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SYSTEMS

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Category	Product
Course	Discount Wizard
Version	1.1
Client	Generic
Software	2.18.5.34

Free Item Discount

Hints and Tips

✓ Use this discount to give customers a free product when they buy a different product, or from a group of products.

✓ Use the **Nth Item Free** discount if your discount only has target criterion; e.g. buy 2 Mars bars and get the 3rd bar free.

✓ POS operators must still scan the free product to trigger the discount; this keeps its SOH accurate in the system.

✓ 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).
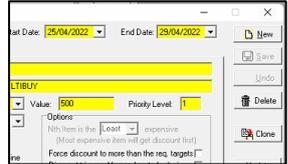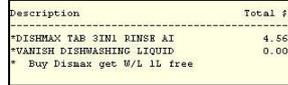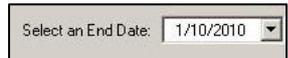
If the eligible discounts are:	And the priority levels are:	Then the customer gets:
all exclusive *(only one can apply)*	the same	only the discount with the lowest discount ID (the oldest one).
all exclusive	different	only the discount with the highest priority.
all non-exclusive	different or the same	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.

Examples of Free Item Discounts:
• Buy Dismax Tab 3in1 15pk and get one Vanish Dishwashing Liquid 1L free (valued at $1.49)
• Buy one from these selected Beer 24pk slabs and get a 2L bottle of coke free.

ⓘ Don't create a discount If the free product isn't normally sold or stocked in your store; simply add a stock message to the criterion product, which displays at POS to remind the customer about the free product.

Procedure to Create a Free 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 20 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.*		
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.*		

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Hints and Tips

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

✓ The **Target** defines what product is given for free (step 12), and the unit or dollar quantity that must be bought to trigger the discount (and get this quantity for free) (step 13).

✓ The product is only free when the target **and** criterion product/s are **both** bought in the right multiples.
  - E.g. 'Get 2 free pk Water Crackers 125g (T) when you buy 3 Kraft Dips 220/250g (C); six dips must be bought to get another two packets of crackers for free.

✓ Use an **Item Group** target to give customers a free product from a selection of individual products, or if a product has multiple EAN/s packaging.
  - Refer to the PRO-3b Item Groups Fact Sheet.
  - If you don't know the **Group ID**, click 🔍 to search for it; click **Search** to retrieve a list of every item group created.
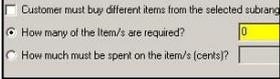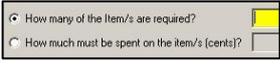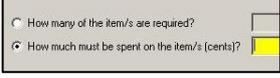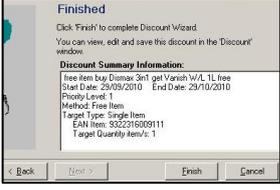
7.	Select the **Priority Level** for this discount. *[1] is the highest priority; set a higher priority for discounts that provide better value for customers.*	
8.	Select the **Show a total dollar saving...** check box if you want the discount & total amount saved to print at the end of the receipt. *If a generic savings message has been configured for all receipts, this includes the saving instead.*	
9.	Click [Next >].	
10.	In the **Select Discount Method** field, select **Free Item**.	
11.	Click [Next >]. *The **Enter Value of discount** field isn't used in this type of discount.*	
12.	Select the product that will be given for free: *You can only add one target to this type of discount.* *You don't use the **Department** option as a target; it's too broad and difficult to limit customers from exploiting the discount.*	

To discount:	Then:
a single product (use **A Group of Items** if there are 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 13.
a product in 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. *Refer to Hints and Tips.* Go to step 13.

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Hints and Tips

13. Nominate the quantity that the customer must buy to trigger/receive the free product:

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

14. 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 17, **OR** click **Back** to return to the Options screen.
add additional conditions *You must add at least one condition to this type of discount, otherwise the product is free every time!*	you'll use the **Add a Criterion** option. Go to step 15.
exclude certain products from a condition	you'll use the **Add a Criterion Exception** option. Go to step 16.

*The **Add a Target** and **Add a Target Exception** options aren't used in this type of discount, as it's most logical to only add a single target product to this discount.*

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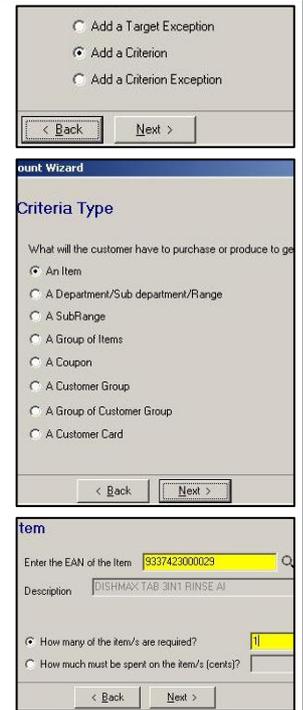
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Hints and Tips

✓ **Criterion** is extra conditions that the customers purchase has to meet to get the free product.
- Refer to the PRO-3c Adding Criterion Fact Sheet.
- E.g. Buy a Gillette Fusion Manual Blades 4pk (C) and get a Manual Razor for free (T).
- 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.
- If the criterion and target belong to /are the same category, units used as criterion won't get the discount (they can't be used as a target in the same discount).

✓ **Criterion Exceptions** are specific products in the criterion group *(selected in step 15)* 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. Get this specific bottle of champagne free, 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!

15.	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.

The adjacent Item screen example shows a discount where a customer has to buy one packet of Dishmax Tabs to get the discount (e.g. to get one bottle of Dishwash Liquid for free).

f. Click [Next >].

g. Return to step 14.

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 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 criterion in step 15.

The adjacent example shows a discount where magnums won't count towards triggering the discount; you'd add each EAN as an exception).

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

i. Click [Next >]. *The Options screen is displayed.*

j. Return to step 14.

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Hints and Tips

✓ **Limit Per Customer** in a single transaction options:
- **Max Benefit amount**: not used in this type of discount.
- **Max number of items**: not used in this type of discount.
- **Max number of applications**: the number of times the discount can be applied; e.g. if 'Buy a Gillette Fusion Manual Blades 4pk and get a Manual Razor for free' can only be applied [6] times, then a maximum of 6 razors will be free.

✓ **Options check boxes:**
- **Nth Item is the [x] expensive:** not used in this type of discount.
- **Force discount to more than the req. Targets:** not used in this type of discount.
- **Discount triggered for each set of Criteria:** Not used.
- **Non-exclusive- apply on top of other disnts:** If selected, this discount can be applied to an already discounted product. E.g. two discounts '10% off soft drinks' & 'Buy one from these selected Beer 24pk slabs and get a 2L bottle of coke free'; the customer gets the coke for free.
An exclusive discount won't apply if another exclusive discount has already been applied to the product.
- **Apply on top of price overrides:** not used in this type of discount.
- **No further discounts (selected discounts):** stops the discount from receiving a staff/% off txn discount set to exclude selected discounts.

17.	Once you've clicked [Finish] *(at step 14)*, review and edit the details 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.*	

18.	As required, limit the number of times the customer can receive the discount in a single transaction. *See Hints and Tips.*	
19.	As required, select the **Options** for the discount. *See Hints and Tips.*	
20.	Click [Save].	

21.	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.	