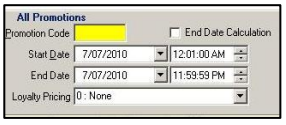
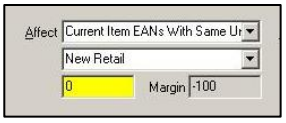
**PRO-2e** *Page| 1 of 3*

| | |
|---|---|
| Category | Product |
| Course | Pricing |
| Version | 1.1 |
| Client | Generic |
| Software | 2.18.2.2 |

# In-store Price Promotions

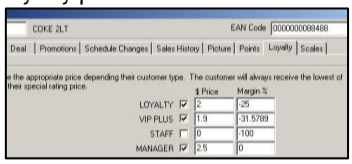
A promotion is a special retail price for a period of time, to promote or clear stock of a product or selected category.

## Procedure to Create an In-store Promotion

| | | |
|---|---|---|
| 1. | From the BOS **Tools** menu, select **Stock Functions**, then **Stock.**<br>**Or click the **Stock Maintenance** icon.** | |
| 2. | In the **EAN Code** field, type, or search for, the EAN to put on promotion.<br>**The promotion only applies to this UPP.** | |
| 3. | Click the **Promotions** tab. | |
| 4. | Click New. | |
| 5. | In the **Promotion Code** field, type the number of weeks the promotion will run for.<br>** Select the **End Date Calculation** check box first, to automatically calculate the **End Date** off the promotion code (if it's a number).** |  |
| 6. | In the **Start Date** field, select the date the promotion will begin. | |
| 7. | In the **End Date** field, select the date the promotion will end. | |
| 8. | In the **Loyalty Pricing** field, select a loyalty group if required *(see Hints and Tips).* | |
| 9. | In the **Affect** fields:<br>a. select the scope the promotion applies to.<br>b. select the type of promotion; *e.g. New Retail*.<br>c. type the new price, percent-off amount, or dollar-off amount as applicable. |  |
| 10. | Click Save. | |
| 11. | If Generate Label is displayed, click **No**.<br>**A shelf ticket is already queued in the Labels Wizard as a Promotion On category.** | |
| 12. | If the promotion started earlier today:<br>a. Click Update.<br>b. If the **Affect** is more than this product (e.g. sub-range), run **DPC** and **Price Update** from the **SurefireBOS** folder on the desktop. | |
| 13. | Click Close. | |
| 14. | Print the tickets. Refer to the PRO-5i Print Promotional Tickets Fact Sheet.<br>** The promotion becomes active at POS on the scheduled date/time after scheduled tasks run.** | ❑ |

### Hints and Tips

- ✓ The **Promotions** tab also lists any promotions imported from HOST.
- ✓ If you want a restricted ability for Managers to create promotions (i.e. so they can respond to competitor pricing), Surefire can use security settings and assign a **Manager's Special Role**. Users in this role can only create, modify, and delete a promotion which:
  - Has a fixed promotion code, start date, and end date
  - Only affects the current item
  - Is for a new retail price only.
- ✓ **Types of promotion:**
  - new retail price
  - percentage discount off
  - dollar amount discount off.
- ✓ **Loyalty Pricing** limits a promotion to customers who add a card or AR code to the sale that's linked to this privilege.
  - Refer to the TECH-4d Configure Special Customer Pricing Fact Sheet.
  - The **Loyalty** tab lists the active loyalty promotions.




- ✓ Customer receipts can display a custom message and the saving underneath the product. Refer to TECH-2k Configure POS Customer Receipt Options Fact Sheet.

```
Description                          Total $
-----------------------------------------
 PUMP HOUSE WATER                     14.00
VIP saving $5.00
*ALLENS ANTICOL
```

- ✓ If your store has set a retail price lower than a Head Office HOST price change or promotion, the lowest price will apply at POS.
  - A HOST ticket will still print, but should be ignored.

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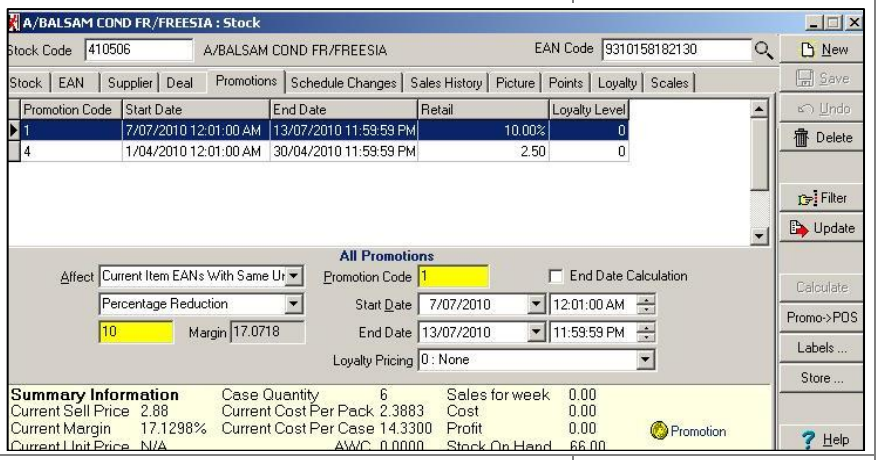
# Procedure to Edit or Delete an In-store Promotion

**Hints and Tips**

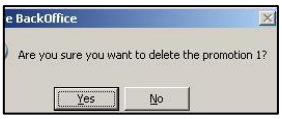
- ✓ If your Head Office permits, you can edit HOST promotions listed on the Promotions tab to match a competitor's price.
  - However, this will be over-ridden back to the original promotion the next time that HOST is imported.
  - Alternatively, your business may use Managers Special Role (see page 1) to allow Managers to create in-store promotions for this purpose.
- ✓ If you edit a **sub-range** level promotion, it applies the change against all the other products in the sub-range as well.
  - If you change the promotion to affect 'single item', it deletes the promotions that were against the other products in the sub-range.
- ✓ A **Promotion** icon is displayed in the Summary Information when the promotion is active.

- ✓ If you edit an active promotion and click **Update**, request an **automatic label** to be generated (in step 6); when you print the ticket, it'll have the revised promotion details, so long as you select a promotion label report.
- ✓ If you edit a future promotion, don't request an automatic label; print tickets in the same way as a new promotion, using the **Promotions On** category.
- ✓ There are several reports available for promotions, within the **Reports** -> **Deals and Promotions** menu.
  - If the report includes a **Stocked** prompt, you must set this to **Y** or **N**, or the report will return blank.

| | | |
|---|---|---|
| 1. | From the BOS **Tools** menu, select **Stock Functions**, then **Stock.**<br>**Or click the **Stock Maintenance** icon*.* | |
| 2. | In the **EAN Code** field, type, or search for, the EAN on promotion. | |
| 3. | Click the **Promotions** tab. | |
| 4. | Click the applicable promotion in the grid.<br>**The selected promotion is highlighted blue, and the details are populated in the **All Promotions** section.** |  |
| 5. | **To:** / **then:**<br>edit the promotion — go to step 6.<br>delete the promotion — go to step 7. | |
| 6. | Complete the following steps to edit a promotion:<br>a. Change fields as required.<br>b. Click Save.<br>**A Generate Label message is displayed.**<br>c. Click **Yes** if it's an active promotion, or **No** if it's a future promotion.<br>d. Click Update if it's an active promotion<br>**The change/s are effective at POS immediately.**<br>e. Go to step 8.<br>**Requested labels are queued as automatic labels; print them using a promotion label report.** | |
| | | |

**Hints and Tips**

- ✓ It's not necessary to delete a finished promotion.
- ✓ If you want to deactivate an active promotion **effective immediately,** it's easier to simply edit the end -date to the past and click Update (rather than delete the promotion).

| | | |
|---|---|---|
| 7. | Complete the following steps to delete the promotion:<br>**See Hints and Tips.***<br>a. Click Delete. A warning is displayed.<br>b. Click **Yes** to proceed.<br>**The promotion is removed from the grid.***<br>c. If it was an active promotion, to revert the price at POS:<br>- click **Update**.<br>- if the **Affect** was more than this product (e.g. sub-range), you must run **DPC** and P**rice Update** from the **SurefireBOS** folder on the desktop.<br>d. Go to step 8. |  <br> |
| 8. | Click Close. | |
| 9. | Print new tickets, or remove promotional ticketing as required.<br>**See Hints and Tips.*** | |
| | | ❑ |