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SUREfire SYSTEMS

<table>
<tr><td>

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Category	Technical
Course	Codes & Desc.
Version	1.0
Client	Generic
Software	2.14.100

</td></tr>
</table>

Configure Special Price Levels

Price Levels are configured if your business wants to set up short-term or long-term price promotions and/or discounts that a customer only receives if they either:

- present a specific type of card linked to the price level
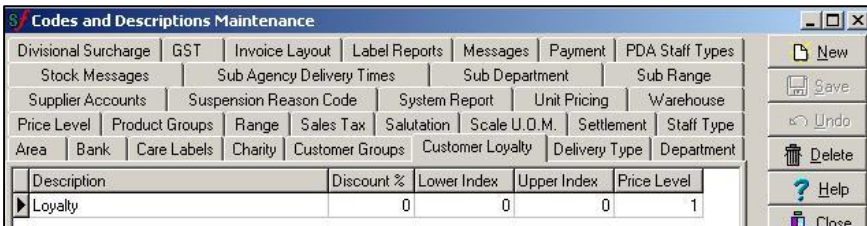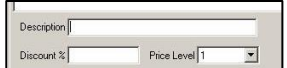- have an AR account linked to the price level.
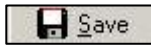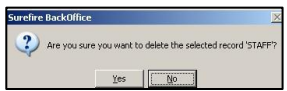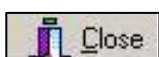
Procedure to Configure Special Price Levels

1.	From the HOS/BOS **Tools** menu, select **Codes and Descriptions.** *Or select the Codes and Descriptions shortcut.*	
2.	Click the **Price Level** tab.	

Hints and Tips

- ✓ **Price Level** is sometimes referred to as **Customer Level**.

- ✓ A maximum of four alternative price levels can be active at any time (excluding [0] normal retail price).

- ✓ **Important!** If you're only creating one loyalty level, leave a gap in the numbering in case you want another loyalty level in-between in the future, as you can't edit the code.

- ✓ If you create several price levels, allocate a higher **Code** number to indicate a cheaper special price level.
  - If a customer is eligible for two price levels, they'll only receive the price with the highest **Code**.
  - E.g. [0] = normal retail price
    [1] = loyalty
    [2] = VIP Plus
    [3] = staff
    [4] = manager

- ✓ Summary of process to use special pricing:
  - Configure **Price Levels** in Codes and Descriptions.
  - Link **Price Levels** to **Customer Loyalty** groups in Codes and Descriptions.
  - Link a **Price Level** to either a Customer Card in POS Config. or each AR record.
  - Create a loyalty promotion in a product's stock record/HOS pricing, selecting the **Customer Loyalty** group eligible for the special pricing.
  - You can also create a discount in **Discount Wizard** that's only applied when a customer belongs to a specific **Price Level** (criteria).

3.	Click **New**.	
4.	In the **Code** field, type a one digit code to identify this price level. *Use [1], [2], [3], and [4]; See Hints and Tips.*	
5.	In the **Description** field, type the name of the pricing level.	
6.	Click **Save**.	

7.	To:	then:	
	add another price level	return to step 3.	
	edit the description for a price level *(you can't edit the code)*	click the required row; the details are populated in the fields below. Overtype the text as required. Click **Save**.	
	delete a price level	click the required row; the details are populated in the fields below. Click **Delete.** Click **Yes** to continue.	
	link the price level to a customer loyalty group	go to step 8. *You must do this for all alternative price levels that'll be used.*	

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Hints and Tips

✓ You must link each alternative **Price Level** configured to a **Customer Loyalty** group.

✓ You can set a maximum of four different **Customer Loyalty** groups.

✓ The **Discount** and **Index** fields on the Customer Loyalty tab aren't used in this version of SURE*fire.*

✓ Before you can start using special pricing, you need to apply the **Price Level Code** against either:
- the applicable customer card; refer to Tech-2d Configure Customer Cards Fact Sheet. This has the quickest & broadest application, as you only have to apply it once for many customers to be eligible for the promotion.
- each HOS/BOS Account Receivable record (on the **General** tab, in the **Price Level** field) that you want to receive the pricing. This method takes longer.

8.	Click the **Customer Loyalty** tab.	
9.	Click **New**.	
10.	In the **Description** field, type the name of the loyalty group.	
11.	Select the **Price Level** for this loyalty group. *This relates to the price level that you configured in steps 4 - 5.*	
12.	Click **Save**.	

13.	**To:**	**then:**	
	add another loyalty group	return to step 9.	
	edit a loyalty group	click the required row; the details are populated in the fields below. Change the required field/s as required. Click **Save**.	
	delete a loyalty group *An error is displayed if you try to delete a loyalty group assigned to active promotions.*	click the required row; the details are populated in the fields below. Click **Delete.** Click **Yes** to continue.	
	finish	click **Close**.	

14.	From the HOS/BOS **System** menu, select **Location Setup.**	
15.	If a Head Office user, select the Location that you want to define. *You'll be defining the configuration for all stores at and below the level that you select.*	
16.	Double-click the **Configure** icon. *If a HOS user, click **Yes** to continue.*	

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Hints and Tips

✓ **Print Savings on Receipt** only displays savings from promotions created against the stock record; it doesn't include price overrides, manual discounts at POS, markdowns, or automatic discounts.

```
Description                    Total $
----------------------------------------
 PUMP HOUSE WATER                 14.00
VIP saving $5.00
*ALLENS ANTICOL
                    3 @ $1.10      3.30
*  #1 MB 3 FOR $2.50             -0.80
P  G/CIRCLE ORANGE PULP FREE JCE  3.99
Promo saving $1.01
 COTTAGE CAKES CARROT            3.30
```

- The message/s won't print for an item if it receives other pricing instead of the promotion; e.g. a price override, manual discount at POS, markdown, or an automatic item discount.
- Important! The **CB Savings Description** only prints if your business uses prefixed cards configured and linked to that price level in SUREfire (only adding the price level against an AR account won't trigger the message). Refer to the TECH-2d Configure Customer Cards Fact Sheet.

✓ You nominate special pricing for applicable customers by selecting the corresponding Customer Loyalty group when you set up a promotion in the Stock record or HOS Pricing.

- Refer to the PRO-2e In-store Price Promotions Fact Sheet.

✓ You can also create a discount in **Discount Wizard** that's only applied when a customer card or AR code linked to a specific **Price Level** is entered at POS.

- Refer to the PRO-3c Adding Criterion Fact Sheet.

✓ 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** next runs.

17.	Click the **Print** ->**Receipt** tab.	
18.	In the Print Savings on Receipt section, complete the following steps if you want promotion saving amounts to display underneath the products on the receipt: • Select the **Print Promotion Saving** check box. • Type the text to display for normal promotions. • Type the text to display for loyalty (CB) price level promotion's (if used). *See Hints and Tips.*	
19.	Click ⊞ Save .	
20.	Click **Yes** to continue. *Or click **Cancel** to return to the settings.*	
21.	Click **OK.**	
22.	Click Close to exit the Location Setup.	
23.	You're now ready to use the configured Price Levels and Customer Loyalty groups. *Refer to Hints and Tips.*	
		❑