

PRO-3k Page | 1 of 5

Category	Product
Course	Discount Wizard
Version	1.1
Client	Generic
Software	2.18.5.34

Hints and Tips

- ✓ Use this discount to give customers a dollar-amount off the total bill when certain conditions are met.
- ✓ 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 value of discount.
 - A4 invoices only display the discounted price after apportioning.
 - Refunds are excluded.
 - Reports will always show the apportioned sale value, regardless of the POS configuration selected.
- ✓ **Priority** is more important for transaction discounts that are non-exclusive and triggered by a \$ spend amount; these are based on the current total after item discounts/overrides have been applied, so setting a lower priority may mean the discount won't be triggered.
 - Quantity based discounts are triggered off original prices.

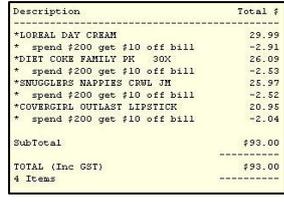
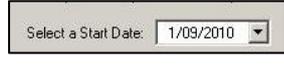
Amount Off Transaction Discount

Examples of Amount Off Transactions:

- \$10 off the bill when you spend \$200 or more store-wide (excludes gift cards and cigarettes).
- \$2 off the bill when you produce a supra-saver coupon.

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

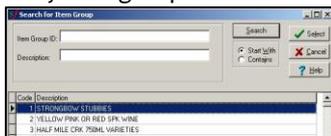
Procedure to Create an Amount Off Transaction Discount

1.	From the HOS/BOS Tools menu, select Discount Wizard .							
2.	<table border="1"> <tr> <th>To:</th> <th>Then:</th> </tr> <tr> <td>Create a discount from scratch</td> <td>Click New. Go to step 3.</td> </tr> <tr> <td>Use another discount as the base (copy it)</td> <td>Search for and select the discount to see on-screen. Click Clone. <i>*All details are copied, and the Description now starts with 'CLONE'*</i> <i>*Click Undo to cancel creation of this discount.*</i> Edit the discount, i.e. update the description, dates, and items. Go to step 20 to save.</td> </tr> </table>	To:	Then:	Create a discount from scratch	Click New . Go to step 3.	Use another discount as the base (copy it)	Search for and select the discount to see on-screen. Click Clone . <i>*All details are copied, and the Description now starts with 'CLONE'*</i> <i>*Click Undo to cancel creation of this discount.*</i> Edit the discount, i.e. update the description, dates, and items. Go to step 20 to save.	 
To:	Then:							
Create a discount from scratch	Click New . Go to step 3.							
Use another discount as the base (copy it)	Search for and select the discount to see on-screen. Click Clone . <i>*All details are copied, and the Description now starts with 'CLONE'*</i> <i>*Click Undo to cancel creation of this discount.*</i> Edit the discount, i.e. update the description, dates, and items. Go to step 20 to save.							
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>							

PRO-3k Page| 2 of 5

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 enabled.
- ✓ 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](#).
 - E.g. Get \$10 off the bill when you **spend \$200 or more** (C).
 - 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 when the customer doesn't necessarily have to buy every product in a selection 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.
 - If you don't know the **Group ID**, click to search for it; click **Search** to retrieve a list of every item group created.



<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 </p>	
<p>10. In the Select Discount Method field, select Amount Off Transaction.</p>	
<p>11. Type the dollar value of the discount in cents. <i>*E.g. enter 50¢ as 50, \$1 as 100, \$10 as 1000.*</i></p>	
<p>12. Click </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. b. Click 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 \$200 store-wide (...All products check box) to get a discount (e.g. to get \$10 off the transaction).</i> d. Click <p><i>*The Options screen is displayed.*</i></p>	

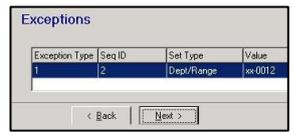
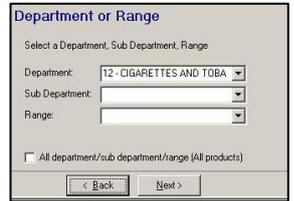
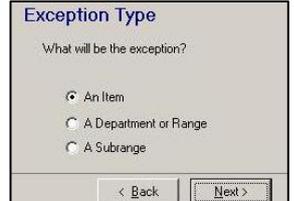
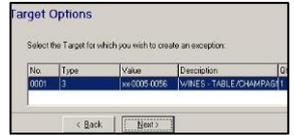
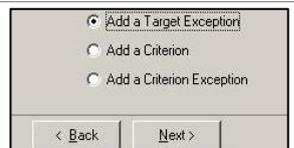
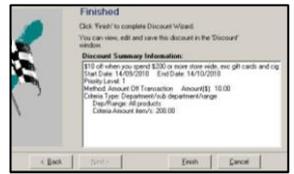
Hints and Tips

- ✓ 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).

14.	To: view a summary of the discount, or finish	then: select Preview Discount Summary Information . Click Next > . Click Finish and go to step 17, or click Back to return to the Options screen.
	exclude certain products from the discount (<i>available from 2.13.0.0 onwards</i>)	you'll use the Add a Target Exception option. Go to step 15.
	add additional conditions	select Add a Criterion . Return to step 13.
	exclude certain products from a condition	you'll use the Add a Criterion Exception option. Go to step 16.

The **Add a Target option isn't used in this type of discount; by default, the transaction is the target.**

15. Complete the following steps to add a target exception:
- 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.
Use the same method as selecting the criterion in step 13.
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.
 - Click **Next >**. A summary is displayed; **Exception Type 1** represents a target exception.
 - Click **Next >**. The Options screen is displayed.
 - Return to step 9.



PRO-3k Page | 4 of 5

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. \$10 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, but they'll still be apportioned the discount).
 - 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 triggering the discount (e.g. spend \$200 to get \$10 off the transaction).
 - h. Click **Next >**.
A summary of the exception is displayed.
The Options screen is displayed.
 - i. Click **Next >**. A summary is displayed.
 - j. Click **Next >**. The Options screen is displayed.
 - k. Return to step 14.

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.**



PRO-3k Page| 5 of 5

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 coupon to get \$2 off the transaction, and they spend \$200 so are also eligible to get \$10 off the bill, they should get both discounts.
An exclusive transaction discount won't apply if another exclusive item or transaction discount has already been applied to the transaction.
 - **Apply on top of price overrides:** doesn't apply to this type of discount.

<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. 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>20. Click </p>	
<p>21. To: create another discount then: return to step Error! Reference source not found..</p> <hr/> <p>finish (BOS user) click . Click </p> <hr/> <p>finish (HOS user) 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>	