

✓ The configuration is applied to the registers when **File Transfer** next runs and the operator logs off/on; if made at Head Office, this occurs after **HOS Export/Import** runs.

3. Complete the following steps for the applicable option:

See Hints and Tips

If:	then:
staff accounts don't use a common prefix	go to step 4.
staff accounts share a unique prefix (step 1), AND you want POS to recognise it like a product (rather than searching for it)	configure the card prefix. *Refer to the TECH-2d Configure Customer Cards Fact Sheet.* *Set the **Prefix** to the number you've used; the fact sheet suggests what prefix number to use.* *Type the **Title** as STAFF.* *Do not select any other parameters.*

4.

If:	then:
you'll use AR discount for staff discount	end of procedure.
you'll use **Discount Wizard** for staff discount	create the discount in Discount Wizard. *Refer to Hints and Tips.* *Refer to the PRO-3p Staff (and other Privilege) Discount Fact Sheet; or use the PRO-3h Percentage off Item Discount or PRO-3l Percentage off Transaction.* *The **target** is usually 'all departments'; use **target exclusions** to exclude selected departments e.g. cigarettes.* The **criterion** will be the Customer Group that you set up at step 2.* *Set to **priority 1**, so that it's triggered first if there are other eligible non-exclusive discounts (that are lower priority.* *Set to **non-exclusive**, so that it still applies if there's also an exclusive discount that applies (remember, only one exclusive discount can apply in a transaction).* End of procedure.

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