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PRO-3h *Page| 1 of 5*	
Category	Product
Course	Discount Wizard
Version	1.1
Client	Generic
Software	2.18.5.34

Percentage Off Item Discount

Examples of percentage off item discounts:
- 5% off Duck Disinfectant 1L (limit 5 per transaction)
- 20% off all Blackmore's vitamins *(a group of items)*
- 10% off when you spend $50 or more on vitamins
- 5% off Coke 2L when you produce a supa saver coupon
- 5% off when you show a staff card *(a customer group)*
- 15% off Oyster Bay Sav Blanc wine 750ml when you buy a Pepperjack Barossa Shiraz red wine 750ml.

Hints and Tips

✓ Use this discount to give customers a percentage off:
  - a specific product
  - a nominated department hierarchy
  - any product in the store
  - a group of specific products.

✓ If a customer buys products that are eligible for more than one discount, POS applies an exclusive discount first (page 5), based on the **priority level**.
  - All eligible discounts are calculated off the original price, unless the **Apply on top of price overrides** checkbox is selected (see page 5).

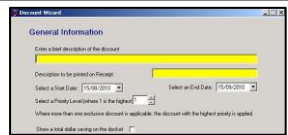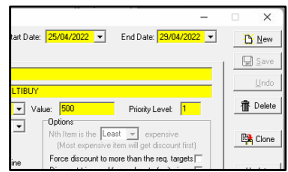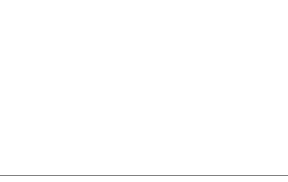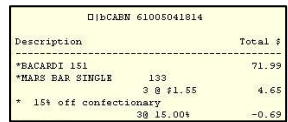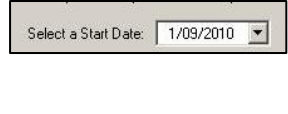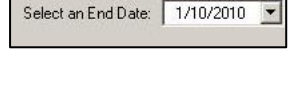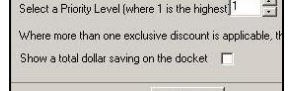| If the eligible discounts are:	And the priority levels are:	Then the customer gets:
all exclusive *(only one can apply)*	the same	only the discount with the lowest discount ID (the oldest one).
all exclusive	different	only the discount with the highest priority.
all non-exclusive	different or the same	all eligible discounts.
a mixture of exclusive and non-exclusive	different or the same	one exclusive discount (depends on priority, as above), and all non-exclusive discounts.

✓ Function buttons:
  - **Back:** to check/edit selection/s on the previous screen.
  - **Next:** to go to the next screen.
  - **Cancel:** to cancel the discount.

Procedure to Create a Percentage Off Item Discount

1.	From the HOS/BOS **Tools** menu, select **Discount Wizard**.	
2.	**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**. *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 22 to save.	
3.	Type a brief description of the discount. *Maximum 80 characters.*	
4.	Type a description that will print on the customers receipt next to the discount amount *(below the target product)*. *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.	Select the **Priority Level** for this discount. *[1] is the highest priority; set a higher priority for discounts that provide better value for customers.*	Select a Priority Level (where 1 is the highest) 1 Where more than one exclusive discount is applicable, th Show a total dollar saving on the docket

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Hints and Tips

✓ The **Target** defines what product/s gets the discount (step 13), and the unit or dollar quantity that must be bought to trigger the discount (step 14).

- If you add more than one target, the customer has to buy <u>every</u> target (in the right quantity) to get the discount.
- If you only give the discount **once the customer spends a certain amount**, this is based on the **reduced total** after any higher priority/older eligible item-level discounts/price overrides/AR discounts – this means the discount might not be triggered (*e.g. if a multi-buy reduces the total below the minimum spend*).

✓ The link between targets and criterion (added at step 17):

If the discount has:	Then the discount is applied:
no criterion	to every unit bought, if the minimum target quantity is met.
	E.g. Get 10% off when you buy **three** *(or more)* *(the minimum)* bottles of Coke 2L; the 4th, 5th, 15th... bottles also get 10% off.
criterion (C)	only when the target **and** criterion product/s are **both** bought in the right multiples.
	E.g. 50% off **one** Adidas Roll-on Deodorant 50ml (T) when you buy **two** Adidas Shower Gel 400ml (C); four gels must be bought to get 50% off a 2nd deodorant.
	Force discount to more than the req. Targets check box (see page 5) overrides this rule.

✓ Use an **Item Group** target if the customer can choose from several products, or a product has multiple EAN/s packaging, and they don't necessarily have to buy every product to get the discount.

- Refer to the PRO-3b Item Groups Fact Sheet.

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 includes the saving instead.* *The amount off is also listed under each product.*	Cash Tendered $76.95 / Change Due $0.00 / GST Amount $7.00 / * Signifies item(s) with GST / Buy Rum get Coke 2L for $1 $1.55 / 15% off confectionary $0.69
9.	Click [Next >].	
10.	In the **Select Discount Method** field, select **Percentage Off Item**.	
11.	Type the percentage value of the discount. *E.g. enter 5% as 500, 10% as 1000, 50% as 5000.*	
12.	Click [Next >].	
13.	Select the target that will receive the discount:	

To discount:	Then:
a single product *(use **A Group of Items** if there's multiple EANs for the product)*	select **An Item**. Click [Next >]. Type or search for the EAN; press **Enter** if you typed the EAN. Go to step 14.
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. *You can select only the **Range** to auto-populate the hierarchy above it.* Go to step 14.
every product in a selected sub-range	select **A Subrange.** Click [Next >]. Select the required sub range. Go to step 14.
a specific group of products	Select **A Group of Items.** Click [Next >]. In the **Group ID** field, type or search for the group; press **Enter** if you typed the ID. Go to step 14.

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PRO-3h *Page| 3 of 5*

Hints and Tips

✓ The link between targets and criterion (added at step 17):

If the discount has:	Then the discount is applied:
no criterion	to every unit bought, if the minimum target quantity is met.
	E.g. Get 10% off when you buy **three** (*or more*) (*the minimum*) bottles of Coke 2L; the 4th, 5th, 15th... bottles also get 10% off.
criterion (C)	only when the target **and** criterion product/s are **both** bought in the right multiples.
	E.g. 50% off **one** Adidas Roll-on Deodorant 50ml (T) when you buy **two** Adidas Shower Gel 400ml (C); four gels must be bought to get 50% off a 2nd deodorant.
	Force discount to more than the req. Targets check box (see page 5) overrides this rule.

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14. 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 certain quantity of the product/s	select **How many...**, and type the number of units that must be purchased.
spends a certain dollar amount on the product/s *See Hints/Tips.*	select **How much...**, and type the amount. *Enter the amount in cents. E.g. type $5.00 as 500.*

15. Click [Next >].

The Options screen is displayed.

To:	then:
view a summary of the discount, or finish	select **Preview Discount Summary Information.** Click [Finish] and go to step 19, **or** click **Back** to return to the Options screen.
add another target	select **Add a Target.** return to step 13.
exclude certain products from the discount	you'll use the **Add a Target Exception** option. Go to step 16.
add additional conditions	you'll use the **Add a Criterion** option. Go to step 17.
exclude certain products from a condition	you'll use the **Add a Criterion Exception** option. Go to step 18.

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PRO-3h *Page| 4 of 5*

Hints and Tips

✓ **Target Exceptions** are products in the target *(selected in step 13)* that won't get the discount; think of it as filtering out products when you've selected a broad target.
   - E.g. 15% off all confectionary *(T)*, **excluding boxed chocolates** *(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!

✓ **Criterion** is extra conditions that the customers purchase has to meet to get the discount off the target product/s.
   - Refer to the PRO-3c Adding Criterion Fact Sheet for full instructions to add criterion.
   - E.g. get 0.50¢ off a Dove moisturiser 85gm *(T)* when you buy a Dove cleanser 1L *(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.
   - Any products used as criterion won't receive the discount if they are also in the target.

✓ **Criterion Exceptions** are specific products in the criterion group *(selected in step 17)* 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 champagne, when you spend $50 on red or white bottles of wine **excluding magnums** *(buying magnum bottles won't count towards the $50)*.
   - 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 target exception:

a. On the Options screen, select **Add a Target Exception**.

b. Click [Next >].

c. If there's more than one target listed, click the target that will have the exclusion.

d. Click [Next >].

e. Select the type of exception.

f. Click [Next >].

g. Select the EAN or the category to exclude. *Use the same method as selecting the target in step 13.*

h. Click [Next >]. *A summary is displayed; Exception 1 represents a target exception.*

i. Click [Next >].

j. Return to step 15.

17.	Complete the following steps to add a criterion:

a. On the Options screen, select **Add a Criterion**.

b. Click [Next >].

c. Select the type of object that the customer has to purchase or produce.

d. Click [Next >].

e. Select the specific product/object required, and the criterion rules *See Hints and Tips.*

f. Click [Next >].

g. Return to step 15.

18.	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 listed, click the criterion that will have the exclusion.

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 target in step 13.*

h. Click [Next >]. *A summary is displayed; Exception 2 represents a criterion exception.*

i. Click [Next >].

j. Return to step 15.

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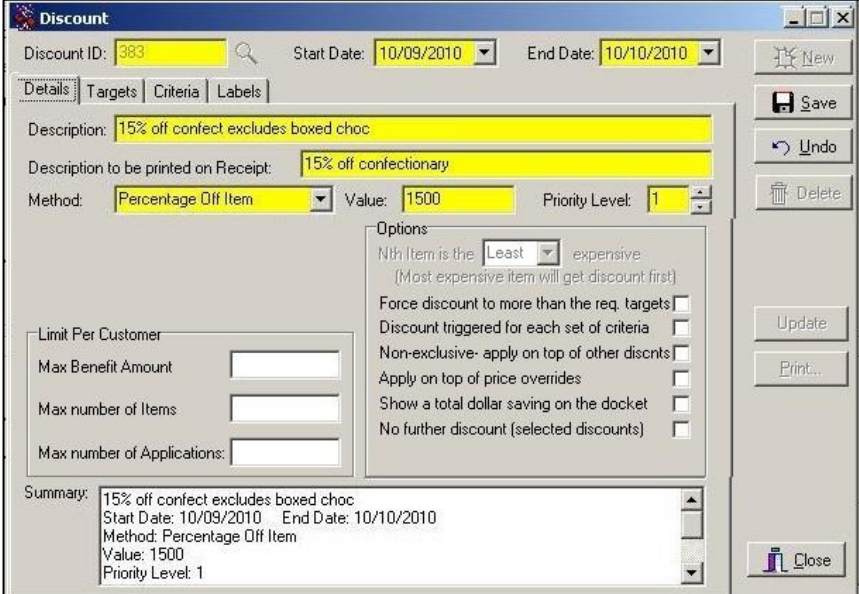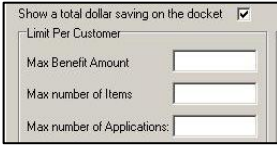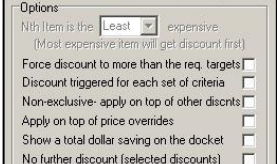
PRO-3h *Page| 5 of 5*

Hints and Tips

✓ **Limit Per Customer** options:
- **Max Benefit amount:** the maximum saving amount in dollars; the discount stops being applied after this.
- **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:**
- **Nth Item is the [x] expensive:** not used in this discount.
- **Force discount to more than the req. Targets:** only used if your discount has criteria; if selected, the discount will be applied to more than the target quantity specified (*in step 14*); e.g. '50% off one Adidas Deodorant 50ml when you buy two Adidas Shower Gel 400ml' - if a customer buys 3 gels and 2 deodorants, they'll get 50% off both deodorants (*even though a 4th gel wasn't bought; so really the discount is '50% off deodorant if you buy 2 (or more) gels'*).
- **Discount triggered for each set of Criteria:** Not used.
- **Non-exclusive- apply on top of other disnts:** means this discount can be applied to an already discounted product. E.g. two discounts '10% off soft drinks' & '5% off Coke 2L when you produce a coupon'; the customer gets 15% off when they buy coke. An exclusive discount won't apply if another exclusive discount has already been applied to the product.
- **Apply on top of price overrides:** if selected, this discount will be calculated off the reduced price (resulting from another eligible discount or a manual price override), rather than the original price.
- **No further discounts (selected discounts):** stops the discount from receiving a staff/% off txn discount set to exclude selected discounts.

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19. Once you've clicked [Finish] (*at step 15*), review and change the details of the discount as required.

*Click the **Targets** tab or **Criteria** tab to view the detailed parameters.*

*If required, click the **Labels** tab to design a ticket; refer to the PRO-3d Add a Discount Ticket Fact Sheet.*

20. As required, limit the number of times the customer can receive the discount in a single transaction.

See Hints and Tips.

21. As required, select the **Options** for the discount.

See Hints and Tips.

You usually leave these all unselected.

22. Click [Save].

23.

To:	then:
create another discount	return to step **Error! Reference source not found.**.
finish (BOS user)	click [Update]. Click [Close].
finish (HOS user)	click [Close]. Activate the discount/s for the applicable store/s. *Refer to the PRO-3f Activate a Discount Fact Sheet.*

The discount is effective at POS on the nominated date.

❑