

**TECH-2i** Page | 1 of 4

Category	Technical
Course	POS Config.
Version	1.1
Client	Generic
Software	2.18.5

**Hints and Tips**

✓ **Discount types:**

- **Manual discount:** a saving off retail price that is given by the operator at POS (using the discount item or transaction option), or scanned off a SATO markdown sticker. Departments can be excluded from the discount (step 6).
- **Automatic discount:** a saving off retail price that is triggered by scanning products in a discount created using [Discount Wizard](#); e.g. multi-buys, free items.
- **AR discount:** a percentage off the price of every product, in every transaction, that's set up against the customers AR account – so is triggered when the account is added to the sale. Departments can be excluded from the discount (step 8).

✓ **Transaction discount apportioning:**




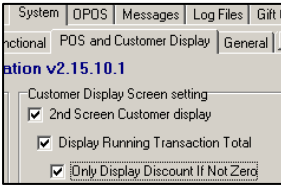
- From 2.13.0.0, receipts can show the discount amount apportioned across each included product; this makes refunds easier to calculate when there's a receipt.
- A4 receipts and reports always show the apportioned sale value, regardless of the POS configuration selected.
  - The amounts are calculated as: [extended price after any other applicable discounts] / [value of all included products after any other applicable discounts], multiplied by the value of discount (which is converted into dollars by [sum of included products] x [percent discount]).
  - Refunds are excluded.

# Configure Discount Rules for POS

You can configure the rules for manual discounts, automatic discounts, and AR discounts at POS.

If your store is Head-Office managed, these rules are usually configured from the HOS, not on the BOS.

## Procedure to Configure what Products are Discounted at POS

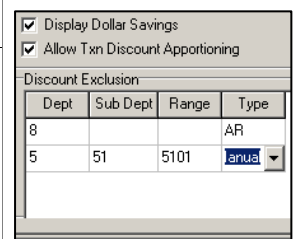
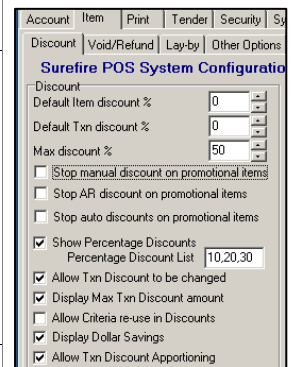
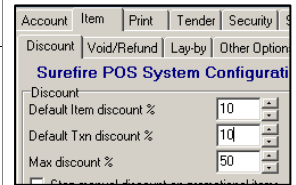
<p>1. From the HOS/BOS <b>System</b> menu, select <b>Location Setup</b>.</p>									
<p>2. If a Head Office user, select the Location that you want to define. <i>*You'll be defining the configuration for all stores at and below the level that you select; if you want different configuration at selected stores, set the global config at the higher level, and then override this by setting the config for the selected store.*</i></p>									
<p>3. Double-click the <b>Configure</b> icon. <i>*If a HOS user, click Yes to continue.*</i></p>									
<p>4. Click the <b>Item -&gt; Discount</b> tab.</p>									
<p>5. Select the relevant general options for discounting at POS:</p> <table border="1" data-bbox="614 1276 1181 2016"> <thead> <tr> <th>To::</th> <th>then:</th> </tr> </thead> <tbody> <tr> <td>display a dollar savings column</td> <td>select the <b>Display Dollar Savings</b> check box. <i>*POS displays promotion &amp; manual discount savings before tendering, and also auto discount savings when tendering.*</i></td> </tr> <tr> <td>use transaction discount apportioning on receipts <i>*See Hints &amp; Tips.*</i></td> <td>select the <b>Allow Txn Discount Apportioning</b> check box.</td> </tr> <tr> <td>hide the discount line (under subtotal) on the customer display if no transaction discount applies</td> <td>click the <b>System -&gt; POS and Customer Display</b> tab. Select the <b>Only Display Discount if Not Zero</b> check box.</td> </tr> </tbody> </table>	To::	then:	display a dollar savings column	select the <b>Display Dollar Savings</b> check box. <i>*POS displays promotion &amp; manual discount savings before tendering, and also auto discount savings when tendering.*</i>	use transaction discount apportioning on receipts <i>*See Hints &amp; Tips.*</i>	select the <b>Allow Txn Discount Apportioning</b> check box.	hide the discount line (under subtotal) on the customer display if no transaction discount applies	click the <b>System -&gt; POS and Customer Display</b> tab. Select the <b>Only Display Discount if Not Zero</b> check box.	 
To::	then:								
display a dollar savings column	select the <b>Display Dollar Savings</b> check box. <i>*POS displays promotion &amp; manual discount savings before tendering, and also auto discount savings when tendering.*</i>								
use transaction discount apportioning on receipts <i>*See Hints &amp; Tips.*</i>	select the <b>Allow Txn Discount Apportioning</b> check box.								
hide the discount line (under subtotal) on the customer display if no transaction discount applies	click the <b>System -&gt; POS and Customer Display</b> tab. Select the <b>Only Display Discount if Not Zero</b> check box.								

**TECH-2i** Page| 2 of 4

**Hints and Tips**

- ✓ **The following rules for manual discounts are hard-coded into the POS:**
  - Discount percentages can only be whole numbers; e.g. 10, 20, 30.
  - Even if you configure POS to **default** or **suggest discount amounts**, the operator can still type any amount (up to the max discount % set).
  - Once a product has received a manual item discount, this can't be changed or receive another manual item discount.
  - Once a transaction has received a manual transaction discount, manual item discounts are not allowed.
  - Manual discounts will still be applied to products that have received an automatic discount (and vice versa); in some discount methods, you can use the **'Apply on top of price overrides'** rule in the auto discount to control whether the auto discount is calculated off the original price or the already discounted price.
  
- ✓ If you add a **Discount Exclusion**, if the operator tries to discount the product POS prompts *'This item is ineligible for manual discount'* (and if you set it to [AR] the product is excluded from the AR transaction discount saved against the customer's account).

6. Complete the required steps on the <b>Item - &gt; Discount</b> tab to configure the options available for manual discounts:	
<b>To:</b>	<b>then:</b>
display a default amount when the operator selects item discount percent	in the <b>Discount Item Discount %</b> field, type the default percentage. <i>*[0] means the operator must type an amount.*</i> <i>*The default must be less than any <b>Max Discount</b> set.*</i>
display a default amount when the operator selects transaction discount percent	in the <b>Discount Txn Discount %</b> field, type the default percentage. <i>*[0] means the operator must type an amount.*</i> <i>*The default must be less than any <b>Max Discount</b> set.*</i>
show suggested discount amounts on-screen (as buttons) <i>*This can be used <u>instead</u> of default amounts*</i>	select the <b>Show Percentage Discounts</b> check box. In the <b>Percentage discount List</b> field, type the amounts. <i>*Separate each amount with a comma (no spaces).*</i> <i>*The amounts must be less than any <b>Max Discount</b> set.*</i>
set a maximum discount percentage allowed for manual item and transaction discounts	in the <b>Max Discount %</b> field, type the maximum percentage allowed. <i>*[0] will disallow all %-off item discounts.*</i> Select the <b>Display Max Txn Discount amount</b> check box if you want to prompt the operator if they enter more than allowed.
allow a txn discount amount to be changed	select the <b>Allow Txn Discount to be changed</b> check box.
stop products on promotion from being discounted	select the <b>Stop manual discount on promotional items</b> check box.
stop products in selected departments, sub-depts, or ranges from being manually discounted	In the <b>Discount Exclusion</b> box, type the code/s down to the level to exclude. <i>*You must use the POS code set in <b>Codes &amp; Descriptions</b>.*</i> Select the Type: <b>Manual</b> . <i>*Or select <b>Both</b> to also apply the rule to AR discounts.*</i> <i>*POS must be rebooted.*</i>

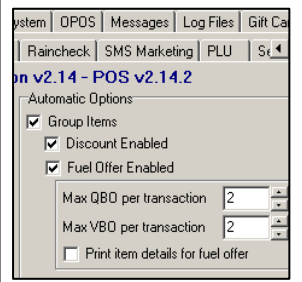
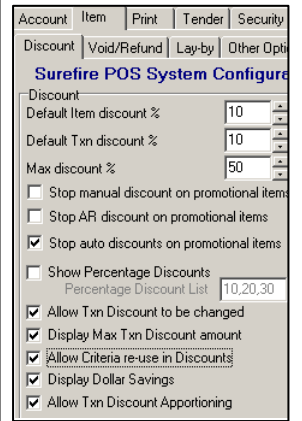


**TECH-2i** Page | 3 of 4

**Hints and Tips**

- ✓ **Allow Criteria re-use in discounts** means that a product used to trigger one discount (either as criteria or target quantity), can be used to trigger another discount in the same transaction. If this option isn't enabled, the customer will have to buy more units to satisfy the other discount/s.  
**Important:** the only way a **tiered discount** will work as expected is if you do not allow criteria re-use (e.g. 2 for \$2 or 3 for \$2.50); otherwise the units already discounted act as criteria, which means units outside a multiple get a portion of the discount (e.g. when 4 units are bought, the '3 for' applies, and 1/2 the '2 for' applies to the 4<sup>th</sup> unit).
- ✓ **Coupon options:**
  - Note: a coupon can only print once per transaction; the rules below refer to the number of different coupons that can print per transaction.
  - **QBO:** quantity based offers are coupons that print when the customer buys a certain product, produces another coupon, or belongs to a customer group/price level.
    - E.g. get a coupon for a free pizza loaf in your next purchase, when you spend \$15 in the bakery dept in a single transaction.
  - **VBO:** value based offers are coupons that print when the customer spends a certain amount on a transaction (after all other manual and automatic discounts).
    - E.g. a coupon for 4c off fuel when you spend \$100 or more in a transaction.
  - **Print item details for fuel offer** isn't usually selected; this will print the coupon description underneath every target product used to trigger the coupon to print; this would become quite repetitive for VBO offers!

7.	<p>Complete the required steps to configure the options available for <b>automatic discounts</b>:</p> <p><i>*Important: changing any of these options requires POS to be rebooted to see them apply.*</i></p> <p><i>*Note: Use Best Price Calculation for New Price for Item Group option is not used as it's obsolete.*</i></p>														
	<table border="1" style="width: 100%;"> <tr> <td style="width: 30%;"><b>To:</b></td> <td style="width: 70%;"><b>then:</b></td> </tr> <tr> <td>stop products on promotion from receiving an auto discount</td> <td>select the <b>Stop auto discounts on promotional items</b> check box.</td> </tr> <tr> <td>allow a product to satisfy multiple discounts</td> <td>select the <b>Allow Criteria re-use in Discount</b> check box.</td> </tr> <tr> <td>enable discount coupons to print on customer receipts, or change the number of coupons that print</td> <td>                     Select the <b>Fuel Offer Enabled</b> check box  <i>*Group Items and Discount Enabled should already be selected.*</i>                       Select the <b>Max QBO</b> that can print per transaction.                      Select the <b>Max VBO</b> that can print per transaction.  <i>*See Hints and Tips*</i> </td> </tr> <tr> <td>stop an auto discount applying if a promotion or AR discount makes the item cheaper</td> <td>                     Click the <b>Item -&gt; More Discount</b> tab.                      Select the <b>Do not Allow Discount Increase</b> check box.                 </td> </tr> <tr> <td>force Percent Off Item discounts to apply against the cheapest product, when a customer includes several products from a mixed-price Item Group</td> <td>                     Click the <b>Item -&gt; More Discount</b> tab.                      Select the <b>Always calculate the cheapest price for percent off item in the item group</b> check box.  <i>*If left unselected, the dearest item will be discounted.*</i> </td> </tr> <tr> <td>apply multi-buy offers on the operator and customer displays <i>*Rather than at payment, like other auto-discounts*</i></td> <td>                     Click the <b>Item -&gt; More Discount</b> tab.                      Select <b>Enable Immediate Discount</b> check box.   <i>*Currently only used for 'New Price for Item Group' method, that has no criteria, and if the <u>same</u> item is scanned in the required qty.*</i> </td> </tr> </table>	<b>To:</b>	<b>then:</b>	stop products on promotion from receiving an auto discount	select the <b>Stop auto discounts on promotional items</b> check box.	allow a product to satisfy multiple discounts	select the <b>Allow Criteria re-use in Discount</b> check box.	enable discount coupons to print on customer receipts, or change the number of coupons that print	Select the <b>Fuel Offer Enabled</b> check box <i>*Group Items and Discount Enabled should already be selected.*</i>  Select the <b>Max QBO</b> that can print per transaction. Select the <b>Max VBO</b> that can print per transaction. <i>*See Hints and Tips*</i>	stop an auto discount applying if a promotion or AR discount makes the item cheaper	Click the <b>Item -&gt; More Discount</b> tab. Select the <b>Do not Allow Discount Increase</b> check box.	force Percent Off Item discounts to apply against the cheapest product, when a customer includes several products from a mixed-price Item Group	Click the <b>Item -&gt; More Discount</b> tab. Select the <b>Always calculate the cheapest price for percent off item in the item group</b> check box. <i>*If left unselected, the dearest item will be discounted.*</i>	apply multi-buy offers on the operator and customer displays <i>*Rather than at payment, like other auto-discounts*</i>	Click the <b>Item -&gt; More Discount</b> tab. Select <b>Enable Immediate Discount</b> check box.  <i>*Currently only used for 'New Price for Item Group' method, that has no criteria, and if the <u>same</u> item is scanned in the required qty.*</i>
<b>To:</b>	<b>then:</b>														
stop products on promotion from receiving an auto discount	select the <b>Stop auto discounts on promotional items</b> check box.														
allow a product to satisfy multiple discounts	select the <b>Allow Criteria re-use in Discount</b> check box.														
enable discount coupons to print on customer receipts, or change the number of coupons that print	Select the <b>Fuel Offer Enabled</b> check box <i>*Group Items and Discount Enabled should already be selected.*</i>  Select the <b>Max QBO</b> that can print per transaction. Select the <b>Max VBO</b> that can print per transaction. <i>*See Hints and Tips*</i>														
stop an auto discount applying if a promotion or AR discount makes the item cheaper	Click the <b>Item -&gt; More Discount</b> tab. Select the <b>Do not Allow Discount Increase</b> check box.														
force Percent Off Item discounts to apply against the cheapest product, when a customer includes several products from a mixed-price Item Group	Click the <b>Item -&gt; More Discount</b> tab. Select the <b>Always calculate the cheapest price for percent off item in the item group</b> check box. <i>*If left unselected, the dearest item will be discounted.*</i>														
apply multi-buy offers on the operator and customer displays <i>*Rather than at payment, like other auto-discounts*</i>	Click the <b>Item -&gt; More Discount</b> tab. Select <b>Enable Immediate Discount</b> check box.  <i>*Currently only used for 'New Price for Item Group' method, that has no criteria, and if the <u>same</u> item is scanned in the required qty.*</i>														



**TECH-2i** Page | 4 of 4

- Hints and Tips**
- ✓ If you're a Head Officer user, the saved configuration is transmitted to the store/s when **HOS Export** and **HOS Import** are next run.
  - ✓ The configuration is applied to the registers when **File Transfer** next runs (usually every few minutes).
    - The POS doesn't need to be rebooted, except where this has been specifically mentioned for a config. setting.

8. Complete the required steps to configure the options available for **AR item discounts**:
- |  |   |
|--|---|
| <p><b>To:</b></p> <p>stop products on promotion from receiving an AR discount</p>                | <p><b>then:</b></p> <p>select the <b>Stop AR discounts on promotional items</b> check box.</p>  |
| <p>stop products in selected departments, sub-depts, or ranges from receiving an AR discount</p> | <p>In the <b>Discount Exclusion</b> box, type the code/s down to the level to exclude.</p> <p><i>*You must use the POS code set in <b>Codes &amp; Descriptions</b>.*</i></p> <p>Select the Type: <b>AR</b>.</p> <p><i>*Or select <b>Both</b> to also apply the rule to manual discounts.*</i></p> |
9. Complete the following steps once finished:
- a. Click **Save**; Click **Yes** to continue.
  - b. Click **OK**.
  - c. Click **Close** to exit Location Setup.
10. Complete the following steps if your business uses reason codes at POS, and you want to stop any further manual item discounts, automatic exclusive item/txn discounts, or AR discounts from applying to products that have had a manual price change or item discount at POS:
- a. While still in Location Setup, double-click the **Reason Codes** icon.
  - b. Select the applicable function from the list.
 

*\*You can set this rule for item discount, transaction discount, and/or price change.\**
  - c. Set the **Action** code to [2] for each reason.
  - d. Click .
  - e. Repeat steps b to d for each function you want to configure this way.
  - f. Click the [x] at the top of the dialog box.
- \*Refer to [TECH-1i Configure POS BOS Reason Codes Fact Sheet](#) for full instructions.\**
11. Click on the Location Set up dialog screen.

