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Category	Product
Course	Discount Wizard
Version	1.1
Client	Generic
Software	2.18.5.34

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.
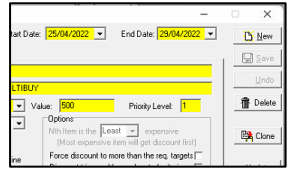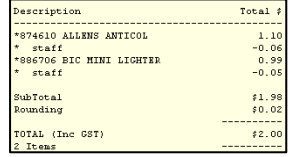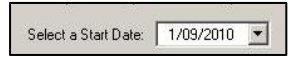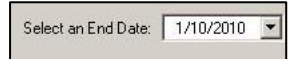 • **Cancel:** to cancel the discount.

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.	<table><tr><td>**To:**</td><td>**Then:**</td></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**. *All details are copied, and the **Description** now starts with 'CLONE'* *Click **Undo** to cancel creation of this discount.* Edit the discount, i.e. update the description, dates, and items. Go to step 30 to save.</td></tr></table>	
3.	Type a brief description of the discount. *Maximum 80 characters.*	General Information
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)*. *Maximum 30 characters.*	
5.	Select the **Start Date** that the discount is effective in stores. *Defaults to today's date.*	Select a Start Date: 1/09/2010
6.	Select the **End Date** for the discount; the last day that customers can get the discount. *Defaults to one month from today's date.*	Select an End Date: 1/10/2010
7.	Priority isn't applicable for this discount. *See Hints and Tips.*	

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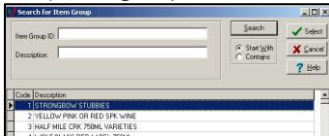
8.	Select the **Show a total dollar saving...** check box if you want the discount & total amount saved to print at the end of the receipt. *If a generic savings message has been configured for all receipts, this is displayed and includes the discount saving instead.*
9.	Click Next >.
10.	In the **Select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

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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*).

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18. Select the target that will be discounted:

Usually you select department level.

To discount:	Then:
a single product (*use A Group of Item if there are multiple EANs*)	select **An Item**. Click [Next >] 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 [Next >] 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 [Next >] Select the required sub range. Go to step 19.
a specific group of products	select **A Group of Items**. Click [Next >] In the **Group ID** field, type or search for the group OR click **New** to create a new group. *See Hints & Tips.* Go to step 19.

19. Nominate the quantity that the customer must buy to trigger/receive the discount:

*You must select **How Many..** or **How Much..**; you can type [1] product or [1] cent as the minimum.*

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 *See Hints/Tips.*	select **How much...**, and type the amount. *Enter the amount in cents. E.g. type $5.00 as 500.*

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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

20.	Click [Next >]. *The Options screen is displayed.*	Options ○ Preview Discount Summary Infor ○ Add a Target ○ Add a Target Exception ⦿ Add a Criterion ○ Add a Criterion Exception
21.	Click **Add a Criterion.**	
22.	Click [Next >].	
23.	Select the type of object that the customer has to purchase or produce. *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.*	Criteria Type What will the customer have to purchase or produce to get the di ⦿ An Item ○ A Department/Sub department/Range ○ A SubRange ○ A Group of Items ○ A Coupon ○ A Customer Group ○ A Group of Customer Group ○ A Customer Card ○ A Price Level [Next >]
24.	Click [Next >].	
25.	Select the specific product/object required, and the criterion rules. *See Hints and Tips.* *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.*	Customer Group Enter a Customer Group [1] Description STAFF [< Back] [Next >]
26.	Click [Next >]. *The Options screen is displayed.*	Options ⦿ Preview Discount Summary Informa ○ Add a Target ○ Add a Target Exception ○ Add a Criterion ○ Add a Criterion Exception [< Back] [Next >]

To:	then:
view a summary of the discount, or finish	select **Preview Discount Summary Information.** Click [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 *not normally done*	select the **Add a Criterion** option. Return to step 22.

Add a criterion exclusion isn't usually used, as you're unlikely to add departments/products as criterion for staff discount.

Finished
 Click 'Finish' to complete Discount Wizard.
 You can view, edit and save this discount in the 'Discount' window.
 Discount Summary Information:
 staff discount
 Start Date: 15/11/2011   End Date: 6/01/2012
 Priority Level: 1
 Method: Staff Discount
 Target Type: Department/sub department/range
 Dep/Range: All products
 Target Quantity item/s: 1
 Criteria Type: Customer Group
 Customer Group Code: 1
 Target Exception Type: Department/sub department/ran
 Dep/Range: 12
 [< Back] [Next >] [Finish] [Ca]

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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.

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27. Complete the following steps to add a target exception:
- On the Options screen, 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 target in step 18.*
- Click [Next >]. A summary is displayed.
- Click [Next >].
- Return to step 26.

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

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

See Hints and Tips.

30. Click [Save].

31.

To:	then:
finish (BOS user)	click [Update]. Click [Close].
finish (HOS user)	click [Close]. Activate the discount. *Refer to the PRO-3f Activate a Discount Fact Sheet.*

The discount is effective on the nominated date.