



Portal User Guide

Pricing and Promotions

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Pricing and promotions

The Portal offers a range of capabilities for managing your item prices.

Managing prices

The Portal offers several different ways to manage the prices of items in your inventory:

- Individual item prices can be set using Inventory Maintenance.
See Inventory Management - Pricing tab on page 82.
- Prices changes can be scheduled for the future, to allow time for signage changes.
See Managing price changes on page 16.
- Prices can also be changed in bulk across departments, suppliers, brands, or item variations.
See Bulk Price Change screen on page 78.
- Lists of prices can be uploaded by file to override the listed items.
See Importing new item prices from a file on page 64.

Managing promotional tools

The Portal also offers you many tools for temporarily adjusting the price to encourage customer purchases, including:

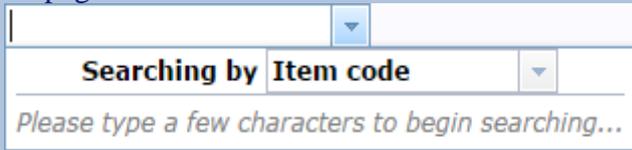
- Temporary price changes called specials.
See Managing price specials on page 314.
- Point of Sale discounts for individual items or whole transactions.
See Managing discounts on page 244.
- Bulk purchase discounts for large quantities of the same item purchased at once.
See Managing bulk discounts on page 297.
- Supplier rebates.
See Managing rebates on page 87.
- Promotions such as buy-one-get-one-free, buy-one-get-one-half-price and similar.
See Managing promotions on page 127.

Each of these tools can be configured to include or exclude other tools.

Finding an item using the search screen

Find an item when you want to edit its configuration in Inventory Management.

Note: This topic describes using the search screen to find items. If you are trying to find an item in a search field within another screen, see *Finding an item with a search field* on page 12.



A search interface with a text input field at the top. Below it is a label 'Searching by' followed by a dropdown menu currently showing 'Item code'. Below the dropdown is a light gray placeholder text: 'Please type a few characters to begin searching...'.

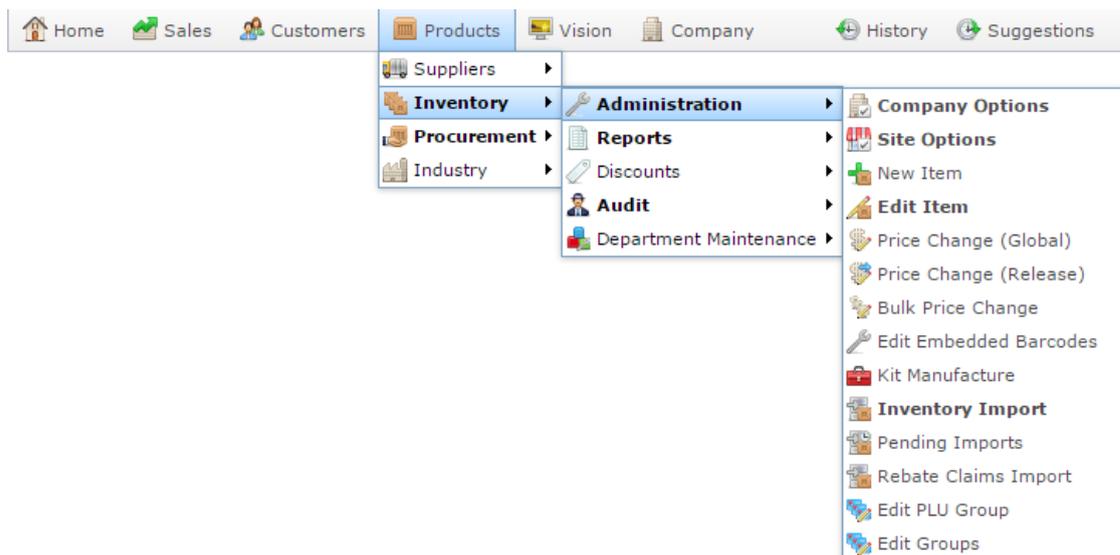
You can either:

- list all items starting with a chosen letter
- search for an item by typing information in the search fields.

Opening the Find Item screen

To search for items, you first must open the Find Item screen:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Find Item screen is displayed.

Find Item

Searching For Items At: Department:

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Listing all items by letter:

To list items that start with a specific letter alphabetically:

1. Select the site you want to search from the **Searching For Items At** drop-down list.

Find Item

Searching For Items At: Chadstone Department: All

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Search

2. If you want to restrict your search to a single department, select it from the **Department** drop-down list.

Find Item

Searching For Items At: Chadstone Department: All

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Search

3. **Note:** Your Portal configuration may used another name for this field.
4. Press the corresponding letter of the alphabet at the top of the search screen.

Find Item

Searching For Items At: Chadstone Department: All

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Search

The items that start with that letter are listed alphabetically.

Find Item

Searching For Items At: Department:

Custom **A** **B** C D E E G H I J K L M N O P Q R S T U V W X Y Z

Items starting with 'B'

Babich Sav Blanc [1] (9016)	Beef Stir-fry [1] (361)
Baby Veal [1] (34)	Beef Stroganoff [1] (39)
Backstraps [1] (119)	Beef Trim [1] (319)
Backstraps [1] (484)	Beef Wine Garlic [1] (386)
Banana Muffin [Each] (300)	Big Beef Burger Patty [1] (385)
Basil & Coriande [1] (473)	Big Eye Bacon [1] (243)
Basil Chilli Bee [1] (425)	Biltong Stokkie 100g [1] (525)
Bbq Chicken [1] (404)	Biltong Stokkie 500g [1] (527)

Searching for items

You can search for an item based on its item description, item code, barcode or supplier cross reference number. The Portal searches for matches:

- Anywhere within the words of the field.
For example, **APP** matches both **apple**, and **pineapple**, and a search for a barcode of **33** returns all items with barcodes that contain 33. If a field contains multiple words, it matches any word in the field.
- From the start of the item code.
For example, a search for an item code of **3** returns all item codes starting with 3, not all item codes that contain 3.
- Using the first search field that contains data.
For example, if you type **APP** in the **Description** field and **3** in the Item Code field, the Portal ignores the **Item Code** field and searches for items that have a word in the description starting with **APP**.

Note: An item's description is not the same as the description that appears in the Point of Sale. If you have difficulty locating an item, make sure you are using the correct description. See *Inventory Management - Details tab*. Also see *Creating a new item*.

To search for items:

1. If the custom search fields are not displayed, press the Custom tab.

Find Item

Searching For Items At: Chadstone Department: All

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Search

2. Type the term you want to search on in the search fields.

Find Item

Searching For Items At: Department:

[Custom](#)

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

Note: Because the Portal uses the first field with data that it finds, you should only search for items using one search field at a time.

3. Press .

The search results are displayed.

Finding an item with a search field

Find an item using a search field when you need to add that item during a procedure, such as creating a promotion group.

Note: If you are searching for an item using the whole screen rather than just a field, see *Finding an item using the search screen* on page 6.

You can search for an item based on its:

- item code, or partial item code
- description or partial description
- barcode.

Note: The Portal requires the search term to be at least three characters long, so choose a search term that uses at least three characters. For example, if your item's item code is only two digits long, you should search on description or barcode instead.

Partial search terms

If you search based on an item's code or description, the Portal attempts to match your search term to the beginning of the item code, or the beginning of each word in the description. For example, **300** matches with all item codes starting with 300, and **APP** matches with apple, but not pineapple.

If you search based on a partial item code or partial description, the Portal attempts to match your search term to anywhere within the item code, or anywhere within the description. For example, **300** matches any item code that contains 300, and **APP** matches both apple and pineapple.

Searching for items

To search for an item:

1. Press within the search field to open the additional search options.



The image shows a search field interface. At the top, there is a search input box with a dropdown arrow on the right. Below it, a dropdown menu is open, showing the text 'Searching by Item code' with a small dropdown arrow to its right. Below the dropdown menu, there is a placeholder text: 'Please type a few characters to begin searching...'.

2. Select the field you want to search by.
3. Type your search term.

The results are displayed below the search field.



4. Press an item to select it.

Refreshing an item on the Point of Sale

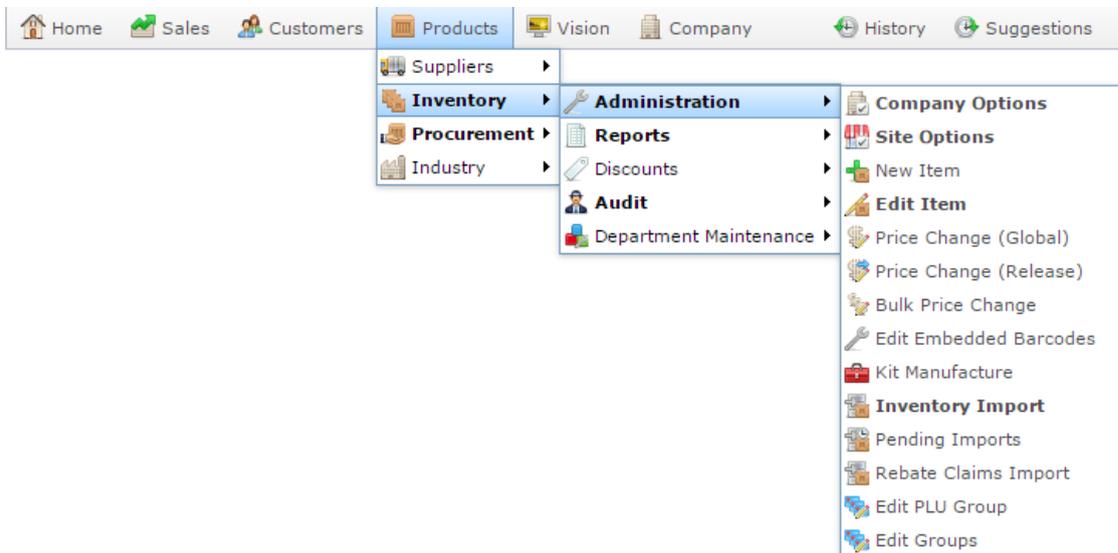
Refresh an item on the Point of Sale when you have changed the item using Inventory Maintenance but the changes aren't apparent in the Point of Sale.

Note: The Point of Sale automatically refreshes all changed items over a period of time. Only use this procedure if you need the update on the Point of Sale immediately, or you think the change has not come across.

Note: If there are many updates at once, changes may take longer to appear in the Point of Sale. See *Checking the site update queue*.

To refresh an item on the Point of Sale:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Control tab.

The Control tab of the Inventory Management screen is displayed.

Inventory Management

Item Code: 392 Site: Chadstone
Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes Bulk Discount Specials Promotions Table / Home Information Ingredients **Control**

Copy Item 392 to Chadstone
Rename Item 392 as
Supplier Item Cross Reference
Supplier Last Cost
Kit Maintenance
Add Label
Refresh Item
Delete Item
Show Tracked Items

Find New Save

5. Press **Refresh Item**.
6. The item is added to the terminal update queue.

Managing price changes

You can schedule price changes for the future to give sites time to prepare new labels and signage. Prices can also be changed in bulk, by department, supplier, brand or variation, if you have many price changes to process.

Also see:

- *Bulk Price Change screen* on page 78.
- *Global Price Change Editor screen* on page 67.
- *Price Change report* on page 72.

What you can do:

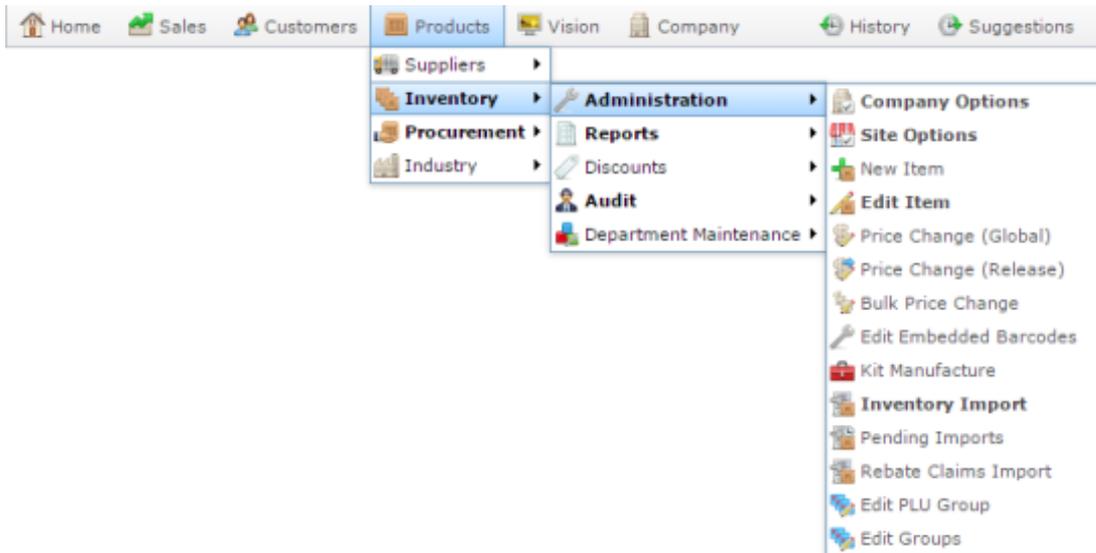
- *Viewing price changes* on page 17.
- *Creating a global price change* on page 18.
- *Editing a global price change* on page 21.
- *Cancelling a global price change* on page 23.
- *Copying an item's cost across sites* on page 25.
- *Copying an item's RRP across sites* on page 31.
- *Copying an item's description across sites* on page 28.
- *Changing item prices by brand* on page 34.
- *Changing item prices by colour* on page 39.
- *Changing item prices by department* on page 44.
- *Changing item prices by size* on page 49.
- *Changing item prices by style* on page 54.
- *Changing item prices by supplier* on page 59.

Viewing price changes

View pending and previous price changes using the Price Change report.

To view pending price changes:

1. Press **Products** in the main menu bar.
2. Press **Inventory > Administration > Price Change (Release)**.



The Price Change report is displayed.

Price Change Report - Pending

Descript	Item	Active	From	Ref	Departm	SOH	Cost	New Retail	Old Retail	Delta Value
Total										

Site
Chadstone

Date From
27/04/2015

Date To
27/04/2015

Type
Pending

Department
All

Price Level
Retail

Add to Favourites

3. Use the filters to display price changes for different sites, date ranges, departments and price levels.

Creating a global price change

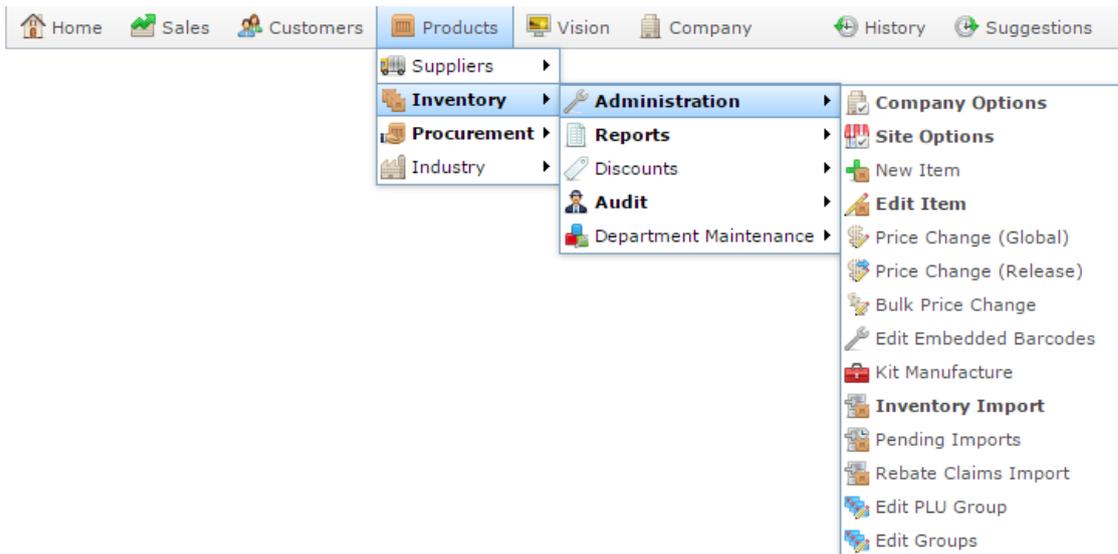
Create a global price change when you want to arrange a price change to an item in advance. You can specify how far in the future price changes are scheduled, and print labels in advance to prepare for the change.

You can create a price change for a single site, or across several sites at the same time.

Note: If you want to manually correct a pricing error, see *Changing an item's price manually* on page 65.

To create a global price change:

1. Press **Inventory** in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.



3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Buttons: Find, Synchronise All, Synchronise RRP, Synchronise Descriptions, Synchronise Cost, Reset Pending, Reset, Commit Changes

4. Select the date you want the price to take effect in the **Release Date** field.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Buttons: Find, Synchronise All, Synchronise RRP, Synchronise Descriptions, Synchronise Cost, Reset Pending, Reset, Commit Changes

5. Type the new price in the **RRP (Inc)** field of the site or sites where you want to change the price.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

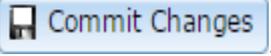
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Buttons: Find, Synchronise All, Synchronise RRP, Synchronise Descriptions, Synchronise Cost, Reset Pending, Reset, Commit Changes

Managing price changes

6. Press .

The price change is scheduled.

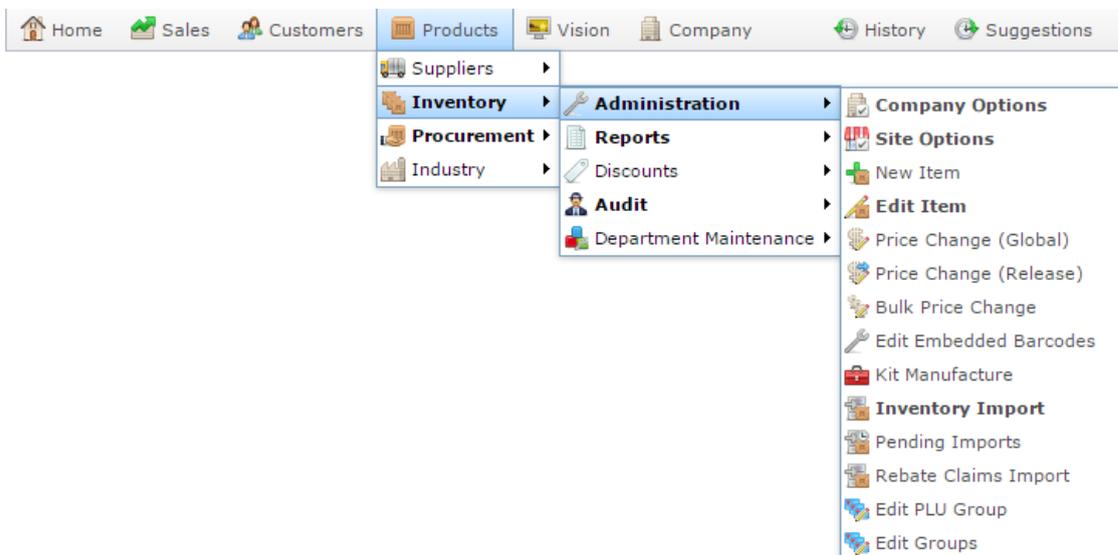
Editing a global price change

Edit a price change to correct a price change before it takes effect.

Note: If you want to manually correct a pricing error, see *Changing an item's price manually* on page 65.

To edit a global price change:

1. Press  in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.



3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.

Managing price changes

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Find Synchronise All Synchronise RRP Synchronise Descriptions
Synchronise Cost Reset Pending Reset Commit Changes

4. Select the date you want the price to take effect in the **Release Date** field.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Find Synchronise All Synchronise RRP Synchronise Descriptions
Synchronise Cost Reset Pending Reset Commit Changes

5. Type the new price in the **RRP (Inc)** field of the site or sites where you want to change the price.

Global Price Change Editor

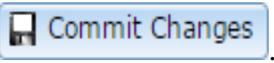
Current Site: Chadstone Release Date: 13/04/2015

Item: 300
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Find Synchronise All Synchronise RRP Synchronise Descriptions
Synchronise Cost Reset Pending Reset Commit Changes

6. Press .

The price change is scheduled.

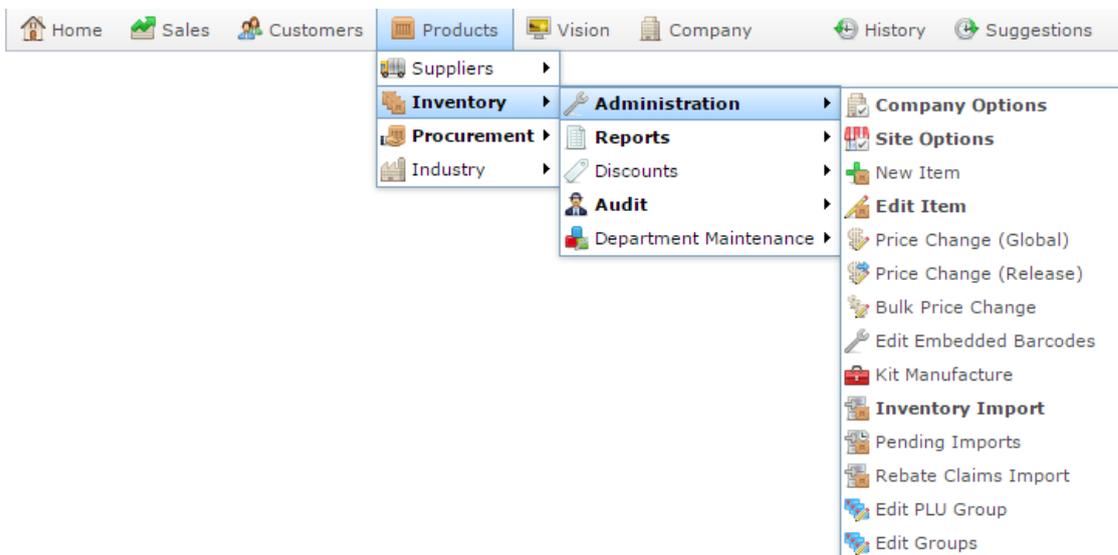
Cancelling a global price change

Cancel a price change when you do not want the item to change price as scheduled.

Note: If you want to change the new price to something else, see *Editing a global price change* on page 21.

To cancel a price change:

1. Press  in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.

3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.

Managing price changes

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Find Synchronise All Synchronise RRP Synchronise Descriptions
Synchronise Cost Reset Pending Reset Commit Changes

4. Select the site or sites where you want to cancel in the Price grid.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

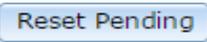
Item: 300
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Find Synchronise All Synchronise RRP Synchronise Descriptions
Synchronise Cost Reset Pending Reset Commit Changes

Tip: You can select more than once site at once by holding the **Shift** key when you select the sites.

5. Press .

The price changes are removed.

6. Press .

The changes are saved.

Copying an item's cost across sites

You can set an item to have the same cost across all sites by synchronising the cost.

Note: Synchronising works based on the default site, which is listed as the **Current Site** on the Global Price Change Editor screen. Make sure the site listed in the **Current Site** has the information you want to synchronise to. If necessary, edit the fields before synchronising.

Global Price Change Editor

Current Site: Chadstone

Item: 300

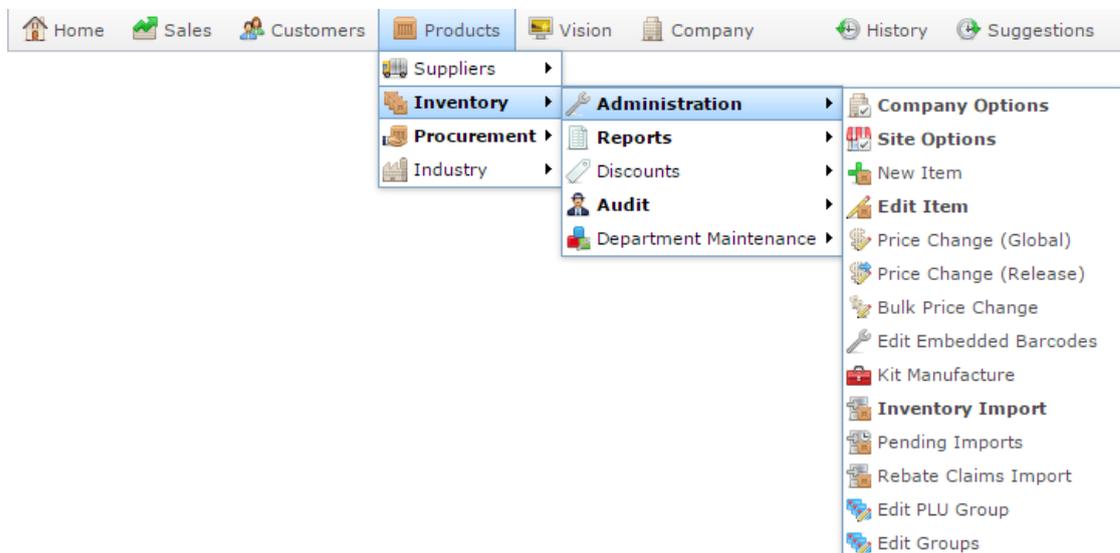
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department
Chadstone	Banana Muffin	Banana Muffin	
Richmond	Banana Muffin	Banana Muffin	

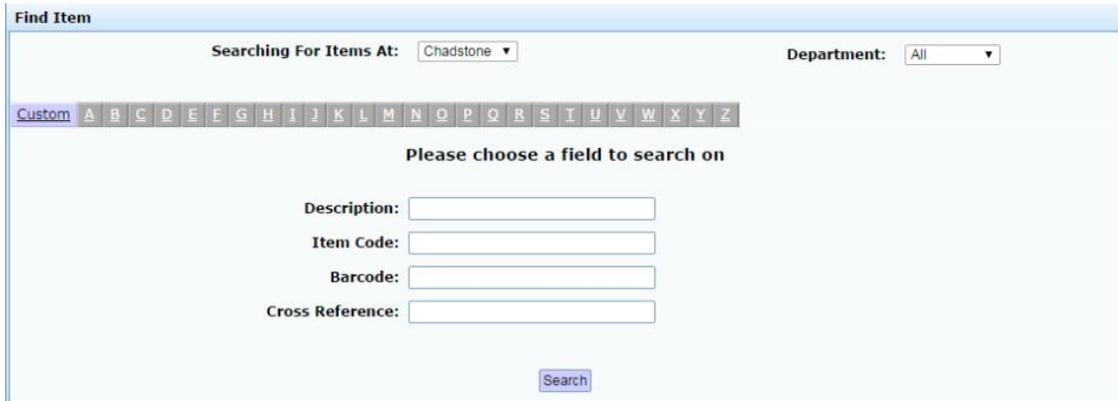
To synchronise the item cost across sites:

1. Press **Inventory** in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.

Managing price changes



Find Item

Searching For Items At: Department:

Custom

Please choose a field to search on

Description:

Item Code:

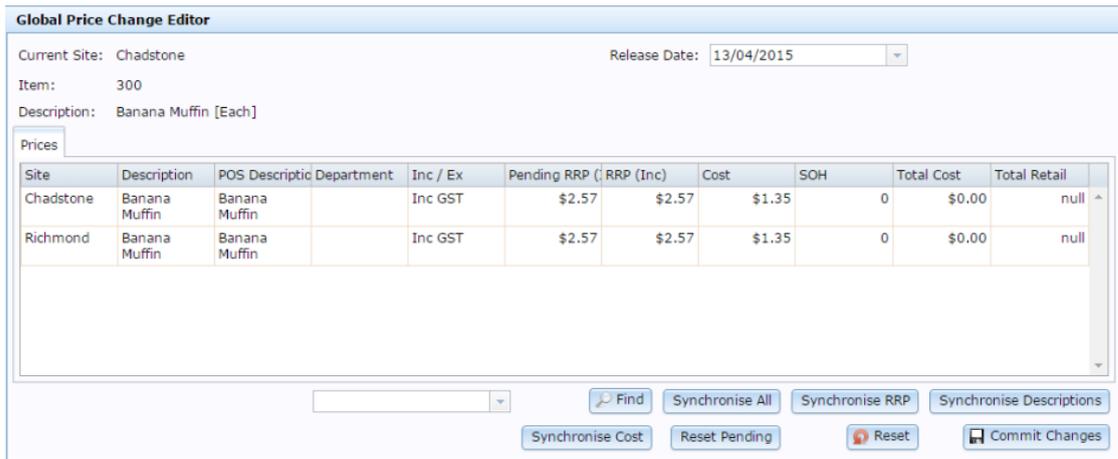
Barcode:

Cross Reference:

3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.



Global Price Change Editor

Current Site: Chadstone Release Date:

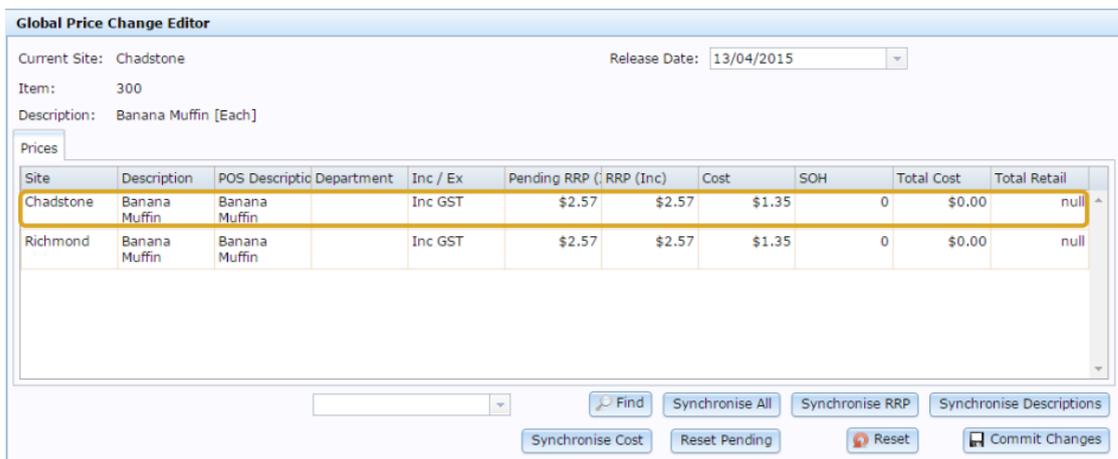
Item: 300

Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

4. Make sure the current site has the information you want to synchronise.



Global Price Change Editor

Current Site: Chadstone Release Date:

Item: 300

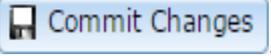
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

5. Press .

The information is copied to the other sites.

6. Press .

The price change is scheduled.

Copying an item's description across sites

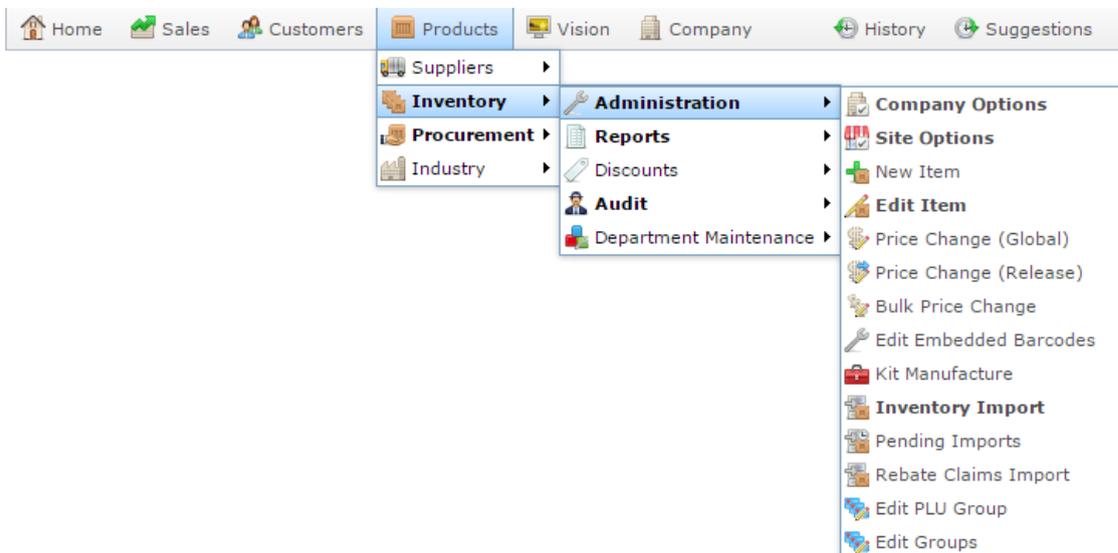
You can set an item to have the same Portal and Point of Sale descriptions across all sites by synchronising the description.

Note: Synchronising works based on the default site, which is listed as the **Current Site** on the Global Price Change Editor screen. Make sure the site listed in the **Current Site** has the information you want to synchronise to. If necessary, edit the fields before synchronising.

Site	Description	POS Descriptio	Department
Chadstone	Banana Muffin	Banana Muffin	
Richmond	Banana Muffin	Banana Muffin	

To synchronise the item descriptions across sites:

1. Press  in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.

Find Item

Searching For Items At: Chadstone Department: All

Custom A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Please choose a field to search on

Description:

Item Code:

Barcode:

Cross Reference:

3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

4. Make sure the current site has the information you want to synchronise.

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

Description: Banana Muffin [Each]

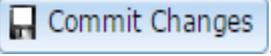
Prices

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

5. Press .

The information is copied to the other sites.

Managing price changes

6. Press .

The price change is scheduled.

Copying an item's RRP across sites

You can set an item to have the same Recommended Retail Price (RRP) across all sites by synchronising the RRP.

Note: Synchronising works based on the default site, which is listed as the **Current Site** on the Global Price Change Editor screen. Make sure the site listed in the **Current Site** has the information you want to synchronise to. If necessary, edit the fields before synchronising.

Global Price Change Editor

Current Site: Chadstone

Item: 300

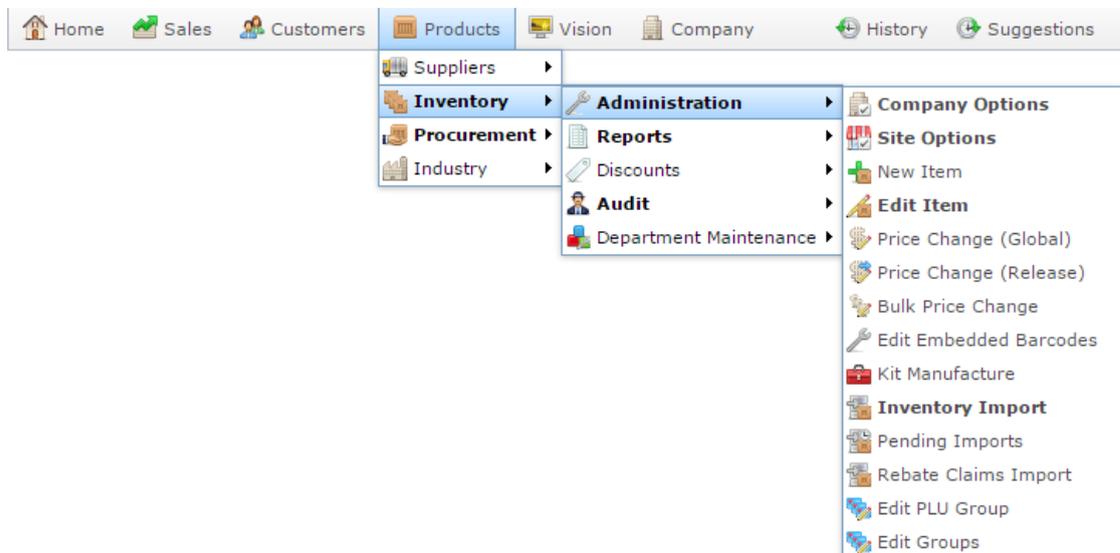
Description: Banana Muffin [Each]

Prices

Site	Description	POS Descriptio	Department
Chadstone	Banana Muffin	Banana Muffin	
Richmond	Banana Muffin	Banana Muffin	

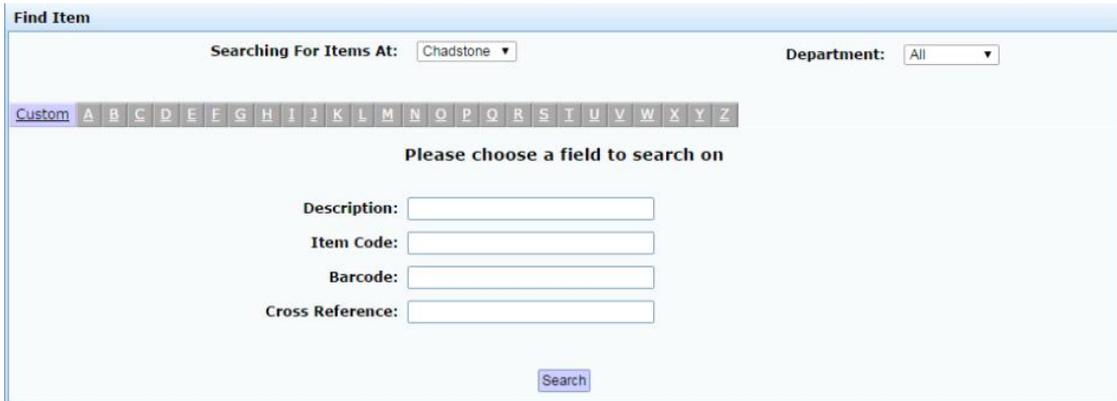
To synchronise the item RRP across sites:

1. Press  in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.

Managing price changes

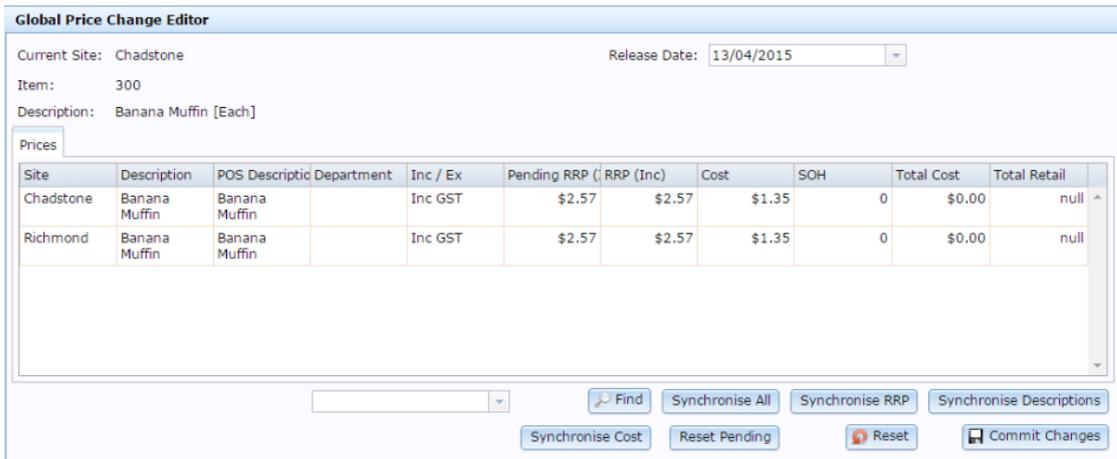


The 'Find Item' screen shows a search interface. At the top, it says 'Searching For Items At: Chadstone' and 'Department: All'. Below this is a row of letters from A to Z, with 'C' highlighted. The main area contains the text 'Please choose a field to search on' followed by four input fields: 'Description:', 'Item Code:', 'Barcode:', and 'Cross Reference:'. A 'Search' button is located at the bottom center.

3. Search for the item you want to change.

See *Finding an item with a search field* on page 12.

The Global Price Change Editor screen is displayed.



The 'Global Price Change Editor' screen displays the following information:

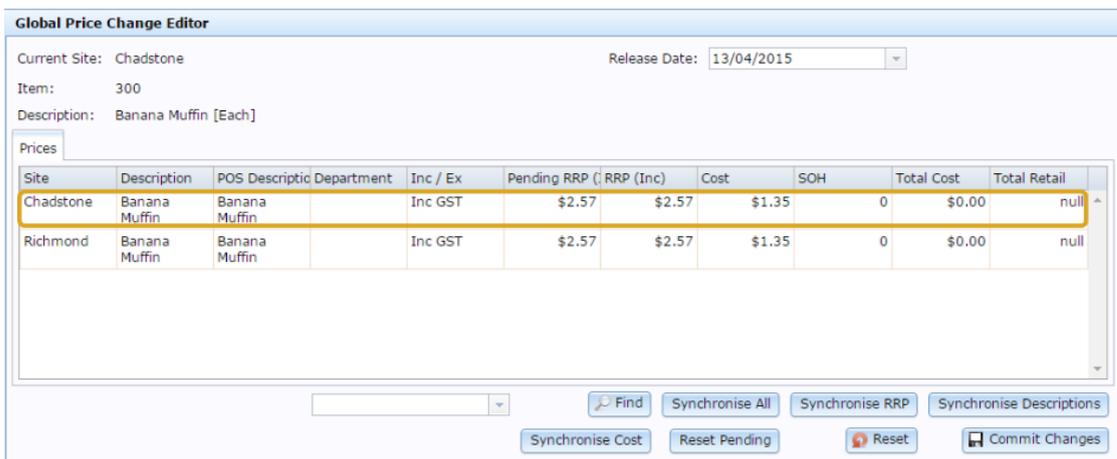
- Current Site: Chadstone
- Release Date: 13/04/2015
- Item: 300
- Description: Banana Muffin [Each]

Below this is a 'Prices' section with a table:

Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

At the bottom, there are several buttons: 'Find', 'Synchronise All', 'Synchronise RRP', 'Synchronise Descriptions', 'Synchronise Cost', 'Reset Pending', 'Reset', and 'Commit Changes'.

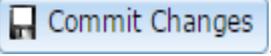
4. Make sure the current site has the information you want to synchronise.



This screenshot is identical to the previous one, but the first row of the table (Chadstone) is highlighted with a yellow border, indicating it is selected for synchronization.

5. Press **Synchronise RRP**.

The information is copied to the other sites.

6. Press .

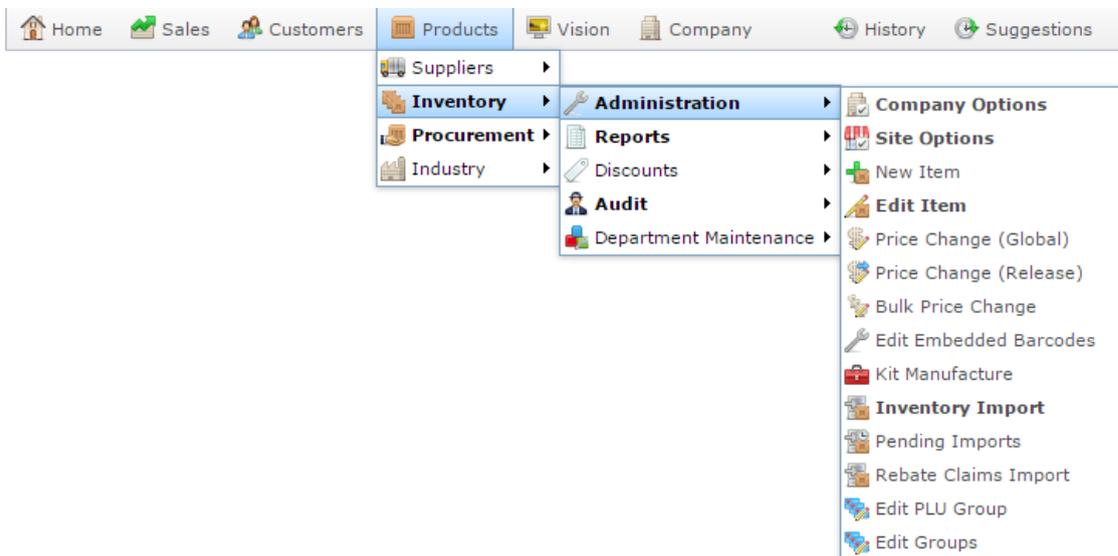
The price change is scheduled.

Changing item prices by brand

You can change item prices by a flat amount or percentage across several different item groupings.

To change all prices of a brand:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

See *Bulk Price Change* screen on page 78.

3. Select **Brand** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
 Department

Change
 RRP

Release Date
 29/04/2015

Site
 Chadstone

Percentage Change
 0

Amount Change
 0

Add to Favourites

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
 Department

Change
 RRP

Release Date
 29/04/2015

Site
 Chadstone

Percentage Change
 0

Amount Change
 0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

7. If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
10

Amount Change
0

Add to Favourites

8. If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

Add to Favourites

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

10

Amount Change

1.50

- Press the brand you want to apply the price change to in the Brand grid.

Bulk Price Change

Description	Brand
ACMEx Products	ACMEx

By
Brand

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

The price change is applied.

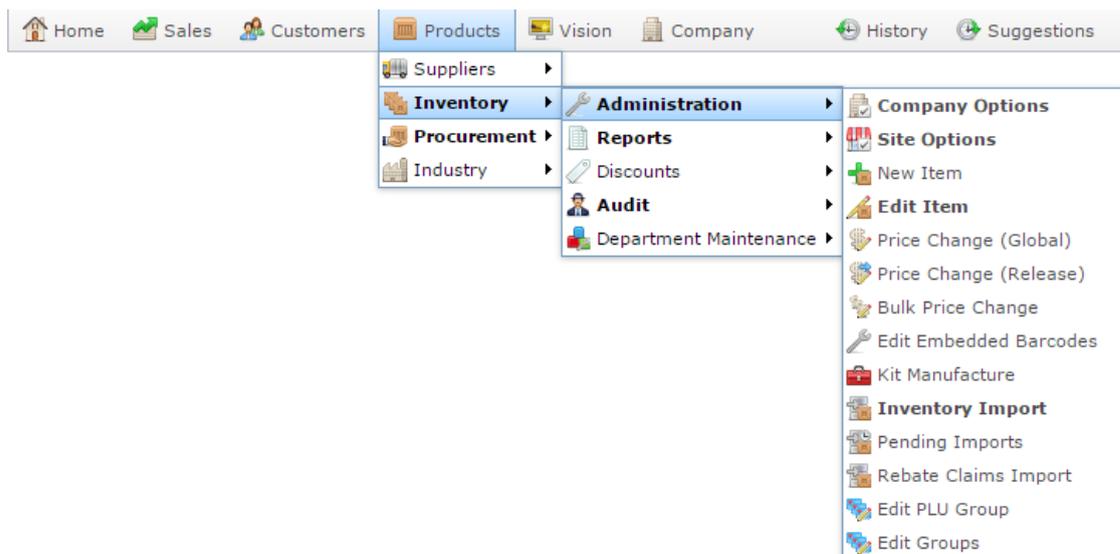
Changing item prices by colour

You can change item prices by a flat amount or percentage across several different item groupings.

Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company*.

To change all prices for a colour:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

See *Bulk Price Change* screen on page 78.

3. Select **Colour** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

7. If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
10

Amount Change
0

Add to Favourites

8. If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
0

Amount Change
1.50

Add to Favourites

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

Amount Change

9. Press the colour you want to apply the price change to in the Colour grid.

Bulk Price Change

Description	Colour
Black	Black
Blue	Blue
Purple	Purple
Red	Red
White	White

By

Change

Release Date

Site

Percentage Change

Amount Change

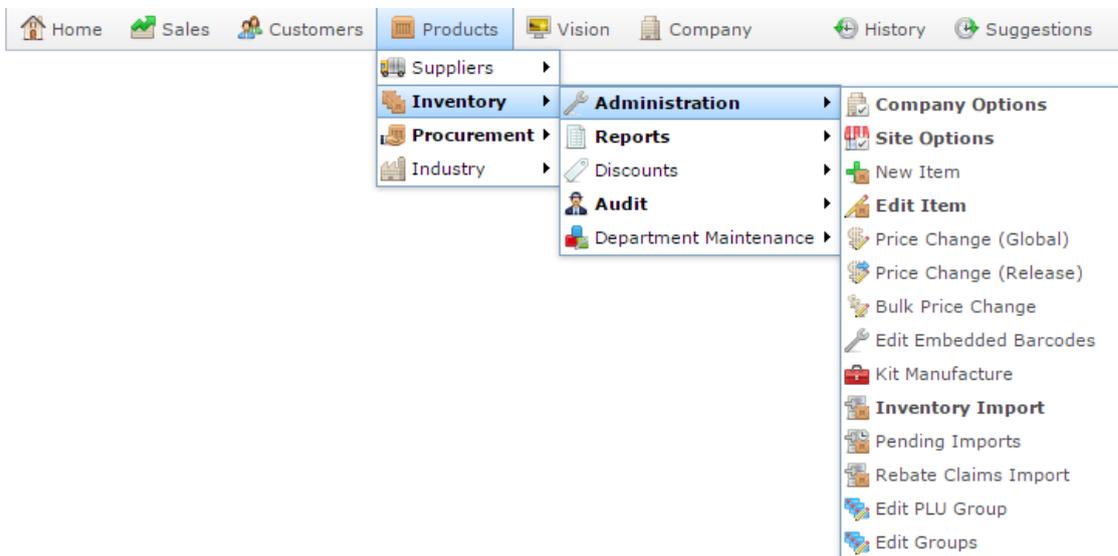
The price change is applied.

Changing item prices by department

You can change item prices by a flat amount or percentage across several different item groupings.

To change all prices in a department:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

See *Bulk Price Change* screen on page 78.

3. Select **Department** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
 Department

Change
 RRP

Release Date
 29/04/2015

Site
 Chadstone

Percentage Change
 0

Amount Change
 0

Add to Favourites

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
 Department

Change
 RRP

Release Date
 29/04/2015

Site
 Chadstone

Percentage Change
 0

Amount Change
 0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

7. If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
10

Amount Change
0

Add to Favourites

8. If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

Add to Favourites

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

10

Amount Change

1.50

9. Press the department you want to apply the price change to in the Department grid.

Managing price changes

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
10

Amount Change
0

Add to Favourites

The price change is applied.

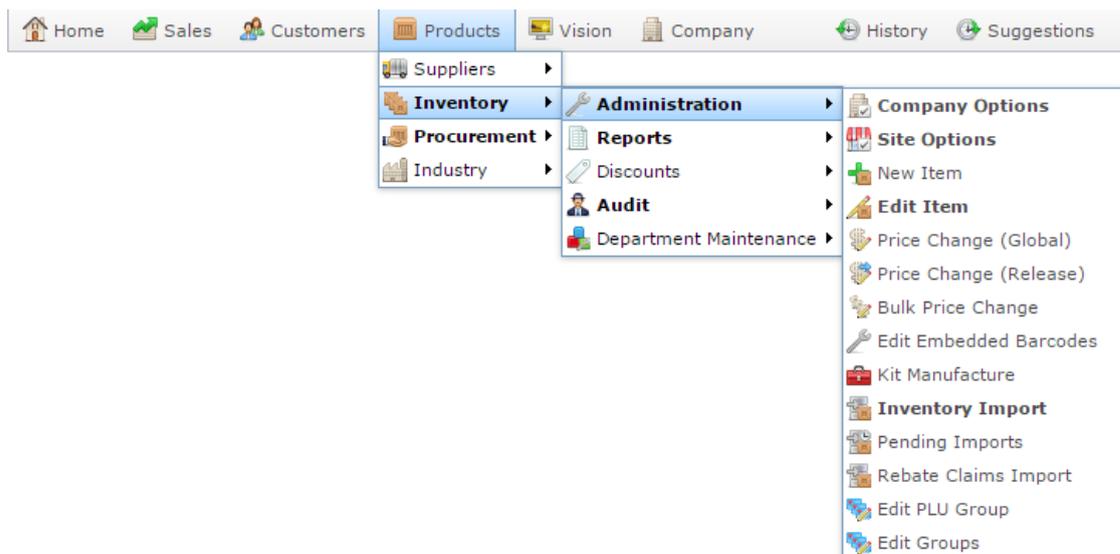
Changing item prices by size

You can change item prices by a flat amount or percentage across several different item groupings.

Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company*.

To change all prices for a size:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

See *Bulk Price Change* screen on page 78.

3. Select **Size** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

7. If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
10

Amount Change
0

Add to Favourites

8. If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
0

Amount Change
1.50

Add to Favourites

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

Amount Change

9. Press the size you want to apply the price change to in the Size grid.

Bulk Price Change

Description	Size
Large	L
Medium	M
Small	S

By

Change

Release Date

Site

Percentage Change

Amount Change

The price change is applied.

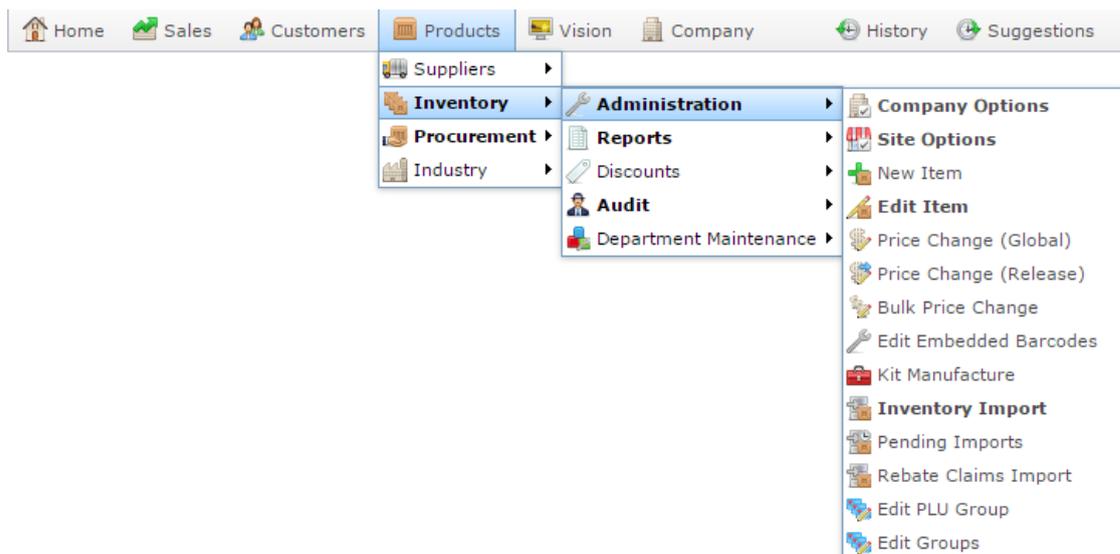
Changing item prices by style

You can change item prices by a flat amount or percentage across several different item groupings.

Note: Your Portal configuration may use labels other than Style, Size and Colour. This documentation uses the Portal default labels. See *Configuring item variation labels for your company*.

To change all prices for a style:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

See *Bulk Price Change* screen on page 78.

3. Select **Style** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

7. If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

- If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

Amount Change

9. Press the style you want to apply the price change to in the Style grid.

Bulk Price Change

Description	Style
Extra length in the torso	Long Torso
Fits close to the body	Fitted
Hangs loose from the body	Loose
Regular fit	Regular

By

Change

Release Date

Site

Percentage Change

Amount Change

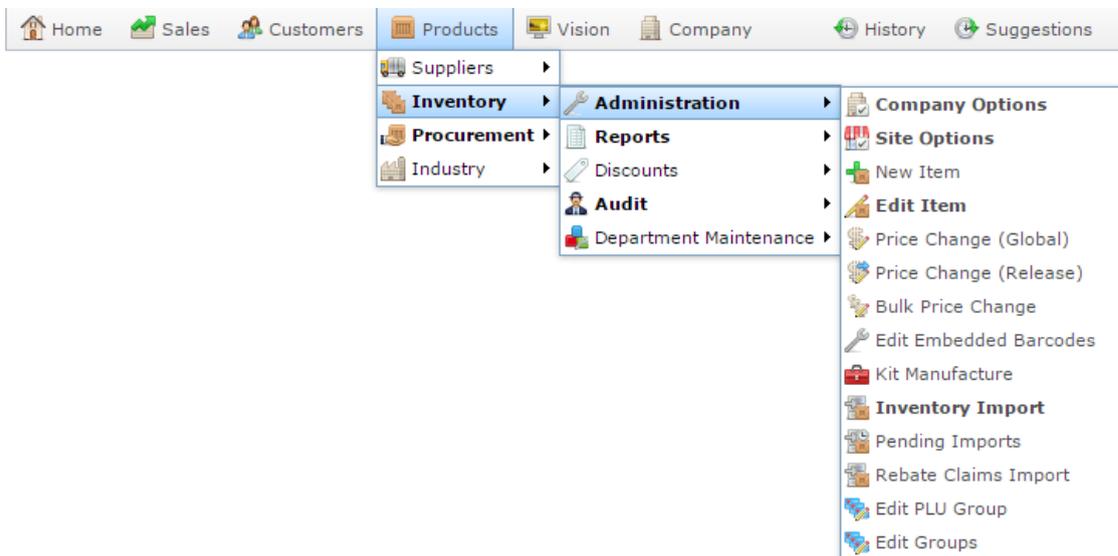
The price change is applied.

Changing item prices by supplier

You can change item prices by a flat amount or percentage across several different item groupings.

To change all prices for a supplier:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

↗
⋮

By

Department ➤

Change

RRP ➤

Release Date

29/04/2015

Site

Chadstone ➤

Percentage Change

0

Amount Change

0

Add to Favourites

See *Bulk Price Change* screen on page 78.

Managing price changes

3. Select **Supplier** from the **By** drop-down list.
4. Select whether to change the item's cost or recommended retail price (RRP) from the **Change** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

5. Select the date on which the change takes effect from the **Release Date** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

6. Select which site you want to change prices for from the **Site** drop-down list.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

- If you want to apply a percentage across the items, type the percentage as a whole number in the **Percentage Change** field.

For example, if you want to increase all prices by 10%, type **10**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By

Change

Release Date

Site

Percentage Change

Amount Change

- If you want to apply a flat amount to the items, type the amount in the **Amount Change** field.

For example, if you want to increase all prices by \$1.50, type **1.5**.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date
7/05/2015

Site
Chadstone

Percentage Change
0

Amount Change
1.50

Add to Favourites

Note: You can apply both a flat amount and a percentage at the same time. The Portal first adds the flat amount to the price, then calculates the percentage of the combined price. For example, if you applied both **10%** and **\$1.50**, a \$10 item would have the flat amount of \$1.50 added first, making the price \$11.50, and then be increased by 10% (\$1.15) to a total of \$12.65.

Percentage Change

10

Amount Change

1.50

9. Press the supplier you want to apply the price change to in the Supplier grid.

Bulk Price Change

Description	Supplier
ACMEx Products	5001
Yaardvark Supplies	5002

By
Supplier

Change
RRP

Release Date
29/04/2015

Site
Chadstone

Percentage Change
0

Amount Change
0

Add to Favourites

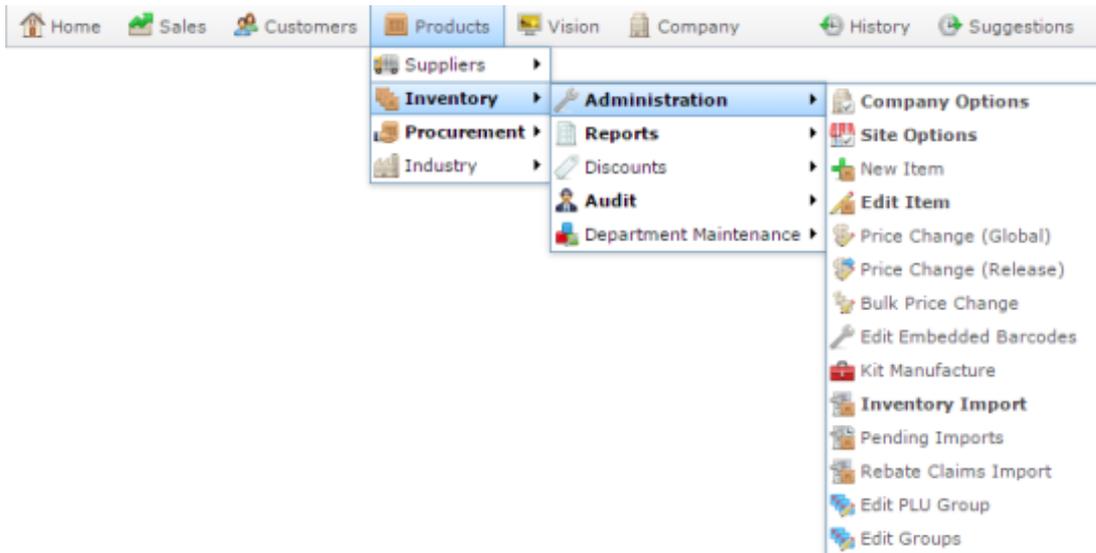
The price change is applied.

Importing new item prices from a file

You can override item prices from a file using the Portal file upload.

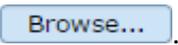
To import item prices into your inventory:

1. Press  **Products**.
2. Press **Inventory > Administration > Inventory Import**.



The Online Inventory Upload / Price Change screen is displayed.



3. Press .

An Open File popup screen is displayed.

4. Choose the file you want to upload.

The name of the file is displayed in the **Filename** field.

5. Press .

The Portal begins uploading the file.

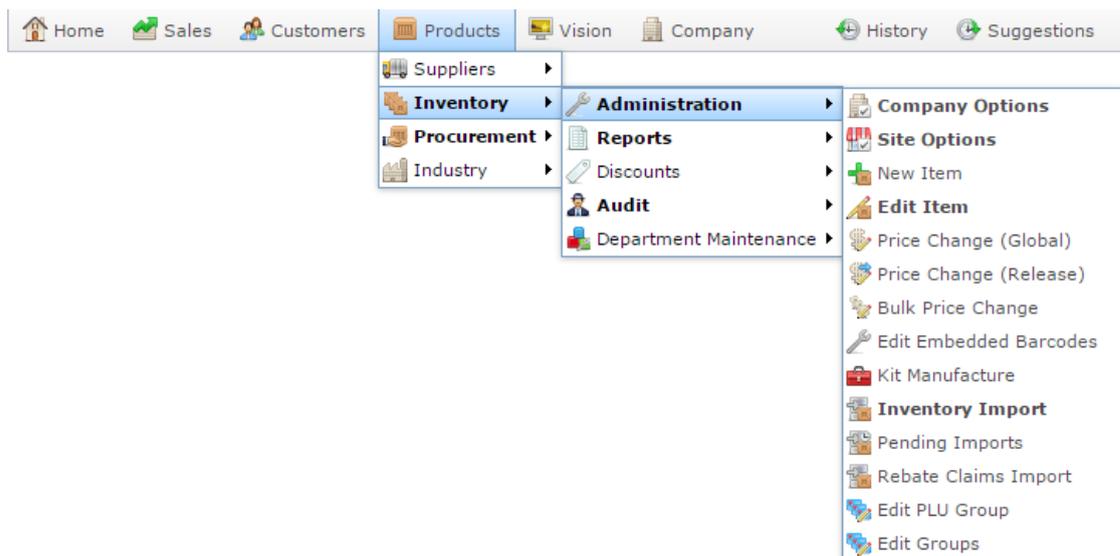
Changing an item's price manually

Change an item's price manually when you want a price edit to take effect immediately for a specific site.

Note: Updates do not appear on Point of Sale terminals until the item has been refreshed. Item updates are performed periodically. If you need to send the changes to the Point of Sale terminals immediately, refresh the item. See *Refreshing an item on the Point of Sale* on page 14.

To change an item's price manually:

1. Press  **Products** in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Pricing tab.

The Pricing tab of the Inventory Management screen is displayed.

Managing price changes

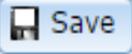
The screenshot shows the 'Inventory Management' window with the 'Pricing' tab selected. The window title is 'Inventory Management'. At the top, there are fields for 'Item Code: 392', 'Site: Chadstone', 'Item Description: Chicken Bbq', 'Last Change: 28/02/2010 By Bird, Bob', and 'Created: 28/02/2010'. Below this is a navigation bar with tabs: 'Details', 'Pricing', 'Stock Control', 'Point Of Sale', 'Barcodes', 'Bulk Discount', 'Specials', 'Promotions', 'Table / Home', 'Information', 'Ingredients', and 'Control'. The 'Pricing' tab is active, showing a form with the following fields and values:

Preferred Margin (%):	90	Update Retail Using Preferred Margin
Tax / GST Level:	10% (Rate 1)	Inclusive
Cost (\$):	5.242	(Inclusive)
Retail (\$):	6.99	(Inclusive)
Sell Price 2 (\$):	0	(Inclusive)
Sell Price 3 (\$):	0	(Inclusive)
Sell Price 4 (\$):	0	(Inclusive)
Sell Price 5 (\$):	0	(Inclusive)
Supplier RRP (\$):	0	(Inclusive)
Unit Price (\$):	0	(Inclusive)

At the bottom right of the window, there are buttons for 'Find', 'New', and 'Save'.

See *Inventory Management - Pricing tab* on page 82.

5. Change the prices using the fields as required.

6. Press  Save.

The new prices are saved.

Global Price Change Editor screen

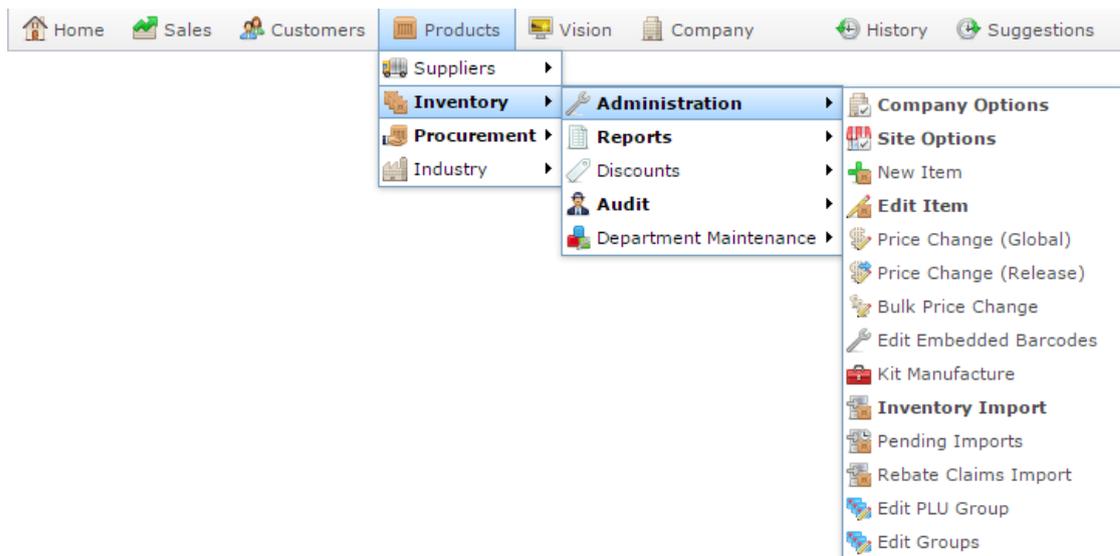
Use the Global Price Change Editor screen to:

- Schedule price changes for an item across one or more sites.
- Share item prices, costs or descriptions across sites.

Opening the Global Price Change Editor screen

To open the Global Price Change Editor screen:

1. Press  in the main menu bar.
2. Press **Inventory > Administration > Price Change (Global)**.



The Find Item screen is displayed.

3. Search for the item you want to change.
See Finding an item with a search field on page 12.
 The Global Price Change Editor screen is displayed.

Managing price changes

Global Price Change Editor

Current Site: Chadstone Release Date: 13/04/2015

Item: 300

Description: Banana Muffin [Each]

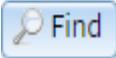
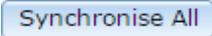
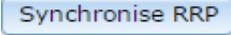
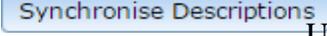
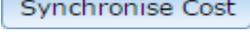
Prices

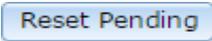
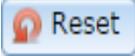
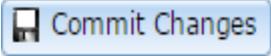
Site	Description	POS Descriptio	Department	Inc / Ex	Pending RRP (	RRP (Inc)	Cost	SOH	Total Cost	Total Retail
Chadstone	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null
Richmond	Banana Muffin	Banana Muffin		Inc GST	\$2.57	\$2.57	\$1.35	0	\$0.00	null

Global Price Change Editor screen key fields and buttons

Item area

Use this area to view or synchronise item information and change the price release date.

Field	Description
Current Site	The current default site. Synchronising the RRP , Cost or Description uses the information listed for this site.
Release Date	The date the price change goes into effect.
Item	The unique code identifying the item in your inventory.
Description	The item's description.
	Find another item to change the price of. See <i>Finding an item with a search field</i> on page 12.
	Update the Cost , RRP and Description for this item on all sites to match those of the Current Site .
	Update the RRP for this item on all sites to match that of the Current Site .
	Update the Description for this item on all sites to match that of the Current Site .
	Update the Cost for this item on all sites to match that of the Current Site .

Field	Description
	Remove pending price changes for the item at the site selected. Note: You must select a site or sites to remove the changes.
	Reset all changes made since this item was last saved.
	Save changes made to this item.

Price grid

Use this area to view the price, cost and description of the item at each site, and made necessary changes.

Field	Description
Site	The site for which this item price and cost applies.
Description	The item's description at this site. Note: Press this field to set a new description for this item.
POS Description	The item's Point of Sale description at this site. Note: Press this field to set a new Point of Sale description for this item.
Department	The department the item is allocated to at this site.
Inc / Ex	Whether tax is included in the item's cost at this site.

Pending RRP	The next price the item is scheduled to have at this site.
--------------------	--

RRP (Inc)	The new price to set for this item.
------------------	-------------------------------------

Note: Press this field to set a new price for this item.

Cost	The new cost to set for this item.
-------------	------------------------------------

Note: Press this field to set a new cost for this item.

SOH	The number of units of this item (stock on hand) available at this site.
------------	--

Total Cost	The total cost of all units of this item available at this site.
-------------------	--

Total Retail	The total retail price of all units of this item available at this site.
---------------------	--

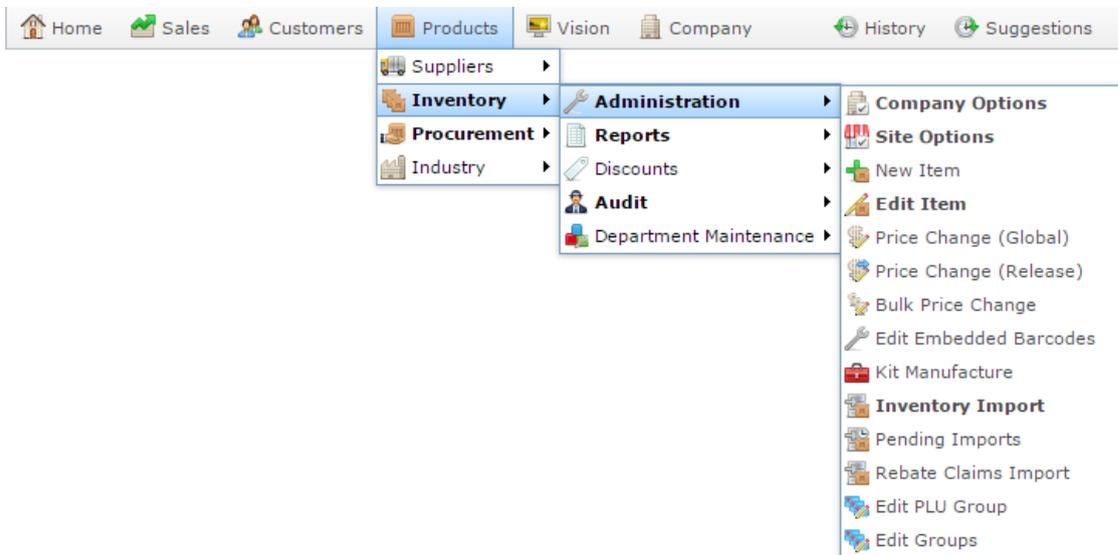
Price Change report

Use the Price Change report to view past and pending price changes of items across your company.

Opening the Price Change report

To open the Price Change report:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Price Change (Release)**.



The Price Change report is displayed.

Price Change Report - Pending

Descript	Item	Active	From	Ref	Departm	SOH	Cost	New Retail	Old Retail	Delta Value
Total										



Site

Chadstone >

Date From

27/04/2015

Date To

27/04/2015

Type

Pending >

Department

All >

Price Level

Retail >

Add to Favourites

Price Change report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Date / Date From and Date To / As of / Start Date and End Date	Select the date or date period to report on.

Field	Description
Type	Select to filter the report by where the price change was created:
Pending	Show only price changes created using the Global Price Change Editor.
All	Show all price changes.
Manual	Show only price changes created in Inventory Maintenance.
Bulk	Show only department-wide price changes created by Bulk Price Changes screen.
Receipts	Show only price changes created by stock receipting.
Purchase Orders	Show only price changes created by purchase orders.
Department	Select to filter the report by department.
Price Level	Select to filter the report by price levels.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Item / Description	Description of the item. Note: Click on the description to access other options in a popup menu.
Item Number / Item	The item code of the item.
Processed	The date the price change was created.
Changed	The date the price change was processed.
From	The method through which the price change was created. For example, manual, file import, bulk change.
Ref	Name of the file or batch of files used to import price changes.
Cost (Inc)	The item cost including tax. <i>See Inventory Management - Pricing tab on page 82.</i>
SOH	The stock-on-hand of the item.

Field	Description
Department	Unique code identifying the department.
New Retail	The new price of the item.
Old Retail	The previous price of the item.
Delta Value	The difference between the old and new item price.

Bulk Price Change screen

Use the Bulk Change screen to change prices by either a percentage or flat amount across an entire:

- Department.
- Supplier.
- Brand.
- Style.
- Colour.
- Size.

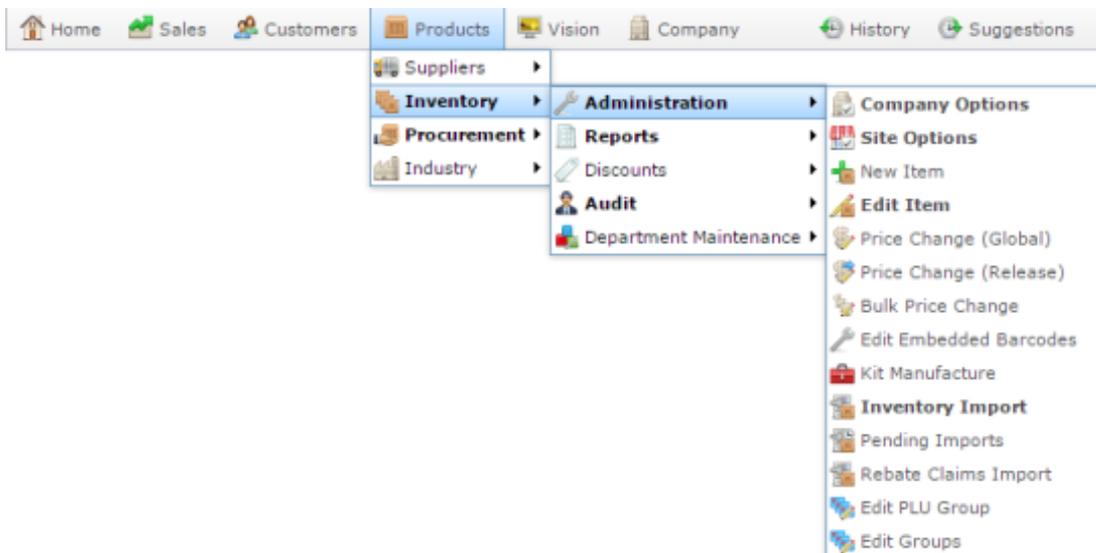
Note: Bulk price changes cannot be deleted and must be reversed manually with another bulk price change. Ensure your selections are correct before you proceed.

Note: Colour Size and Style are item variants. Your Portal configuration may use different labels. See *Configuring additional information fields for your company*

Opening the Bulk Price Change screen

To open the Bulk Price Change screen:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Bulk Price Change**.



The Bulk Price Change screen is displayed.

Bulk Price Change Department(s) Level

Department
Cafe
Deli

By
Department

Change
RRP

Release Date

Site
Chadstone

Percentage Change

Amount Change

Bulk Price Change screen key fields and buttons

Price change area

Use this area to control the price change amount, date, and what item groups and site the change applies to.

Field	Description
By	Select to change prices across one of the item groups: <ul style="list-style-type: none">▪ Department.▪ Supplier.▪ Brand.▪ Style.▪ Colour.▪ Size.
Change	Select to change either the Recommended Retail Price (RRP) or the item cost.
Release Date	Select the date on which the change will take effect.
Site	Select the site the price change applies to.
Percentage Change	Type in the percentage to apply to all prices within this group. <div style="border: 1px solid #000; background-color: #e6f2ff; padding: 10px;"><p>Note: Positive numbers increase the price. Type percentages as a whole number. For example, to increase prices by 10% type 10. To decrease prices by 5% type -5.</p><p>Note: If you use both Amount and Percentage, the Portal first applies the flat rate Amount Change, and then calculates the Percentage.</p></div>

Field	Description
Amount Change	Type the flat amount to apply to all prices within this group.
	Note: Positive numbers increase the price.
	Note: If you use both Amount and Percentage , the Portal first applies the flat rate Amount Change , and then calculates the Percentage .

Group selection area

Use this area to select which item group to apply the price change to.

Note: The groups displayed changes with your selection in the **By** drop-down list.

Field	Description
Description	Description of the item group. For example, description of the brand or style.
Department / Supplier / Brand / Style / Colour / Size	Once you have selected how you want to change the price in the Price Change area, press the item group you want to apply the price change to.

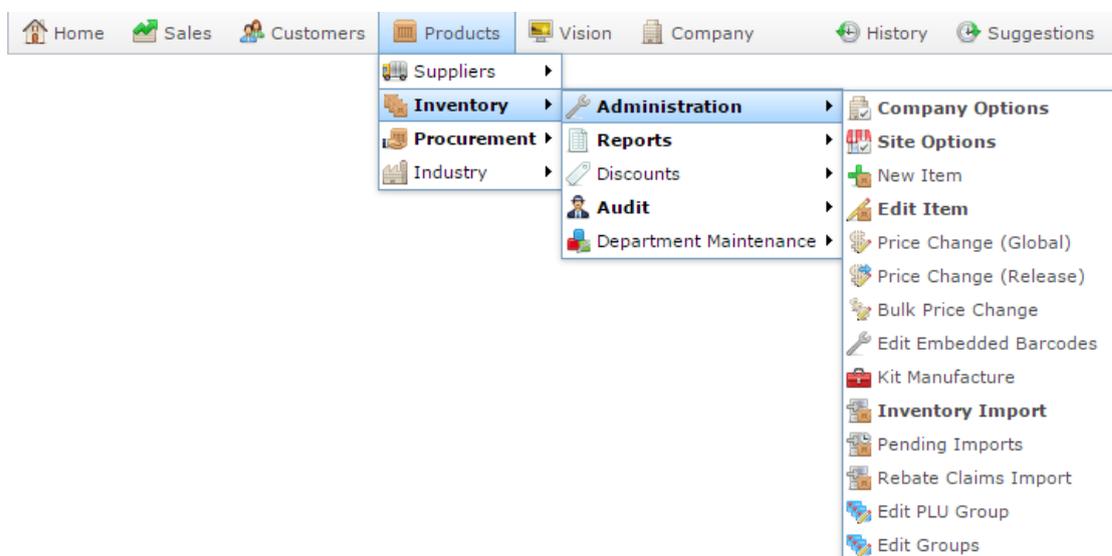
Inventory Management - Pricing tab

Use the Pricing tab of the Inventory Management screen to manage the cost and price of items in your inventory.

Opening the Pricing tab

To open the Pricing tab:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Pricing tab.

The Pricing tab of the Inventory Management screen is displayed.

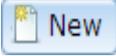
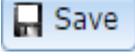
The screenshot shows the 'Inventory Management' window with the 'Pricing' tab selected. The 'Item Code' is 392 and the 'Site' is Chadstone. The 'Item Description' is 'Chicken Bbq'. The 'Last Change' was on 28/02/2010 by Bird, Bob, and it was 'Created' on 28/02/2010. The 'Preferred Margin (%)' is set to 90, with an 'Update Retail Using Preferred Margin' button. The 'Tax / GST Level' is 10% (Rate 1) and 'Inclusive'. The 'Cost (\$)' is 5.242. The 'Retail (\$)' is 6.99. There are five 'Sell Price (\$)' fields, all set to 0. The 'Supplier RRP (\$)' and 'Unit Price (\$)' are also set to 0. At the bottom right, there are 'Find', 'New', and 'Save' buttons.

Inventory Management - Pricing tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

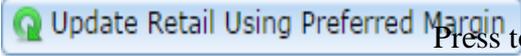
Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. <i>See Inventory Management - Point of Sale tab.</i>
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. <i>See Copying an item to another site.</i>

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	<p>Switch the Inventory Maintenance screen to another item.</p> <p>See <i>Finding an item with a search field</i> on page 12.</p>
	<p>Create a new item.</p> <p>See <i>Creating a new item</i>.</p>
	<p>Save changes to the item.</p>

Pricing tab key fields and buttons

Field	Description
Preferred Margin (%)	<p>Type the percentage of the cost price you want to be added to create the retail price.</p> <p>For example, if an item costs \$1.80, a preferred margin of 50% calculates the retail price by adding 50% of the item cost. $1.8 + (1.8 \times .5) = \\2.70.</p> <p>The Portal recalculates prices by preferred margin as $\text{Item Cost} \times (1 + (\text{Preferred Margin} / 100))$. In the example above, that would be $1.8 \times (1.5) = 2.7$.</p>
Tax / GST Level	<p>The level of tax charged on the cost of this item.</p>

Field	Description
Inclusive/Exclusive	Select whether the item's cost includes tax. If the item's cost does not include tax, then the Portal adds the taxed amount to the item's cost when calculating prices on preferred margins.
Cost (\$)	<p>The item's cost, calculated as either the last supplier cost used or the weighted average of all supplier costs for this item.</p> <p>See <i>Configuring costs for your site</i>.</p> <p>If you want to override the item cost, type the amount the item costs to supply.</p>
Retail (\$)	Type the standard retail price of the item.
Sell Price 2 (\$)	Type the level 2 price of the item.
Sell Price 3 (\$)	Type the level 3 price of the item.
Sell Price 4 (\$)	Type the level 4 price of the item.
Sell Price 5 (\$)	Type the level 5 price of the item.
Supplier RRP (\$)	Type the recommended retail price of the item according to the supplier.
Unit Price (\$)	Type the price per measured unit, for example per kilogram.

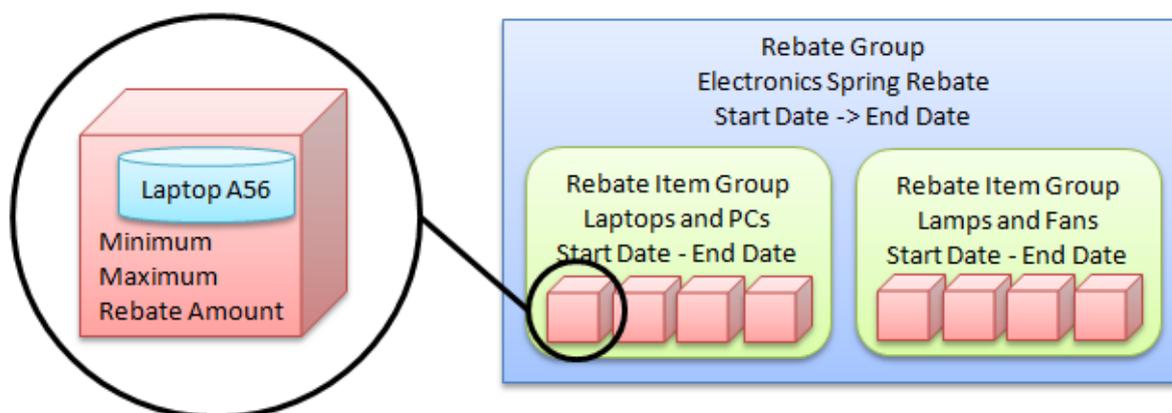
Field	Description
<p>RRP GP Margin</p>	<p>The gross profit margin if the item is sold at its recommended retail price.</p> <p>Note: This field is only displayed if the Show Margins Company configuration is set. See <i>Configuring inventory options for your company</i>.</p>
<p>RRP GP Markup</p>	<p>The gross markup from the item's cost to its recommended retail price.</p> <p>Note: This field is only displayed if the Show Margins Company configuration is set. See <i>Configuring inventory options for your company</i>.</p>
<p>Gross Profit (Ex)</p>	<p>The gross profit earned when this item is sold at its recommended retail price.</p> <p>Note: This field is only displayed if the Show Margins Company configuration is set. See <i>Configuring inventory options for your company</i>.</p>
<p></p>	<p>Press to recalculate the Retail price to ensure it provides the Preferred Margin over the Cost.</p>

Managing rebates

You can create rebates for items as a promotional tool. Rebates are money granted back to the customer when they purchase a specific item.

Rebates are controlled in a hierarchy of two groups:

- Item groups, with specific rebate rules assigned for each item.
- Rebate groups, which corral item groups into collective start and end dates.



Rebate item groups can be restricted to loyalty members, or open to all customers. Each item in a rebate item group can:

- Be restricted to a minimum and maximum number of purchased units per item.
- Provide a flat amount as a rebate, or a percentage of the purchase price.

You can import rebate claims into the Portal by file import to send to your creditors .

Also see:

- *Rebate Item Maintenance screen* on page 114.
- *Rebate Groups report* on page 122.
- *Rebate Groups List report* on page 119.
- *Online Rebate Claims Upload.*

What you can do:

- *Creating a rebate group list* on page 89.
- *Editing a rebate group list* on page 91
- *Deleting a rebate group list* on page 93.
- *Creating a rebate item group* on page 95
- *Creating a loyalty-only rebate item group* on page 100

Managing rebates

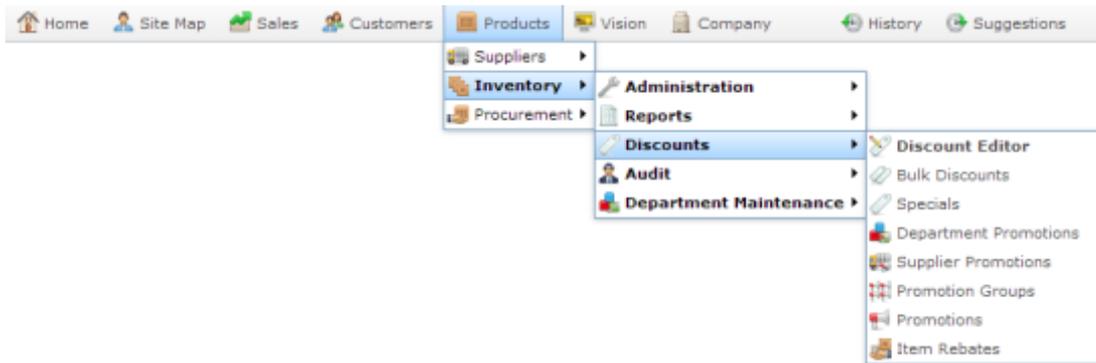
- *Editing a rebate item group* on page 98.
- *Adding items to a rebate item group* on page 103.
- *Removing items from a rebate item group* on page 106.
- *Finalising a rebate item group* on page 109
- *Deleting a rebate item group* on page 111.
- *Importing rebate claims from a file* on page 113.

Creating a rebate group list

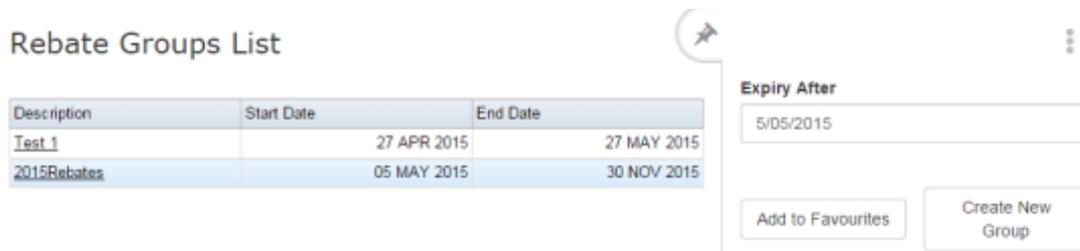
Create a new rebate group list to group rebate item groups together for easy maintenance.

To create a new rebate group list:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



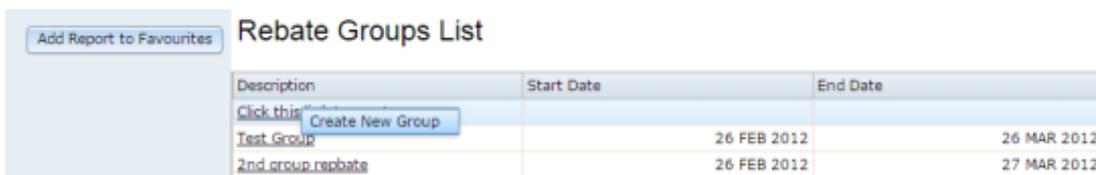
The Rebate Groups List report is displayed.



3. Press **Click this link to create groups**.

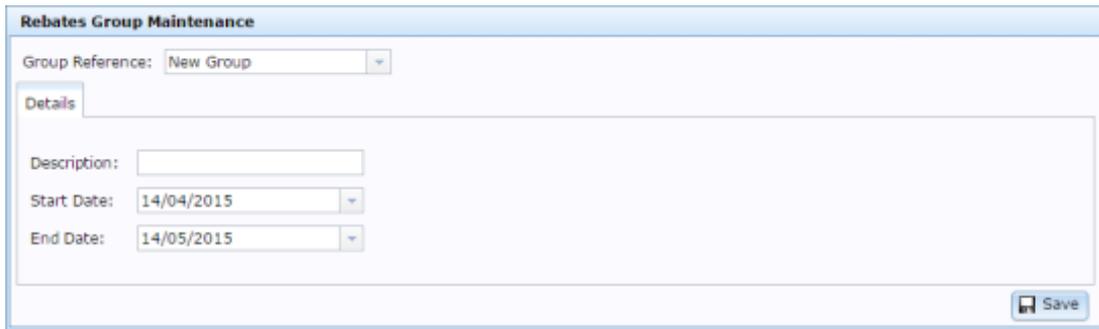
A popup menu is displayed.

4. Press **Create New Group**.



The Rebates Group Maintenance screen is displayed.

Managing rebates



Rebates Group Maintenance

Group Reference: New Group

Details

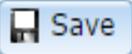
Description:

Start Date: 14/04/2015

End Date: 14/05/2015

Save

5. Type a description to identify the rebate groups list in the **Description** field.
6. Select the date the rebates contained in this group will start from the **Start Date** field.
7. Select the date the rebates contained in this group expire from the **End Date** field.

8. Press .

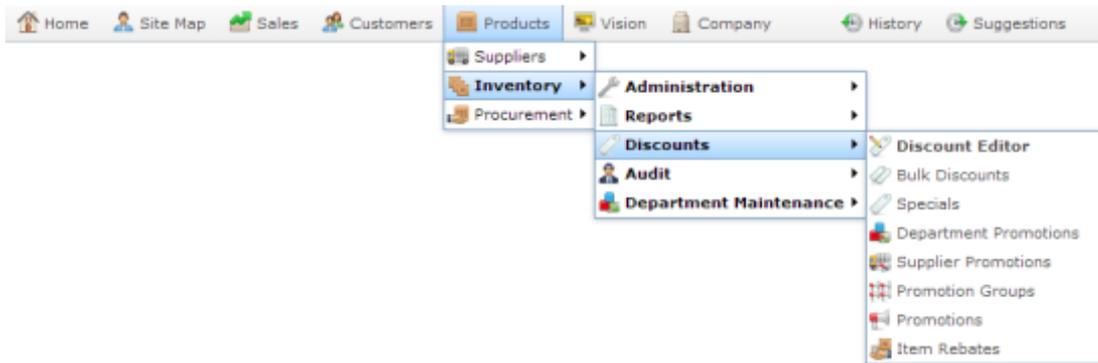
The rebate groups list is created.

Editing a rebate group list

Edit a rebate group list to change the group's description or active period.

To edit a rebate group list:

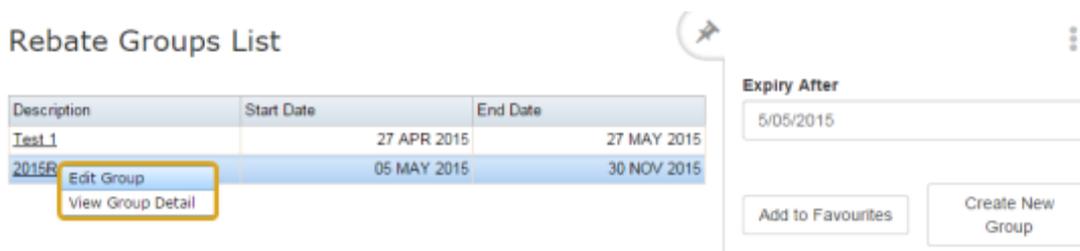
1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.



1. Press the Description of the group you want to edit.
A popup menu is displayed.
2. Press **Edit Group**.



The Rebate Groups Maintenance screen is displayed.

Managing rebates

Rebates Group Maintenance

Group Reference: 2015Rebates [103]

Details

Description: 2015Rebates

Start Date: 5/05/2015

End Date: 30/11/2015

Save Delete Group

3. Make the required changes.

4. Press  Save.

The rebate groups list is created.

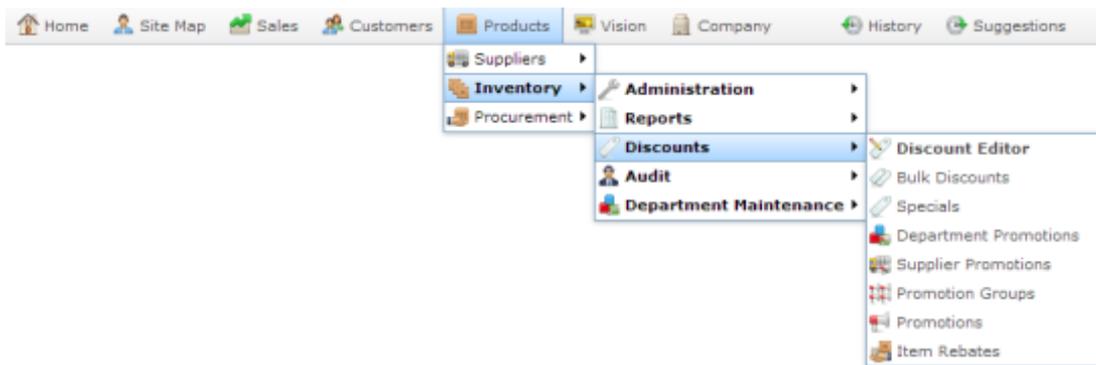
Deleting a rebate group list

Delete a rebate group list to remove it from the Portal.

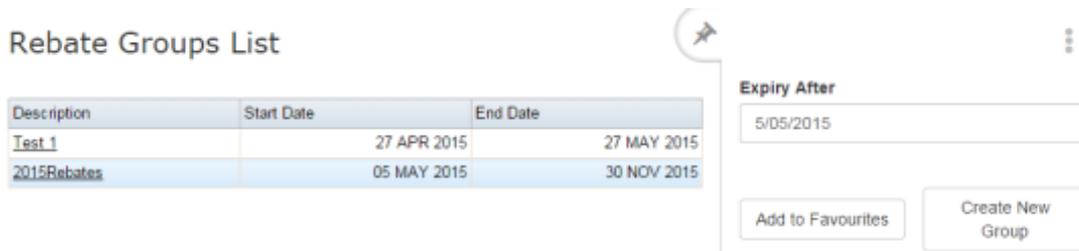
Note: If you delete a rebate group list while it contains rebate item groups, you cannot access the item groups. You should delete or move all related rebate item groups before deleting a rebate group list.

To edit a rebate group list:

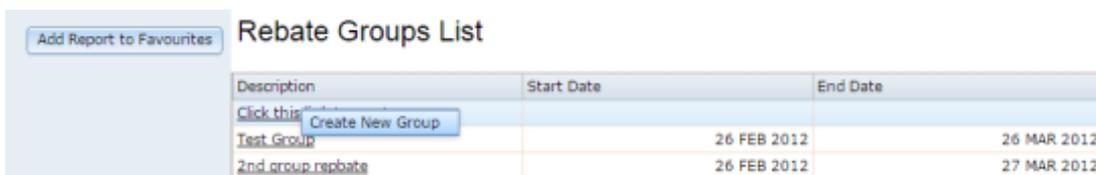
1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

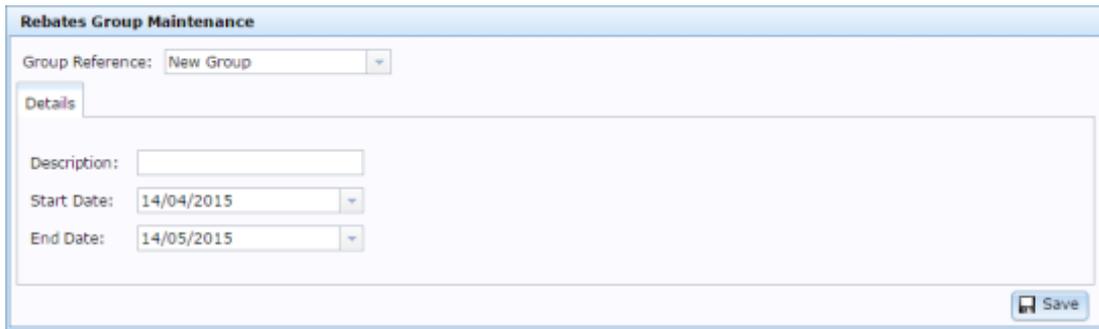


1. Press [Click this link to create groups.](#)
A popup menu is displayed.
2. Press **Create New Group**.



The Rebate Groups Maintenance screen is displayed.

Managing rebates



Rebates Group Maintenance

Group Reference: New Group

Details

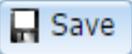
Description:

Start Date: 14/04/2015

End Date: 14/05/2015

Save

3. Type a description to identify the rebate groups list in the **Description** field.
4. Select the date the rebates contained in this will start from the **Start Date** field.
5. Select the date the rebates contained in this group expire from the **End Date** field.

6. Press .

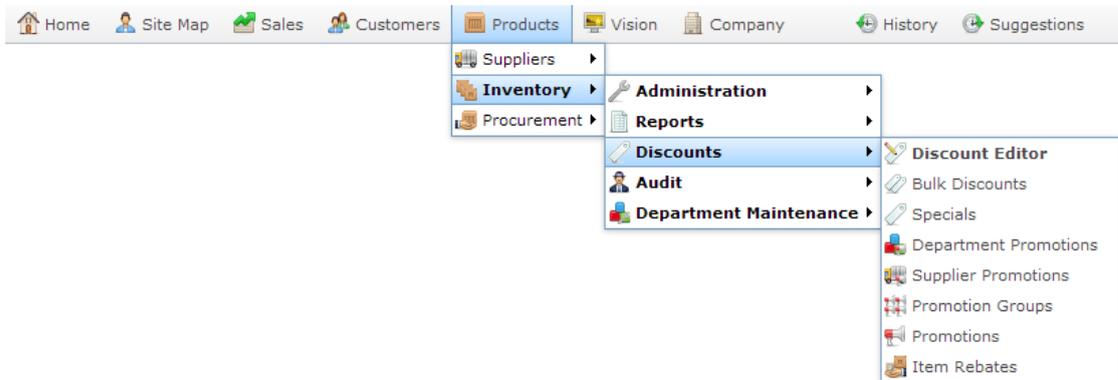
The rebate groups list is created.

Creating a rebate item group

Create a rebate item group to apply a rebate to a specific group of items.

To create a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

Rebate Groups List

Description	Start Date	End Date
Test 1	27 APR 2015	27 MAY 2015
2015Rebates	05 MAY 2015	30 NOV 2015

Expiry After:

3. Press the Description of the rebate group you want to open.

A popup menu is displayed.

Rebate Groups List

Description	Start Date	End Date
Click this link to create groups		
Test 1 <input type="button" value="View Group Detail"/>	26 FEB 2012	26 MAR 2012
2nd group	26 FEB 2012	27 MAR 2012

4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Add Report to Favourites

Site:
All

Group:
Test Group [100] : 26

Expiry After:
13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press **Create New Rebate**.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: New Rebate

Site: All

Details Items

Group: None

Description:

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

Finalise Save Delete Rebate

6. Select the rebate group you want this rebate item group to belong to from the **Group** drop-down list.
7. Type a description to identify the rebate item group in the **Description** field.
8. Select the date the rebate should start from the **Start Date** field.
9. Select the date the rebate should expire from the **End Date** field.
10. If you want this rebate to apply only to loyalty members, select the **Loyalty Only** field.
11. Press the **Items** tab.

The Items tab is displayed.

Item Group Rebate Maintenance

Rebate Reference:

Site:

Details **Items**

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Minimum	Maximum	% Rebate	Amount
No Items		0	0	0%	\$0.00

12. Add the items you want to include in the rebate group, and set their rebate amounts.
See *Adding items to a rebate item group* on page 103.

13. Press .

The rebate item group is created.

Editing a rebate item group

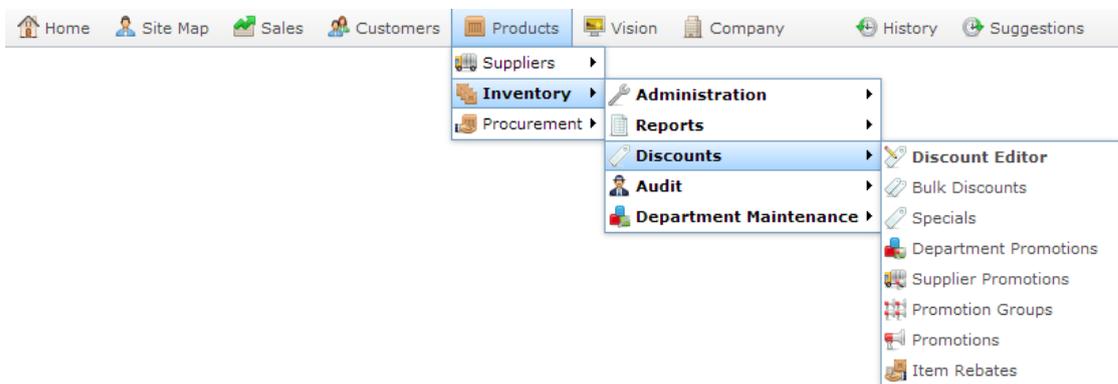
Edit a rebate item group to:

- Move the rebate group to another group list.
- Change the start or end date of the rebate.
- Change the loyalty-only status of the group.
- Add or remove items from the group.
- Change the item minimum and maximums.
- Change the rebates given for each item.

Note: You cannot edit a rebate item group once it has been finalised.

To edit a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

Rebate Groups List

Description	Start Date	End Date
Test_1	27 APR 2015	27 MAY 2015
2015Rebates	05 MAY 2015	30 NOV 2015

Expiry After

5/05/2015

Add to Favourites

Create New Group

3. Press the Description of the rebate group you want to open.

A popup menu is displayed.

Description	Start Date	End Date
Click this link to create groups		
Test Group	26 FEB 2012	26 MAR 2012
2nd Group	26 FEB 2012	27 MAR 2012

4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to edit.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference:

Site:

Details | Items

Group:

Description:

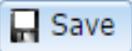
Start Date:

End Date:

Loyalty Only

6. Make the required changes.

See *Rebate Item Maintenance screen* on page 114.

7. Press .

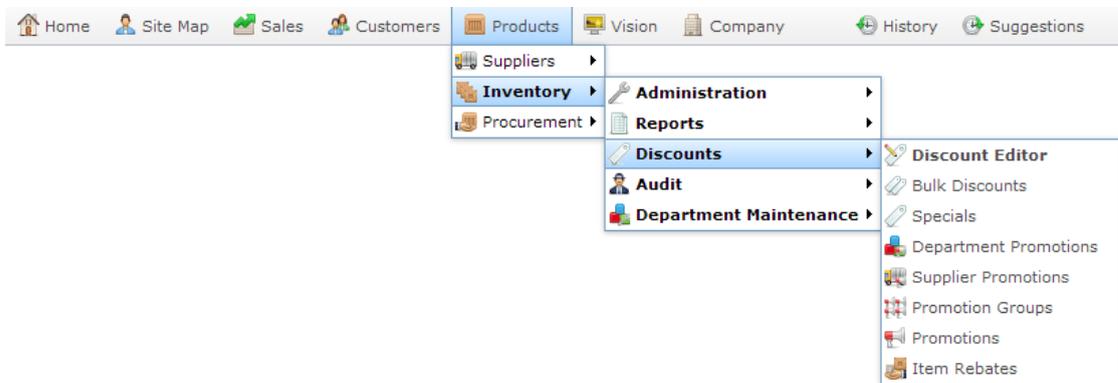
The rebate item group is edited.

Creating a loyalty-only rebate item group

Create a loyalty-only rebate item group to apply a rebate to a specific group of items for loyalty members. Customers must scan or sign in their loyalty membership in order to receive the rebate.

To create a loyalty-only rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

Rebate Groups List

Description	Start Date	End Date
Test 1	27 APR 2015	27 MAY 2015
2015Rebates	05 MAY 2015	30 NOV 2015

Expiry After

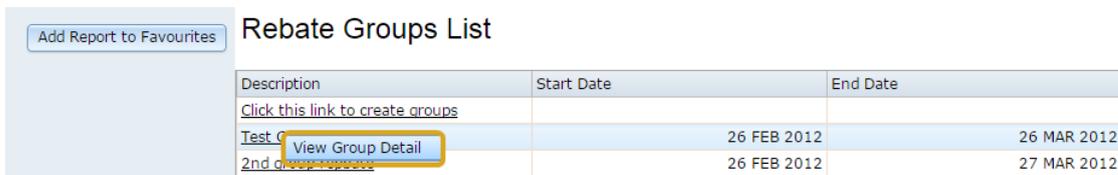
5/05/2015

Add to Favourites

Create New Group

3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Add Report to Favourites

Site:
All

Group:
Test Group [100] : 26

Expiry After:
13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test_5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press **Create New Rebate**.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: New Rebate

Site: All

Details | **Items**

Group: None

Description:

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

6. Select the rebate group you want this rebate item group to belong to from the **Group** drop-down list.
7. Type a description to identify the rebate item group in the **Description** field.
8. Select the date the rebate should start from the **Start Date** field.
9. Select the date the rebate should expire from the **End Date** field.
10. Select the **Loyalty Only** field.
11. Press the **Items** tab.

The Items tab is displayed.

Managing rebates

Item Group Rebate Maintenance

Rebate Reference: New Rebate

Site: All

Details Items

Item Code: Find Add

Description:

Unit Price:

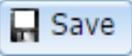
Stock On Hand:

Description	Item	Minimum	Maximum	% Rebate	Amount
No Items		0	0	0%	\$0.00

Update Delete

Finalise Save Delete Rebate

12. Add the items you want to include in the rebate group, and set their rebate amounts.
See *Adding items to a rebate item group* on page 103.

13. Press .

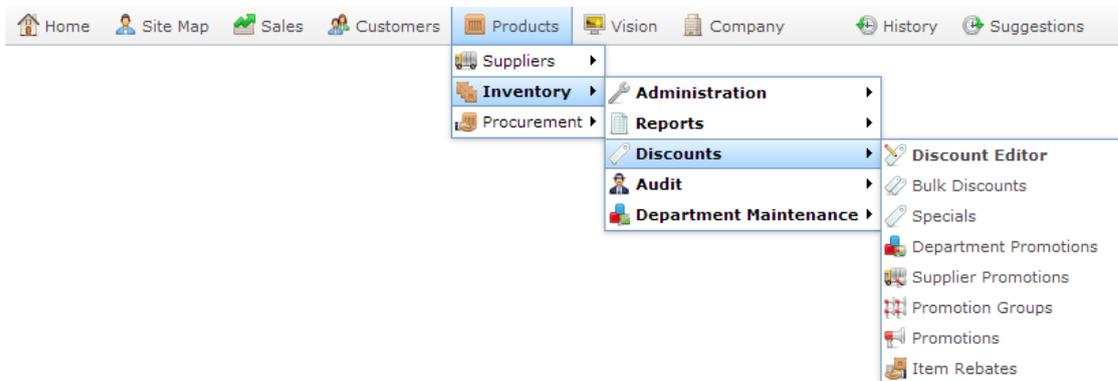
The rebate item group is created.

Adding items to a rebate item group

Add items to a rebate item group to apply a specific rebate to them over the same period of time. Different items may receive different rebate amounts, and require different quantities to be included in the transaction to trigger a rebate.

To add items to a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

Rebate Groups List

Description	Start Date	End Date
Test 1	27 APR 2015	27 MAY 2015
2015Rebates	05 MAY 2015	30 NOV 2015

Expiry After

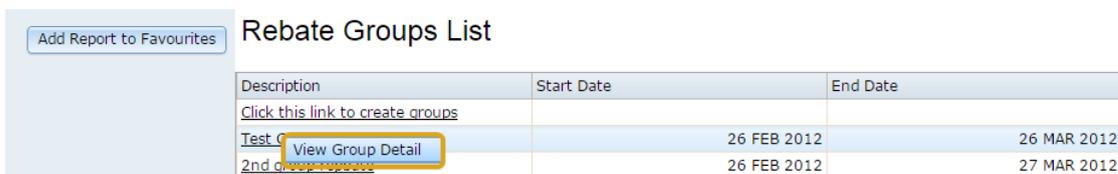
5/05/2015

Add to Favourites

Create New Group

3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Managing rebates

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Add Report to Favourites

Site:
All

Group:
Test Group [100] : 26

Expiry After:
13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to add items to.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: Rebate 6 [6]

Site: All

Details Items

Group: None

Description: Rebate 6

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

Finalise **Save** **Delete Rebate**

6. Press the **Items** tab.

The Items tab is displayed.

Item Group Rebate Maintenance

Rebate Reference: New Rebate

Site: All

Details **Items**

Item Code:

Find **+ Add**

Description:

Unit Price:

Stock On Hand:

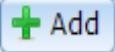
Description	Item	Minimum	Maximum	% Rebate	Amount
No Items		0	0	0%	\$0.00

Update **Delete**

Finalise **Save** **Delete Rebate**

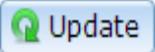
7. Search for the item to add in the **Item Code** field.

See *Finding an item with a search field* on page 12.

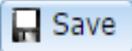
8. Press .

The item is added to the Items grid.

9. Type the minimum number of units of this item that must be in the transaction to receive a rebate in the **Minimum** field.
10. Type the maximum number of units of this item that can receive a rebate in one transaction in the **Maximum** field.
11. Type either:
- The percentage of the price to apply as a rebate in the **% Rebate** field.
 - The flat amount to apply as a rebate in the **Amount** field.

12. Press .

The item is added.

13. When you have finished adding or editing items, press .

The rebate item group is saved.

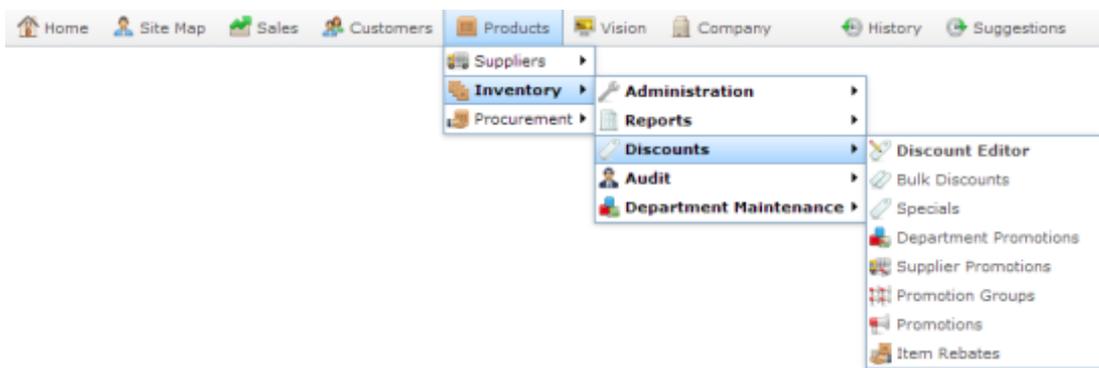
Removing items from a rebate item group

Remove an item from a rebate item group if you do not want a rebate to apply to it.

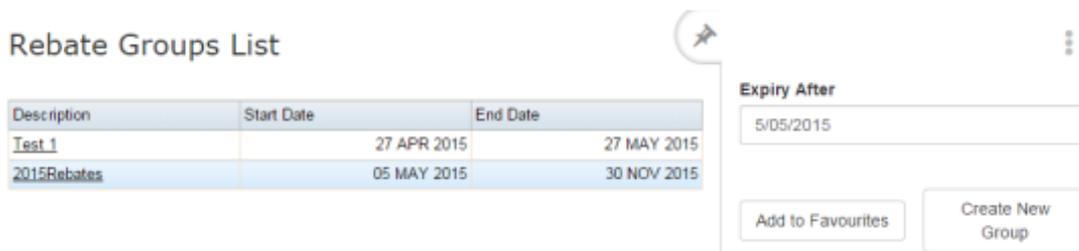
Note: If you want to keep the item in the group without applying a rebate, you can set the % Rebate and Amount fields to 0 for that item.

To remove items from a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.

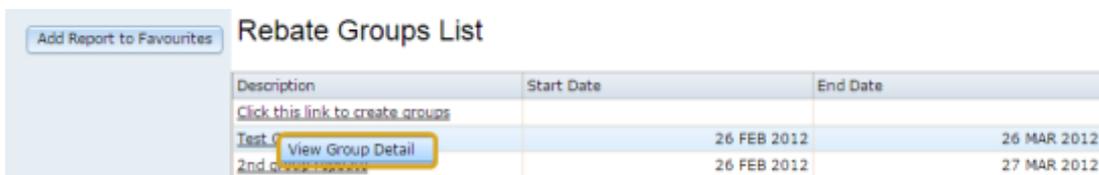


The Rebate Groups List report is displayed.



3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Site: All

Group: Test Group [100] : 26

Expiry After: 13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test_5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to from items from.
The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: Rebate 6 [6]

Site: All

Details Items

Group: None

Description: Rebate 6

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

Finalise Save Delete Rebate

6. Press the **Items** tab.
The Items tab is displayed.

Item Group Rebate Maintenance

Rebate Reference: New Rebate

Site: All

Details Items

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Minimum	Maximum	% Rebate	Amount
No Items		0	0	0%	\$0.00

Update Delete

Finalise Save Delete Rebate

7. Press the item in the Item grid you want to remove.

Managing rebates

Item Group Rebate Maintenance

Rebate Reference: Rebate 6 [6]

Site: All

Details Items

Item Code: []

Find Add

Description:

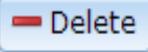
Unit Price:

Stock On Hand:

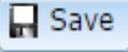
Description	Item	Minimum	Maximum	% Rebate	Amount
Sweet Chilli Chicken Skewers	333	0	1,000	5%	\$0.00
Taylors Marinade	222	0	1,000	3%	\$2.00

Update Delete

Finalise Save Delete Rebate

8. Press .

The item is removed.

9. When you have finished removing or editing items, press .

The rebate item group is saved.

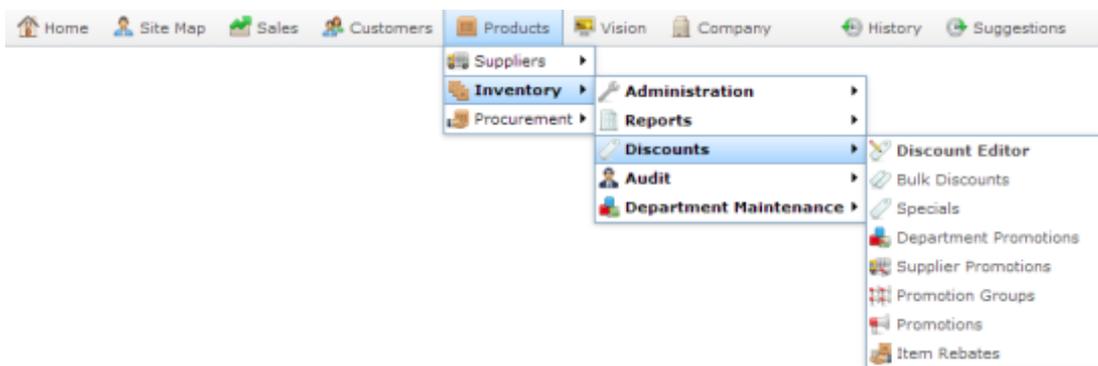
Finalising a rebate item group

Finalise a rebate item group when you want to lock it against further changes.

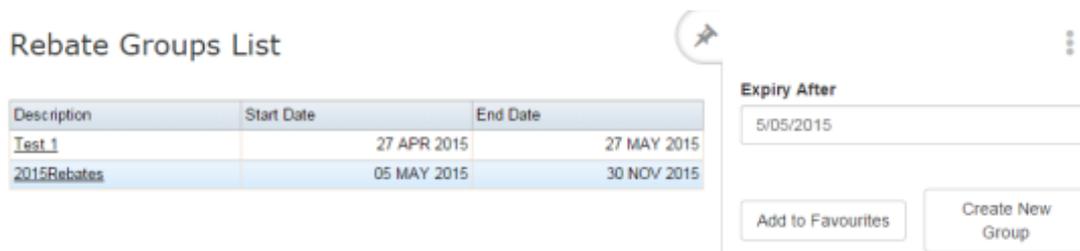
Note: You cannot edit a rebate item group once it has been finalised. Rebates are not applied until the rebate item group has been finalised.

To finalise a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.

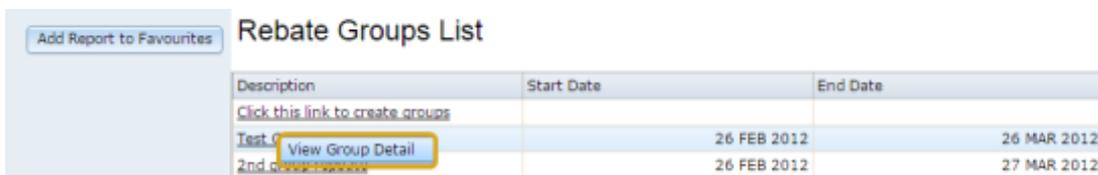


The Rebate Groups List report is displayed.



3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Managing rebates

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Site: All

Group: Test Group [100] : 26

Expiry After: 13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to delete.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: Rebate 6 [6]

Site: All

Details Items

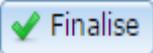
Group: None

Description: Rebate 6

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

6. Press .

The rebate item group is finalised.

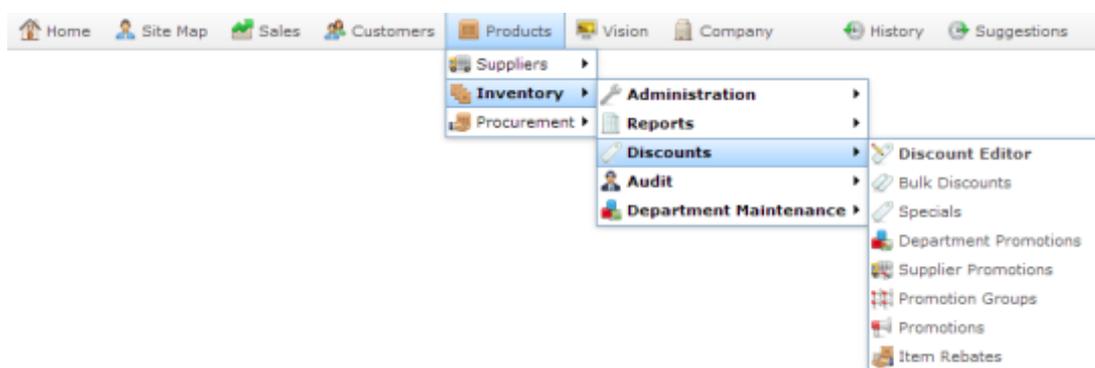
Deleting a rebate item group

Delete a rebate item group if you do not a rebate to apply to this group of items anymore.

Note: You cannot delete a rebate item group once it has been finalised.

To delete a rebate item group:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.

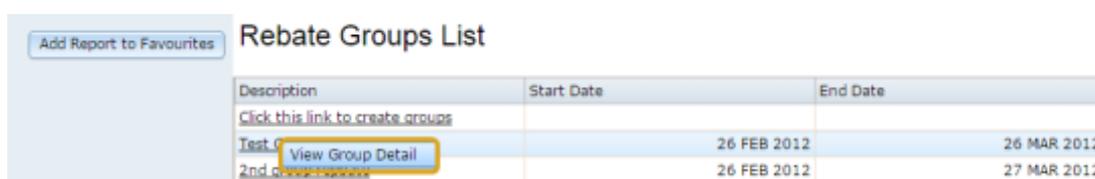


The Rebate Groups List report is displayed.



3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

Managing rebates

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Site: All

Group: Test Group [100] : 26

Expiry After: 13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to delete.

The Item Group Rebate Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference: Rebate 6 [6]

Site: All

Details Items

Group: None

Description: Rebate 6

Start Date: 13/04/2015

End Date: 13/05/2015

Loyalty Only

Finalise Save Delete Rebate

6. Press **Delete Rebate**.

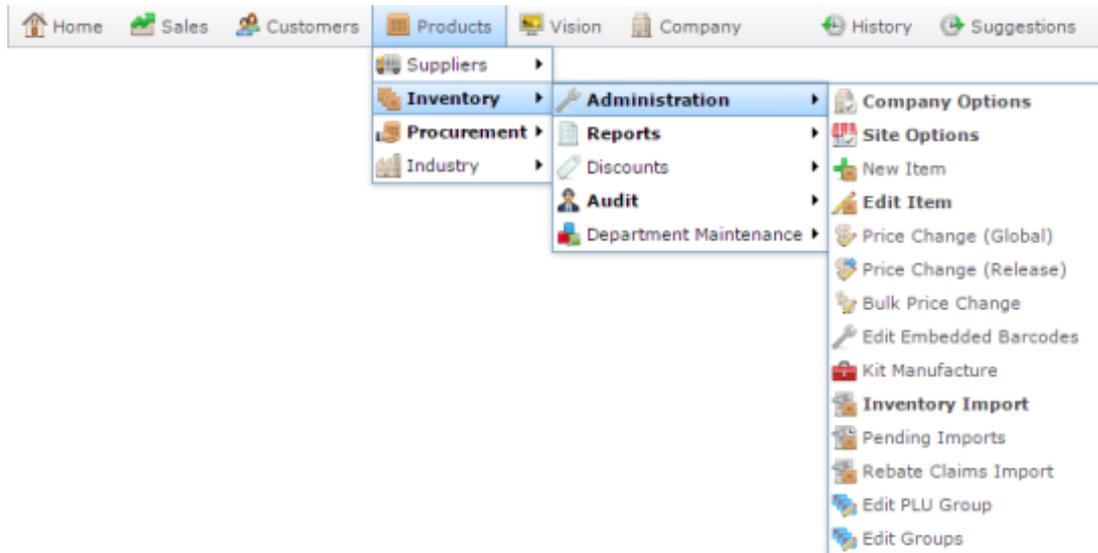
The rebate item group is deleted.

Importing rebate claims from a file

You can import rebate claims for creditors from a file using the Portal file upload.

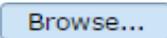
To import rebate claims into the Portal:

1. Press  **Products**.
2. Press **Inventory > Administration > Rebate Claims Import**.



The Online Rebate Claims Upload screen is displayed.

The screenshot shows the 'Online Rebate Claims Upload' screen. It features a dropdown menu for 'Site' set to 'Chadstone'. Below this is a section for 'Rebate Import CSV File' with a 'Filename:' label and a text input field. A 'Browse...' button is positioned to the right of the input field. At the bottom right of the form, there is an 'Update' button with a green circular arrow icon.

3. Press .

An Open File popup screen is displayed.

4. Choose the file you want to upload.

The name of the file is displayed in the **Filename** field.

5. Press .

The Portal begins uploading the file.

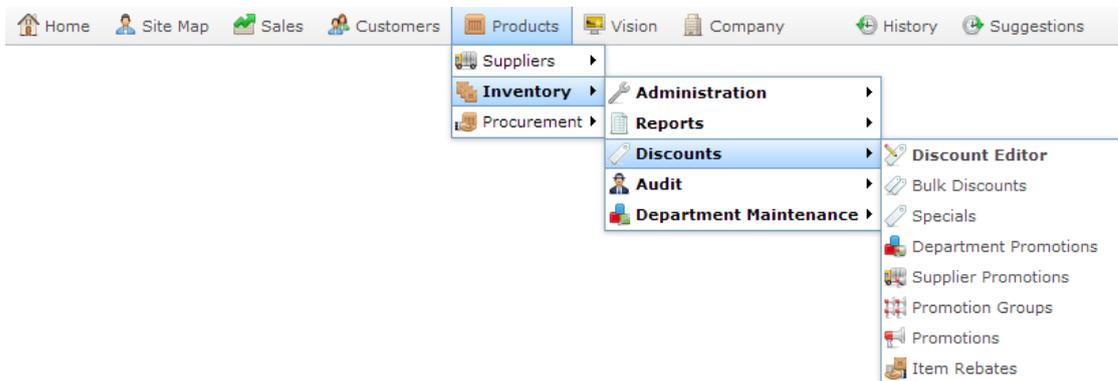
Rebate Item Maintenance screen

Use the Rebate Item Maintenance screen to create, edit and add or remove items from a rebate item group.

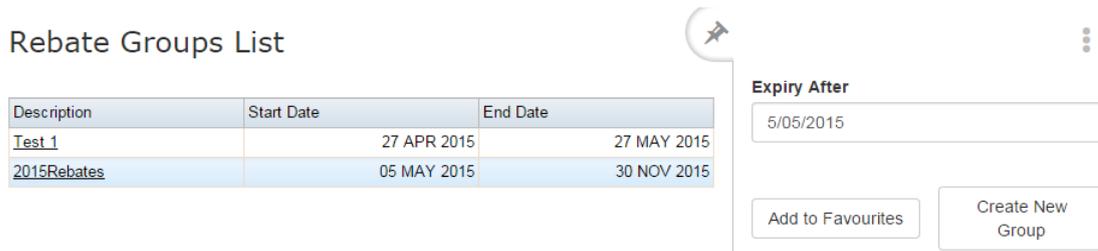
Opening the Rebate Item Maintenance screen

To open the Rebate Item Maintenance screen:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.

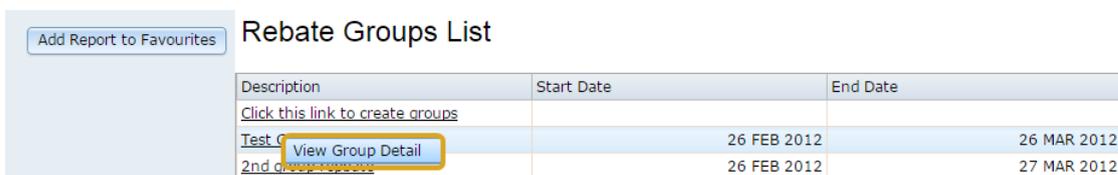


The Rebate Groups List report is displayed.



3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

[Add Report to Favourites](#)

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Site:
All

Group:
Test Group [100] : 26

Expiry After:
13/03/2015

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test 5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

5. Press the rebate item group you want to open.

The Rebate Item Maintenance screen is displayed.

Item Group Rebate Maintenance

Rebate Reference:

Site:

Details Items

Group:

Description:

Start Date:

End Date:

Loyalty Only

Rebate Item Maintenance key fields and buttons

Common fields

Field	Description
Rebate Reference	The rebate being edited. Note: Select New Rebate to create a new rebate item group.
Site	The site the rebate is enabled for. Note: This is not editable once the rebate has been created.

Details tab

Use this area to set the description, start and end dates of the rebate.

Field	Description
Group	Select the rebate group this rebate item group belongs to.
Description	Type a description to identify the rebate item group.
Start Date	Select the date the rebate begins for this group of items.
End Date	Select the date the rebate expires for this group of items.

Loyalty Only

Select to restrict this rebate to loyalty members only.

Items tab

Use this area to add or remove items from the rebate group, and set their rebates and restrictions.

Field**Description****Item code /**

Code identifying the item.

Item

Note: Search for items to add to the Items grid. See *Finding an item with a search field* on page 12.

Description

Description of the item.

Unit Price

Price per unit of the item.

Stock on Hand

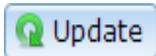
Number of units of this item on stock at the site.

Minimum The minimum number of units that must be purchased in one transaction to trigger the rebate.

Maximum The maximum number of units that can be eligible for the rebate in one transaction.

% Rebate The rebate to apply as a percentage of the item's price per unit.

Amount The rebate to apply as a flat amount per unit.



Press to save changes to the rebate item group, including items that have been added or removed.



Press to remove the selected item from the rebate item group.

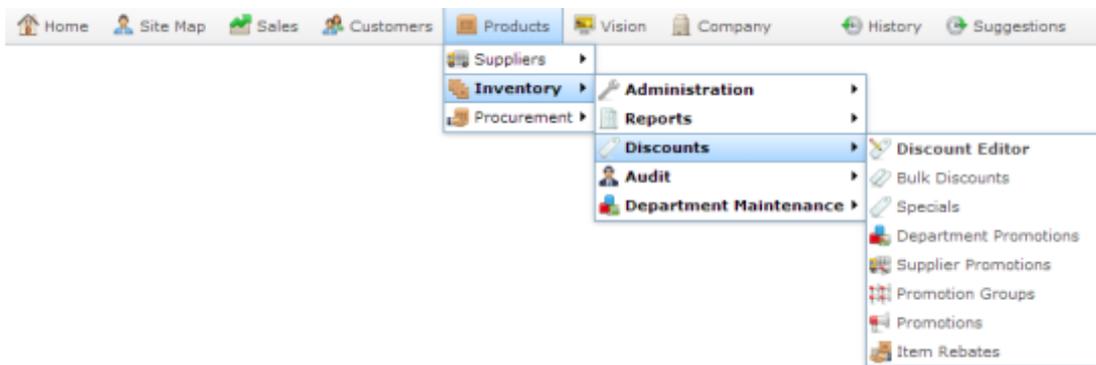
Rebate Groups List report

Use the Rebate Groups List report to view and open rebate item groups.

Opening the Rebate Groups List report

To open the Rebate Groups List report:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.



The Rebate Groups List report is displayed.

Rebate Groups List

Description	Start Date	End Date
Test 1	27 APR 2015	27 MAY 2015
2015Rebates	05 MAY 2015	30 NOV 2015

Expiry After:

Rebate Groups List report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description [[RebateGroupList]]	Description of the rebate group.
Start Date	Start date of all rebates in this group.
End Date	End date of all rebates in this group.

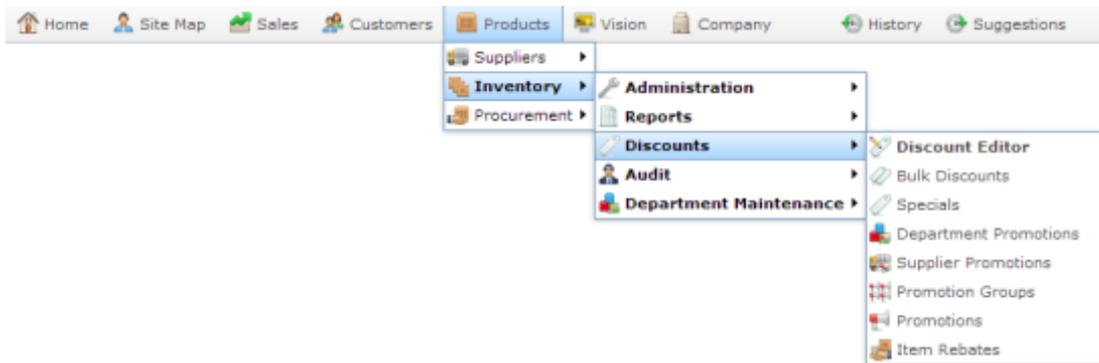
Rebate Groups report

Use the Rebate Groups report to view and open item groups for rebates.

Opening the Rebate Groups report

To open the Rebate Groups report:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Item Rebates**.

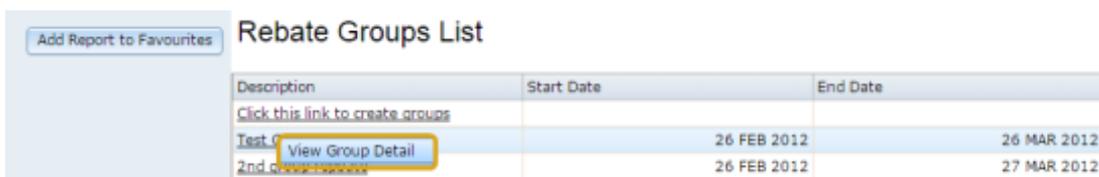


The Rebate Groups List report is displayed.



3. Press the Description of the rebate group you want to open.

A popup menu is displayed.



4. Press **View Group Detail**.

The Rebate Groups report is displayed.

[Add Report to Favourites](#)

Site:

Group:

Expiry After:

Item Group Rebate Report : Test Group [100] : 26-Feb-2012 -> 26-Mar-2012

Description	Rebate Ref #	Group	Site	Start Date	End Date	Items	Loyalty Only	Finalised
Create New Rebate			All					
Test_5	6	Test Group [100] : 26-Feb-2012 -> 26-Mar-2012	All	07-Mar-2012	07-Apr-2012	1		

Rebate Groups report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Group	Select to filter the report to a specific rebate group.
Expiry After	Select to filter the report to rebates that expire after this date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the rebate item group. Press the group description to edit the rebate item group.
Rebate Ref #	Unique code identifying the rebate item group.
Group	Rebate group that the rebate item group belongs to.
Site	Site the rebate applies to.
Start Date	Start date from which the rebate applies.
End Date	Date the rebate expires.
Items	Number of items in the rebate item group.
Loyalty Only	Whether this rebate is available only to loyalty members.

Field	Description
Finalised	Whether the rebate is finalised. <div data-bbox="914 432 1391 560" style="border: 1px solid #4a7ebb; background-color: #d9e1f2; padding: 5px;">Note: Finalised rebates cannot be modified.</div>

Managing promotions

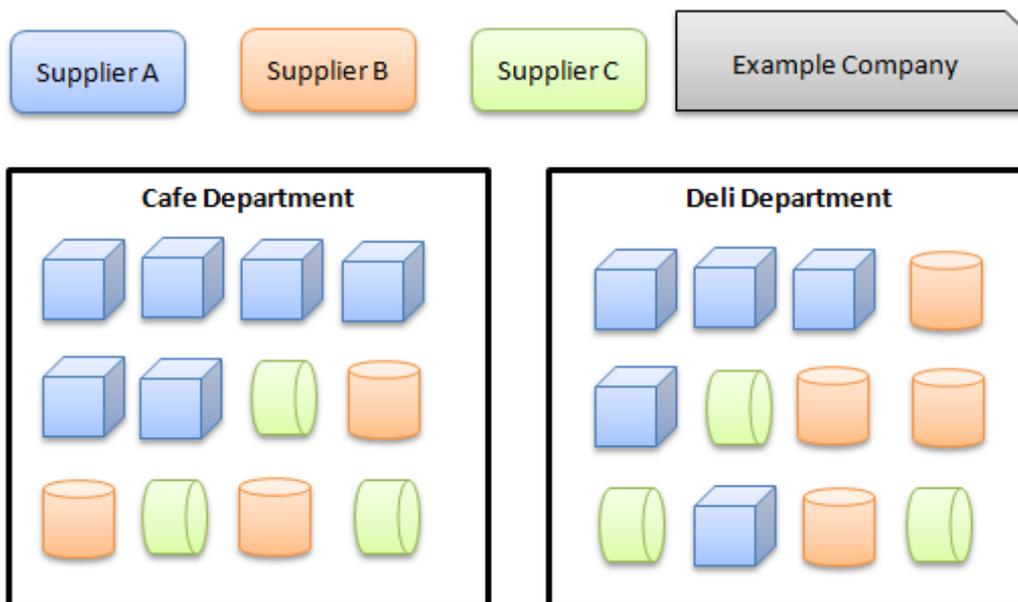
Promotions allow you to offer special price reductions or free items if a certain amount of a particular set of items is purchased. The amount can be measured in either dollar value or in number of transaction lines and is automatically calculated at the Point of Sale.

You can create promotions for:

- all items within a particular department
- all items from a particular supplier
- a hand-picked group of items in a promotion group.

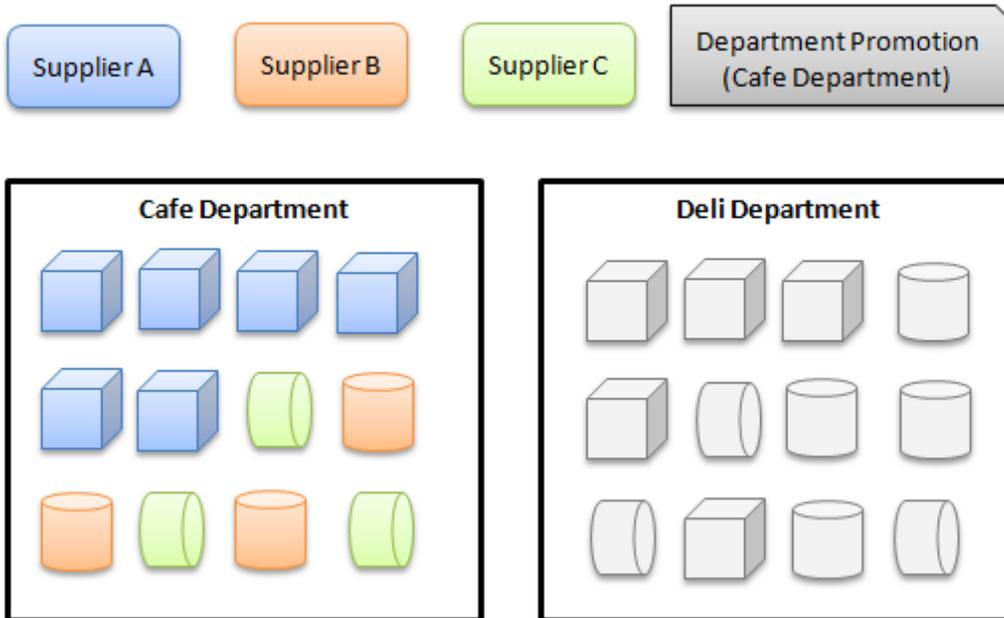
You can also specify whether certain promotions can be combined with discounts, bulk discounts or specials, and whether they apply only to loyalty customers.

The Portal provides three different ways to include items within promotions. The company in this example uses two different departments selling items supplied by three suppliers.



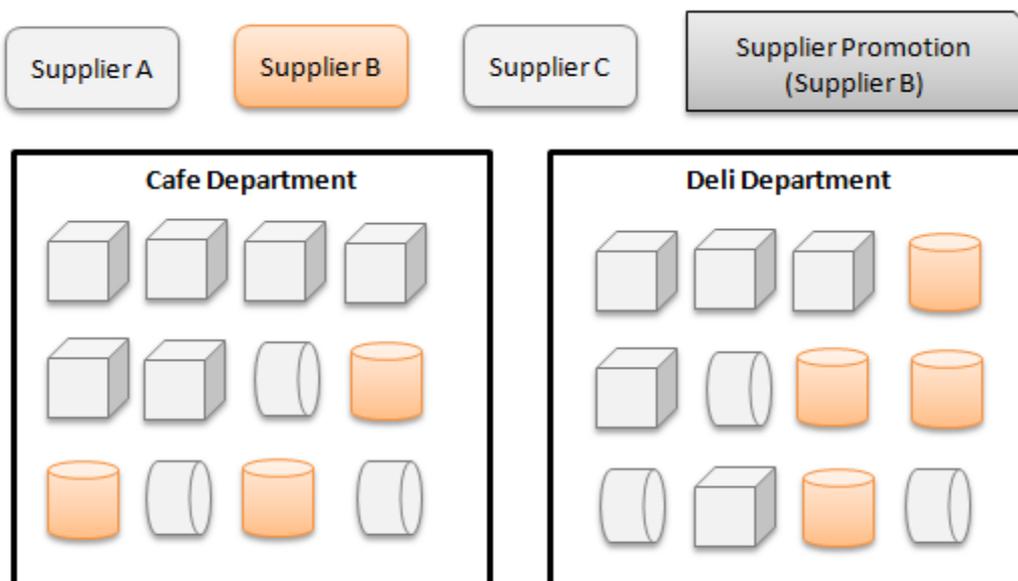
Department promotions

A department promotion applies to all items that belong to the selected department. Items that do not belong to the department are not affected by the promotion, even if they belong to the same promotion group or are supplied by the same supplier.



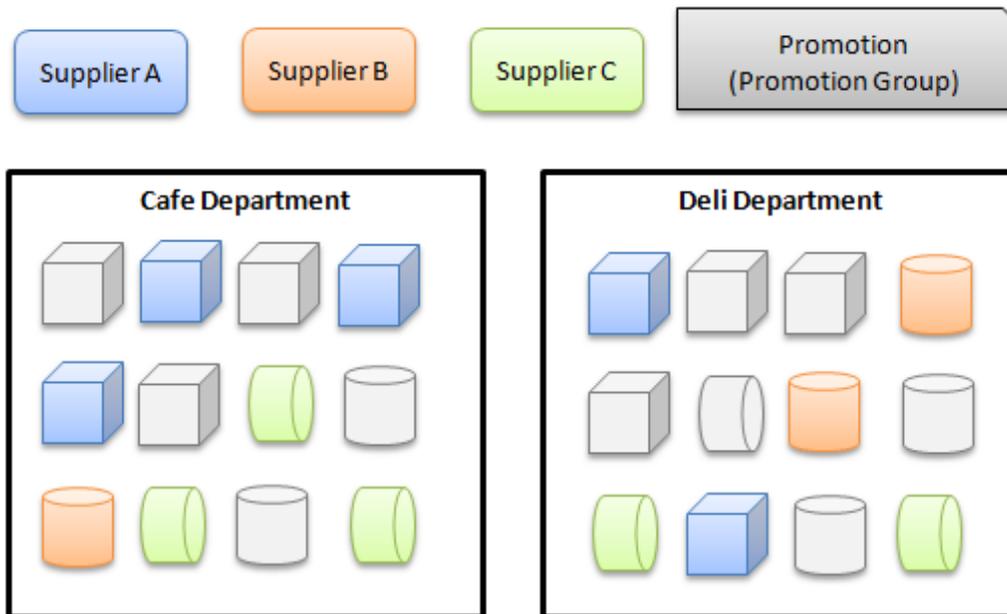
Supplier promotions

A supplier promotion applies to all items that are supplied by the selected supplier. Items that are not supplied by this supplier are not affected by the promotion, even if they belong to the same department or promotion group.



Group promotions

Group promotions apply only to the items included in the selected promotion groups. Items that do not belong to the promotion groups are not affected by the promotion, even if they belong to the same department or are supplied by the same supplier as other items. Any combination and quantity of items can be added to a promotion group, allowing you to specify exactly how a group promotion should function. Group promotions have a more involved creation process, but they provide much more flexibility in promotions.



Promotion groups

Where supplier and department promotions use ready-made groups of items (a particular supplier or department) group promotions require you to define your own groups of items the promotion applies to. Group promotions use promotion groups in two different ways:

- Trigger groups define which items the customer must purchase to be eligible for the promotion. A promotion can have more than one trigger group.
- Non-trigger groups define which items are affected by the promotion. That is, they may be at a discount, reduced by a flat amount, or represent a list of free items the customer can choose from.

Note: Promotion groups are only considered trigger or non-trigger groups within a particular promotion. The same group may be a trigger group in one promotion, but a non-trigger group in another. However, you cannot use the same group as both trigger and non-trigger in the same promotion.

Defining promotion groups

When you add an item to a group, you can define how many units of that item constitute one item in that group. For example, you may have a promotion group as a trigger group that includes shirts and jackets. The promotion may require one shirt to trigger the promotion, or three jackets.



Using promotion groups

In addition to defining quantities of each item with a promotion group, you can also define how the promotion group itself triggers the promotion. More than one promotion group can be used to trigger a promotion, and they can trigger it in different ways:

- Any item purchased from the promotion group.

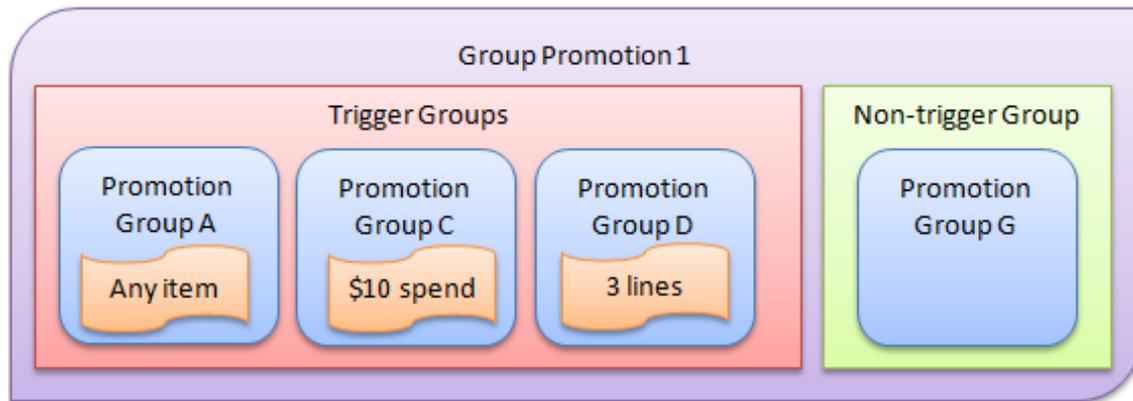
Note: In the case above with the jacket, it would require three jackets to be purchased to trigger the promotion.

- A minimum purchase price from the promotion group.

Note: If using a purchase minimum, the item quantities within the promotion groups are not relevant.

- A minimum number of different items purchased from the promotion group.

Note: In the above case, the three jackets and one shirt would count as two items. If only two jackets were purchased, it would count as only one item, as the required number of units of jackets has not been purchased.



Defining rewards

You can define the reward a group promotion creates, whether it is a:

- Free item(s) from the non-trigger group.
- Discount off the purchase price of the non-trigger group items.
- Flat rate subtracted from the purchase price of the non-trigger group items.

Also see:

- *Supplier Promotion Maintenance screen* on page 143.
- *Supplier Promotions report* on page 148.
- *Department Promotion Maintenance screen* on page 160.
- *Department Promotions report* on page 165.
- *Promotion Group Maintenance screen* on page 182.
- *Promotion Group report* on page 186.
- *Group Promotion Maintenance screen* on page 230.
- *Group Promotions report* on page 235

What you can do:

- *Sending a promotion to the Point of Sale* on page 228.

Supplier promotions

- *Creating a supplier promotion* on page 133.
- *Editing a supplier promotion* on page 137.
- *Adding a rebate voucher to a supplier promotion* on page 139.
- *Deleting a supplier promotion* on page 141.

Department promotions

Managing promotions

- *Creating a department promotion* on page 152.
- *Editing a department promotion* on page 156.
- *Deleting a department promotion* on page 158.

Promotion groups

- *Creating a promotion group* on page 169.
- *Adding items to a promotion group* on page 173.
- *Editing the quantity of items in a promotion group* on page 176.
- *Removing an item from a promotion group* on page 178.
- *Editing a promotion group* on page 171.
- *Deleting a promotion group* on page 180.

Group promotions

- *Creating a group promotion* on page 189.
- *Adding a group to a group promotion* on page 195.
- *Removing a group from a group promotion* on page 201.
- *Editing a group promotion* on page 193.
- *Creating a line minimum for a group promotion* on page 204.
- *Creating a sale minimum for a group promotion* on page 207.
- *Creating a trigger group for a group promotion* on page 198.
- *Creating a buy-one-get-one-free promotion* on page 210.
- *Creating a combo promotion* on page 213.
- *Deleting a group promotion* on page 216

Example promotions

- *Creating a promotion with a flat-rate reward* on page 218.
- *Creating a promotion with minimum lines* on page 224.
- *Creating a promotion with minimum sales* on page 226.
- *Creating a loyalty-only promotion* on page 222.
- *Excluding discounts and specials from your promotion* on page 220.

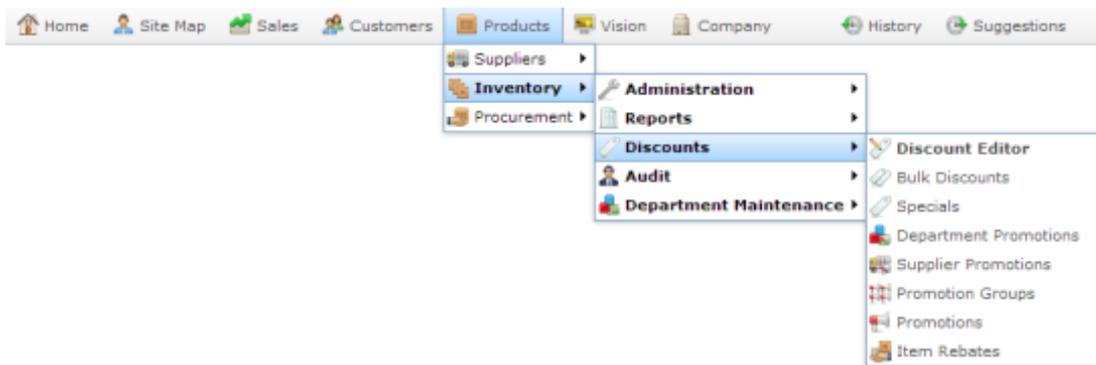
Creating a supplier promotion

Create a supplier promotion when you want a promotion to include all items from a particular supplier.

Note: You can control whether promotions are eligible for discounts, items on special, or restricted to loyalty members only.

To create a supplier promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip #	Promot Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst											
ACME> 263 Autumn		Chadst	14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

3. Press **Create New Supplier Promotion**.

Supplier Promotions Report

Descrip #	Promot Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst											
ACME> 263 Autumn		Chadst	14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

The Supplier Promotion Maintenance screen is displayed

Supplier Promotion Maintenance

Promotion Number:

Location:

Details

Description:

POS Description:

Start Date:

End Date:

Minimum Sales:

Minimum Lines:

Amount: Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire:

Supplier:

Committed

4. Select the site at which the promotion will occur from the **Location** drop-down list.

Note: You can select **All** sites if the promotion is company-wide. If you want the promotion to only apply to some sites and not others, you must create a promotion for each site.

5. Type the description to identify the promotion in the **Description** field.
6. Type the description to appear on the Point of Sale and receipts in the **POS Description** field.

Details

Description:

POS Description:

Start Date:

End Date:

Minimum Sales:

Minimum Lines:

Amount: Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

7. Select the **Start Date** and **End Date** for the promotion.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

8. If the promotion requires the customer to purchase a minimum amount of eligible items, type the total price they must reach in the **Minimum Sales** field.
9. If the promotion requires the customer to purchase a minimum number of different eligible items, type that number in the **Minimum Lines** field.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

10. Type the amount the promotion is worth in the **Amount** field. For example, if the promotion takes \$20 off the transaction total, type **20**.
11. If the promotion provides a discount instead of a flat deduction, select the **Is Discount** field.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

12. If the promotion is restricted only to loyalty members, select the **Loyalty Only** field.
13. If the promotion permits further discounts, select the **Allow with Discount** field.

Managing promotions

14. If the promotion permits items with specials to be included in the transaction total, select the **Allow with Specials** field.
15. If the promotion permits using the bulk discount price for items purchased in bulk, select the **Allow with Bulk Discount** field.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

16. If the promotion amount is to be given to the customer as a supplier rebate voucher, select the **As Rebate Voucher** field.
17. If the promotion amount is to be given to the customer as a regular voucher, select the **As Voucher** field.

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn

Location: Chadstone

Details

Description: ACMEx Autumn

POS Description: ACMEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

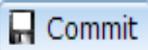
Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire: 30

Supplier: [5001] ACMEx Products

Committed

18. If you are using either rebate vouchers or regular vouchers, type the number of days the voucher is valid after being issued in the **Days to Expire** field.
19. Select the supplier the promotion is for from the **Supplier** drop-down list.
20. Press  **Commit**.

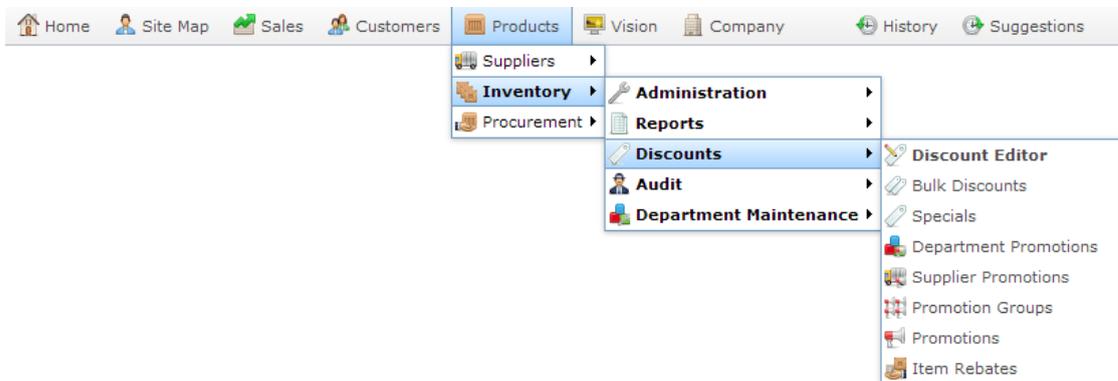
The promotion is saved and sent to the Point of Sale.

Editing a supplier promotion

Edit a supplier promotion if you want to change when it runs, the minimum price or items required, restrict it to loyalty members or change whether it is applicable with discounts or specials.

To edit a supplier promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst												
ACME's 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Managing promotions

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn

Location: Chadstone

Details

Description: ACMEx Autumn

POS Description: ACMEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

As Rebate Voucher As Voucher

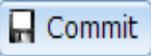
Days to Expire: 30

Supplier: [5001] ACMEx Products

Committed

4. Make the required changes

See *Supplier Promotion Maintenance* screen on page 143.

5. Press .

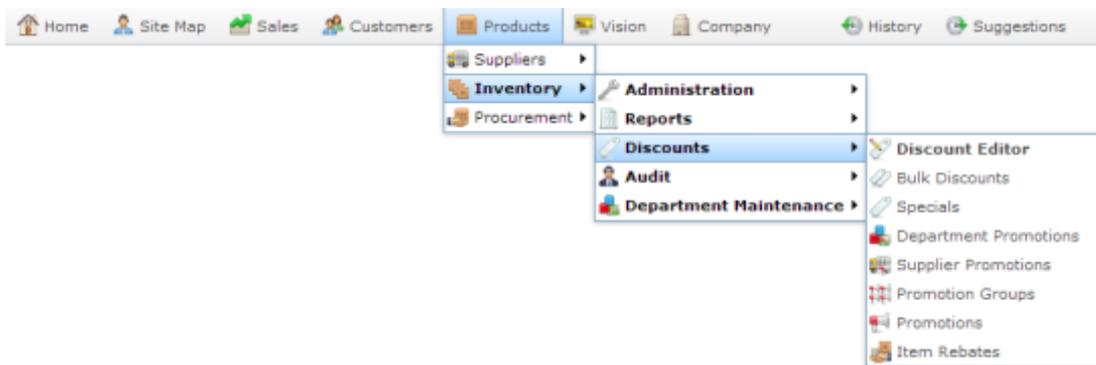
The changes are saved and sent to the Point of Sale.

Adding a rebate voucher to a supplier promotion

The promotion amount of supplier promotions can be supplied to your customers as rebate vouchers.

To configure a promotion to create supplier rebate vouchers:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descr#	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplier Promot		Chadst												
ACME> 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Managing promotions

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn
Location: Chadstone

Details

Description: ACMEx Autumn
POS Description: ACMEx
Start Date: 14/04/2015
End Date: 30/06/2015
Minimum Sales: \$50.00
Minimum Lines: 1
Amount: 20 Is Discount
 Loyalty Only
 Allow with Discount Allow with Specials
 Allow with Bulk Discount
 As Rebate Voucher As Voucher
Days to Expire: 30
Supplier: [5001] ACMEx Products
 Committed

4. Select the **As Rebate Voucher** field.
5. Type the number of days the voucher is valid for once it has been created in the **Days to Expire** field.

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn
Location: Chadstone

Details

Description: ACMEx Autumn
POS Description: ACMEx
Start Date: 14/04/2015
End Date: 30/06/2015
Minimum Sales: \$50.00
Minimum Lines: 1
Amount: 20 Is Discount
 Loyalty Only
 Allow with Discount Allow with Specials
 Allow with Bulk Discount
 As Rebate Voucher As Voucher
Days to Expire: 30
Supplier: [5001] ACMEx Products
 Committed

6. Press .

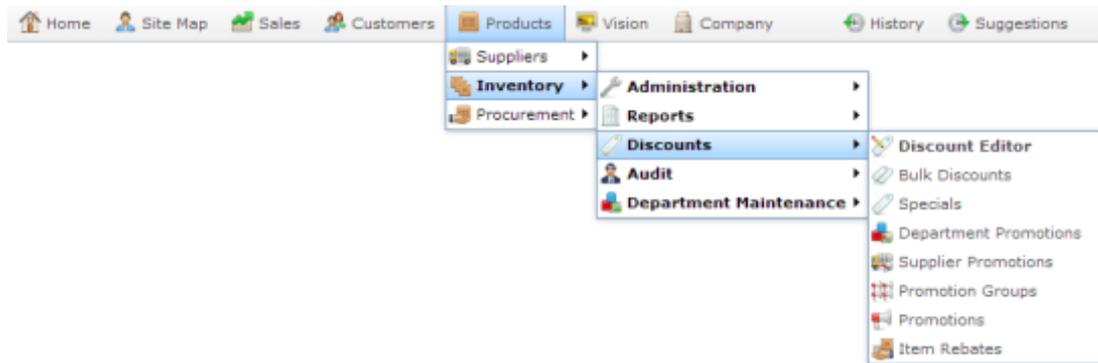
The changes are saved and the promotion is sent to the Point of Sale.

Deleting a supplier promotion

Delete a supplier promotion if you do not want the promotion on your Portal.

To delete a supplier promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplier Promot		Chadst												
ACME 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Managing promotions

The screenshot shows a web form titled "Supplier Promotion Maintenance". At the top, there are two dropdown menus: "Promotion Number" with the value "[263] ACMEEx Autumn" and "Location" with the value "Chadstone". Below these is a "Details" tab. The form contains several input fields and checkboxes:

- Description: ACMEEx Autumn
- POS Description: ACMEEx
- Start Date: 14/04/2015
- End Date: 30/06/2015
- Minimum Sales: \$50.00
- Minimum Lines: 1
- Amount: 20
- Is Discount
- Loyalty Only
- Allow with Discount
- Allow with Specials
- Allow with Bulk Discount
- As Rebate Voucher
- As Voucher
- Days to Expire: 30
- Supplier: [5001] ACMEEx Products
- Committed

At the bottom right of the form, there are two buttons: "Commit" and "Delete Promotion".

4. Press **Delete Promotion**.

The promotion is deleted.

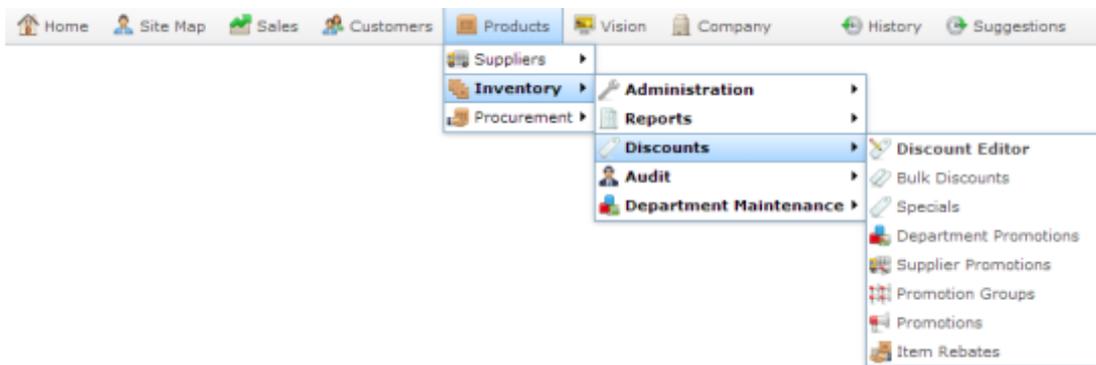
Supplier Promotion Maintenance screen

Use the Supplier Promotion Maintenance screen to create and edit supplier promotions.

Opening the Supplier Promotion Maintenance screen

To open the Supplier Promotion Maintenance screen:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descr#	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplier Promot		Chadst												
ACME+ 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site: Chadstone

Expiry After: 13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Managing promotions

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn

Location: Chadstone

Details

Description: ACMEx Autumn

POS Description: ACMEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire: 30

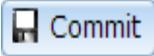
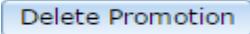
Supplier: [5001] ACMEx Products

Committed

Supplier Promotion Maintenance screen key fields and buttons

Field	Description
Promotion Number	<p>Unique number identifying the promotion.</p> <p>Select another promotion from the drop-down list, or New Promotion to create a new promotion.</p>
Location	The site the promotion is enabled for.
Description	A description of the promotion to identify it in the Portal.
POS Description	The description that is displayed on the Point of Sale and receipts.
Start Date	The date the promotion starts.
End Date	<p>The last day of the promotion.</p> <div style="border: 1px solid #0056b3; background-color: #d9e1f2; padding: 5px; margin-top: 10px;"> <p>Note: Promotions cannot be set to start or end at specific hours of the day.</p> </div>
Minimum Sales / Minimum Transaction Amount	<p>The minimum total purchases in a transaction required to trigger the promotion.</p> <p>For example, if you want the promotion to only apply when a customer purchases \$10 or more of eligible items, type 10.</p>

Field	Description
Minimum Lines	<p>The minimum number of transaction lines required to trigger a promotion.</p> <p>Each item requires its own transaction line in the receipt, no matter how many units are purchased or in what order they are scanned at the Point of Sale. If you you want to restrict the promotion to only occur when a customer purchases 3 or more different eligible products, type 3.</p> <div data-bbox="480 674 1390 878" style="border: 1px solid #4F81BD; padding: 5px;"> <p>Note: Minimum Sales and Minimum Lines can be combined to create a complex trigger, where a set number of different items must be purchase to a specific minimum price before the transaction is eligible for the promotion.</p> </div>
Amount / Promotion Amount	<p>The amount the promotion deducts from the transaction total.</p> <div data-bbox="480 1003 1390 1169" style="border: 1px solid #4F81BD; padding: 5px;"> <p>Note: This can be a flat amount deduction, such as \$10, or a percentage of the total transaction, such as 10%. Use the Is Discount field to control how the Portal treats this amount.</p> </div>
Is Discount	<p>Select to make the Amount field a discount percentage from the transaction total.</p> <p>For example, if the Amount is 20 and Is Discount is not selected, the promotion takes \$20 off the transaction total. If Is Discount is selected, the promotion takes 20% off the transaction total.</p>
Loyalty Only	<p>Select to restrict this promotion to loyalty members only. The promotion is then only available to customers who have scanned their loyalty card in the transaction.</p>
Allow with Discount	<p>Select to permit discounts to be combined with this promotion.</p> <p>If not selected, items involved with this promotion can not have discounts applied to them at the Point of Sale.</p>

Field	Description
Allow with Specials	<p>Select to permit price specials with this promotion.</p> <p>If not selected, items that currently have price specials are not applicable to this promotion.</p>
Allow with Bulk Discount	<p>Select to permit bulk discounts to be combined with this promotion.</p> <p>If not selected, bulk discount prices do not apply if this promotion is triggered.</p>
As Rebate Voucher	<p>Select to create a rebate voucher of the promotion amount for each transaction, rather than deducting the promotion from the total.</p>
As Voucher	<p>Select to create a normal voucher of the promotion amount for each transaction, rather than deducting the promotion from the total.</p>
Days to Expire	<p>Type the number of days before the created voucher expires.</p>
Supplier	<p>Select the supplier whose items you want to include in the promotion.</p> <div data-bbox="480 1352 1393 1592" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px;"> <p>Note: All items of this supplier are automatically included. You cannot include more than one supplier in a supplier promotion. If you want to create a promotion for two suppliers, you must either create two separate supplier promotions, or combine the items in a promotion group and create a group promotion.</p> </div>
Committed	<p>If selected, this promotion has been saved.</p>
	<p>Press to save any changes to the promotion.</p>
	<p>Press to delete the promotion.</p>

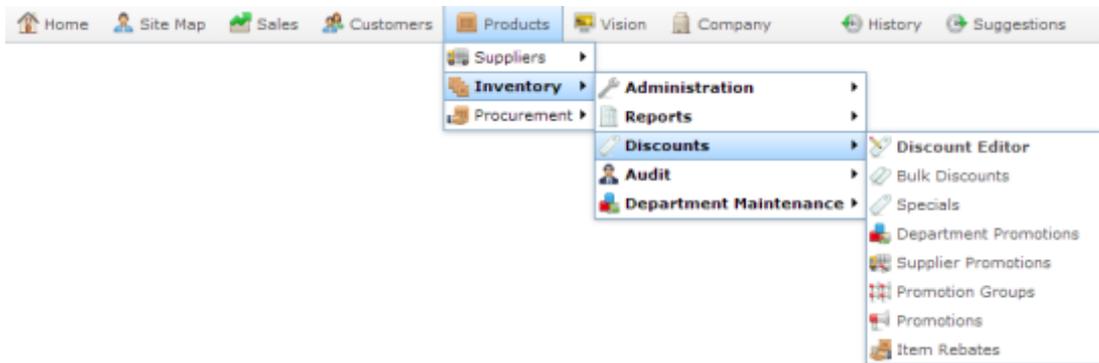
Supplier Promotions report

Use the Supplier Promotions report to view and create supplier promotions.

Opening the Supplier Promotions report

To open the Supplier Promotions report:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descr#	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplier Promot		Chadst												
ACME+ 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site:

Expiry After:

Supplier Promotions report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Expiry After	Select to filter the report to promotions that expire after this date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the promotion.
Promotion #	Unique code identifying the promotion.
Site	Site the promotion applies to.
Supplier	Supplier the promotion applies to.
Start Date	Date the promotion begins.
End Date	Date the promotion ends.
Min Lines	Minimum number of transaction lines required by the promotion.
Min Amount	Minimum transaction amount of eligible items required by the promotion.

Field	Description
Discount	Transaction deduction applied by the promotion. <div data-bbox="914 465 1393 631" style="border: 1px solid #add8e6; padding: 5px;">Note: This may be a discount off the transaction total, or a flat rate amount.</div>
Voucher	If selected, this promotion is awarded to the customer as a voucher.
Rebate	If selected, this promotion is awarded to the customer as a supplier rebate voucher.
Loyalty Only	If selected, this promotion is only available to loyalty members.
With Specials	If selected, this promotion is applicable with item price specials.
With Discount	If selected, further discounts can be applied to a transaction on top of this promotion.
With Bulk Discount	If selected, bulk discount prices are applicable with this promotion.

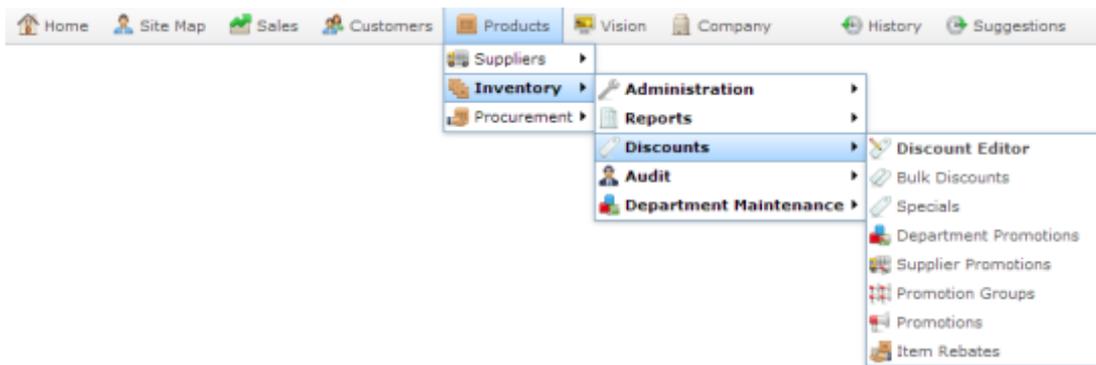
Creating a department promotion

Create a department promotion when you want a promotion to include all items from a particular department.

Note: You can control whether promotions are eligible for discounts, items on special, or restricted to loyalty members only.

To create a department promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Department Promotions**.



The Department Promotions report is displayed.

Department Promotions Report

Descri	Promc #	Site	Depart	Start Date	End Date	Min Lines	Min Amour	Disco	Vouch	Loyalt Only	With Speciz	With Disco	With Bulk Disco
Create New Depart Promc		Chads											
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓			

Site: Chadstone

Expiry After: 15/04/2015

Add to Favourites

3. Press **Create New Department Promotion**.

Department Promotions Report

Descri	Promc #	Site	Depart	Start Date	End Date	Min Lines	Min Amour	Disco	Vouch	Loyalt Only	With Speciz	With Disco	With Bulk Disco
Create New Depart Promc		Chads											
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓			

Site: Chadstone

Expiry After: 15/04/2015

Add to Favourites

The Department Promotion Maintenance screen is displayed

4. Select the site at which the promotion will occur from the **Location** drop-down list.

Note: You can select **All** sites if the promotion is company-wide. If you want the promotion to only apply to some sites and not others, you must create a promotion for each site.

5. Type the description to identify the promotion in the **Description** field.
6. Type the description to appear on the Point of Sale and receipts in the **POS Description** field.

7. Select the **Start Date** and **End Date** for the promotion.

Managing promotions

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

8. If the promotion requires the customer to purchase a minimum amount of eligible items, type the total price they must reach in the **Minimum Sales** field.
9. If the promotion requires the customer to purchase a minimum number of different eligible items, type that number in the **Minimum Lines** field.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

10. Type the amount the promotion is worth in the **Amount** field. For example, if the promotion takes \$20 off the transaction total, type **20**.
11. If the promotion provides a discount instead of a flat deduction, select the **Is Discount** field.

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

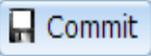
Allow with Bulk Discount

12. If the promotion is restricted only to loyalty members, select the **Loyalty Only** field.
13. If the promotion permits further discounts, select the **Allow with Discount** field.

14. If the promotion permits items with specials to be included in the transaction total, select the **Allow with Specials** field.
15. If the promotion permits using the bulk discount price for items purchased in bulk, select the **Allow with Bulk Discount** field.

The screenshot shows a 'Details' section of a promotion form. The fields are as follows:

- Description: Deli Half price
- POS Description: Deli Half Price
- Start Date: 16/04/2015
- End Date: 1/05/2015
- Minimum Sales: \$20.00
- Minimum Lines: 3
- Amount: 50
- Is Discount:
- Loyalty Only:
- Allow with Discount:
- Allow with Specials:
- Allow with Bulk Discount:

16. If the promotion amount is to be given to the customer as a regular voucher, select the **As Voucher** field.
17. If you are using vouchers, type the number of days the voucher is valid after being issued in the **Days to Expire** field.
18. Select the department the promotion is for from the **Department** drop-down list.
19. Press .

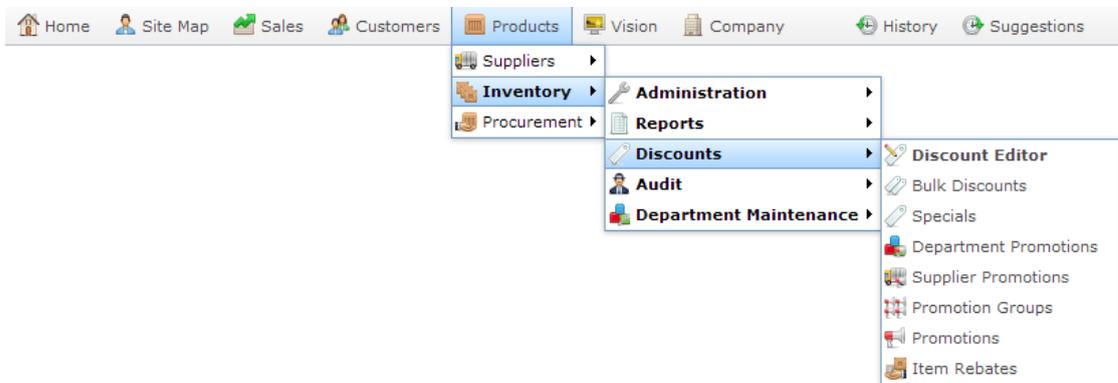
The promotion is saved.

Editing a department promotion

Edit a department promotion if you want to change when it runs, the minimum price or items required, restrict it to loyalty members or change whether it is applicable with discounts or specials.

To edit a department promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Department Promotions**.



The Department Promotions report is displayed.

Department Promotions Report

Descri	Promc #	Site	Depar	Start Date	End Date	Min Lines	Min Amour	Discou	Vouch	Loyalt Only	With Specia	With Discou	With Bulk Discou
Create New Depart Promc		Chads											
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓			

Site

Expiry After

3. Press the promotion you want to open.

The Department Promotion Maintenance screen is displayed.

Department Promotion Maintenance

Promotion Number: [264] Deli Half price

Location: Chadstone

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

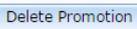
Allow with Discount Allow with Specials

Allow with Bulk Discount As Voucher

Days to Expire: 30

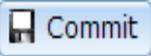
Department: Deli

Committed

4. Make the required changes

See *Department Promotion Maintenance* screen on page 160.

5. Press .

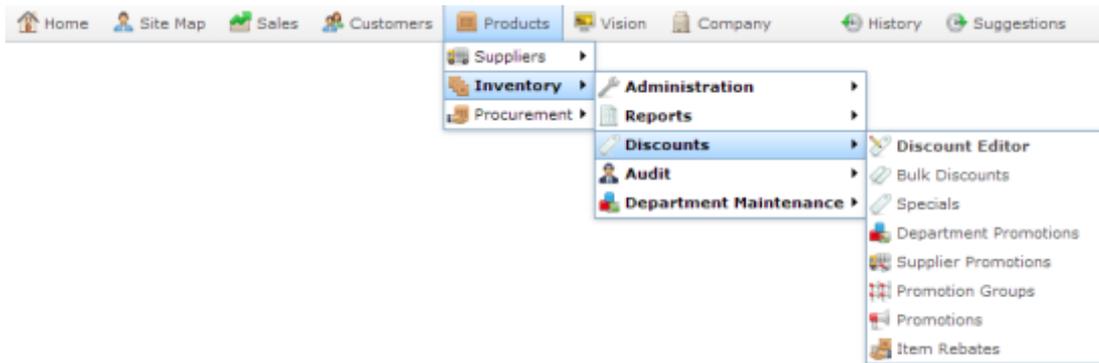
The changes are saved and sent to the Point of Sale.

Deleting a department promotion

Delete a department promotion if you do not want the promotion on your Portal.

To delete a department promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Department Promotions**.



The Department Promotions report is displayed.

Department Promotions Report

Descr	Promc #	Site	Depar	Start Date	End Date	Min Lines	Min Amour	Discol	Vouch	Loyalty Only	With Speciz	With Discol	With Bulk Discol
Create New Depart Promc		Chads											
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓			

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Department Promotion Maintenance screen is displayed.

Department Promotion Maintenance

Promotion Number: [264] Deli Half price

Location: Chadstone

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount As Voucher

Days to Expire: 30

Department: Committed Deli

4. Press .

The promotion is deleted.

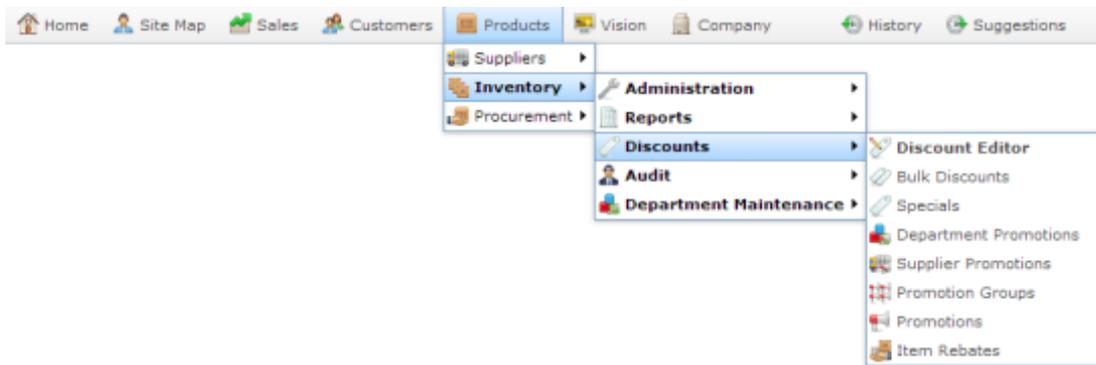
Department Promotion Maintenance screen

Use the Department Promotion Maintenance screen to create and edit department promotions.

Opening the Department Promotion Maintenance screen

To open the Department Promotion Maintenance screen:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Department Promotions**.



The Department Promotions report is displayed.

Department Promotions Report

Descr	Promc #	Site	Depart	Start Date	End Date	Min Lines	Min Amour	Disco	Vouch	Loyalty Only	With Speciz	With Disco	With Bulk Disco
Create New Depart Promc		Chads											
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓			

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Department Promotion Maintenance screen is displayed.

Department Promotion Maintenance

Promotion Number: [264] Deli Half price

Location: Chadstone

Details

Description: Deli Half price

POS Description: Deli Half Price

Start Date: 16/04/2015

End Date: 1/05/2015

Minimum Sales: \$20.00

Minimum Lines: 3

Amount: 50 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount As Voucher

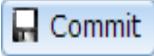
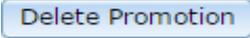
Days to Expire: 30

Department: Committed Deli

Department Promotion Maintenance screen key fields and buttons

Field	Description
Promotion Number	<p>Unique number identifying the promotion.</p> <p>Select another promotion from the drop-down list, or New Promotion to create a new promotion.</p>
Location	The site the promotion is enabled for.
Description	A description of the promotion to identify it in the Portal.
POS Description	The description that is displayed on the Point of Sale and receipts.
Start Date	The date the promotion starts.
End Date	<p>The last day of the promotion.</p> <div style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: Promotions cannot be set to start or end at specific hours of the day.</p> </div>
Minimum Sales / Minimum Transaction Amount	<p>The minimum total purchases in a transaction required to trigger the promotion.</p> <p>For example, if you want the promotion to only apply when a customer purchases \$10 or more of eligible items, type 10.</p>

Field	Description
Minimum Lines	<p>The minimum number of transaction lines required to trigger a promotion.</p> <p>Each item requires its own transaction line in the receipt, no matter how many units are purchased or in what order they are scanned at the Point of Sale. If you you want to restrict the promotion to only occur when a customer purchases 3 or more different eligible products, type 3.</p> <div data-bbox="480 674 1393 880" style="border: 1px solid #4F81BD; padding: 5px;"> <p>Note: Minimum Sales and Minimum Lines can be combined to create a complex trigger, where a set number of different items must be purchase to a specific minimum price before the transaction is eligible for the promotion.</p> </div>
Amount / Promotion Amount	<p>The amount the promotion deducts from the transaction total.</p> <div data-bbox="480 1003 1393 1171" style="border: 1px solid #4F81BD; padding: 5px;"> <p>Note: This can be a flat amount deduction, such as \$10, or a percentage of the total transaction, such as 10%. Use the Is Discount field to control how the Portal treats this amount.</p> </div>
Is Discount	<p>Select to make the Amount field a discount percentage from the transaction total.</p> <p>For example, if the Amount is 20 and Is Discount is not selected, the promotion takes \$20 off the transaction total. If Is Discount is selected, the promotion takes 20% off the transaction total.</p>
Loyalty Only	<p>Select to restrict this promotion to loyalty members only. The promotion is then only available to customers who have scanned their loyalty card in the transaction.</p>
Allow with Discount	<p>Select to permit discounts to be combined with this promotion.</p> <p>If not selected, items involved with this promotion can not have discounts applied to them at the Point of Sale.</p>

Field	Description
Allow with Specials	<p>Select to permit price specials with this promotion.</p> <p>If not selected, items that currently have price specials are not applicable to this promotion.</p>
Allow with Bulk Discount	<p>Select to permit bulk discounts to be combined with this promotion.</p> <p>If not selected, bulk discount prices do not apply if this promotion is triggered.</p>
As Voucher	<p>Select to create a normal voucher of the promotion amount for each transaction, rather than deducting the promotion from the total.</p>
Days to Expire	<p>Type the number of days before the created voucher expires.</p>
Department	<p>Select the department whose items you want to include in the promotion.</p> <div data-bbox="480 1193 1394 1469" style="border: 1px solid #add8e6; padding: 10px; background-color: #e6f2ff;"> <p>Note: All items of this department are automatically included. You cannot include more than one department in a department promotion. If you want to create a promotion for two departments, you must either create two separate department promotions, or combine the items in a promotion group and create a group promotion.</p> </div>
Committed	<p>If selected, this promotion has been saved.</p>
	<p>Press to save any changes to the promotion.</p>
	<p>Press to delete the promotion.</p>

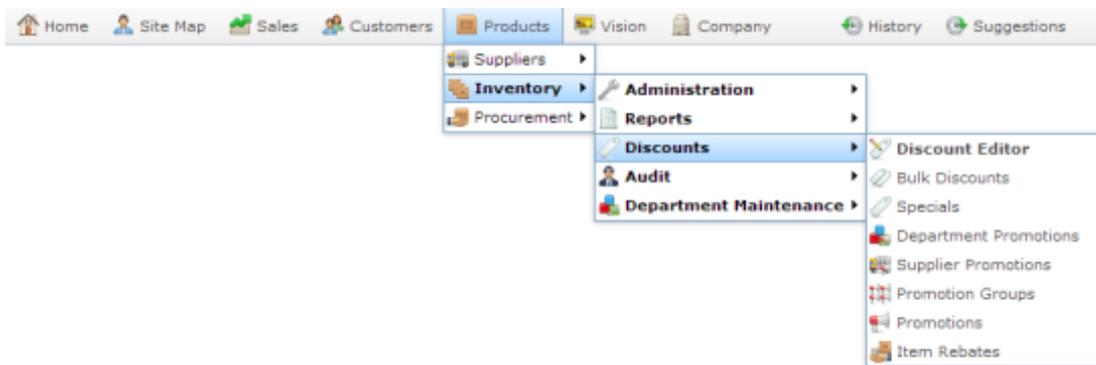
Department Promotions report

Use the Department Promotions report to view and create Department promotions.

Opening the Department Promotions report

To open the Department Promotions report:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Department Promotions**.



The Department Promotions report is displayed.

Department Promotions Report

Descri	Promc	Site	Depart	Start Date	End Date	Min Lines	Min Amour	Discox	Vouch	Loyalty	With Only	With Speciz	With Discox	With Bulk Discox
Create New Depart Promc		Chads												
Deli Half price	264	Chads		16-Apr-2015	01-May-2015	3	\$20.00	\$50.00	✓	✓				

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

Department Promotions report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Expiry After	Select to filter the report to promotions that expire after this date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the promotion.
Promotion #	Unique code identifying the promotion.
Site	Site the promotion applies to.
Dept / Department	Department the promotion applies to.
Start Date	Date the promotion begins.
End Date	Date the promotion ends.
Min Lines	Minimum number of transaction lines required by the promotion.
Min Amount	Minimum transaction amount of eligible items required by the promotion.

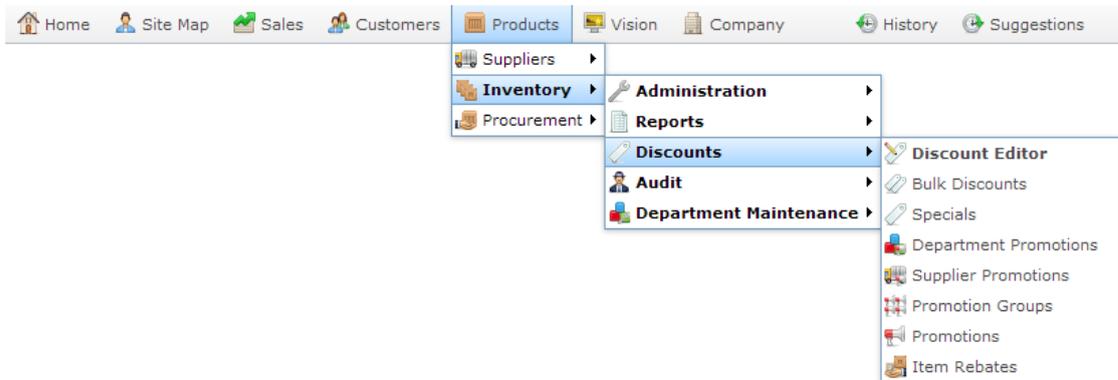
Field	Description
Discount	Transaction deduction applied by the promotion. Note: This may be a discount off the transaction total, or a flat rate amount.
Voucher	If selected, this promotion is awarded to the customer as a voucher.
Loyalty Only	If selected, this promotion is only available to loyalty members.
With Specials	If selected, this promotion is applicable with item price specials.
With Discount	If selected, further discounts can be applied to a transaction on top of this promotion.
With Bulk Discount	If selected, bulk discount prices are applicable with this promotion.

Creating a promotion group

Create a promotion group to apply a promotion to a specific set of items.

To create a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Buttons: Add to Favourites, Create New Promotion Group

3. Press **Create New Promotion Group**.

The Promotion Group Maintenance screen is displayed

The screenshot shows the 'Promotion Group Maintenance' form. At the top, there is a 'Group' tab. Below it, the 'Promotion Group' dropdown is set to 'New Group', 'Enabled' is set to 'Enabled', and the 'Group Description' field is empty. A table with three columns: 'Description', 'Item', and 'Quantity' is visible. The table contains one row with 'No Items' in the 'Description' column and '0' in the 'Quantity' column. A 'Save' button is located at the bottom right of the form.

4. Type a description for the promotion group in the **Group Description** field.
5. Press  Save.

The empty promotion group is created.

The screenshot shows the 'Promotion Group Maintenance' form after the group has been created. The 'Promotion Group' dropdown is now set to '[2] : Impulse Items', 'Enabled' is 'Enabled', and the 'Group Description' field contains 'Impulse Items'. The 'Item Code' dropdown is empty. Below the 'Item Code' field are 'Find' and 'Add' buttons. The table below still shows 'No Items' in the 'Description' column and '0' in the 'Quantity' column. At the bottom right, there are 'Update', 'Delete', 'Save', and 'Delete Group' buttons.

6. Add items to the promotion group and specify their quantity.
See *Adding items to a promotion group* on page 173.
Also see *Editing the quantity of items in a promotion group* on page 176.
7. Press .

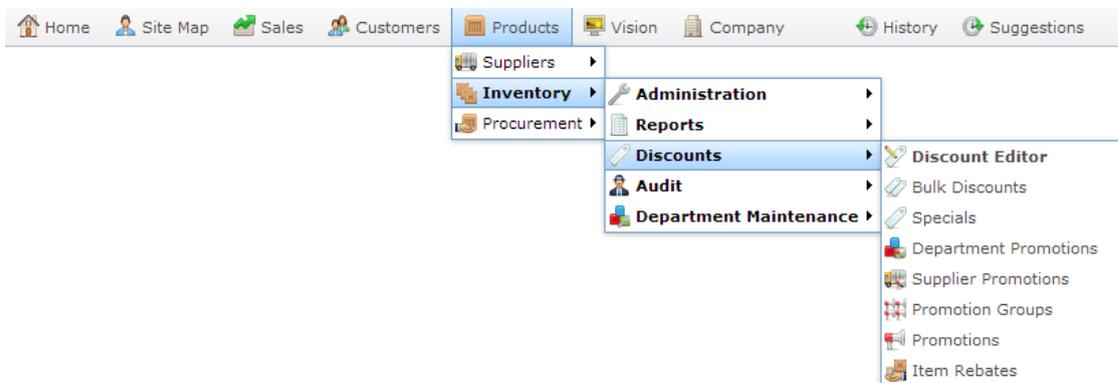
The promotion group is complete.

Editing a promotion group

Edit a promotion group if you want to change the group's description, item list or to disable or enable the group.

To edit a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Buttons: Add to Favourites, Create New Promotion Group

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Managing promotions

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinate	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylor's Marinade	222	1

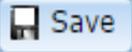
Find Add

Update Delete

Save Delete Group

4. Make the required changes.

See *Promotion Group Maintenance* screen on page 182.

5. Press .

The changes to the promotion group are saved.

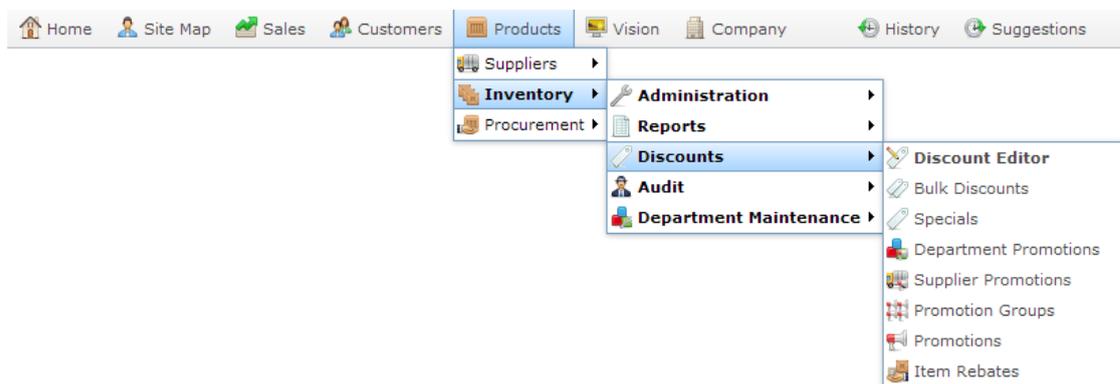
Adding items to a promotion group

Add items to a promotion group to include them in the promotion.

Note: You can control whether promotions are eligible for discounts, items on special, or restricted to loyalty members only.

To add items to a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Add to Favourites
Create New Promotion Group

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Managing promotions

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

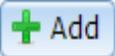
Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylor's Marinade	222	1

Update Delete Save Delete Group

4. Search for the item to add to the group in the **Item Code** field.

See *Finding an item with a search field* on page 12.

5. Press .

The item is added to the item grid.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

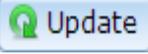
Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylor's Marinade	222	1

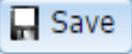
Update Delete Save Delete Group

6. Type the number of units required in the **Quantity** field of the item grid.

Note: This is the number of units of this particular item a customer has to purchase in order to count as 'one' item of this promotion group. For example, if they must buy three of a particular item to be eligible for the promotion, type **3** here. See *Editing the quantity of items in a promotion group* on page 176.

7. Press .

The updates to the item are saved.

8. Press .

The promotion group is saved.

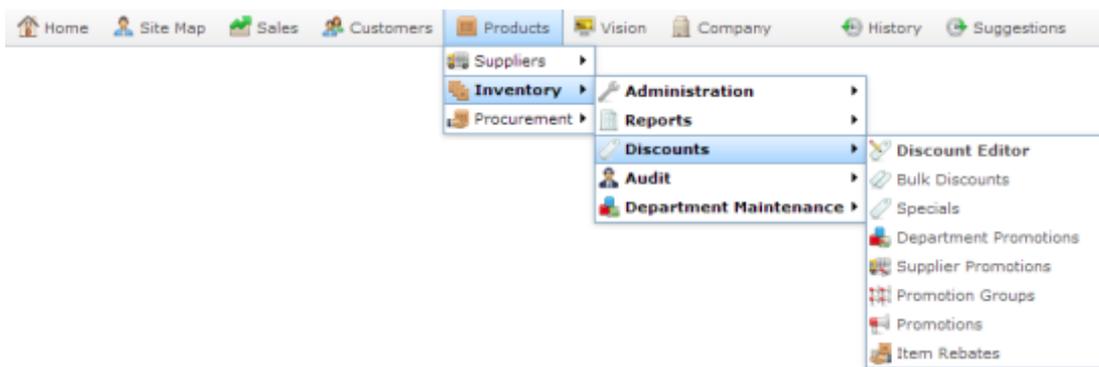
Editing the quantity of items in a promotion group

Edit the quantity of items in a promotion group to determine:

- How many units of the item must be purchased, if the promotion group is a trigger group.
- How many units of the item are eligible for the promotion reward, if the group is a non-trigger group.

To edit the quantity of items in a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Buttons: Add to Favourites, Create New Promotion Group

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylors Marinade	222	1

Update Delete

Save Delete Group

- Press the item in the grid you want to edit the quantity of.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

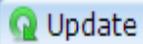
Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylors Marinade	222	1

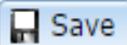
Update Delete

Save Delete Group

- Type the number of units required in the **Quantity** field.

- Press .

The updates to the item are saved.

- Press .

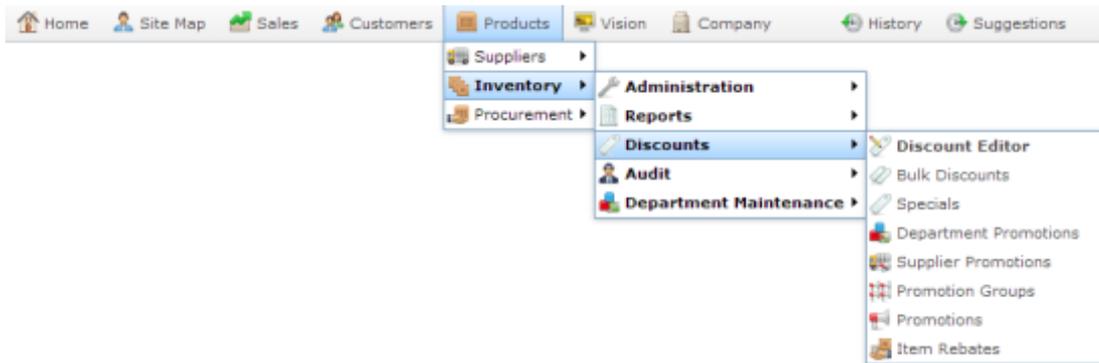
The promotion group is saved.

Removing an item from a promotion group

Remove an item from a promotion group if you do not want it involved with the promotion.

To remove an item from a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

[Add to Favourites](#) [Create New Promotion Group](#)

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylors Marinade	222	1

Update Delete

Save Delete Group

4. Press the item in the grid you want to remove.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

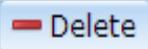
Unit Price:

Stock On Hand:

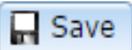
Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylors Marinade	222	1

Update Delete

Save Delete Group

5. Press .

The item is removed.

6. Press .

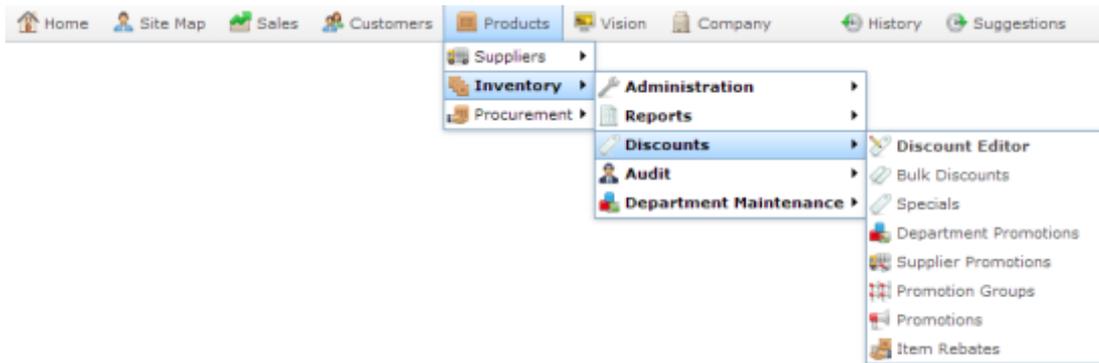
The promotion group is saved.

Deleting a promotion group

Delete a promotion group if you no longer want to use the group in promotions

To delete a promotion group:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runoff	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Buttons: Add to Favourites, Create New Promotion Group

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Find Add

Description:

Unit Price:

Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylor's Marinade	222	1

Update Delete

Save Delete Group

4. Press **Delete Group**.

The promotion group is deleted.

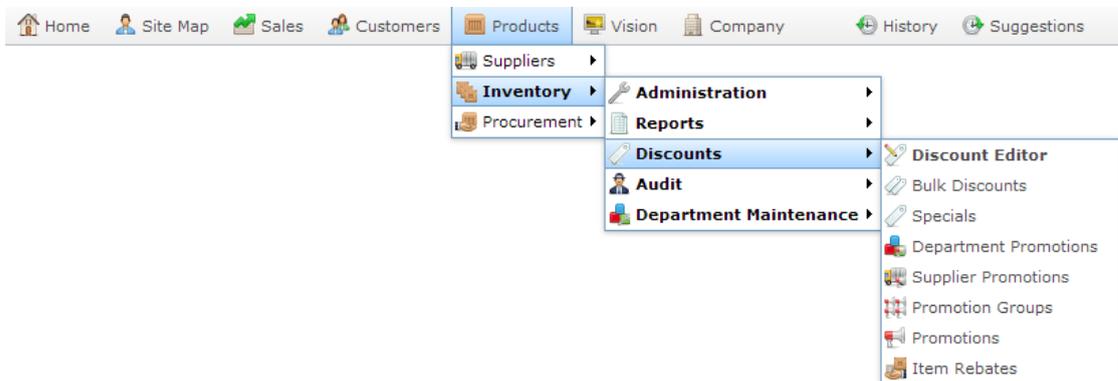
Promotion Group Maintenance screen

Use the Promotion Group Maintenance screen to create promotion groups for use in group promotions.

Opening the Promotion Group Maintenance screen

To open the Promotion Group Maintenance screen:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runoff	1	3	✓	07 Jul 2014	30 Jul 2014	Example

3. Press the promotion group you want to open.

The Promotion Group Maintenance screen is displayed.

Promotion Group Maintenance

Group

Promotion Group: [2] : Impulse Items

Enabled: Enabled

Group Description: Impulse Items

Item Code:

Description:

Unit Price:

Stock On Hand:

Description	Item	Quantity
Master Food Sauce	553	1
Master Foods Marinade	502	1
Master Foods Sauce	501	5
Master Foods Sauce	552	1
Master Foods Sauces	554	1
Sweet Chilli	419	1
Taylor's Marinade	222	1

Find Add

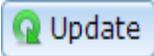
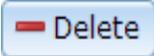
Update Delete

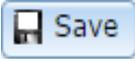
Save Delete Group

Promotion Group Maintenance screen key fields and buttons

Group area

Use the group area to maintain the group's description and search for items to add to the group.

Field	Description
Promotion Group	Select the promotion group to edit, or New Promotion Group to create a new group.
Enabled	Select to make this promotion group available for use in the Portal.
Group Description	The description of the promotion group.
Item Code	Search for items to add to the group. See <i>Finding an item with a search field</i> on page 12.
Description	Description of the selected item.
Unit Price	Price per unit of the selected item.
Stock On Hand	Units of stock on hand at the default site.
	Press to save any changes made to the item grid.
	Press to remove the selected item from the promotion group.

Field	Description
	Press to save any changes to the promotion group.
	Press to delete the promotion group.

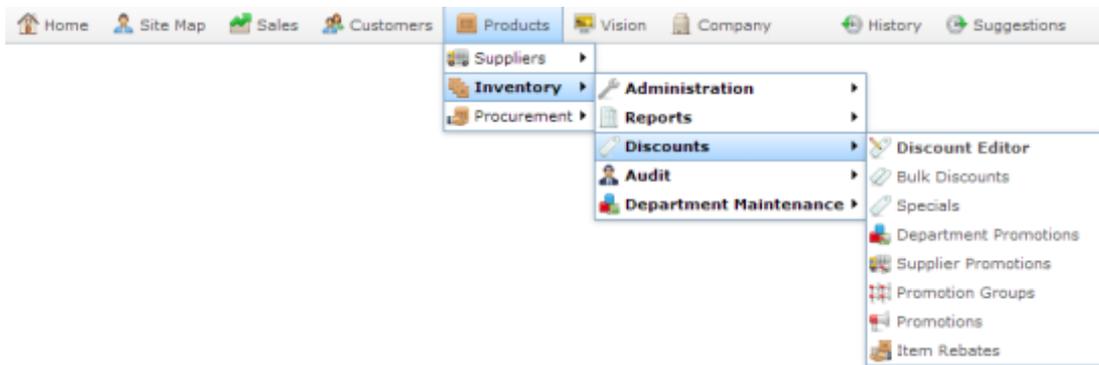
Promotion Group report

Use the Promotion Group report to view and create promotion groups for use in group promotions.

Opening the Promotion Group report

To open the Promotion Group report:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotion Groups**.



The Promotion Groups report is displayed.

Promotion Group Report

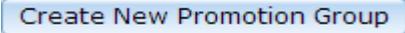
Promotion Group	ID	Items	Enabled	Date Created	Date Changed	User
Impulse Items	2	7	✓	06 Aug 2014	06 Aug 2014	Example
End of year runout	1	3	✓	07 Jul 2014	30 Jul 2014	Example

Add to Favourites Create New Promotion Group

Promotion Group report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
	Press to create a new promotion group.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Promotion Group	Description of the promotion group.
ID	Unique code identifying the promotion group.
Items	Number of unique items in the promotion group.
Enabled	Whether the promotion group is available for use in the Portal.
Date Created	Date the promotion group was created.
Date Changed	Date the promotion group was last edited.
User	Name of the Portal user who last edited the promotion group.

Creating a group promotion

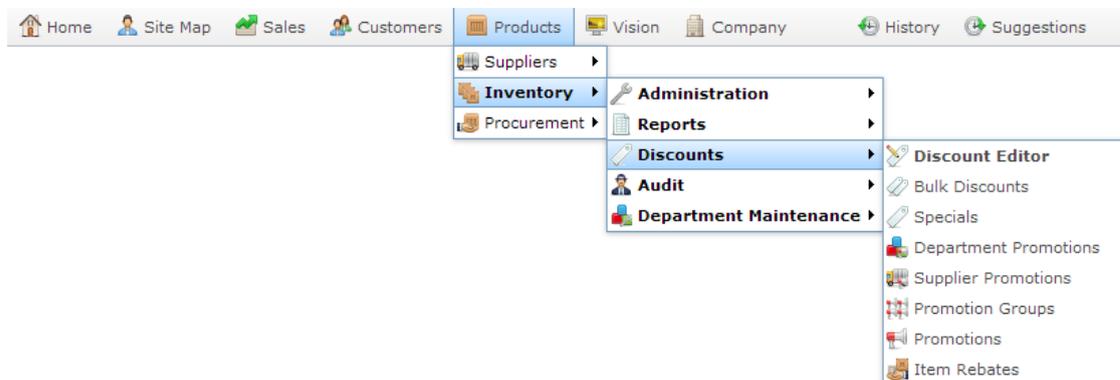
Create a group promotion when you want finer control over which items are included in the promotion and what the promotion rewards are.

Note: Group promotions require at least one trigger promotional group and a non-trigger promotional group. You cannot save a group promotion that does not contain a group. Create the promotional groups before you create the group promotion. See *Creating a promotion group* on page 169.

Note: You can control whether promotions are eligible for discounts, items on special, or restricted to loyalty members only.

To create a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comm
Create New Prom		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site

Expiry After

3. Press **Create New Promotion**.

Promotions Report

Descr #	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comm
		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

The Group Promotion Maintenance screen is displayed

Promotion Maintenance

Promotion Number:

Location:

Details Groups

Description:

POS Description:

Start Date:

End Date:

Minimum Transaction Amount:

Maximum Transaction Amount:

Promotion Amount: Is Discount

Free Item Loyalty Only
 Allow with Discount Fixed Amount
 Allow with Bulk Discount Allow with Specials
 Deduct Promotional items from Total
 As Voucher

Days to Expire:

Committed Enabled

4. Select the site at which the promotion will occur from the **Location** drop-down list.

Note: You can select **All** sites if the promotion is company-wide. If you want the promotion to only apply to some sites and not others, you must create a promotion for each site.

5. Type the description to identify the promotion in the **Description** field.
6. Type the description to appear on the Point of Sale and receipts in the **POS Description** field.
7. Select the **Start Date** and **End Date** for the promotion.
8. If the promotion requires the customer to purchase a minimum amount of eligible items, type the total price they must reach in the **Minimum Transaction Amount** field.
9. If you want to limit the total purchase amount the promotion is valid for, type the highest allowable total in the **Maximum Transaction Amount** field.

10. Type the amount the promotion is worth in the **Promotion Amount** field. For example, if the promotion takes \$20 off the transaction total, type 20.
11. If the promotion provides a discount instead of a flat deduction, select the **Is Discount** field.

The screenshot shows the 'Promotion Maintenance' window. The 'Promotion Number' is '[267] Impulse Run Out' and the 'Location' is 'Chadstone'. The 'Details' tab is selected. The 'Description' and 'POS Description' are both 'Impulse Run Out'. The 'Start Date' is '16/04/2015' and the 'End Date' is '2/05/2015'. The 'Minimum Transaction Amount' is '10', the 'Maximum Transaction Amount' is '1000', and the 'Promotion Amount' is '50'. The 'Is Discount' checkbox is checked. Other options like 'Loyalty Only', 'Free Item', 'Allow with Discount', 'Allow with Bulk Discount', 'Fixed Amount', 'Allow with Specials', 'Deduct Promotional items from Total', and 'As Voucher' are unchecked. The 'Days to Expire' is '30', and the 'Committed' and 'Enabled' checkboxes are checked. At the bottom right, there are 'Commit' and 'Delete Promotion' buttons.

12. If the promotion is restricted only to loyalty members, select the **Loyalty Only** field.
13. If the promotion permits a single item from the non-trigger promotional group for free, select the **Free Item** field.
14. If the promotion allows all items from the non-trigger promotional group for free, select the **Deduct Promotional items from Total** field.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Description: Impulse Run Out

POS Description: Impulse Run Out

Start Date: 16/04/2015

End Date: 2/05/2015

Minimum Transaction Amount: 10

Maximum Transaction Amount: 1000

Promotion Amount: 50 Is Discount

Free Item Loyalty Only

Allow with Discount Fixed Amount

Allow with Bulk Discount Deduct Promotional items from Total

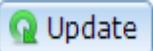
As Voucher

Days to Expire: 30

Committed Enabled

Commit Delete Promotion

Note: You can use the **Maximum Transaction Amount** to limit the number of free items.

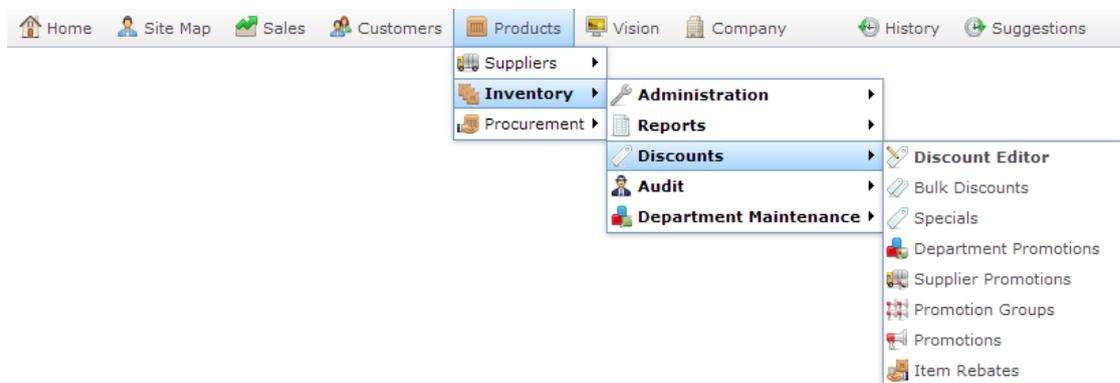
15. If the promotion permits further discounts, select the **Allow with Discount** field.
16. If the promotion permits items with specials to be included in the transaction total, select the **Allow with Specials** field.
17. If the promotion permits using the bulk discount price for items purchased in bulk, select the **Allow with Bulk Discount** field.
18. If the promotion amount is to be given to the customer as a regular voucher, select the **As Voucher** field.
19. If you are using vouchers, type the number of days the voucher is valid after being issued in the **Days to Expire** field.
20. Add the trigger and non-trigger groups to the promotion on the Groups tab.
See *Adding a group to a group promotion* on page 195.
Also see *Creating a trigger group for a group promotion* on page 198.
21. Select any minimum lines or quantities for the groups.
See *Creating a promotion with minimum lines* on page 224.
Also see *Creating a promotion with minimum sales* on page 226.
22. Press .
The promotion is saved.

Editing a group promotion

Edit a group promotion if you want to change when it runs, the minimum price or items required, restrict it to loyalty members, add or remove promotion groups or change whether it is applicable with discounts or specials.

To edit a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comn
Create New Prom		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site:

Expiry After:

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Managing promotions

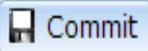
The screenshot shows the 'Promotion Maintenance' window. At the top, the 'Promotion Number' is '[267] Impulse Run Out' and the 'Location' is 'Chadstone'. Below this are two tabs: 'Details' (selected) and 'Groups'. The 'Details' tab contains the following fields and options:

- Description: Impulse Run Out
- POS Description: Impulse Run Out
- Start Date: 16/04/2015
- End Date: 2/05/2015
- Minimum Transaction Amount: 10
- Maximum Transaction Amount: 1000
- Promotion Amount: 50
- Is Discount
- Free Item
- Allow with Discount
- Allow with Bulk Discount
- Loyalty Only
- Fixed Amount
- Allow with Specials
- Deduct Promotional items from Total
- As Voucher
- Days to Expire: 30
- Committed
- Enabled

At the bottom right, there are two buttons: 'Commit' and 'Delete Promotion'.

4. Make the required changes

See *Group Promotion Maintenance* screen on page 230.

5. Press  Commit.

The changes are saved and sent to the Point of Sale.

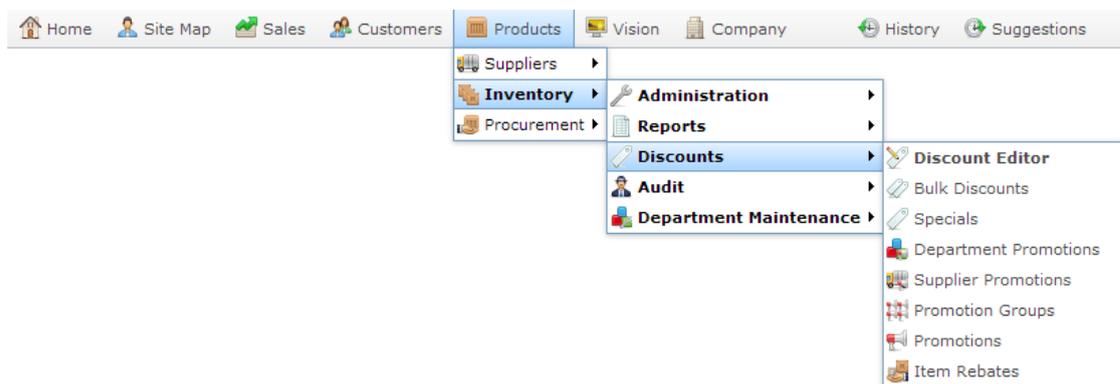
Adding a group to a group promotion

Add a group to a group promotion to apply the promotion rules to specific items.

Note: Promotion groups must be created before you can add them to group promotions. See *Creating a promotion group* on page 169.

To add a group to a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comn
Create New Prom		Chad												
Impul: Run Out	267	Chad	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site
⋮

Expiry After

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Managing promotions

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details Groups

Description: Impulse Run Out
POS Description: Impulse Run Out
Start Date: 16/04/2015
End Date: 2/05/2015
Minimum Transaction Amount: 10
Maximum Transaction Amount: 1000
Promotion Amount: 50 Is Discount

Free Item Loyalty Only
 Allow with Discount Fixed Amount
 Allow with Bulk Discount Allow with Specials
 Deduct Promotional items from Total
 As Voucher

Days to Expire: 30
 Committed Enabled

4. Press the Groups tab.

The Groups tab is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details **Groups**

Group:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runoff	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

5. Select the group you want to add from the **Group** drop-down list.

6. Press .

The group is added.

7. If the group is a trigger group, select **Is Trigger**.

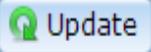
See *Creating a trigger group for a group promotion* on page 198.

8. Type the minimum number of different items from this group required or permitted by the promotion in the **Lines** field.

See *Creating a promotion with minimum lines* on page 224.

9. Type the minimum sale total of items for this group required or permitted by the promotion in the **Minimum** field.

See *Creating a promotion with minimum sales* on page 226.

10. Press .

The group details are saved.

Creating a trigger group for a group promotion

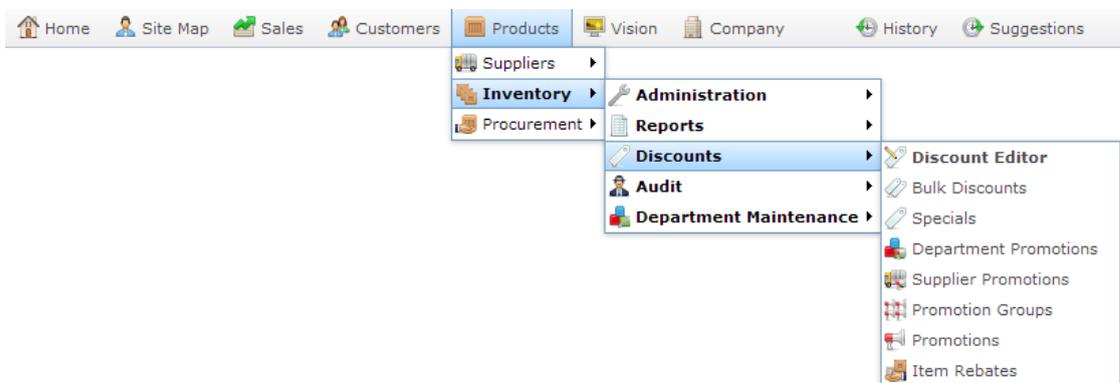
Set a group in a promotion as a trigger group to identify the items that trigger the promotion.

For example, if your promotion gives \$10 off when items from your Impulse Purchase group are purchased, the Impulse Purchase group is the trigger group. All group promotions must have at least one trigger group.

Note: Promotion groups must be created before you can add them to group promotions. See *Creating a promotion group* on page 169.

To create a trigger group in a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comm
Create New Promc		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Description: Impulse Run Out

POS Description: Impulse Run Out

Start Date: 16/04/2015

End Date: 2/05/2015

Minimum Transaction Amount: 10

Maximum Transaction Amount: 1000

Promotion Amount: 50 Is Discount

Free Item Loyalty Only

Allow with Discount Fixed Amount

Allow with Bulk Discount Allow with Specials

Deduct Promotional items from Total

As Voucher

Days to Expire: 30

Committed Enabled

Commit Delete Promotion

4. Press the Groups tab.

The Groups tab is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runoff	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

5. Select the group you want to set as a trigger group in the Group grid.

6. Select **Is Trigger**.

Managing promotions

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

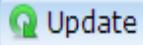
Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runoff	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

7. Press .

The group is updated.

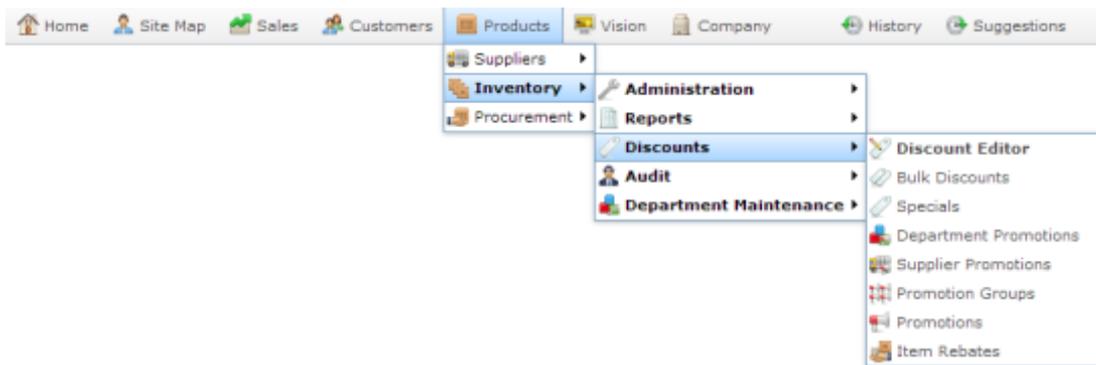
Removing a group from a group promotion

Remove a group from a group promotion if you do not want those items to apply to the promotion.

Note: You can remove trigger and non-trigger groups using the same method, but group promotions must contain at least one non-trigger group.

To remove a group from a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Promi #	Site	Start Date	End Date	Group Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comr
Create New Promi		Chads											
Input Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓					50.00	\$10.00	✓

Site: Chadstone

Expiry After: 15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Managing promotions

The screenshot shows the 'Promotion Maintenance' window with the 'Details' tab selected. The form contains the following fields and options:

- Promotion Number: [267] Impulse Run Out
- Location: Chadstone
- Description: Impulse Run Out
- POS Description: Impulse Run Out
- Start Date: 16/04/2015
- End Date: 2/05/2015
- Minimum Transaction Amount: 10
- Maximum Transaction Amount: 1000
- Promotion Amount: 50
- Is Discount:
- Loyalty Only:
- Free Item:
- Fixed Amount:
- Allow with Discount:
- Allow with Specials:
- Allow with Bulk Discount:
- Deduct Promotional items from Total:
- As Voucher:
- Days to Expire: 30
- Committed:
- Enabled:

Buttons at the bottom right: Commit, Delete Promotion.

4. Press the Groups tab.

The Groups tab is displayed.

The screenshot shows the 'Promotion Maintenance' window with the 'Groups' tab selected. The form contains the following elements:

- Promotion Number: [267] Impulse Run Out
- Location: Chadstone
- Group: [] + Add
- Table with columns: Group, Group#, Sequence, Items, Date Changed, Is Trigger, Lines, Minimum, User

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Buttons at the bottom right: Update, Delete, Commit, Delete Promotion.

5. Select the group you want to remove from the Group grid.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

6. Press .

The group is removed.

Creating a line minimum for a group promotion

Create a line minimum for a group in a group promotion to:

- Require a minimum number of different items be purchased from a trigger group to trigger a promotion.
- Restrict a promotion's effects to a maximum number of different items in a non-trigger group.

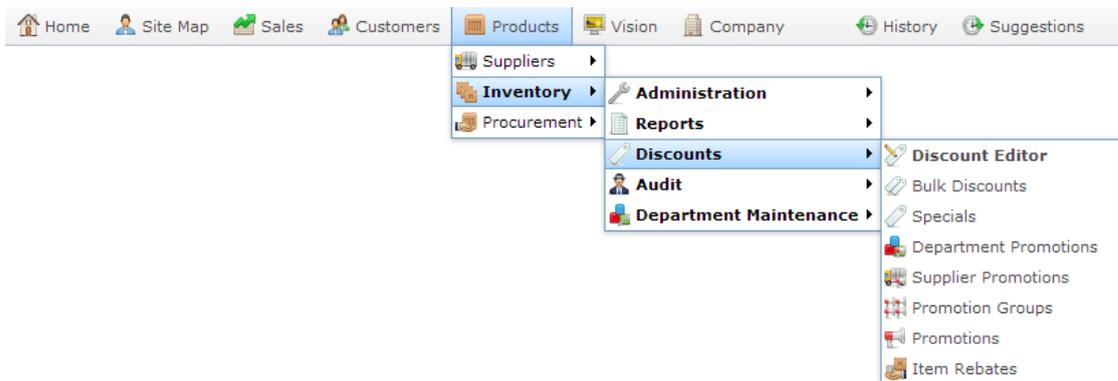
For example, a line minimum of **2** means at least 2 different items from a promotion group to be purchased to trigger the promotion.

Note: You can combine line minimums and sale minimums to create a fine-grained promotion trigger, such as requiring \$50 to be purchased across at least three different items.

Note: Promotion groups must be created before you can add them to group promotions. See *Creating a promotion group* on page 169.

To create a line minimum in a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comm
Create New Prom		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site

Chadstone

Expiry After

15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details
 Groups

Description: Impulse Run Out

POS Description: Impulse Run Out

Start Date: 16/04/2015

End Date: 2/05/2015

Minimum Transaction Amount: 10

Maximum Transaction Amount: 1000

Promotion Amount: 50 Is Discount

Free Item
 Loyalty Only
 Fixed Amount

Allow with Discount
 Allow with Specials

Allow with Bulk Discount
 Deduct Promotional items from Total
 As Voucher

Days to Expire: 30

Committed
 Enabled

4. Press the Groups tab.

The Groups tab is displayed.

Managing promotions

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

5. Select the group you want to add a line minimum to in the Group grid.
6. Type the minimum number of different items in that group that are applicable to the promotion in the **Lines** field.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

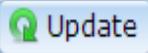
Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

7. Press .

The group is updated.

Creating a sale minimum for a group promotion

Create a sale minimum for a group in a group promotion to:

- Require a minimum total purchase of items be from a trigger group to trigger a promotion.
- Restrict a promotion's effects to a maximum total of items in a non-trigger group.

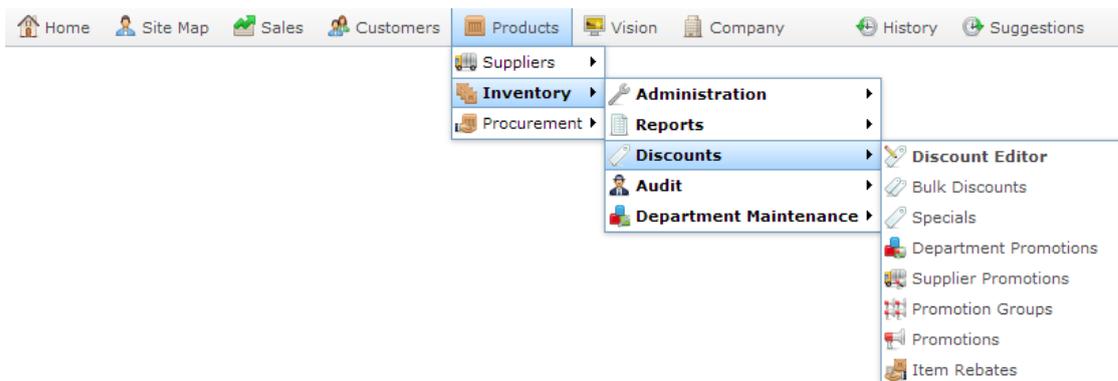
For example, a sale minimum of **20** means at least \$20 of items from a promotion group to be purchased to trigger the promotion.

Note: You can combine line minimums and sale minimums to create a fine-grained promotion trigger, such as requiring \$50 to be purchased across at least three different items.

Note: Promotion groups must be created before you can add them to group promotions. See *Creating a promotion group* on page 169.

To create a sale minimum in a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Promc #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comm
Create New Promc		Chads												
Impul: Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

Managing promotions

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

The screenshot shows the 'Promotion Maintenance' window with the 'Details' tab selected. The promotion is '[267] Impulse Run Out' at the 'Chadstone' location. The description is 'Impulse Run Out'. The start date is '16/04/2015' and the end date is '2/05/2015'. The minimum transaction amount is '10' and the maximum is '1000'. The promotion amount is '50'. The 'Is Discount' checkbox is checked. Other options include 'Loyalty Only', 'Fixed Amount', 'Free Item', 'Allow with Discount', 'Allow with Bulk Discount', 'Deduct Promotional items from Total', 'As Voucher', 'Days to Expire' (30), 'Committed' (checked), and 'Enabled' (checked). Buttons for 'Commit' and 'Delete Promotion' are at the bottom right.

4. Press the Groups tab.

The Groups tab is displayed.

The screenshot shows the 'Promotion Maintenance' window with the 'Groups' tab selected. The promotion is '[267] Impulse Run Out' at the 'Chadstone' location. A 'Group' dropdown menu is visible with a '+ Add' button. Below is a table with the following data:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Buttons for 'Update', 'Delete', 'Commit', and 'Delete Promotion' are at the bottom right.

5. Select the group you want to add a sale minimum to in the Group grid.
6. Type the minimum purchase total of items from that group that are applicable to the promotion in the **Minimum** field.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

7. Press .

The group is updated.

Creating a buy-one-get-one-free promotion

You can use group promotions to create a buy-one-get-one-free promotion.

This promotion uses two groups:

- A trigger group of items the customer must buy one of in order to get the promotion.
- A non-trigger group of items that the customer receives for free.

Note: The trigger group may contain the same items as the non-trigger group, or it may contain different items, depending on what you want to offer the customer as a reward. If you want both groups to contain the same items, you must create two identical promotion groups.

To create this promotion:

1. Create the promotion group containing the items that the customers must buy to trigger the promotion.

Note: This is the **trigger group**.

See *Creating a promotion group* on page 169

2. Create the promotion group containing the items that the customer can receive for free with the promotion.
3. Create a group promotion.

See *Creating a group promotion* on page 189.

4. Add the two groups you have created to the group promotion.

See *Adding a group to a group promotion* on page 195.

5. Make sure the **trigger group** you created at the start of this procedure is marked as the trigger group in the promotion.

See *Creating a trigger group for a group promotion* on page 198.

6. Make sure the second group you created is not marked as a trigger group in this promotion.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

- If the promotion requires a minimum amount to be spent on trigger group items only, type this amount in the **Minimum** field of the trigger group on the Groups tab.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group: + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

See *Creating a sale minimum for a group promotion* on page 207.

- If the promotion requires a minimum amount to be spent on the transaction in total, including non-promotional items, type this amount into the **Minimum Transaction Amount** on the Details tab.

Managing promotions

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details Groups

Description: Impulse Run Out
POS Description: Impulse Run Out
Start Date: 16/04/2015
End Date: 2/05/2015
Minimum Transaction Amount: 10
Maximum Transaction Amount: 1000
Promotion Amount: 50 Is Discount
 Free Item Loyalty Only
 Allow with Discount Fixed Amount
 Allow with Bulk Discount Allow with Specials
 Deduct Promotional items from Total
 As Voucher
Days to Expire: 30
 Committed Enabled

See *Creating a promotion with minimum sales* on page 226.

9. Select the **Free Item** field.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details Groups

Description: Impulse Run Out
POS Description: Impulse Run Out
Start Date: 16/04/2015
End Date: 2/05/2015
Minimum Transaction Amount: 10
Maximum Transaction Amount: 1000
Promotion Amount: 50 Is Discount
 Free Item Loyalty Only
 Allow with Discount Fixed Amount
 Allow with Bulk Discount Allow with Specials
 Deduct Promotional items from Total
 As Voucher
Days to Expire: 30
 Committed Enabled

10. Press .

The promotion is created.

Creating a combo promotion

You can use group promotions to create a combo discount, where customers purchase several items together to receive a discount, free item, or voucher.

To create this promotion:

1. Create the promotion group containing the items that the customers must buy to trigger the promotion.

Note: This is the **trigger group**.

See *Creating a promotion group* on page 169

2. Create the promotion group containing the items that the customer can receive for free with the promotion.
3. Create a group promotion.

See *Creating a group promotion* on page 189.

4. Add the two groups you have created to the group promotion.

See *Adding a group to a group promotion* on page 195.

5. Make sure the **trigger group** you created at the start of this procedure is marked as the trigger group in the promotion.

See *Creating a trigger group for a group promotion* on page 198.

6. Make sure the second group you created is not marked as a trigger group in this promotion.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details **Groups**

Group:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Managing promotions

7. If the promotion requires a minimum amount to be spent on trigger group items only, type this amount in the **Minimum** field of the trigger group on the Groups tab.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details Groups

Group: [] + Add

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runout	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

Update Delete

Commit Delete Promotion

See *Creating a sale minimum for a group promotion* on page 207.

8. If the promotion requires a minimum amount to be spent on the transaction in total, including non-promotional items, type this amount into the **Minimum Transaction Amount** on the Details tab.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out
Location: Chadstone

Details Groups

Description: Impulse Run Out
POS Description: Impulse Run Out
Start Date: 16/04/2015
End Date: 2/05/2015
Minimum Transaction Amount: 10
Maximum Transaction Amount: 1000
Promotion Amount: 50 Is Discount

Free Item Loyalty Only
 Allow with Discount Fixed Amount
 Allow with Bulk Discount Allow with Specials
 Deduct Promotional items from Total
 As Voucher

Days to Expire: 30
 Committed Enabled

Commit Delete Promotion

See *Creating a promotion with minimum sales* on page 226.

9. Press the Groups tab.

10. Type the minimum number of different items a customer must purchase in the **Lines** field of the trigger group.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Group:

Group	Group#	Sequence	Items	Date Changed	Is Trigger	Lines	Minimum	User
End of year runoff	1	1	3	30/07/2014	<input type="checkbox"/>	1	\$0.00	Example
Impulse Items	2	1	7	6/08/2014	<input checked="" type="checkbox"/>	1	\$0.00	Example

For example, if you want them to purchase three different items to trigger the promotion, type **3**.

See *Creating a line minimum for a group promotion* on page 204.

11. Press .

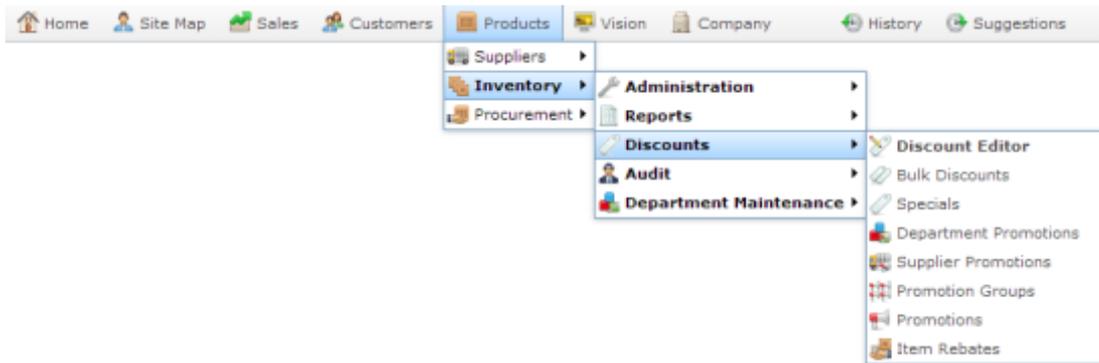
The promotion is created.

Deleting a group promotion

Delete a group promotion if you do not want the promotion on your Portal.

To delete a group promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Promi Site	Start Date	End Date	Group Enabl	Loyalt Only	With Spec	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comn
Create New Prom	Chads											
Input Run Out	267 Chads	16-Apr-2015	02-May-2015	2	✓					50.00	\$10.00	✓

Site: Chadstone

Expiry After: 15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Description: Impulse Run Out

POS Description: Impulse Run Out

Start Date: 16/04/2015

End Date: 2/05/2015

Minimum Transaction Amount: 10

Maximum Transaction Amount: 1000

Promotion Amount: 50

Is Discount

Loyalty Only

Free Item

Fixed Amount

Allow with Discount

Allow with Specials

Allow with Bulk Discount

Deduct Promotional items from Total

As Voucher

Days to Expire: 30

Committed Enabled

Commit Delete Promotion

4. Press **Delete Promotion**.

The promotion is deleted.

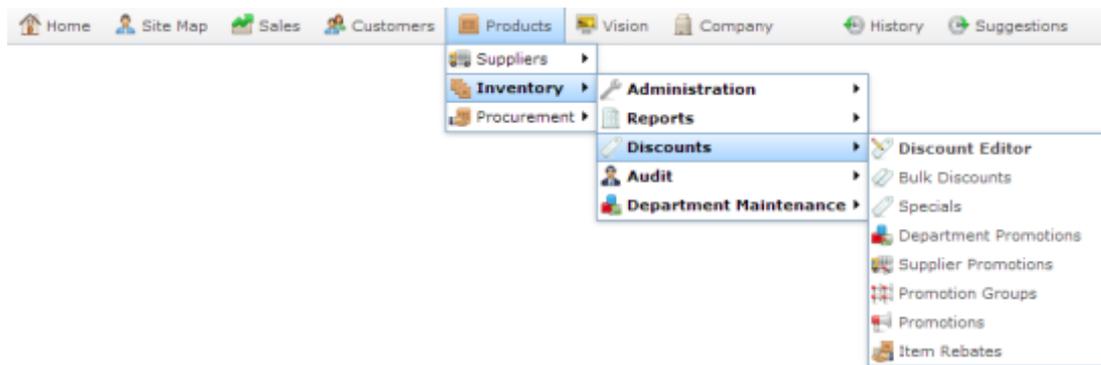
Creating a promotion with a flat-rate reward

You can create a promotion that awards customers a flat amount, such as \$20 off, instead of a discount.

Note: This procedure uses a supplier promotion as an example, but the procedure is identical for department promotions.

To create a flat-rate promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst												
ACME-263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site
Chadstone

Expiry After
13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Supplier Promotion Maintenance

Promotion Number: [263] ACMEEx Autumn

Location: Chadstone

Details

Description: ACMEEx Autumn

POS Description: ACMEEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire: 30

Supplier: [5001] ACMEEx Products

Committed

4. Type the amount you want the promotion to reward in the **Amount** field.
5. Clear the **Is Discount** field.

Supplier Promotion Maintenance

Promotion Number: [263] ACMEEx Autumn

Location: Chadstone

Details

Description: ACMEEx Autumn

POS Description: ACMEEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire: 30

Supplier: [5001] ACMEEx Products

Committed

6. Press .

The changes are saved and sent to the Point of Sale.

Excluding discounts and specials from your promotion

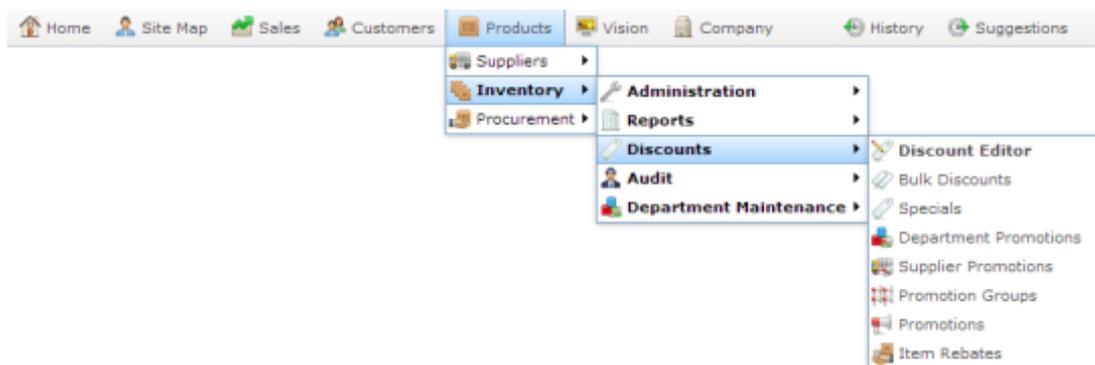
You can restrict any promotion to exclude discounts, bulk discounts or item price specials as eligible items. If excluded:

- Items with a price special are eligible for the promotion, even if they normally would be.
- Discounts cannot be applied to the transaction as a whole.
- Discounts cannot be applied to items within the promotion.
- Bulk discount prices are ignored for items that are included in the promotion.

Note: This procedure uses a supplier promotion as an example, but the procedure is identical for department or group promotions: open the promotion you want to restrict and select the **Loyalty Only** field.

To exclude discounts or specials from a promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.



3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

4. To exclude Point of Sale discounts, clear the **Allow with Discount** field.
5. To exclude bulk discounts, clear the **Allow with Bulk Discount** field.
6. To exclude items on special, clear the **Allow with Specials** field.

7. Press  **Commit**.

The changes are saved and sent to the Point of Sale.

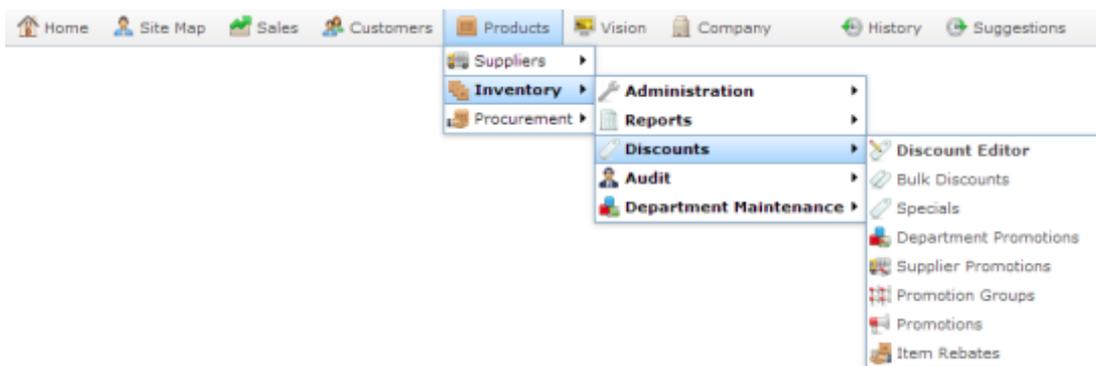
Creating a loyalty-only promotion

You can restrict any promotion to loyalty members only so that customers must scan their loyalty card into the transaction in order to receive the promotion.

Note: This procedure uses a supplier promotion as an example, but the procedure is identical for department or group promotions: open the promotion you want to restrict and select the **Loyalty Only** field.

To make a promotion loyalty-only:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst												
ACME+ 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site:

Expiry After:

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

4. Select the **Loyalty Only** field.

5. Press  **Commit**.

The changes are saved and sent to the Point of Sale.

Creating a promotion with minimum lines

You can require that customers purchase a minimum number of different eligible items before a promotion is triggered.

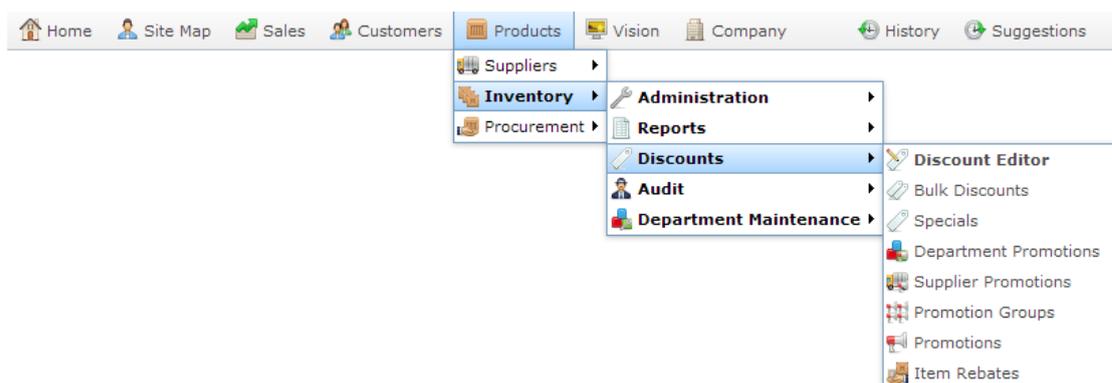
Each different item a customer purchases holds its own line on the Point of Sale receipt. Multiple units of the same item are always held on the same receipt line, no matter how many are purchase or in what order they are scanned. If you require a customer to purchase 3 or more lines, this means they must have at least 3 different items in their transaction that are eligible for the promotion in order to trigger the promotion.

This can be combined with a requirement for a minimum sales total to create a fine-grained trigger for your promotion. See *Creating a promotion with minimum sales* on page 226.

Note: This procedure uses a supplier promotion as an example, but the procedure is identical for department promotions.

To require a lines minimum to trigger a promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.



3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

4. Type the minimum total eligible items the customer must purchase to receive the promotion in the **Minimum Lines** field. For example, if they must purchase \$50 worth of eligible items, type **50**.

5. Press  **Commit**.

The changes are saved and sent to the Point of Sale.

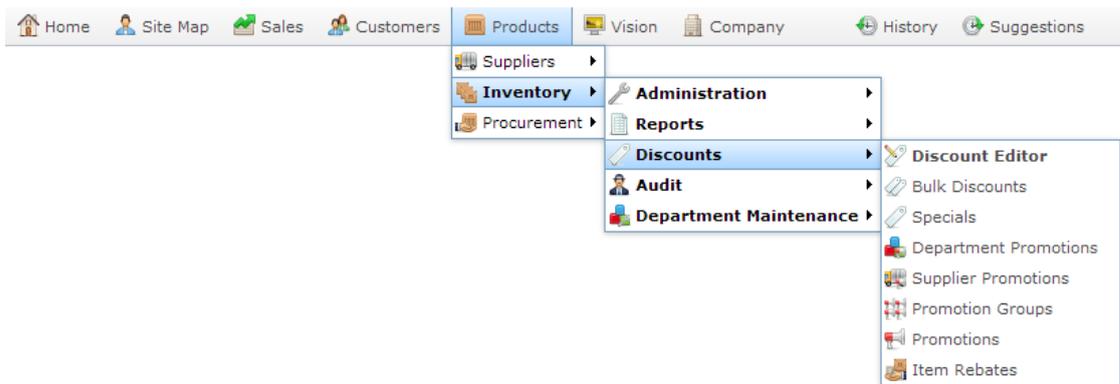
Creating a promotion with minimum sales

You can require that customers purchase a minimum amount of eligible items before a promotion is triggered. This can be combined with a requirement for a minimum number of different items to create a fine-grained trigger for your promotion. See *Creating a promotion with minimum lines* on page 224.

Note: This procedure uses a supplier promotion as an example, but the procedure is identical for department promotions.

To require a sales minimum to trigger a promotion:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst												
ACME x 263 Autumr		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site
Chadstone

Expiry After
13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

4. Type the minimum total eligible items the customer must purchase to receive the promotion in the **Minimum Sales** field. For example, if they must purchase \$50 worth of eligible items, type **50**.

5. Press  **Commit**.

The changes are saved and sent to the Point of Sale.

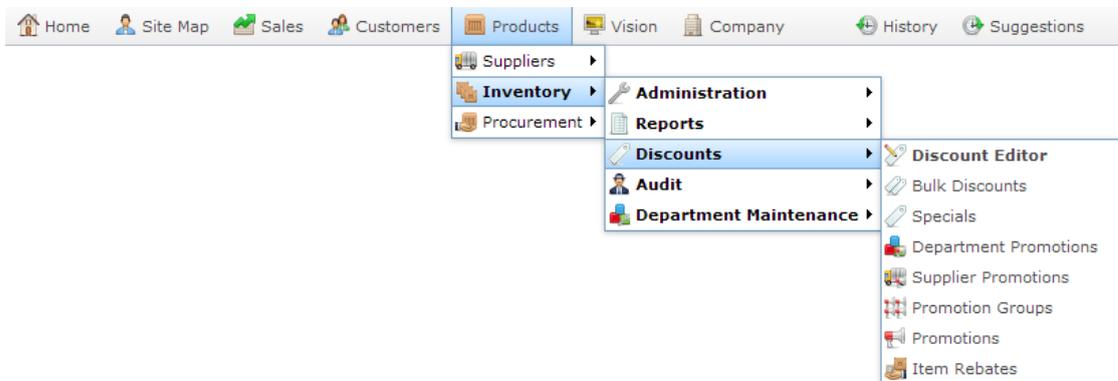
Sending a promotion to the Point of Sale

Send a promotion to the Point of Sale when you want to be available to customers at a site, or if you have changed the promotion since you last sent it to the Point of Sale. Before that, you can save and edit a promotion on the Portal without it affecting the Point of Sale.

Note: The procedure for sending a promotion to the Point of Sale is the same for supplier, department and group promotions. This procedure uses a supplier promotion as an example, but you can send department or group promotions to the Point of Sale by opening the appropriate maintenance screen. See *Department Promotion Maintenance screen* on page 160. Also see *Group Promotion Maintenance screen* on page 230.

To send a promotion to the Point of Sale:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Supplier Promotions**.



The Supplier Promotion report is displayed.

Supplier Promotions Report

Descrip	Promot #	Site	dept	Start Date	End Date	Min Lines	Min Amount	Discour	Vouche	Rebate	Loyalty Only	With Special	With Discour	With Bulk Discour
Create New Supplie Promot		Chadst												
ACME 263 Autumn		Chadst		14-Apr-2015	30-Jun-2015	1	\$50.00	\$20.00						

Site
Chadstone

Expiry After
13/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Supplier Promotion Maintenance screen is displayed.

Supplier Promotion Maintenance

Promotion Number: [263] ACMEx Autumn

Location: Chadstone

Details

Description: ACMEx Autumn

POS Description: ACMEx

Start Date: 14/04/2015

End Date: 30/06/2015

Minimum Sales: \$50.00

Minimum Lines: 1

Amount: 20 Is Discount

Loyalty Only

Allow with Discount Allow with Specials

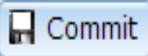
Allow with Bulk Discount

As Rebate Voucher As Voucher

Days to Expire: 30

Supplier: [5001] ACMEx Products

Committed

4. Press .

The promotion is sent to the Point of Sale.

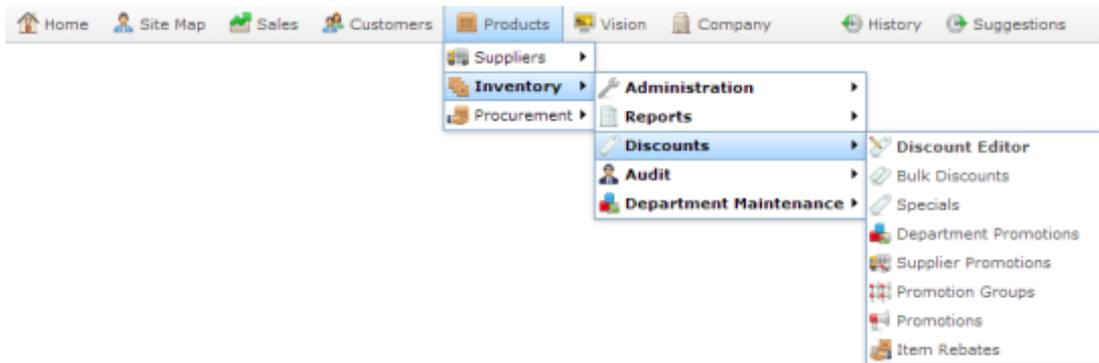
Group Promotion Maintenance screen

Use the Group Promotion Maintenance screen to create and edit group promotions.

Opening the Group Promotion Maintenance screen

To open the Group Promotion Maintenance screen:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comr
Create New Prom		Chads												
Impul-Run Out	267	Chads	16-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site: Chadstone

Expiry After: 15/04/2015

Add to Favourites

3. Press the promotion you want to open.

The Promotion Maintenance screen is displayed.

Promotion Maintenance

Promotion Number: [267] Impulse Run Out

Location: Chadstone

Details Groups

Description: Impulse Run Out

POS Description: Impulse Run Out

Start Date: 16/04/2015

End Date: 2/05/2015

Minimum Transaction Amount: 10

Maximum Transaction Amount: 1000

Promotion Amount: 50 Is Discount

Free Item Loyalty Only

Allow with Discount Fixed Amount

Allow with Bulk Discount Allow with Specials

Deduct Promotional items from Total

As Voucher

Days to Expire: 30

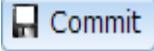
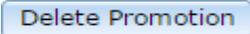
Committed Enabled

Commit Delete Promotion

Group Promotion Maintenance screen key fields and buttons

Field	Description
Promotion Number	<p>Unique number identifying the promotion.</p> <p>Select another promotion from the drop-down list, or New Promotion to create a new promotion.</p>
Location	The site the promotion is enabled for.
Description	A description of the promotion to identify it in the Portal.
POS Description	The description that is displayed on the Point of Sale and receipts.
Start Date	The date the promotion starts.
End Date	<p>The last day of the promotion.</p> <div style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 5px; margin-top: 10px;"> <p>Note: Promotions cannot be set to start or end at specific hours of the day.</p> </div>
Minimum Sales / Minimum Transaction Amount	<p>The minimum total purchases in a transaction required to trigger the promotion.</p> <p>For example, if you want the promotion to only apply when a customer purchases \$10 or more of eligible items, type 10.</p>
Maximum Transaction Amount	<p>The maximum purchase amount allowed under the promotion.</p> <p>For example, if you want the promotion to only be applicable to purchases until \$500, type 500.</p>

Field	Description
Amount / Promotion Amount	<p>The amount the promotion deducts from the transaction total.</p> <p>Note: This can be a flat amount deduction, such as \$10, or a percentage of the total transaction, such as 10%. Use the Is Discount field to control how the Portal treats this amount.</p>
Is Discount	<p>Select to make the Amount field a discount percentage from the transaction total.</p> <p>For example, if the Amount is 20 and Is Discount is not selected, the promotion takes \$20 off the transaction total. If Is Discount is selected, the promotion takes 20% off the transaction total.</p>
Loyalty Only	<p>Select to restrict this promotion to loyalty members only. The promotion is then only available to customers who have scanned their loyalty card in the transaction.</p>
Free Item	<p>Select to enable a single free item from the non-trigger promotional group.</p>
Fixed Amount	<p>Select if the Promotion Amount should be applied only once, no matter how many non-trigger group items are purchased. For example, a flat \$5 off the transaction.</p> <p>Clear if the amount should be applied for each non-trigger group item. For example, a \$5 discount off each item.</p>
Allow with Discount	<p>Select to permit discounts to be combined with this promotion.</p> <p>If not selected, items involved with this promotion can not have discounts applied to them at the Point of Sale.</p>
Allow with Specials	<p>Select to permit price specials with this promotion.</p> <p>If not selected, items that currently have price specials are not applicable to this promotion.</p>

Field	Description
Allow with Bulk Discount	<p>Select to permit bulk discounts to be combined with this promotion.</p> <p>If not selected, bulk discount prices do not apply if this promotion is triggered.</p>
Deduct Promotional Items from Total	<p>Select to deduct the price of the items in the non-trigger group from the transaction total. This effectively makes the items free, up to the Maximum Transaction Amount.</p>
As Voucher	<p>Select to create a normal voucher of the promotion amount for each transaction, rather than deducting the promotion from the total.</p>
Days to Expire	<p>Type the number of days before the created voucher expires.</p>
Committed	<p>If selected, this promotion has been saved.</p>
	<p>Press to save any changes to the promotion.</p>
	<p>Press to delete the promotion.</p>

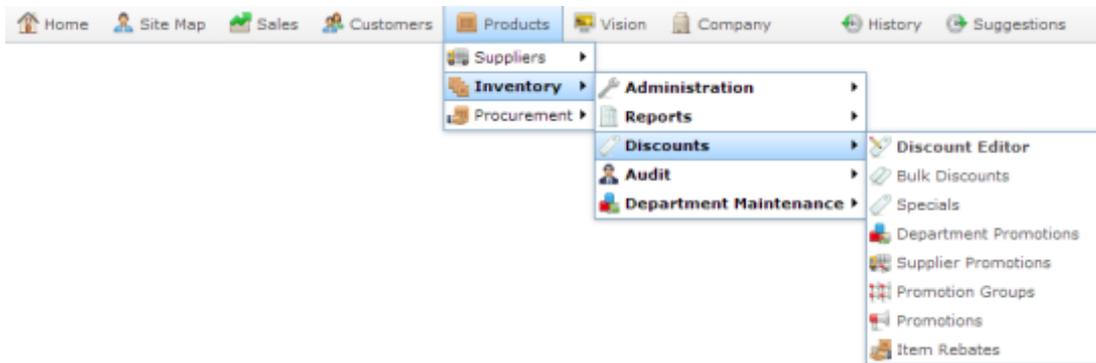
Group Promotions report

Use the Group Promotions report to view and create Group promotions.

Opening the Group Promotions report

To open the Group Promotions report:

1. Press  **Products** from the main menu bar.
2. Press **Inventory > Discounts > Promotions**.



The Promotions report is displayed.

Promotions Report

Descr #	Prom #	Site	Start Date	End Date	Group	Enabl	Loyalt Only	With Speci	With Disco	With Bulk Disco	Free Item	Value	Minim Amou	Comr
Create New Prom		Chads												
Impul-Run Out	267	Chads	15-Apr-2015	02-May-2015	2	✓						50.00	\$10.00	✓

Site
Chadstone

Expiry After
15/04/2015

Add to Favourites

Group Promotions report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Expiry After	Select to filter the report to promotions that expire after this date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Description	Description of the promotion.
Promotion #	Unique code identifying the promotion.
Site	Site the promotion applies to.
Start Date	Date the promotion begins.
End Date	Date the promotion ends.
Groups	The number of promotion groups included in this promotion.
Enabled	If selected, this promotion is enabled and available for use within the portal.

Note: This does not imply the promotion is currently running. Check the start and end dates to determine if the promotion is currently running.

Field	Description
Loyalty Only	If selected, this promotion is only available to loyalty members.
With Specials	If selected, this promotion is applicable with item price specials.
With Discount	If selected, further discounts can be applied to a transaction on top of this promotion.
With Bulk Discount	If selected, bulk discount prices are applicable with this promotion.
Free Item	If selected, this promotion supplies a free item from the non-trigger group.
Value	Transaction deduction applied by the promotion, including the provision of free items.
Minimum Amount	Minimum purchase amount of items in the trigger group required to trigger the promotion.

Field	Description
Committed	<p>If selected, the promotion has been sent to the Point of Sale system and is now available at sites between the specified start and end dates.</p> <p>Promotions that have not been committed are not available on Point of Sale systems, even you are between the specified start and end dates.</p>

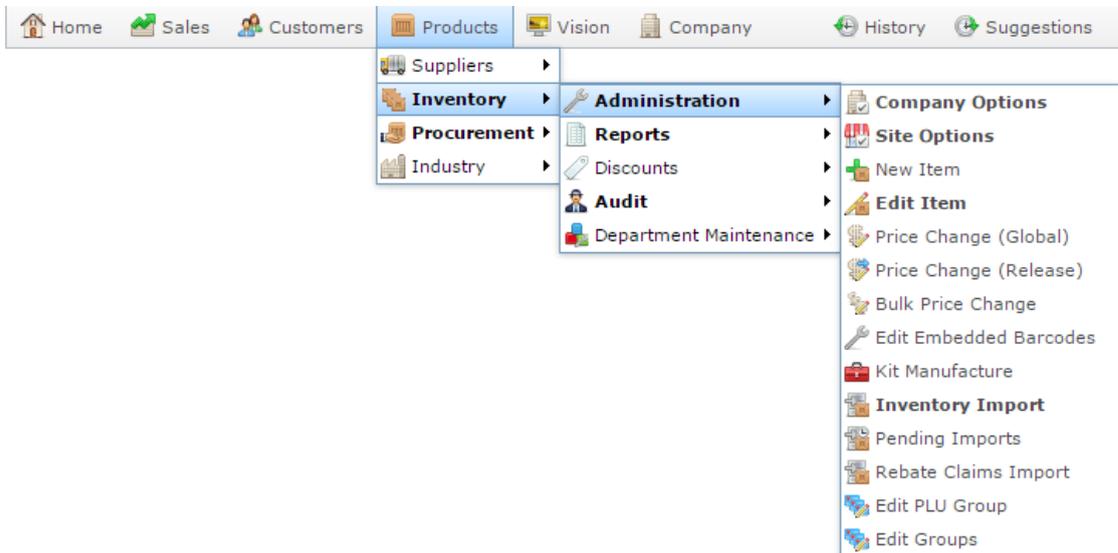
Inventory Management - Promotions tab

Use the Promotions tab of the Inventory Management screen to manage item promotions.

Opening the Promotions tab

To open the Promotions tab:

1. Press  **Products** in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Promotions tab.

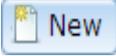
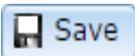
The Promotions tab of the Inventory Management screen is displayed.

Inventory Management - Promotions tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. <i>See Inventory Management - Point of Sale tab.</i>
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. <i>See Copying an item to another site.</i>

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
 Find	Switch the Inventory Maintenance screen to another item. See <i>Finding an item with a search field</i> on page 12.
 New	Create a new item. See <i>Creating a new item</i> .
 Save	Save changes to the item.

Promotions tab key fields and buttons

Field	Description
Group	The group number of the promotion group.
Promotion Group	The promotion group that the promotion belongs to for the listed promotion.
Active	Whether the promotion is currently operating.
Promotion	The name of the promotion.

Field	Description
Enabled	Indicates whether the promotion can operate. Note: A promotion only operates if it is enabled, even if you are within the start and end date.
Start Date	The date the promotion is scheduled to start.
End Date	The date the promotion is scheduled to end.

Managing discounts

You can use the Portal to create set discounts that operators can apply to transactions or transaction-lines via the Point of Sale. Discounts can:

- Set an item's price to its supplier-cost plus a flat amount.
- Reduce an item's unit price by a flat amount.
- Reduce an item's unit price by a percentage of the original price.
- Override an item's price to a fixed amount.
- Override the total of a transaction-line to a fixed amount.
- Prompt an operator to type a discount.

A discount can be applied to any item provided the item's configuration permits discounts. If you want to create a price reduction that only affects a specific set of items, use a promotion. See *Managing promotions* on page 127.

Note: Some items in the inventory may be configured to not allow discounting, or to have a maximum discount that can be applied. If an item has a discount maximum and the operator applies a discount larger than this maximum, the Point of Sale automatically recalculates the discount applied to the item as the maximum allowed amount. If the item is configured not to allow discounts, no discount is applied for that item. Any discounts applied to other items are not affected by this recalculation. See *Inventory Management - Point of Sale tab*.

Also see *Discount Maintenance screen* on page 292.

What you can do:

1. *Creating cost-plus discounts* on page 261.
2. *Creating flat amount per unit discounts* on page 252.
3. *Creating open discounts* on page 246.
4. *Creating override line-total discounts* on page 255.
5. *Creating override unit discounts* on page 258.
6. *Creating percentage discounts* on page 249.
7. *Excluding sites from discounts* on page 286.
8. *Creating discounts that exclude tax* on page 264.
9. *Creating discounts that exclude specials, promotions or bulk discounts* on page 268.
10. *Creating a discount only for loyalty members* on page 272.
11. *Creating a discount for senior citizens* on page 276.
12. *Creating a surcharge that can be applied manually* on page 280.

13. *Editing discounts* on page 284.
14. *Disabling discounts* on page 288.
15. *Deleting discounts* on page 290.

Also see:

- *Managing bulk discounts* on page 297.

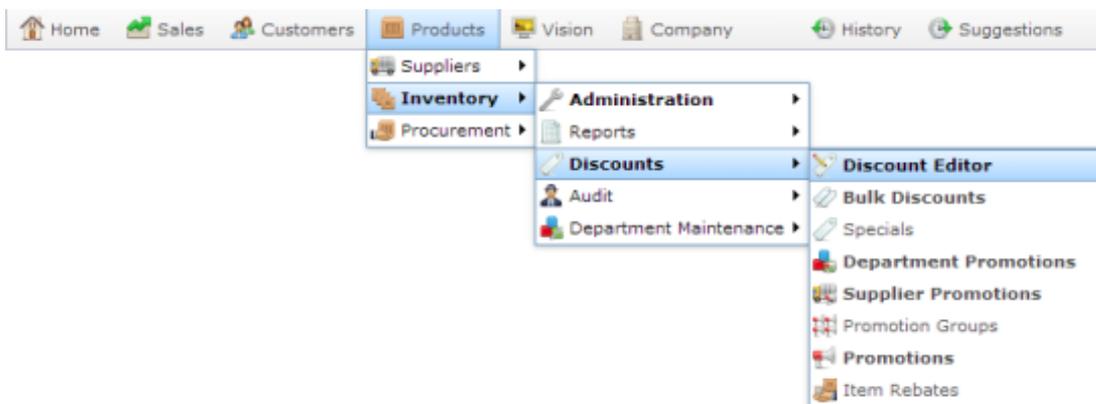
Creating open discounts

Open discounts reduce the transaction total by an amount determined by the operator at the Point of Sale each time the discount is used. You can use this discount type to round down a transaction to a whole-dollar amount. When this discount is selected at the Point of Sale, the operator is prompted to type in the discount amount. That amount reduces the transaction total.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create an open discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



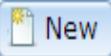
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press  New.

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

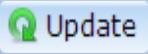
Note: This description appears on the Point of Sale.

6. Select **Open** in the **Type** field.
7. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
8. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

9. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
10. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

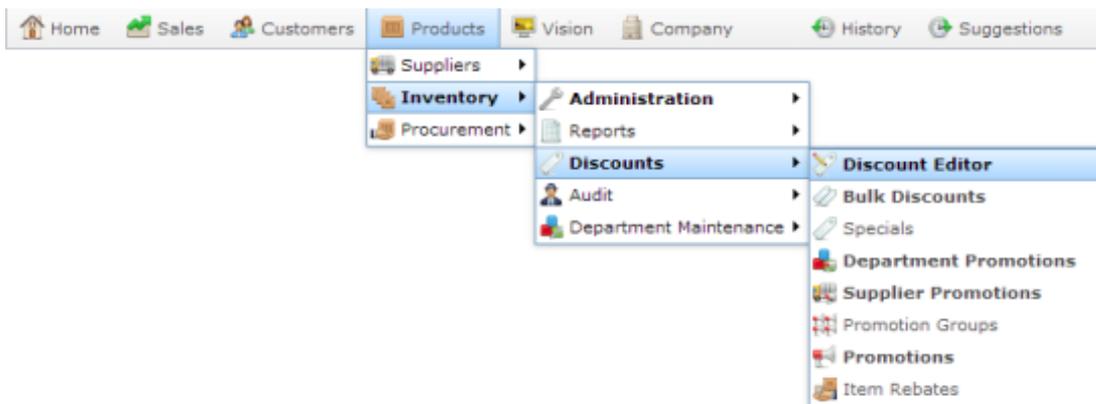
Creating percentage discounts

A percentage discount deducts an amount from the unit price of an item in relation to the item's original unit price. For example, a percentage discount may reduce all item unit prices by half. A \$10 item would be reduced by \$5, while a \$6 item would be reduced by \$3.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a percentage discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Managing discounts

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press  New.

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

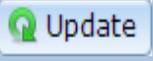
Note: This description appears on the Point of Sale.

6. Type the amount you want to deduct from each unit price in the **%/\$** field.
For example, if you want to create a discount that takes 10% off the unit price, type 10.
7. Select **Percentage** in the **Type** field.
8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

Creating flat amount per unit discounts

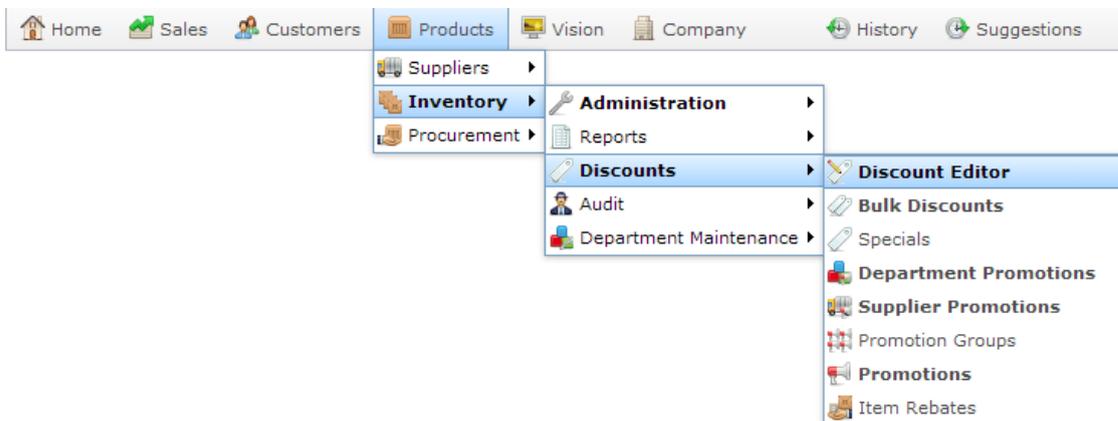
A fixed amount per unit transaction deducts a fixed amount from the item's original price. For example, deducting \$1 from an item.

Note: This discount reduced the price by deducting a flat amount. If you want to create a discount that overrides the price, see *Creating override unit discounts* on page 258.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a fixed amount per unit discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



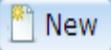
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

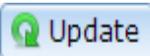
6. Type the discounted price per unit in the **%/\$** field.

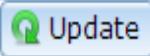
Note: This price applies to all items, regardless of their original price. Items' individual discount maximums still apply.

7. Select **Amount Per Unit** in the **Type** field.
8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

Creating override line-total discounts

An override line-total discount overrides the total cost of the transaction line containing the items. For example, if a transaction line contains 3 units of an item at \$6 per unit, and an override discount of \$15 is applied, the transaction line total becomes \$15. If another item unit is added, the transaction line total is still \$15.

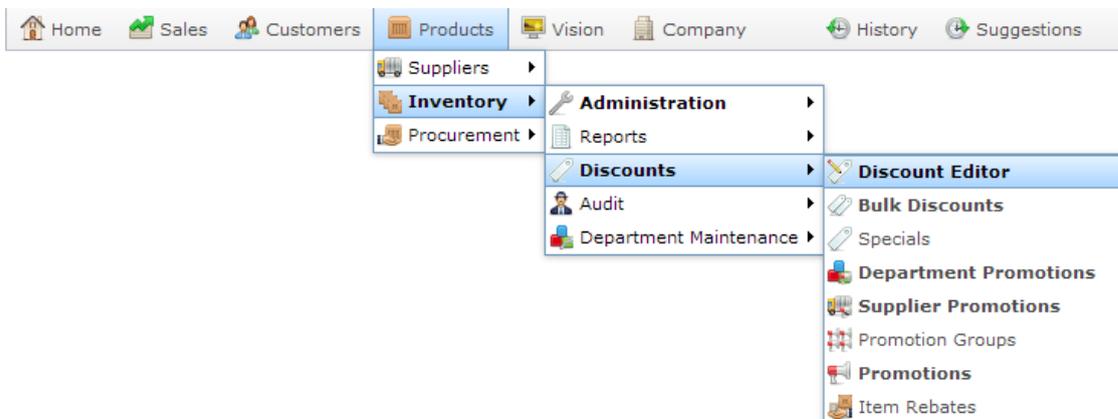
Note: This sets the total cost of the transaction line to the flat amount, no matter how many units of the item have been purchased, unless the per-item price would be reduced further than the item's discount maximum. If you want to override item prices per unit, see *Creating override unit discounts* on page 258.

If the override total is more than the cost of the items, the price is not overridden. For example, if the transaction line contains 3 units of an item at \$2 per unit (giving a line-total of \$6), a line-total discount of \$15 does not increase the price to \$15.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a line cap discount:

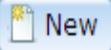
1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Managing discounts

Discount Maintenance														
Discount List														
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance														
Discount List														
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

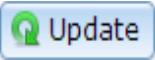
Note: This description appears on the Point of Sale.

6. Type the overridden price the transaction line total should be.
7. Select **Override Total** in the **Type** field.
8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.

11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

Creating override unit discounts

An override unit discount overrides the price of an item to the set price of the discount. This is similar to a manual price override on the Point of Sale, except it must obey any discount maximums set on the item.

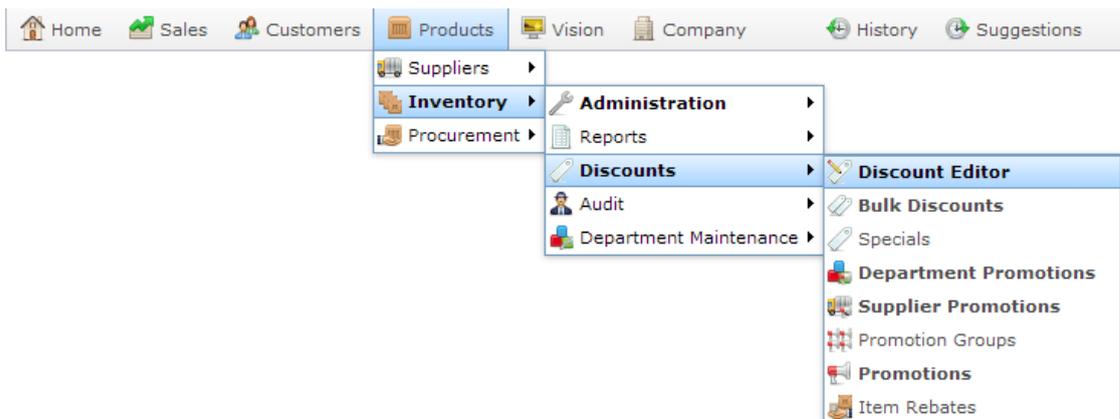
Note: This is different to reducing an item's price by a set amount. An override unit discount of \$3 overrides the price of the item to \$3. A flat amount per unit discount of \$3 reduces the price of an item by \$3. See *Creating flat amount per unit discounts* on page 252.

If the override is more than the cost of the items, the price is not overridden. For example, if the item costs \$2, an override unit discount does not increase the price to \$3.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a line cap discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



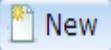
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

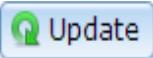
Note: This description appears on the Point of Sale.

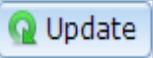
6. Type the overridden price the transaction line total should be.
7. Select **Fixed Amount** in the **Type** field.
8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.

11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

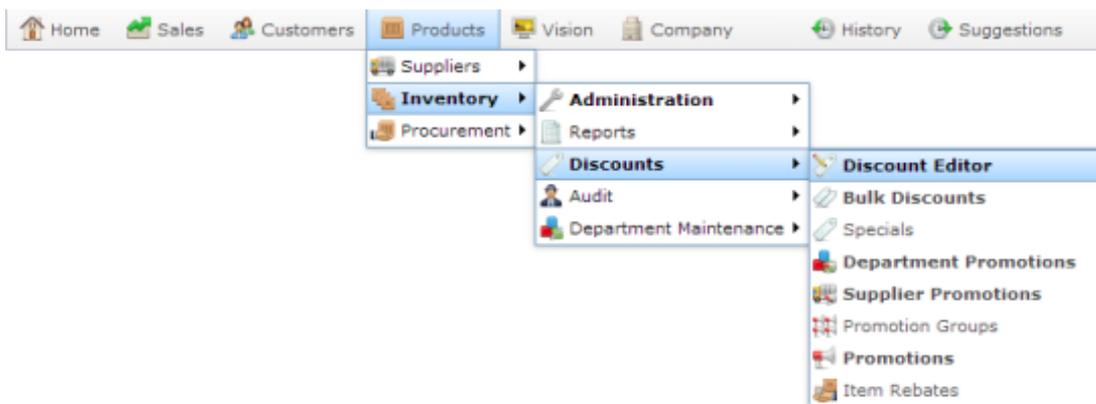
Creating cost-plus discounts

A cost-plus discount sets the unit price of an item to the item's cost plus a specified amount. For example, if a supplier charges \$4 per unit for an item that you usually sell for \$10, a cost-plus discount of \$2 would set that item's price to \$6.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a cost-plus discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Managing discounts

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press  New.

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeDi
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

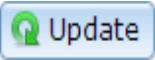
Note: This description appears on the Point of Sale.

6. Type the amount to add to the item's cost price in the **%/ \$** field.
7. Select **Cost Plus** in the **Type** field.
8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.

11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

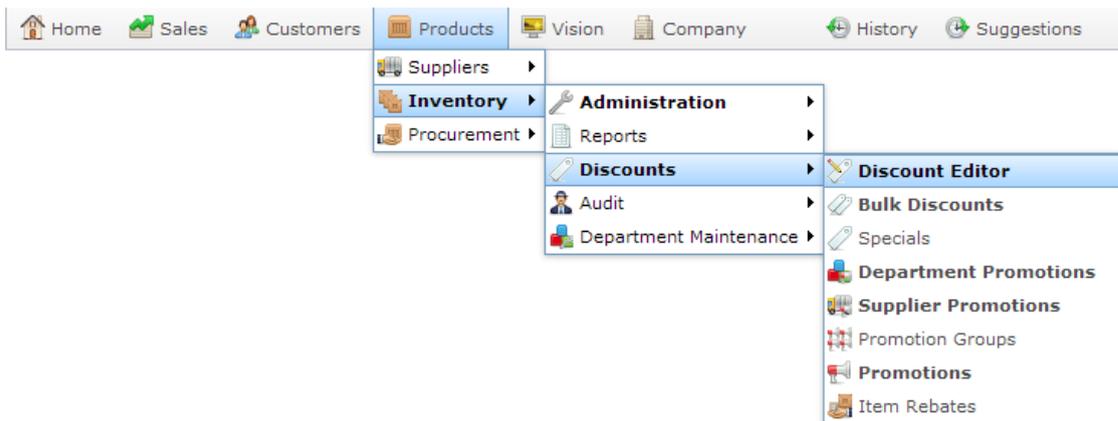
Creating discounts that exclude tax

You can control whether a discount is calculated including the item's tax or not. For example, some senior citizen discounts exclude the item's tax when calculating.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a discount that excludes tax.

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

6. Select the type and amount of the discount in the **Type** and **%/ \$** field
See *Discount Maintenance* screen on page 292.
7. Select **Yes** in the **GST Free** field.

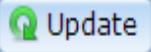
Discount Maintenance															
Discount List															
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD	
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20	
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20	
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20	
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
8	Surcharg -10		Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20	

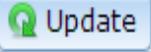
Commit New Update Delete

8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

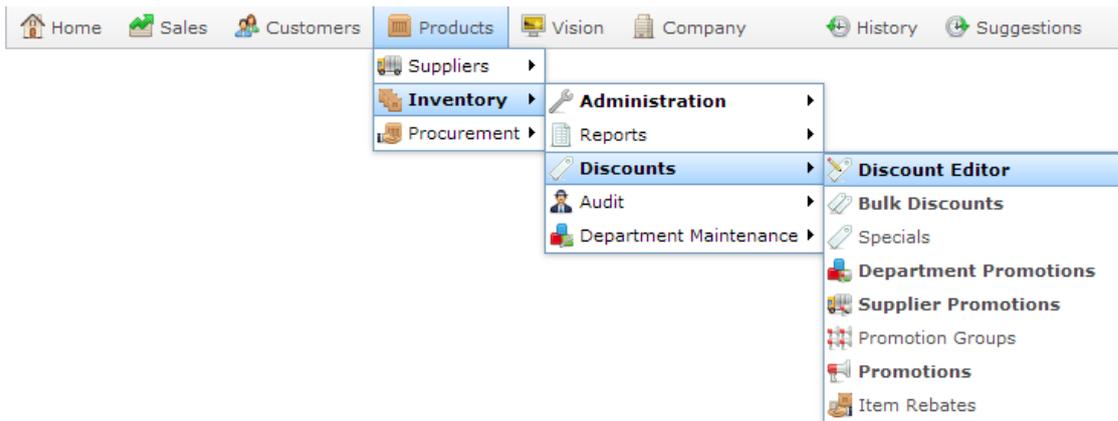
Creating discounts that exclude specials, promotions or bulk discounts

You can control whether discounts apply to items that currently have price specials, items using bulk discount pricing, or items that are being used in a promotion.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a discount that excludes specials, bulk discounts or promotions:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



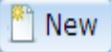
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

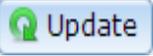
6. Select the type and amount of the discount in the **Type** and **%/ \$** field
See *Discount Maintenance screen* on page 292.
7. To make this discount ineligible with:
 - Specials, select **No** in the **Discount Specials** field.
 - Bulk Discount Pricing, select **No** in the **Discount Bulk Discount** field.
 - Promotions, select **No** in the **Discount Promo** field.

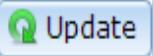
Discount Maintenance															
Discount List															
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changed:	
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20	
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20	
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20	
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20	

8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

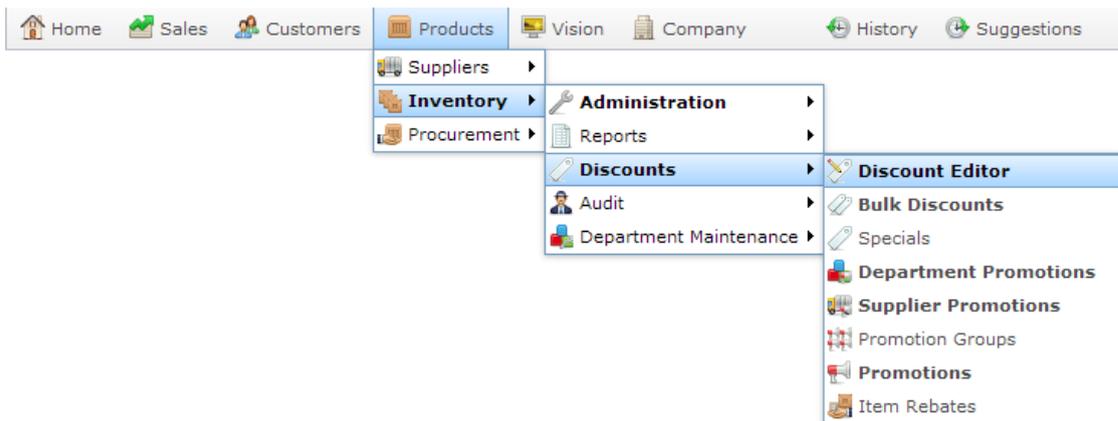
Creating a discount only for loyalty members

You can control whether discounts are available to all of your customers, or only loyalty customers.

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a loyalty discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



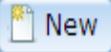
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

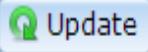
6. Select the type and amount of the discount in the **Type** and **%/ \$** field
See *Discount Maintenance screen* on page 292.
7. Select **Yes** in the **Loyalty Only** field.

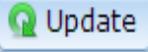
Discount Maintenance															
Discount List															
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD	
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	No	Normal	Bob	27/06/20	
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	No	Normal	Bob	27/06/20	
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	No	Normal	Bob	27/06/20	
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci	Bob	27/06/20		
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W	Bob	27/06/20		
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal	Bob	27/06/20		
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal	Bob	27/06/20		
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal	Bob	27/06/20		
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci	Bob	27/06/20		

8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

Creating a discount for senior citizens

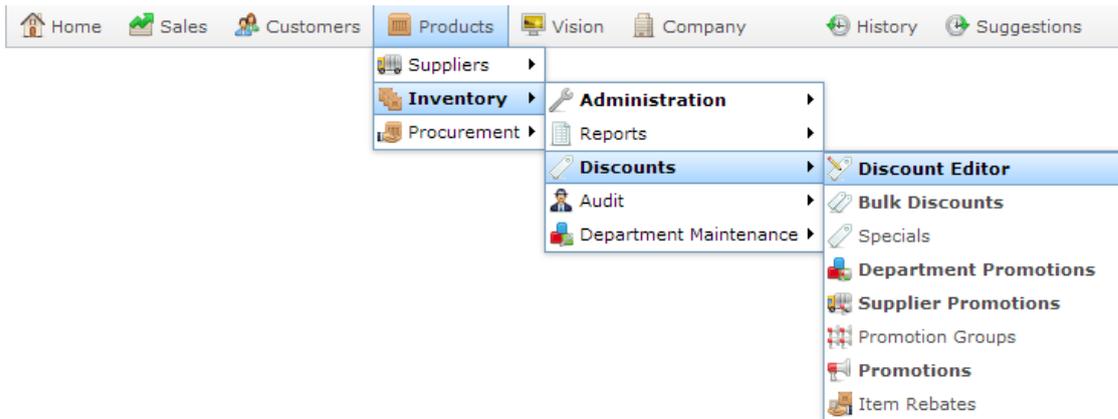
You can create a discount that records the identification from a senior citizens card.

Tip: If you don't need to capture this information, we recommend creating a normal discount for senior citizens and labelling it "Seniors Discount".

Note: Items cannot be discounted past their discount maximums. See *Inventory Management - Point of Sale tab*.

To create a seniors discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



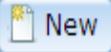
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

6. Select the type and amount of the discount in the **Type** and **%/ \$** field
See *Discount Maintenance screen* on page 292.
7. Select **Senior Citizen** in the **Discount Type** field.

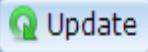
Discount Maintenance															
Discount List															
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD	
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20	
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20	
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20	
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
8	Surcharg -10		Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20	
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20	

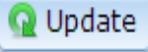
Commit New Update Delete

8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

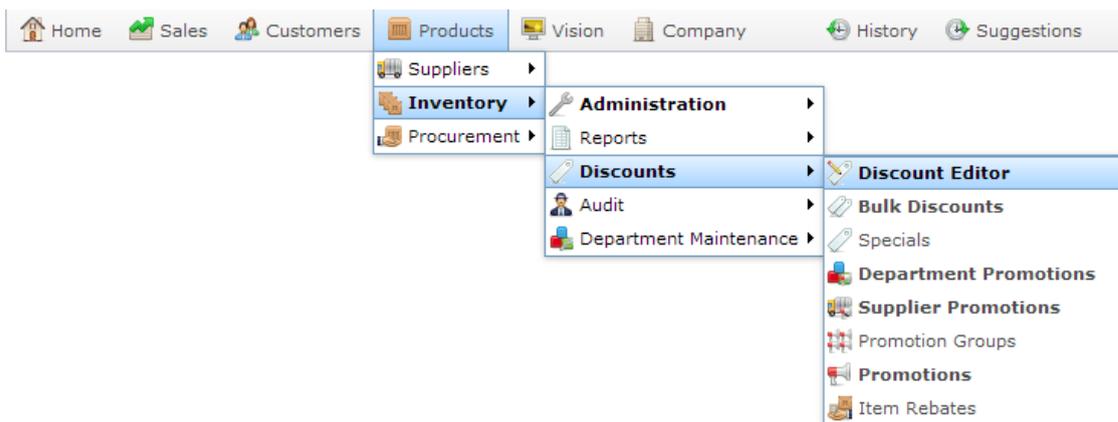
Creating a surcharge that can be applied manually

You can use the discounts system to create a surcharge that you can apply to an individual item or entire transaction. For example, if a customer requests additional service.

Note: All other normal discount rules apply with the surcharge: you can restrict it to loyalty members, exclude promotion, special or bulk discount items, and calculate the surcharge without including the tax on the item.

To create a surcharge:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



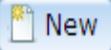
The Discount Maintenance screen is displayed.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press .

A new entry line is added to Discount Maintenance.

Discount Maintenance

Discount List

Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20
0		0	Percenta	Yes	No	Yes	No	No	No	No	Normal			13/07/20

Commit New Update Delete

Managing discounts

4. Type the order the discount should be displayed on the Point of Sale in the **Map ID** field.
5. Type a description in the **Description** field to identify the discount option in the Point of Sale.

Note: This description appears on the Point of Sale.

6. Select the type in the **Type** and field
See *Discount Maintenance screen* on page 292.
7. Type a negative amount to apply in the **%/\$** field.

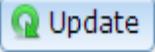
For example, to create a surcharge of 10%, type **-10** in the **%/\$** field and select **Percentage** in the **Type** field.

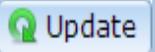
Discount Maintenance														
Discount List														
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharge	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

8. If you don't want this discount to be available on the Point of Sale, select **No** in the **Enabled** field.
9. If you don't want this discount to be applicable to entire transactions, select **No** in the **Sales Discount** field.

Note: If **Sales Discount** is enabled, this discount can be applied to both individual items and to an entire transaction. For example, a 20% discount off all items on the transaction. Normal discount maximums apply for each item.

Note: If **Sales Discount** is disabled for transaction-level discounts such as open discounts, the discount cannot be used.

10. If there are some sites where you don't want this discount to be available, type the names of those sites in the **Site Exceptions** field.
11. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

Editing discounts

Edit a discount when you want to change the discount's:

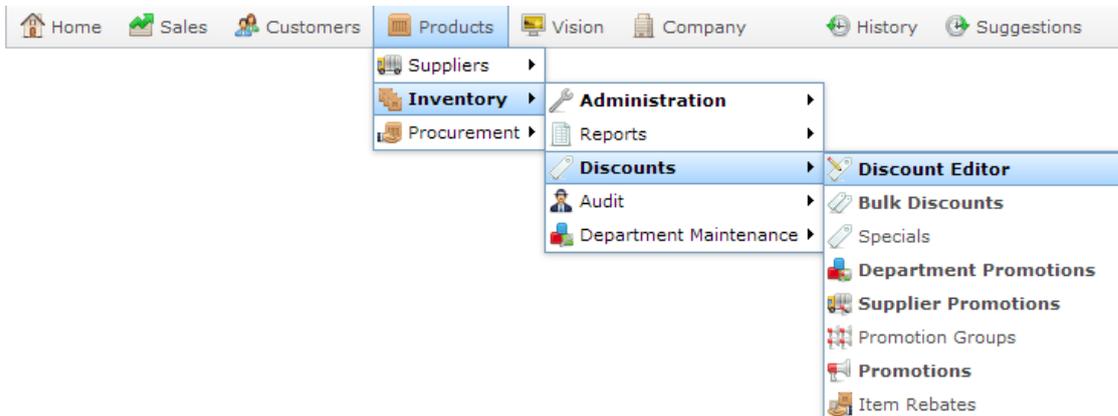
- type
- amount
- Point of Sale description
- applicability for whole transactions
- site exceptions.

If you want to disable this discount so it is no longer available on the Point of Sale, see *Disabling discounts* on page 288.

If you want to delete the discount so it is removed from Discount Maintenance, see *Deleting discounts* on page 290.

To edit a discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Discount Maintenance

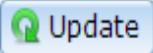
Discount List

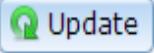
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg -10	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press the fields in the discount you want to edit.
4. Make the changes you want in the desired fields.

See *Discount Maintenance screen* on page 292.

5. Press .

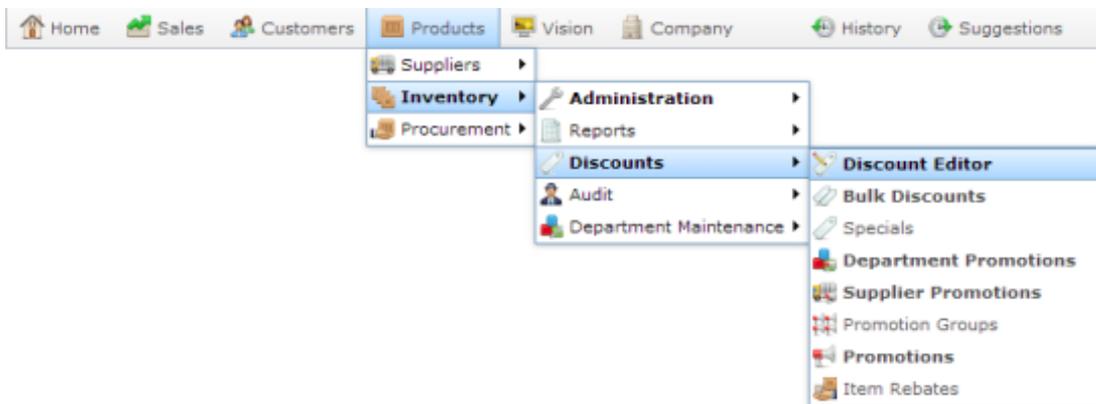
Note: You should only edit one discount at a time. Press  after editing each discount to ensure the Portal stores your changes correctly.

Excluding sites from discounts

You can exclude a site from a discount if you want to allow some discounts to only be available at certain sites. For example, a factory outlet branch may have larger discounts available than normal sites.

To exclude a site from a discount:

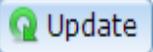
1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.

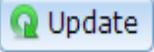


The Discount Maintenance screen is displayed.

Discount Maintenance														
Discount List														
Map ID	Descripti	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior CI		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg -10		Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior CI		Bob	27/06/20

3. Press the **Site Exceptions** field in the discount you want to exclude.

4. Type the name of the site or sites who should not be able to use this discount.
5. Press .

Note: You should only edit one discount at a time. Press  after editing each discount to ensure the Portal stores your changes correctly.

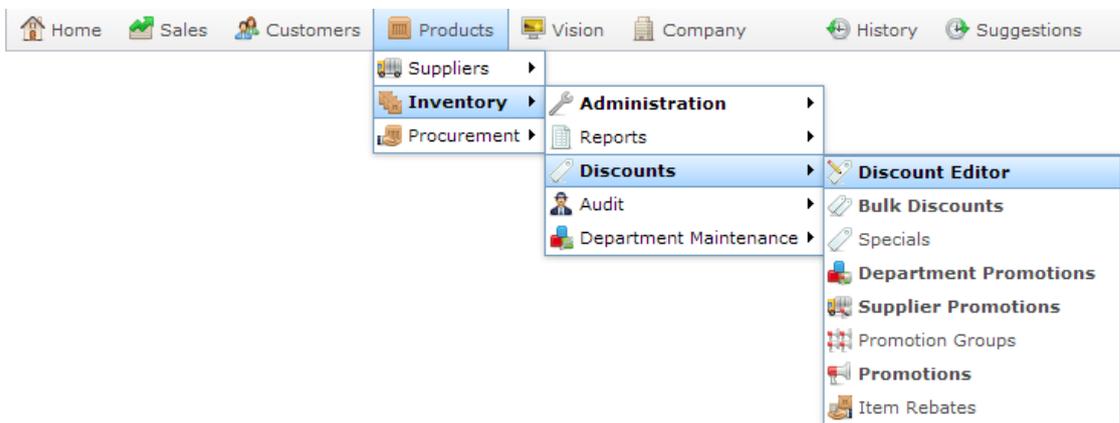
Disabling discounts

Disable a discount when you want to remove it from the Point of Sale without deleting it from Discount Maintenance.

If you want to delete a discount from Discount Maintenance, see *Deleting discounts* on page 290.

To disable a discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



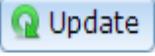
The Discount Maintenance screen is displayed.

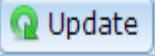
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Commit New Update Delete

3. Press the **Enabled** field of the discount you want to disable.
4. Select **No**.

See *Discount Maintenance screen* on page 292.

5. Press .

Note: You should only edit one discount at a time. Press  after editing each discount to ensure the Portal stores your changes correctly.

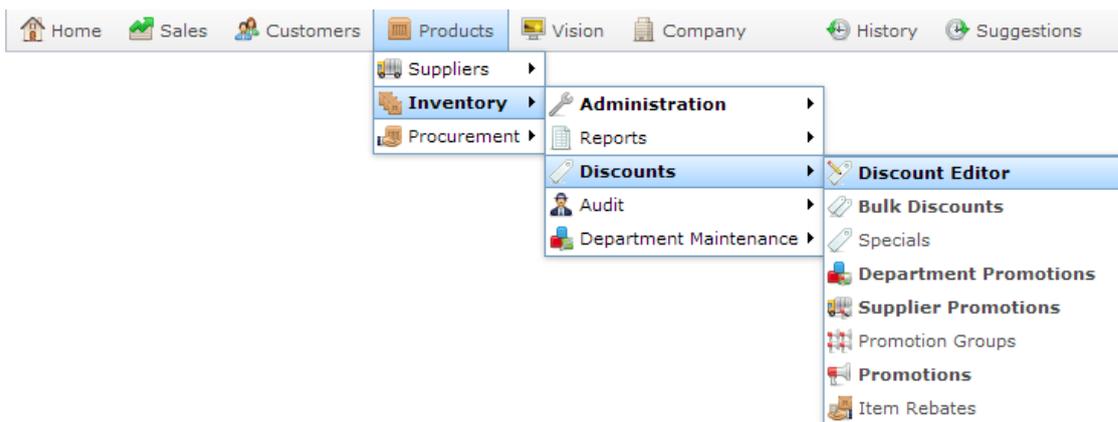
Deleting discounts

Delete a discount when you want to remove it entirely from Discount Maintenance. Past transactions and reports that used this discount are not affected.

Note: Deleted discounts cannot be recovered. If you want to remove a discount from the Point of Sale without removing it from Discount Maintenance, see *Disabling discounts* on page 288.

To delete a discount:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Discount Maintenance														
Discount List														
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg -10		Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

3. Press .

A confirmation screen is displayed.

4. Press .

The discount is removed from Discount Maintenance.

Discount Maintenance screen

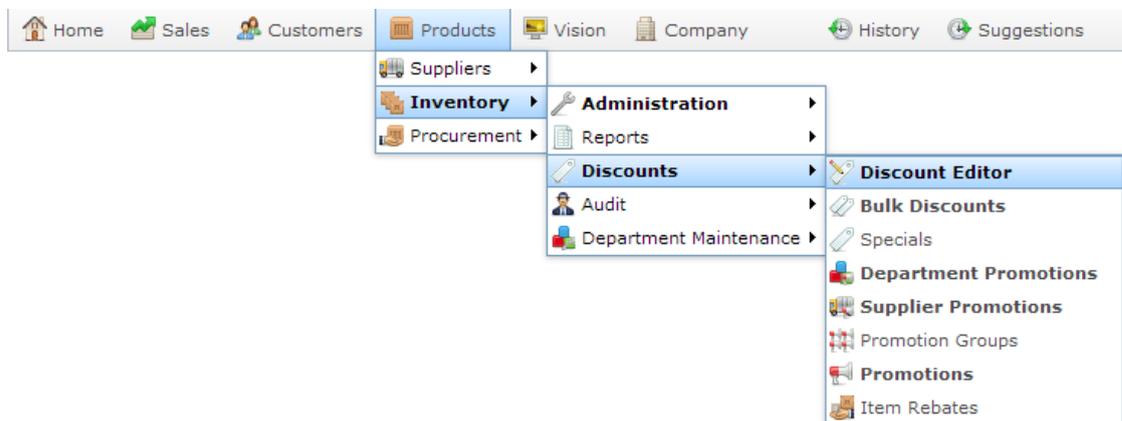
Use the Discount Maintenance screen to view, edit, delete and create discounts for your Point of Sale. Discounts are applied by the operator at the Point of Sale to reduce the price by:

- subtracting a fraction of the item's price
- setting the item price to a fixed price
- setting the transaction line total to a fixed price
- adding a fixed price to the cost of the item
- prompting the operator to type in a discount.

Opening the Discount Maintenance screen

To open the Discount Maintenance screen

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Discounts > Discount Editor**.



The Discount Maintenance screen is displayed.

Discount Maintenance														
Discount List														
Map ID	Description	%/\$	Type	Enabled	Discount	Sales Dis	Loyalty C	Discount	Discount	GST Free	Discount	siteExcep	User	changeD
1	10 Percent Discount (10%)	10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
2	15 Percent Discount (15%)	15	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
3	30 Percent Discount (30%)	30	Percenta	Yes	No	No	No	No	No	No	Normal		Bob	27/06/20
4	SENIOR CITIZEN Discount (20%)	20	Percenta	Yes	No	Yes	No	No	No	Yes	Senior Ci		Bob	27/06/20
5	Person With Disability (20%)	20	Percenta	Yes	No	Yes	No	No	No	No	Person W		Bob	27/06/20
6	Open	0	Open Dis	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
7	Bob	5	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
8	Surcharg	-10	Percenta	Yes	No	Yes	No	No	No	No	Normal		Bob	27/06/20
9	SENIOR CITIZEN Discount (5%)	5	Percenta	Yes	No	Yes	No	No	No	No	Senior Ci		Bob	27/06/20

Discount Maintenance key fields and buttons

Field	Description
Map ID	The order the discount is displayed on the Point of Sale. Lower Map IDs are displayed first.
Description	Description of the discount that appears on the Point of Sale.
%/	<p>Either:</p> <ul style="list-style-type: none"> ▪ Percentage to subtract from the item's price, if Percentage type is selected. ▪ Amount to set the item price or line total to, if Fixed Amount, Override Total or Amount per Unit type is selected. ▪ Amount to add to the item's cost, if Cost Plus type is selected.
Type	<p>Select how the discount works.</p> <p>For more information on discount types, see <i>Managing discounts</i> on page 244.</p> <div style="border: 1px solid #0056b3; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p>Note: The type of discount selected affects how the %/ field behaves.</p> </div>
Enabled	Select Yes to make the discount available at the Point of Sale.
Discount Special	Select Yes to make this discount available to items that have specials.

Field	Description
Sales Discount	Select Yes if the discount can be applied to whole transactions.
Loyalty Only	Select Yes to restrict this discount to loyalty members only.
Discount Bulk Discount	Select Yes to make this discount available with bulk discount pricing.
Discount Promo	Select Yes to make this discount available with promotions.
GST Free	Select Yes to remove any tax from this item and then calculate any further discount using the tax-free price.
Discount Type	Select the discount eligibility: <ul style="list-style-type: none"> ▪ Normal discounts are eligible to all customers. ▪ Senior citizen discounts require a valid senior's card to be presented at the transaction, and prints a second copy of the receipt for the customer to sign for your records. ▪ Person with Disability discounts require a valid disability card to be presented at the transaction.
Site Exceptions	Type the name of any sites that should not have access to this discount.
User	Name of the Portal user who last changed the discount.

Field	Description
Change Date	Date the discount was last edited.

Note: This field is not editable.

Managing bulk discounts

Bulk discounts offer a lower per-unit price for a specific item when a customer purchases above certain quantity of that item. You can create as many bulk discounts as you need, and the Portal ensures the correct discount is applied at the Point of Sale.

Note: Bulk discounts only apply to quantities of an identical item. If you want to create a discount based on a customer purchasing a quantity of mixed items, see *Managing promotions* on page 127.

For example, if an item normally costs \$10 per unit, you can create bulk discounts at:

- 5 or more units, which discounts the price to \$9 per unit.
- 10 or more units, which discounts the price to \$8 per unit.

The highest applicable discount is automatically used, so if a customer purchases:

- 8 units, the 5-or-more discount is applied and they pay (8 x \$9) \$72.
- 12 units, the 10-or-more discount is applied, and they pay (12 x \$8) \$96.

Note: The discount structure is not tiered; the same discounted price is applied to all units purchased, not just the units purchased above the required quantity.

Also see *Inventory Management - Bulk Discount tab* on page 308.

What you can do:

1. *Creating a bulk discount for an item* on page 298.
2. *Editing a bulk discount for an item* on page 302.
3. *Deleting a bulk discount from an item* on page 306.

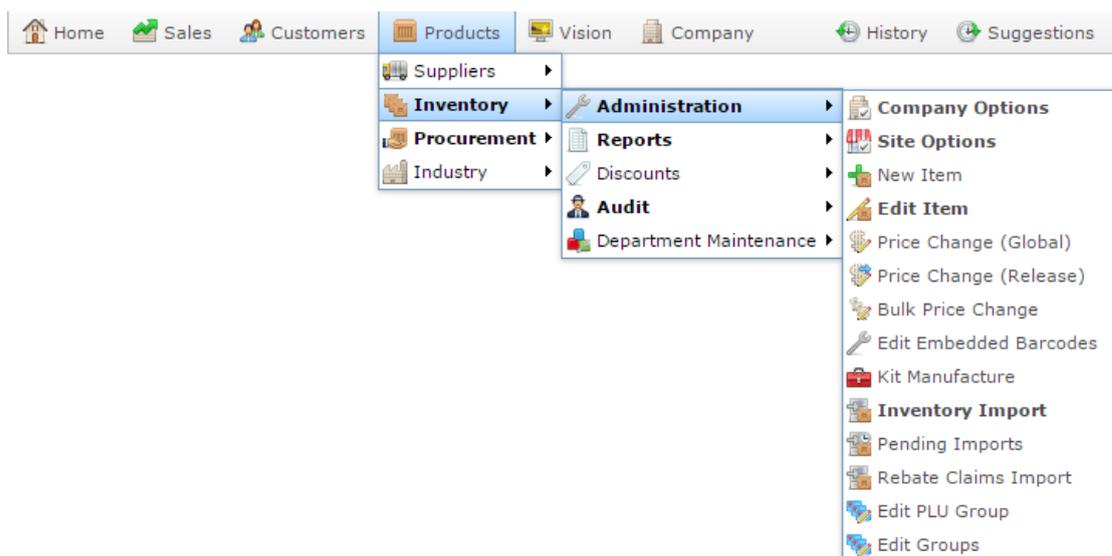
Creating a bulk discount for an item

Create a bulk discount for an item to offer a lower per-unit price when a customer purchases a certain quantity of an item.

Note: Bulk discounts only apply to quantities of an identical item. If you want to create a discount based on a customer purchasing a quantity of mixed items, see *Managing promotions* on page 127.

To create a bulk discount for an item:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

4. Press the Bulk Discount tab.

The Bulk Discount tab of the Inventory Management screen is displayed.

Inventory Management

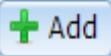
Item Code: 392 Site: Chadstone
 Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
 Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
No Bulk Discounts	0	0	\$6.99	\$6.99	30/12/1899

Update Add Delete

Find New Save

5. Press .

A new entry is added to the bulk discount grid.

6. Press the Quantity Break column of the new grid entry.

Inventory Management

Item Code: 392 Site: Chadstone
 Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
 Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	0	\$6.99	\$6.99	9/09/2014

Update Add Delete

Find New Save

7. Type the minimum number of units the customer must purchase for this bulk discount to apply.

For example, if a customer must purchase 5 or more units to qualify for the bulk discount, type **5**.

- Press the Discount Price column of the new grid entry.

The screenshot shows the 'Inventory Management' interface for item 'Chicken Bbq'. The 'Bulk Discount' tab is active, displaying a grid with the following data:

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

The 'Discount Price' cell containing '\$5.49' is highlighted with a yellow border. Below the grid are buttons for 'Update', 'Add', and 'Delete'. At the bottom right, there are 'Find', 'New', and 'Save' buttons.

- Type the discounted price per-unit the customer will pay if they purchase.
For example, if the customer can purchase 5 for \$10, type **2.00**.

Note: The Discount % column is automatically calculated. You cannot create a bulk discount using the Discount % column. Type the per-unit price in the Discount Price column

- Press the Expiry column of the new grid entry.

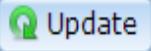
The screenshot shows the 'Inventory Management' interface for item 'Chicken Bbq'. The 'Bulk Discount' tab is active, displaying a grid with the following data:

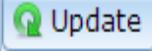
Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

The 'Expiry Date' cell containing '9/09/2014' is highlighted with a yellow border. Below the grid are buttons for 'Update', 'Add', and 'Delete'. At the bottom right, there are 'Find', 'New', and 'Save' buttons.

11. Type the date that this bulk discount option is available until.

For example, if you want the discount to run for 3 months, type in the date 3 months from the current date.

12. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

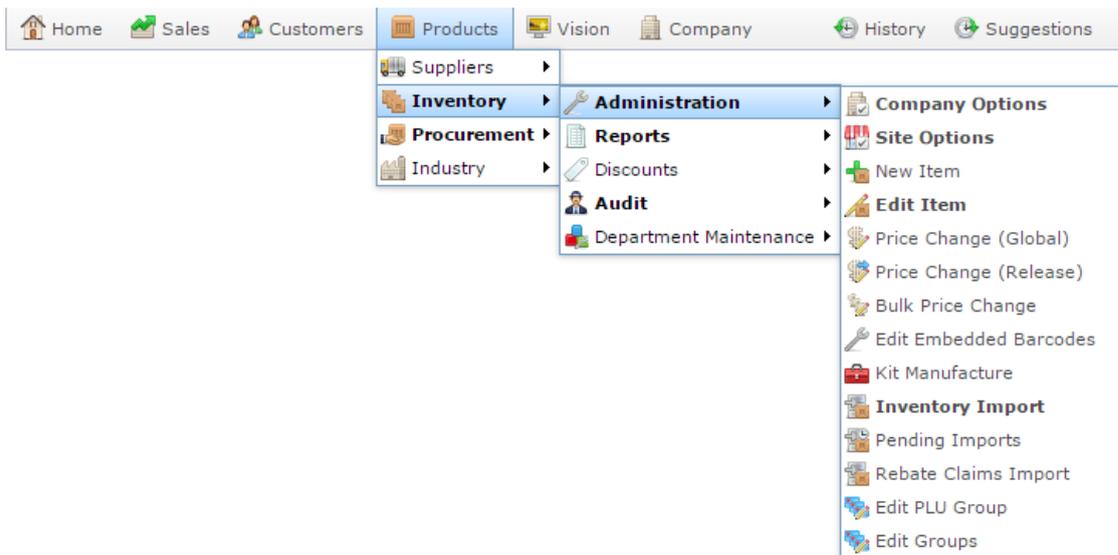
Editing a bulk discount for an item

Edit a bulk discount for an item when you want to change:

- the number of items that must be purchased to enable the discount
- the discount price applied
- the date the discount expires.

To edit a bulk discount item:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

4. Press the Bulk Discount tab.

The Bulk Discount tab of the Inventory Management screen is displayed.

Inventory Management

Item Code: 392 Site: Chadstone
 Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
 Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

Update Add Delete

Find New Save

5. Press the bulk discount entry that you want to edit.
6. If you want to change the number of units the customer must purchase, press the Quantity Break column of the grid entry.

Inventory Management

Item Code: 392 Site: Chadstone
 Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
 Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	0	\$6.99	\$6.99	9/09/2014

Update Add Delete

Find New Save

7. Type the minimum number of units the customer must purchase for this bulk discount to apply.
 For example, if a customer must purchase 5 or more units to qualify for the bulk discount, type 5.
8. If you want to change the bulk discount price that is applied, press the Discount Price column of the new grid entry.

Managing bulk discounts

Inventory Management

Item Code: 392 Site: Chadstone
Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

Update Add Delete

Find New Save

9. Type the discounted price per-unit the customer will pay if they purchase.

For example, if the customer can purchase 5 for \$10, type 2.00.

Note: The Discount % column is automatically calculated. You cannot create a bulk discount using the Discount % column. Type the per-unit price in the Discount Price column

10. If you want to change the date the bulk discount expires, press the Expiry column of the new grid entry.

Inventory Management

Item Code: 392 Site: Chadstone
Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob
Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

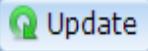
Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

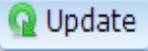
Update Add Delete

Find New Save

11. Type the date that this bulk discount option is available until.

For example, if you want the discount to run for 3 months, type in the date 3 months from the current date.

12. Press .

Note: You should press  after each change to make sure the Portal records your changes correctly, even if you want to make more changes.

The changes are saved to the Portal.

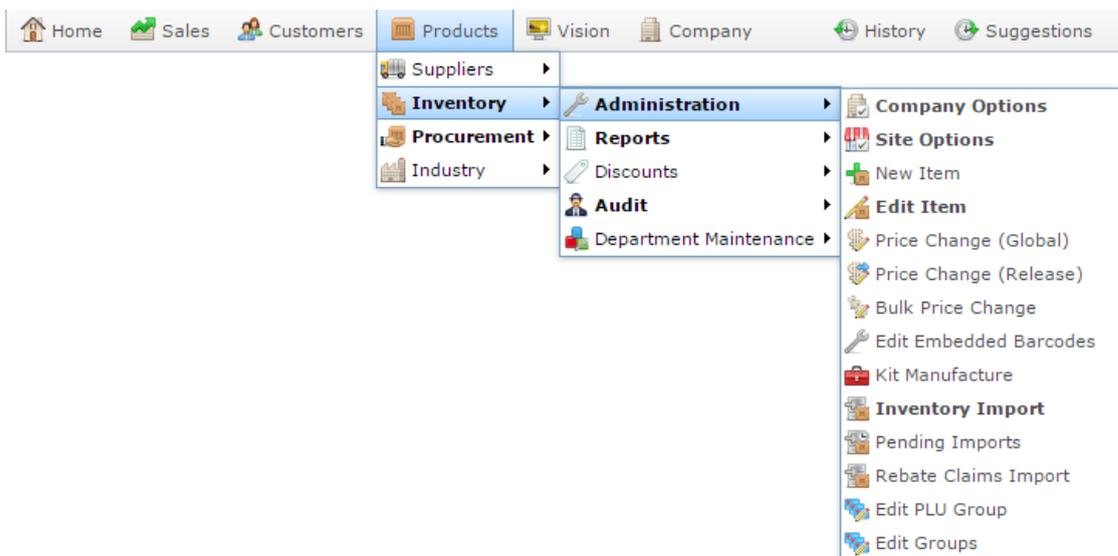
Deleting a bulk discount from an item

You can delete a bulk discount from an item.

Note: If you want to suspend a bulk discount without deleting it, you can edit the expiry date instead. See *Editing a bulk discount for an item* on page 302.

To delete a bulk discount from an item:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

4. Press the Bulk Discount tab.

The Bulk Discount tab of the Inventory Management screen is displayed.

Inventory Management

Item Code: Site:

Item Description: Last Change: 28/02/2010 By Bird, Bob
Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes **Bulk Discount** Specials Promotions Table / Home Information Ingredients Control

Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
-1	5	21.459	\$5.49	\$6.99	9/09/2014

5. Press the bulk discount entry that you want to delete.

Inventory Management - Bulk Discount tab

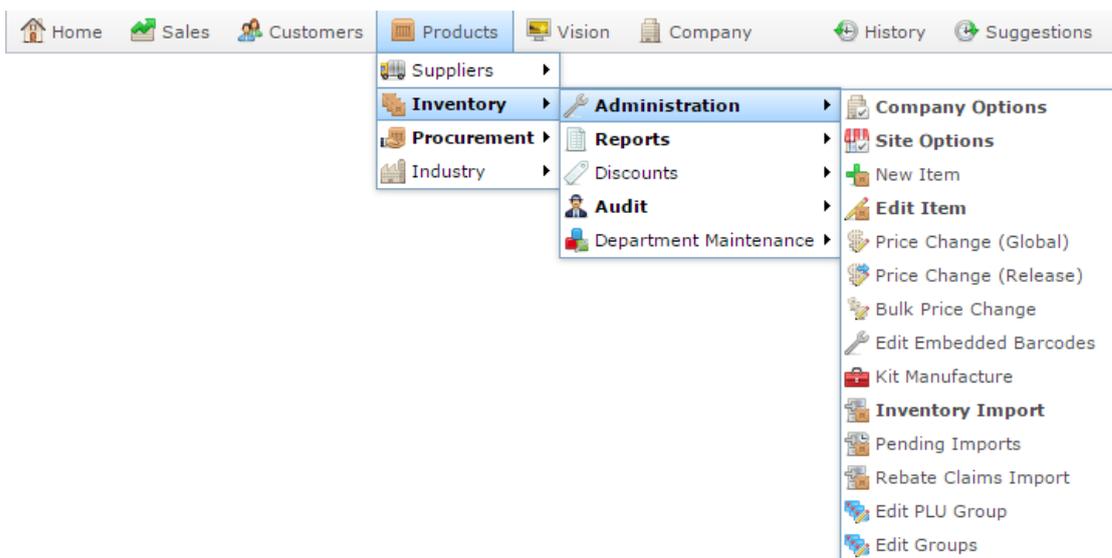
Use the Bulk Discount tab of the Inventory Management screen to manage discounts for bulk purchases of an item.

See *Managing bulk discounts* on page 297.

Opening the Bulk Discount tab

To open the Bulk Discount tab:

1. Press  **Products** in the main menu bar.
2. Press **Inventory** > **Administration** > **Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Bulk Discount tab.

The Bulk Discount tab of the Inventory Management screen is displayed.

Inventory Management

Item Code: Site:

Item Description: Last Change: 28/02/2010 By Bird, Bob
Created: 28/02/2010

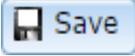
Ref #	Quantity Break	Discount %	Discount Price	Current Price	Expiry Date
No Bulk Discounts	0	0	\$6.99	\$6.99	30/12/1899

Inventory Management - Bulk Discount tab key fields and buttons

Common fields and buttons

Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. <i>See Inventory Management - Point of Sale tab.</i>
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. <i>See Copying an item to another site.</i>
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
	Switch the Inventory Maintenance screen to another item. <i>See Finding an item with a search field on page 12.</i>

Field	Description
 New	Create a new item. See <i>Creating a new item</i> .
 Save	Save changes to the item.

Bulk Discount tab key fields and buttons

Field	Description
Ref #	A reference for the discount used by the Portal.
Quantity Break	The purchase quantity at which this discount activates. <div data-bbox="628 1077 1394 1429" style="border: 1px solid #4F81BD; background-color: #D9E1F2; padding: 10px;"> <p>Note: Only the highest applicable quantity discount is applied per purchase. For example, if you have one discount with a quantity break of 10 and another discount with a quantity break of 25, then purchasing 12 units of the item activates the 10-item discount, but not the 25-item discount. Purchasing 30 units of the item activates the 25-item discount, but not the 10-item discount.</p> </div>
Discount %	The percentage that is discounted off the item unit price. For example, a 25% discount is 25 . This column is automatically calculated by the Portal and cannot be edited.
Discount Price	Type the discounted price of the item per unit at this quantity.
Current Price	The current retail-level price of the item.

Field	Description
Expiry Date	The date this bulk discount is active until.

Bulk discount report screen

Replace this text with a brief paragraph description of the main purpose of this window.

Opening (windowname)

To open (windowname):

1. The first step to opening the window name

The windowname is displayed

Image of window.

For a list of things you can do with this window, see

Windowname key fields and buttons

Name of area

Paragraph introducing area

Field	Description
Images of fields go here.	

Managing price specials

You can create temporary prices on individual items to promote them. Specials can be set to start and end at specific dates and times per site.

Also see *Inventory Management - Specials tab* on page 322.

What you can do:

- *Creating a price special* on page 315.
- *Editing a price special* on page 318.
- *Deleting a price special* on page 320.
- *Viewing price specials* on page 326.

Creating a price special

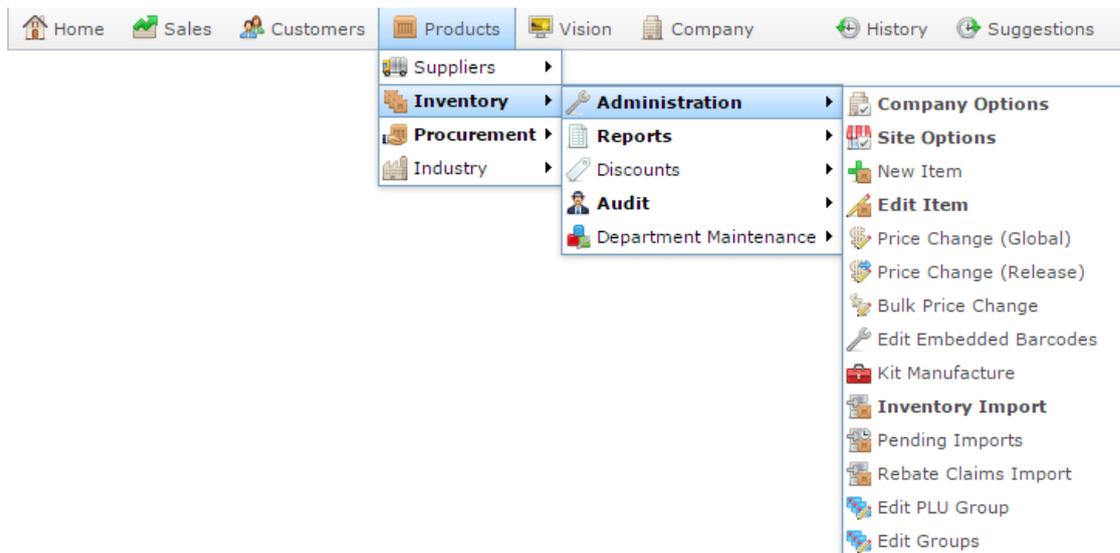
Create a special price if you want to make an individual item a different price at a specific site for a set period, such as a week, or a 24 hour period. Specials can be scheduled in advance, and must run for a minimum of one hour.

You can have multiple specials for items overlapping. If specials overlap, the Portal applies the lowest available price.

Note: Specials work on an individual item, with no prerequisite purchases or quantities. If you want to reduce the price only when a certain quantity is purchased, see *Managing bulk discounts* on page 297. If you want to reduce the price only when certain items are bought, or apply the same discount across a range of items, see *Managing promotions* on page 127. For more information on the ways you can set and change prices in the Portal, see *Pricing and promotions* on page 5.

To create a special:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

4. Press the Specials tab.

The Specials tab of the Inventory Management screen is displayed.

Managing price specials

Inventory Management

Item Code: 392 Site: Chadstone

Item Description: Chicken Bbq Last Change: 28/02/2010 By Bird, Bob

Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes Bulk Discount **Specials** Promotions Table / Home Information Ingredients Control

Start Date	Start Hour	Start Time	Expiry Date	Expiry Hour	Expiry Time	Price	Current Price
30/12/1899	No Specials		30/12/1899	No Specials		\$0.00	\$6.99

Update Specials Add Special Delete Specials

Find New Save

See *Inventory Management - Specials tab* on page 322.

5. Select the site you want to create a special for in the **Site** drop-down list, if necessary.
6. Press **Add Special**.

A new entry is added to the Specials grid.

Inventory Management

Item Code: 300 Site: Chadstone

Item Description: Banana Muffin Last Change: 9/04/2015 By bob

Created: 28/02/2010

Details Pricing Stock Control Point Of Sale Barcodes Bulk Discount **Specials** Promotions Table / Home Information Ingredients Control

Start Date	Start Hour	Start Time	Expiry Date	Expiry Hour	Expiry Time	Price	Current Price
20/04/2015	0		27/04/2015	23		\$2.57	\$2.57

Update Specials Add Special Delete Specials

Find New Save Sales

7. Type the date you want the special to start in the **Start Date** grid field.
8. Type the time you want the special to start in the **Start Hour** grid field.

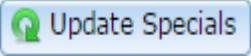
Start Date	Start Hour	Start Time	Expiry Date	Expiry Hour	Expiry Time	Price	Current Price
20/04/2015	0		27/04/2015	23		\$2.57	\$2.57

9. Type the date you want the special to end in the **Expiry Date** grid field.
10. Type the time you want the special to end in the **Expiry Hour** grid field.

Start Date	Start Hour	Start Time	Expiry Date	Expiry Hour	Expiry Time	Price	Current Price
20/04/2015	0		27/04/2015	23		\$2.57	\$2.57

11. Type the special price you want the item to have in the **Price** field.

Start Date	Start Hour	Start Time	Expiry Date	Expiry Hour	Expiry Time	Price	Current Price
20/04/2015	0		27/04/2015	23		\$2.57	\$2.57

12. Press .

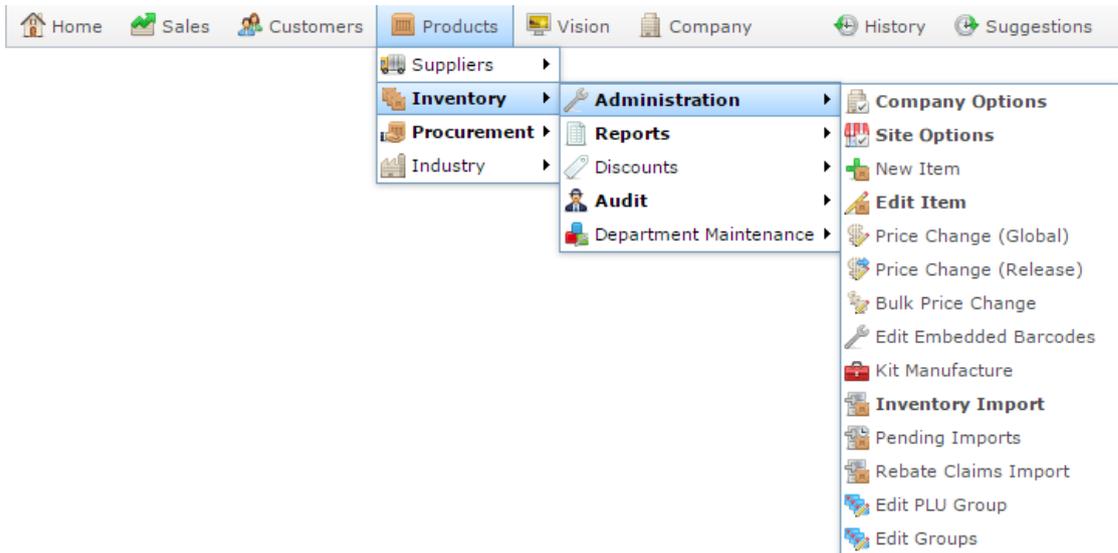
The special is saved. The Portal automatically completes the **Start Time** and **Expiry Time** fields.

Editing a price special

Edit a price special if you want to change the start or end time, or change the special price.

To edit a price special:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



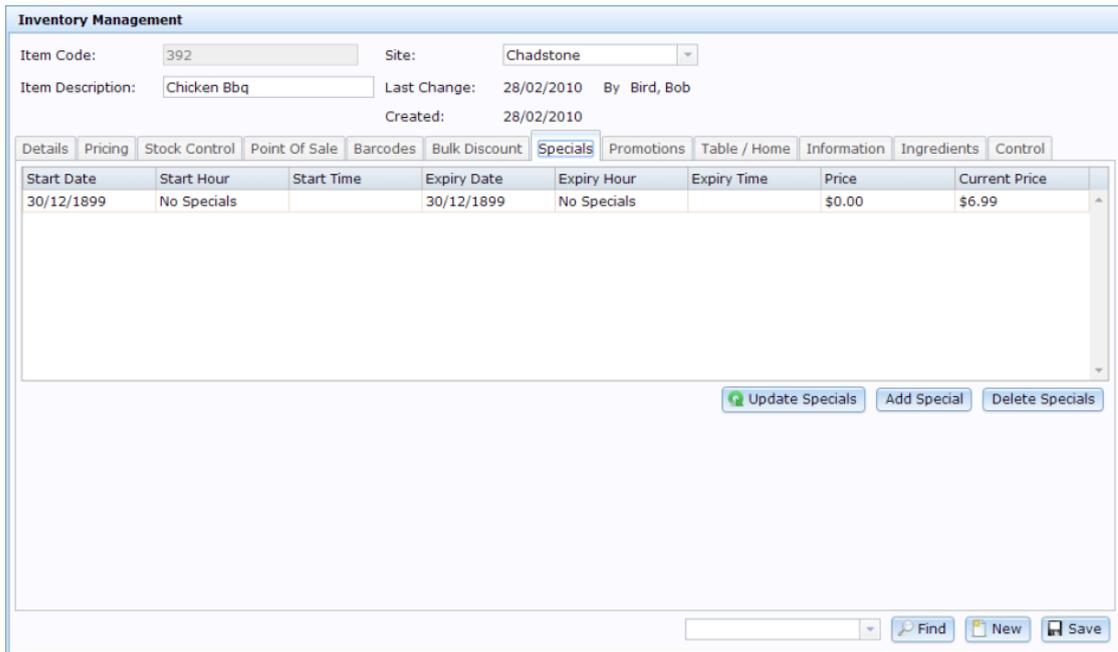
3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

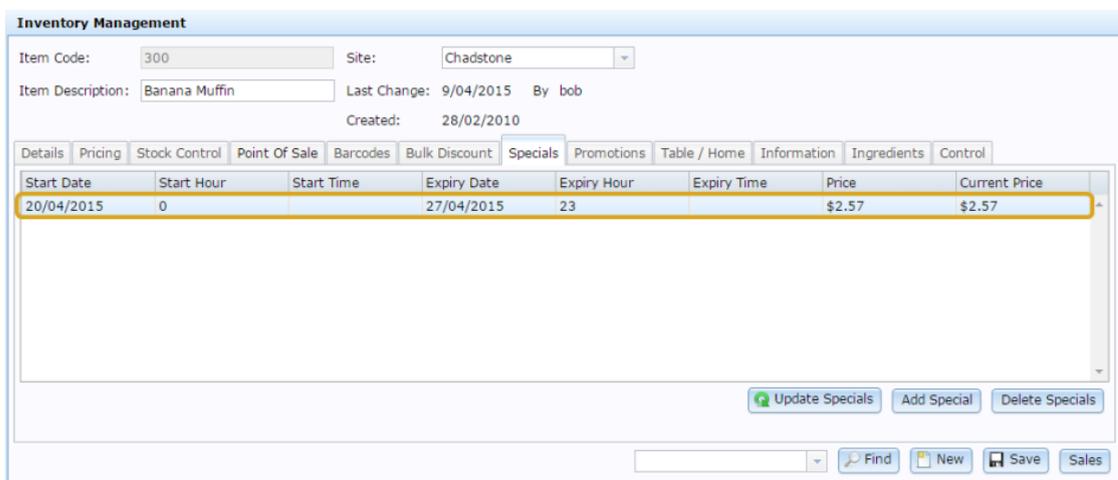
4. Press the Specials tab.

The Specials tab of the Inventory Management screen is displayed.



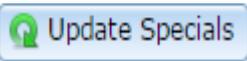
See *Inventory Management - Specials tab* on page 322.

5. Select the site you want to edit a special for in the **Site** drop-down list, if necessary.
6. Press the special in the Specials grid you want to edit.



7. Type the new start and end times, or new price into the grid fields.

Note: You cannot edit the **Start Time** and **Expiry Time** fields. These are automatically calculated by the Portal. To change the time the special starts or ends, change the **Start Date**, **Start Hour**, **Expiry Date** and **Expiry Hour** fields.

8. Press .

The changes are saved.

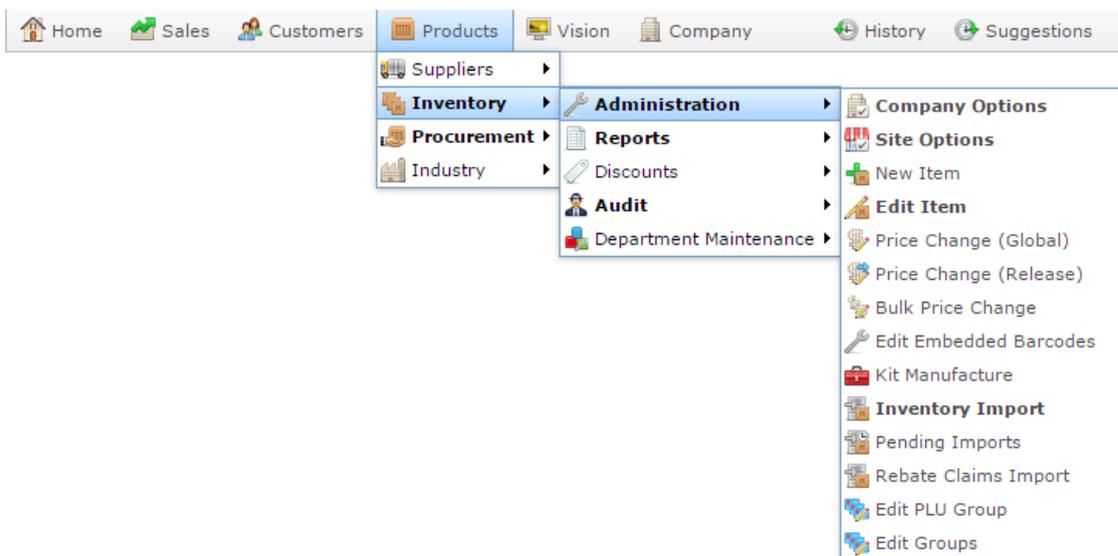
Deleting a price special

Delete a price special when you want to remove it entirely from Inventory Maintenance.

Note: You can edit a special if you want to edit it early. See *Editing a price special* on page 318.

To delete a price special:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



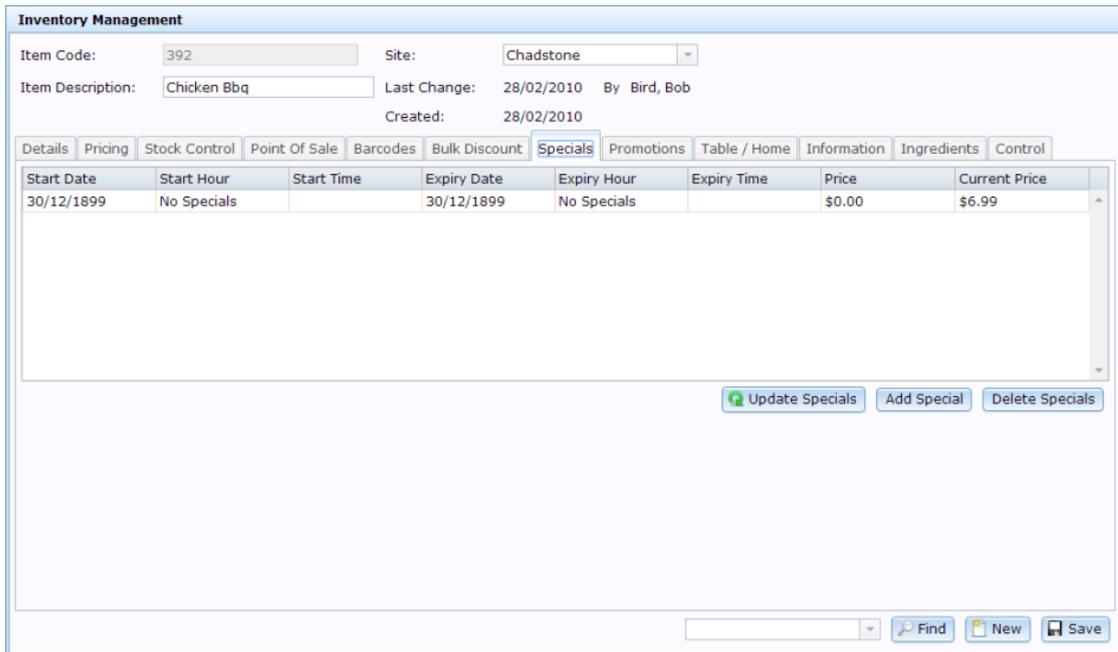
3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

The Details tab of the Inventory Management screen is displayed.

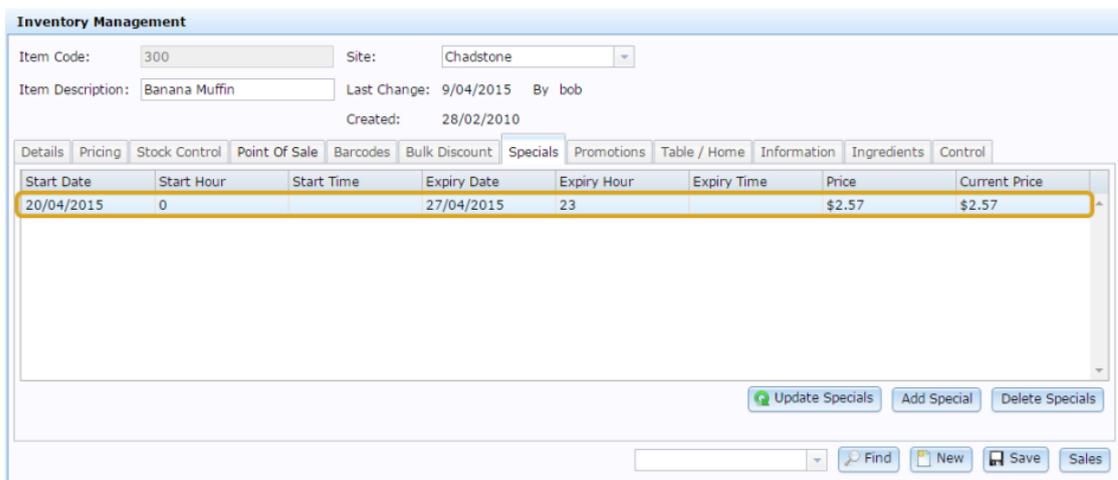
4. Press the Specials tab.

The Specials tab of the Inventory Management screen is displayed.



See *Inventory Management - Specials tab* on page 322.

5. Select the site you want to delete a special from in the **Site** drop-down list, if necessary.
6. Press the special in the Specials grid you want to edit.



7. Press **Delete Specials**.
8. The special is deleted.

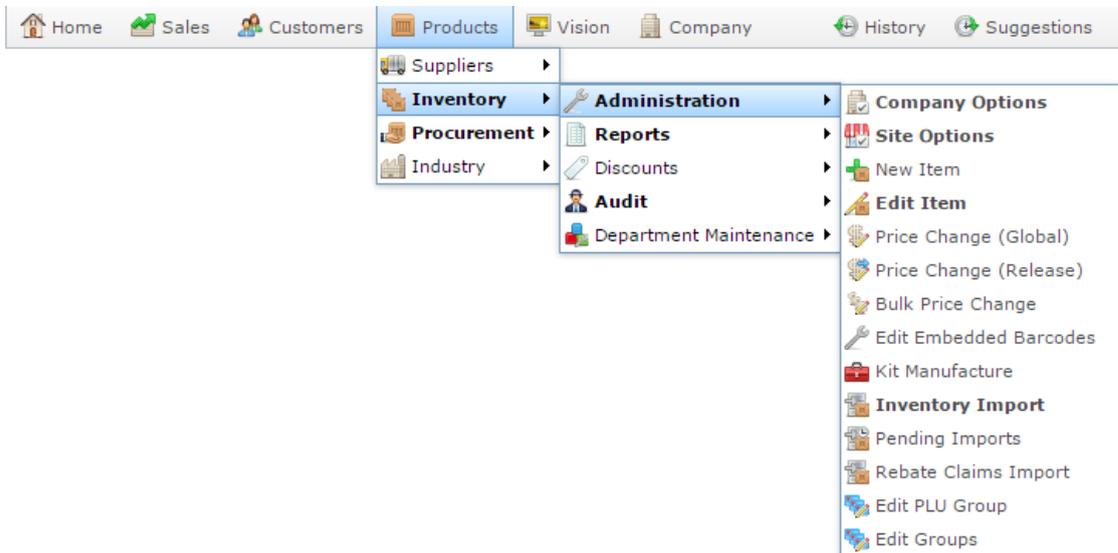
Inventory Management - Specials tab

Use the Specials tab of the Inventory Management screen to manage item specials.

Opening the Specials tab

To open the Specials tab:

1. Press  **Products** in the main menu bar.
2. Press **Inventory > Administration > Edit Item**.



3. Search for the item you want to edit.

See *Finding an item using the search screen* on page 6.

Note: If you want to create a new item, see *Creating a new item*.

The Details tab of the Inventory Management screen is displayed.

4. Press the Specials tab.

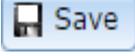
The Specials tab of the Inventory Management screen is displayed.

Inventory Management - Specials tab key fields and buttons

Common fields and buttons

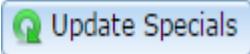
Some fields and buttons are common to all Inventory Maintenance screen tabs.

Field	Description
Item Code	Unique code identifying the item. For reporting integrity, this item code can never be used by another item.
Item Description	Description of the item used throughout the Portal. This description is not used on the Point of Sale. <i>See Inventory Management - Point of Sale tab.</i>
Site	The site selected for the current item configuration. Items can be configured on a per-site basis, offering different prices, availability or procurement management per site. <i>See Copying an item to another site.</i>

Field	Description
Last Change	Date this item was last changed, and the name of the Portal operator who changed it.
Created	Date the item was created.
 Find	Switch the Inventory Maintenance screen to another item. See <i>Finding an item with a search field</i> on page 12.
 New	Create a new item. See <i>Creating a new item</i> .
 Save	Save changes to the item.

Specials tab key fields and buttons

Field	Description
Start Date	The date the special starts.
Start Hour	The time of day the special starts.
Start Time	The hour, time and second the special starts, in twenty-four hour time.
	Note: This field is automatically calculated by the Portal and is not editable.

Field	Description
Expiry Date	The date the special stops running.
Expiry Hour	The time of day the special stops running.
Expiry Time	<p>The hour, time and second the special ends, in twenty-four hour time.</p> <div data-bbox="627 712 1388 840" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: This field is automatically calculated by the Portal and is not editable.</p> </div>
Price	<p>The special price to use for the duration of the special.</p> <div data-bbox="627 967 1388 1064" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p>Note: This price applies to the retail price level only.</p> </div>
Current Price	The current retail price of the item.
<div data-bbox="209 1227 459 1281" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 2px 5px; display: inline-block;">  </div>	<p>Save any changes made to your specials.</p> <p>See <i>Editing a price special</i> on page 318.</p>
<div data-bbox="209 1413 384 1451" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 2px 5px; display: inline-block;"> Add Special </div>	<p>Create a new special.</p> <p>See <i>Creating a price special</i> on page 315.</p>
<div data-bbox="209 1597 421 1635" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 2px 5px; display: inline-block;"> Delete Specials </div>	<p>Delete the selected special.</p> <p>See <i>Deleting a price special</i> on page 320.</p>

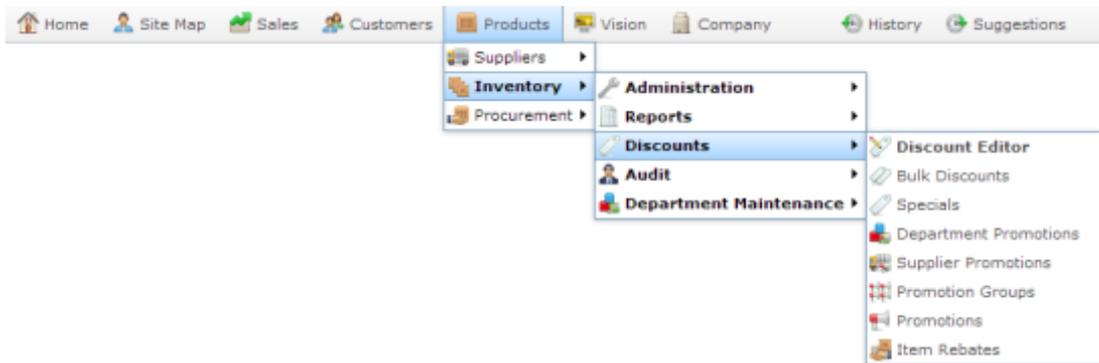
Viewing price specials

Use the Specials report to view the specials running on the Portal during a given period.

Opening the Specials report

To open the Specials report:

1. Press  **Products** from the menu bar.
2. Press **Inventory > Discounts > Specials**.



The Specials report is displayed.

Specials report

Description	Item	Site	Start Date	Start Time	End Date	End Time	Price
Banana Muffin	300	Chadstone	12-May-2015	09:00:00	19-May-2015	23:59:59	\$1.57

Site:

Expiry After:

Specials report key fields

Filters area

Use this area to filter the results shown in the report.

Field	Description
	Press to add this report to your Portal favourites for easier access.
Site / Sites	Select the site or sites to report on.
Expiry After	Select to filter the report to specials that expire after this date.

Report area

This area displays report information.

Note: Not all fields may be displayed at once. Some fields depend on your filter field selections.

Field	Description
Site / Description	The name of the relevant site.
Item / Description	Description of the item. Note: Click on the description to access other options in a popup menu.
Item Number / Item	The item code of the item.
Start Date	Date the special runs from.
Start Time	Time the special runs from on the start date.
End Date	Date the special stops.
End Time	Time the special stops on the end date.

Field	Description
Price	Price of the item during the special.

Glossary

Account

An account is a general ledger structure that categorises particular kinds of income or expenditure for financial reports. Accounts may also be called Ledgers in the Portal.

Aged balance

An aged balance is an amount of money owed that has been adjusted to factor an interest rate applied over time. For example: you owe a creditor \$1000, with a 10% interest. You pay \$700, leaving \$300 still to pay. After the interest period elapses, 10% interest is applied to the remaining \$300. Your aged balance is now \$330.

Balance

A balance is the total amount of money owed either by yourself to a creditor, or by a debtor to you. A balance may be:

- Positive, indicating money is owed.
- Zero, indicating no money is owed.
- Negative, indicating the party who owed money has over-paid. For example, if you pay a creditor \$1000 when you only owed \$999, your balance would be -\$1.

Barcode

A barcode is a string of numbers that links to an item. Items can have multiple barcodes assigned to them. Some barcodes called Price Embedded Barcodes encode information such as the quantity, weight or price of the item into the barcode. You can configure different types of price embedded barcodes in the Portal.

Batch (kit manufacture)

When manufacturing kits, a batch identifies a single point in time where a specified number of kits were manufactured together.

Batch (stock take)

When performing a continuous stock take, a batch identifies a collection of items scanned at one time by one or more PDTs.

Brand

A brand is a means of identifying items that belong to the same product line. Items can only have one brand, but items from different suppliers may have the same brand.

Company

A company represents your organisation within the Portal. A company can have one or more sites, representing physical locations of stores, including online stores. Some Portal configurations and features affect the entire company, other configurations can be specified per site.

Complete Order

A customer order is complete when:

- The order has been fulfilled on the Portal.
- The order has been marked as paid in full on the Portal or the customer has paid the remaining amount on the Point of Sale.
- The order has been collected or delivered.

Contract

A contract is a set of rules dictating the price, quantity and incentives offered by a supplier for a specific item, used by the Portal when calculating the best supplier to purchase a particular quantity of that item. Each contract relates to a single supplier and item, and you can have multiple contracts for each supplier and each item.

Controlled purchase order / Controlled requisition

A controlled purchase order or requisition cannot be finalised until it has been authorised by Head Office.

Cost matrix / price matrix

A cost matrix or price matrix is a means by which the Portal can automatically calculate the price of an item at each price level based on the item's supplier cost. You can create multiple cost levels, so that the price levels of an item that cost \$5 might be calculated very differently from an item that cost \$10.

A price matrix can be:

- Department-based, where all items within a department follow the same cost level rules.
- Supplier-based, where all items from the same supplier follow the same cost level rules.

Only one method can be used. You can also elect to use neither.

Credit adjustment

A credit adjustment adds credit to a balance, decreasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 credit adjustment would mean you owed \$90. Credit adjustments are usually used to correct errors. If you need to decrease money owed due to a refund or return, you should use a credit note instead.

Credit limit

A credit limit is the maximum amount of money a debtor is allowed to owe your organisation at any one time. For example, if a debtor's credit limit is \$1000 and they already owe \$900, they can only go into debt to the value of another \$100.

Credit note

A credit note adds credit to a balance, decreasing the amount of money owed. It is usually created when a balance needs to be adjusted due to a return, refund or rebate.

Creditor

A creditor is an entity to whom your company owes money. They may be a supplier, providing the items your company sells, or they may provide another service, such as a cleaner. The Portal treats suppliers and creditors the same. They have a balance tracking how much you owe them, and a credit limit that determines how much your company is allowed to owe them at a time.

Creditor payment

A creditor payment is a Portal record of paying invoices or debit adjustments. More than one invoice or debit adjustment may be paid either partially or in full in a single payment record. Creditor payments are a Portal record only and are not connected to your bank account.

Cross-reference

A cross-reference records the supplier's internal item code for an item to streamline the ordering process. Cross-references can make stock receipting easier, if suppliers use their internal codes on delivery dockets. Cross-references are also required to use the Portal Data Interchange (PDI) feature.

Colour

A colour is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Customer

A customer is a person or organisation who purchases items in advance, to be collected or delivered at a later date. Customers may also have debtor accounts, where they are allowed to owe money to your organisation and can pay off that debt via the Point of Sale.

Debit adjustment

A debit adjustment debits a balance, increasing the amount of money owed. For example, if you owed a creditor \$100, a \$10 debit adjustment would mean you owed \$110. Debit adjustments are usually only used for corrections. If you need to record a charge due to an order of goods or services, you should use an invoice.

Delivery docket

A delivery docket is a type of stock receipt that records the incoming stock without creating a creditor invoice. Delivery dockets cannot record delivery fees or discounts. You can match delivery docket stock receipts to creditor invoices.

Department

A department is a means of categorising items in your inventory. Items can belong to only one department. Depending on your Portal configuration, you may have up to five levels of departments in a hierarchy, by default called Departments, Sub Departments, Categories, Sub Categories and Ranges.

Note: This documentation uses the Portal default names for these levels: Department and Division. Your Portal may be configured to use different names, but the function is the same. You can see the names and levels your Portal uses in the Department Layers tab of Company Maintenance.

Department promotion

A department promotion is a promotion that applies to all items within a specific department. A department promotion allows you to provide a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Discount

A discount is a reduction in the price of an item. Discounts can apply to:

- A selected item, calculated either per-unit or per-line.
- The whole transaction, calculated per-unit or per-line for every item in the transaction.

Note: Some items may have discount maximums. If the discount you select is greater than the maximum discount allowed for the item, the item is only discounted up to its maximum level.

Per-unit discounts can:

- Reduce an item's price by a percentage of the original price. For example, 10% off.
- Reduce an item's price by a flat amount. For example, \$1 off.
- Set the per-unit price to a set amount. For example, \$5 per item.
- Set the price of the item to its cost price plus a set amount.
- Remove the tax of an item.

Per-line discounts can:

- Cap the total price for an item line to a predetermined amount. For example, the line total may be anything up to a maximum of \$10.
- Set the total price for an item line to a predetermined amount. For example, the line total is \$10.

A discount may also prompt the operator for a discount amount.

Note: The item and transaction discounts available and the item discount maximums are configured in the Portal.

Note: Special discounts such as some senior citizens or disability discounts make an item tax exempt. If a tax exempt discount is applied, the customer must supply their Senior Citizen or Tax Exempt ID during the tender process in order to receive the discount. The Point of Sale displays the discount as if from the normal tax-inclusive price.

Division

Divisions are top-level classifications for departments in your company. The Portal offers two kinds of divisions to support the Oracle financial interfaces: Reporting and Financial. Each department belongs to a single reporting division and a single financial division.

DSD

A DSD is an external supplier that is not part of your company. You may configure different rules and restrictions for direct suppliers than are used for the company warehouse. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.

Employee

An employee is a member of your company staff that you want to roster on to your staff schedule. Employees may or may not have access to Portal and Point of Sale systems.

Fashion

Fashion is the Portal feature that allows you to create variation of items, such as different colours, sizes and styles of the same item. The default labels of colour, size and style can be changed to something that suits your inventory.

Fixture

A fixture is a physical structure or area within your site that contains stock. This may include gondolas, counters, refrigerators, back-room receipt trolleys, tables, wall sections or any other area that regularly contains stock on your site. Fixtures are used primarily during stock take.

Group promotion

A group promotion is a promotion that applies to all items within a group that you define. A group promotion allows you to provide a free item or a discount for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Group purchase order

A group purchase order is a purchase order that combines the requisitions from several sites into one purchase order. Stock levels can be allocated to each site during the creation of the order.

Inventory

The inventory is the Portal feature of maintaining all items that you offer for sale in your company.

Invoice

An invoice details an amount owed by an entity such as your company or a debtor, and the goods or services that incurred that cost. An invoice usually details the period of time by which it must be paid.

You can also receipt stock using an invoice. An invoice stock receipt automatically creates an invoice for that creditor in your Portal records, and allows you to record additional information such as delivery fees and discounts.

Inter-branch transfers (IBT)

An inter-branch transfer is a transfer of stock from one site within a company to another.

Item

An item represents a good or service provided by your organisation. Items are added to transactions in order to sell or return them. An item will include information about its:

- Barcode.

Note: An item can have more than one barcode.

- Description.
- Unit of measurement, for example an item may be sold by weight or as individual units.
- Price per unit of measurement.

Items also have additional information stored on the Portal, such as stock on hand, promotions and discount maximums.

Item options

Items can be modified with options to detail the customer's specific request. For example, a coffee order may contain soy milk or extra sugar. The options available for each item must be configured in the Portal.

Item variation

An item variation is an item that uses Fashion variations of colour, size and style. The default labels of colour, size and style may be renamed for your Portal configuration.

Journal

A journal is a unique code identifying a date, site and terminal for a transaction within the Portal.

Kit

A kit is an item that is made up of several other items in your inventory. The kit item itself does not have a stock-on-hand. Instead, when a kit item is sold, the stock-on-hand of the component items is decreased accordingly.

Label

A label is attached to an item and displays information about that item, such as the item's price, best before date and quantity, cooking or nutritional information, or a barcode. Labels can be printed via the Point of Sale.

Ledger

A ledger is a financial category or general ledger grouping that a transaction corresponds to for accounting purposes. For example, Expenses, Staff Salary, etc. The Portal uses a ledger for the Trail Balance Profit report. Your Portal may be configured not to use other ledgers.

Ledger type

A ledger type is a category or grouping of ledgers for accounting and reporting purposes, such as Income or Expenses. Your Portal may be configured not to use ledgers.

Line minimum

A line minimum is the minimum number of different items that must be in a transaction to trigger an effect, such as a promotion. Each unique item in a transaction creates its own line. Multiple units of the same item are recorded on the same line. A line minimum of 3 requires 3 unique items to be purchased.

Manufactured Kit

A manufactured kit is an item that is made up of several other items in your inventory. The kit item must be manufactured on site before it can be sold, and the stock-on-hand of the kit item is tracked by the Portal. When you manufacture a kit, the stock-on-hand of the component items is decreased and the stock-on-hand of the kit item is increased accordingly.

Matching

Matching is the process of linking a delivery docket receipt with a creditor invoice you have created in the Portal. Invoice-type stock receipts automatically create a creditor invoice and do not need to be matched.

Menu area

A menu area is a category of items designed to group items into meal types during table service. For example, coffees, mains, desserts. Menu areas control which modifier items can be applied to which prime items.

Modifier item

A modifier item is an item in your inventory that is used to add a modification to another item, such as adding 'soy milk' to a coffee. While modifier items can have costs and add to the price of the item they are modifying, they cannot be sold directly on the Point of Sale.

Open transaction

An open transaction is a transaction that has not yet been finalised. For example, a creditor invoice that has not been paid.

Operator

An operator is a staff member who uses the Point of Sale to process transactions or manage the cash drawer. Each operator is identified by a unique operator code and password that they use to log into the Point of Sale. Operator codes are unique to each site, but do not have to be unique within a company.

Pack

A pack represents the number of units that an item is supplied in. For example, you may sell cans of soft drink individually, but they are be ordered in packs of 24 from the supplier. This is different to a referral, where both the single can and the pack of cans are tracked in the inventory.

Pallet

A pallet is a set of cartons containing items that are grouped together as a specific collection so they can be tracked from supplier through to sale via barcodes. A pallet usually has a special barcode that encodes the number of cartons it contains, while each carton has a special barcode detailing the quantity of items it contains and their expiry dates.

Pallet barcodes may also be linked electronically to the carton barcodes.

Payment terms

Payment terms is the number of days after issuing an invoice that a creditor expects to be paid. Common payment terms are 21, 30, 60 or 90.

PDT

A PDT, or portable data terminal, is a small hand-held device with a touchscreen and an in-built scanner that can interact with the Portal to sell, order or count stock via the PDT software interface. PDTs are registered as terminals for a site, just as full Point of Sale terminals are, and require operators to log in to use them.

Portal Data Interchange (PDI)

The Portal Data Interchange (PDI) is a Portal feature that allows two separate companies that both use the AMC Convergent IT Portal to streamline their procurement process by automating the creation of customer orders and stock receipts between the companies.

Permission

A permission is a configuration that determines whether an operator is allowed to perform a specific task. For example, the ability to authorise purchase orders or change employee records may be restricted to certain individuals.

Portal operator

A Portal operator is someone with login credentials to your company's Portal. What a Portal operator can do depends on their permissions. A Portal operator cannot use their Portal login to log into the Point of Sale.

Point of Sale operator

A Point of Sale operator is someone with login credentials to your site's Point of Sale and PDTs. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Point of Sale supervisor

A Point of Sale supervisor is a Point of Sale operator with some additional permissions to do things like authorise changes to the Point of Sale terminal, authorise gift voucher returns, or anything else that your Point of Sale configuration requires a supervisor's authorisation for. Their supervisor status is separate from any Portal permissions they may have. Depending on their permissions, they may have limited access to some Portal functionality through a PDT, but they cannot use their Point of Sale login to log into the Portal.

Price change

A price change updates the Portal with new prices for each price level of an item. Price changes can only be performed by operators with sufficient Portal privileges.

Price level

The Portal inventory system can store multiple price levels. For example, you may have one price level for retail customers and another for corporate or wholesale customers. The Point of Sale can be configured to use the appropriate price level when a debtor or customer is added to the transaction.

Prime item

A prime item is an item that can be sold normally through your Point of Sale. Most of the items in your inventory are likely to be prime items.

Procurement

The procurement system is the set of Portal features that manage and maintain the act of replenishing your stock levels, including managing creditors, contracts, requisitions, purchase orders, stock receipts, returns, adjustments and stock take.

Promotion

A promotion is a Portal feature which lets you create sophisticated rules to offer discounts, free items or rebates when the customer purchases a particular set of or combination of items. The Portal allows you to create promotions based on departments, suppliers, or your own custom item groups.

Promotion group

A promotion group is a group of items you define that either is used to trigger a promotion, or has the effects of the promotion applied to it. You can use the same group for multiple promotions.

Purchase order

A purchase order is a request to an individual supplier to purchase a set quantity of specific items. Purchase orders can be created manually, automatically created from finalised requisitions, or generated using procurement configurations.

Rebate

A rebate is an amount of money offered back to the customer by a supplier as an incentive to purchase. As opposed to a discount, special or promotion, where your company covers the lost profit from the price reduction, the supplier is responsible for reimbursing your company.

Rebate group

A rebate group is a collection of rebate item groups, used to easily control start and end dates of rebates.

Rebate item group

A rebate item group is a collection of rebate items, where each item has its rebate rules defined.

Receipt

A receipt is the printed record of a transaction, including the items, quantities and prices, any loyalty information, the tenders submitted and the operator, the terminal and date the transaction took place at.

Referral

A referral is a connection between two items in your inventory, where one is considered part of the other. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans, you can use a referral so that purchasing a single can (Selling item) depletes your stock of crates (Stock item) by 1/24th. This is different to using packs, as both individual cans and whole crates of items are tracked in your inventory.

Referred item

A referred item is an item that is depleted by the sale of another item. For example, if your inventory tracks both individual cans of soft drink and crates of 24 cans and sells the cans individually, the referred item is the crate of cans, which is depleted every time an individual can is sold. Referred items are also called Stock items in this documentation.

Requisition

A requisition is a list of items requested by a particular site. Each item is given a requested supplier, and all items are included in a single requisition, even if they are from different suppliers. Finalising a requisition can automatically open a purchase order for the appropriate suppliers. Requisitions from multiple sites may be combined into a group purchase order for a supplier, if your Portal is configured to permit group purchase orders.

Roster

A roster is a schedule of when specific staff members are supposed to work.

Sale minimum

A sale minimum is a minimum transaction amount used to trigger a promotion or other effect. For example, a sale minimum of \$10 requires that at least \$10 of items are purchased in a single transaction.

Selling item

A selling item is an item that uses a referral to track its stock levels on a different item. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the individual can is the selling item.

Size

A size is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Note: This should not be confused with an item's size as defined in the Details tab of Inventory Maintenance, which details how units of an item should be measured and sold.

Snap count

A snap count is a record of the stock-on-hand of an item or set of items at the time of the snap count, as tracked by the Portal. Snap counts are used for calculations and reporting.

Special

A special is a temporary reduced price given to a specific item for a period of time. Where a promotion applies to a group of items, a special applies only to an individual item.

Stock adjustment / write-off

A stock adjustment is a record of increasing or decreasing an item's stock-on-hand, with a reason. For example, stock was found after stock take, or stock has been damaged.

Stock item

A stock item is an item that is referred to by another item, to track the stock-on-hand. For example, if your inventory contains both individual cans of soft drink and crates of 24-cans, and your company sells the individual cans but tracks stock of the crates of 24 cans, then the crate of 24 cans is the stock item.

Stock on hand

Stock on hand is the number of units of a particular item a site currently has. It is updated automatically by stock receipting, transfers, adjustments and sales, and compared against stock take numbers to determine shrinkage.

Stock receipt

A stock receipt is the process of recording stock incoming from a supplier to a site. Stock receipts record the supplier, date, item and quantities, including any items that were received but not ordered, or items that were listed but not delivered. Stock receipts may use a delivery docket, which is a plain record of incoming stock, or an invoice, which creates a corresponding creditor invoice in the Portal to link with the stock receipt.

Stock return

A stock return is the process of returning stock to a supplier because it is faulty or otherwise unsuitable for sale. Stock returns record the date, item and quantity being returned and the reason for each item being returned.

Stock take

A stock take is the process of counting all units of stock at a particular site to obtain an accurate stock-on-hand level. Stock takes can either be continuous, where stock is counted while the site is still open for trading, or manual, where all stock is counted in a single session while the site is closed for trading.

Style

A style is one of the three item variation options under Fashion. An item with a designated style may have a colour defined, as well as a size. The terms colour size and style may be renamed for your Portal configuration.

Supplier

A supplier is a creditor from whom you purchase items in your inventory.

Supplier promotion

A supplier promotion is a promotion that applies to all items marked as purchased from a specific supplier. A supplier promotion allows you to provide a discount or supplier rebate for the items purchased, either immediately or as a credit voucher. The promotion can be restricted to only provide a discount if a minimum number of items or minimum sale amount is reached.

Terminal

A terminal is the tablet or other device that runs the Point of Sale. Each terminal is connected to the site via the base station, and is identified by a unique terminal number, which is recorded in every transaction made by the terminal.

Point of Sale Transaction

A Point of Sale transaction is an exchange of items, which represent goods or services provided by your organisation, for payment. Transactions include all the relevant information about the exchange:

- The date, time, site and location of the transaction.
- The operator who performed the transaction, and which terminal they used.
- The items purchased or returned and in what quantities.
- The amounts and types of payments provided, including any change or reimbursement provided to the customer or redeemed loyalty points.

Note: Transactions cannot be finalised until they balance. That is, the amount owed by the customer is zero, and any amount that has been overtendered has been issued as change.

- The loyalty number linked to the transaction, if applicable.

You can view what is currently included in the transaction in the Transaction list of the Point of Sale.

Note: In the Portal, a transaction also refers to an exchange of money, such as the payment of a creditor, or a debit adjustment.

Transaction line

A transaction line is an entry in the Transaction list that contains an item and its quantity. If more than one unit of an item is added to a transaction, the units are grouped into a single line. Actions such as price overrides, voids, discounts or refunds then apply to all units in the line.

Chicken Drum/stk 6.583kg N x \$2.99/kg	\$19.68
Crown Lamb Roast 1.426kg N x \$12.99/kg	\$18.52
Total:	\$38.20
Credit Card	\$20.00
CASH	\$50.00
Change	\$31.80

Warehouse

A warehouse is a supplier that represents your company's central warehouse, used when sites order some or all of their inventory from Head Office rather than directly from external suppliers. You may configure different rules and restrictions for warehouse suppliers than are used for direct suppliers. You can also restrict sites to use only warehouse suppliers and prevent them from ordering from direct suppliers.