

# System Discounts Guide

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#### System Discounts Overview

System Discounts are methods of applying reduced pricing for items based on quantities and priorities. A number of styles can be used to build specific campaigns based on dollars, percentages, and/or quantities utilizing start and stop date ranges.

Dollar and percentage discounts reduce applied items by entered amounts, while the "Buy x Get y Free" method will remove the lowest priced item within the applied group. The "x Items For y Dollars" method will reduce all items by the appropriate amount(s) to match a targeted group price (e.g. 3 for \$1.00). Since System Discounts can be set by priority (application order), items can be applied to multiple discounts allowing the flexibility to utilize multiple discounts in a single transaction as thresholds are met.

	Pricebook											
- 1	Item Details Mass	s Updates	Pricing Except	ptions	Buydowns	System Discount	Vendor Pa	Its Vendor Part	Kits Commission	ns Uplifts	Inactive Ite	ems 🔺 🕨
Dashboard	Name	Start		Stop		Amount	Qty	Receipt Text	Priority	On Schedule		
Dashboard	MARLBORO LOY	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	0.5000	2	MARLBORO LOY.	. 1		Up	Down
<u>_</u>	MARLBORO BUS	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	0.2500	2	SAVE \$.25 PER P.	2		Up	Down
	MARLBORO MU	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	0.0500	2	SAVE \$.05 PER P.	3		Up	Down
	HAPPY HOUR B	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	) 10.0000	6	HAPPY HOURS!	4		Up	Down
Pricebook	FREE LIGHTER	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	0 100.0000	1		5		Up	Down
	R&J CIGAR PRO	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	) 75.0000	10		6		Up	Down
	BUY 2 GET 1 FR	7/1/2018 1	2:01:00 AM	12/31/2	018 11:59:00	) 1.0000					Up	Down
Inventory												
Reports												
. <u> </u>	Discount Details											
÷ ÷	Discount Name: BUY 2 GET 1 FREE Discount Type: Buy x Get y Free V							☑ 1 - FasTrax Store #1				
Queue	Item Filter Type:	ame		$\sim$					2 - FasTrax Sto	ore #2		
Queue	Item Filter Type: Items											
	Start Date:	7/ 1/2018		top Date:	12/31/201	8 🔍 🗸						
	Receipt Text											
Maintenance	Buy: 2	÷	Get Fr	ree: 1		Use Trigger List		ory Clearance				
maintenance								· · · · · · · · · · · · · · · · · · ·				
	Priority: 7	,	Occurrence Li	imit Per S	ale 0	Require Lovalty	Customer Da	ilv Limit 0	Check All		<u>Clear</u>	
<b>&amp;</b> =		_							Check By Zone			
Loyalty	L	Use Scheo	lule			Is Altria Discoun	t Apply	Tax	PRICEBOOK ZON	NE#0 ∨	Check	
	<b>-</b>			1			- (S)	Archived Discour		iger Items In Disc iew Items In Disc		
Schedules	1 Stores Selected To	Receive Cha	nges/For Rep	porting					Cor	porate Mode 1	Messages	Settings

#### Creating a System Discount

1. In Director, choose the "Pricebook" module



System Discounts

2. Then, choose the "System Discounts" tab

This guide will illustrate the "Buy x Get y Free" method of System Discounts. The free item will automatically be the lowest priced.

Other methods:

\$ Off Each Item – when the quantity is met, a dollar amount is removed from each item
% Off Each Item – when the quantity is met, a percentage is remove from each item
X Items For y Dollars – when the quantity is met, each item is reduced to equal a set amount (2 for \$1, 3 for \$5, etc)
Buy x Get y % off – when the buy quantity is met, gives a percent discount off a specified number of items

3. Choose the "Add" button

If you are editing an existing system discount, simply click to highlight a discount in the grid and edit its values in the "Discount Details" portion of the screen.

4. In the "Discount Details" portion of the screen, enter the parameters you wish for the discount to follow

Discount Details	
Discount Name: Y 2 GET 1 FREE Discount Type: 2 y x Get y Free V	3 1 - FasTrax Store #1 2 - FasTrax Store #2
Item Filter Type: $4$ ns $\sim$	2 - ras frax Store #2
Start Date: 5 1/2018▼ Stop Date: 6 1/2018▼	
Receipt Text	
Buy 8 🖨 Get Free: 9 Use Trigger List 1 Inventory Clearance	
Priority: Occurrence Limit Per Sale BARequire Loyalty Customer Daily Limit:	Check All Clear Check By Zone
Use Schedule Is Altria Discount	PRICEBOOK ZONE #0 V Check
	ounts <u>View Trigger Items In Discount</u>

- 1. Discount Name This field is the name of your choosing to identify the discount
- 2. Discount Type This field is the type of discount assigned, which is one of 4 different types
- 3. Store Selector These checkboxes allow you to assign specific stores to specific discounts
- 4. Item Filter Type This filter dropdown allows you to choose the method of what items are in the discount, either choosing specific items (that are assigned manually) or by a department/tree categorization of item(s)
- 5. Start Date The date the discount is set to start
- 6. Stop Date The date the discount is set to stop
- 7. Receipt Text When the discount is triggered, what text will be on the receipt that is visible for the customer
- 8. Qty The quantity needed to be bought on the discount types of "Buy x Get y Free" and "x Items For y Dollars". On the discount types of "\$ Off Each Item" and "% Off Each Item", this field is labeled "Qty"
- Get Free The number of free items when the "Buy" amount is reached. On the discount type "x Items For y Dollars", this field is labeled "For" and it expects a dollar amount. On the methods "\$ Off Each Item" and "% Off Each Item", this field is called "\$ Off Each Item" and "% Off Each Item" respectively
- 10. Use Trigger List When checked, the discount will not fire until the triggered amount of items is purchased (this enables a new field called "Trigger Qty" where this value is placed)
- 11. Inventory Clearance Marks the discount to be automatically archived whenever the item(s) within it are at a 0 QOH (clearing inventory out)
- 12. Priority The prority level of the discount. The lower the numberical value, the higher on the priority the discount is
- 13. Occurrence Limit Per Sale The number of times a discount can be applied in a sale
- 14. Require Loyalty Flags the discount to be a loyalty-customer only discount
- 15. Customer Daily Limit Limits the discount to be only triggerable a certain number of times in a day for a loyalty customer
- 16. Use Schedule Flags the discount to only trigger on specific days/times of the week. This makes a hyperlink called "Manage Schedule" visible, where the days/times can be set
- 17. Is Altria Discount Flags the discount as an Altria funded discount
- 18. Apply Tax Determines if tax is charged before the discount is applied or after
- 19. Archived Discounts Shows a list of all discounts that have been previously archived

Choose "Save" when complete



You can view what items are in what discounts, as well as trigger items by choosing the appropriate hyperlink: "View Trigger Items In Discount" or "View Items In Discount"

#### Managing Discounts Schedule

Once a system discount is created, a schedule can be applied to the discount in order to limit it to only being applied at certain times or on certain days of the week. This is an optional step, and only needs to be applied if the discount is not meant to be applied during all hours and all days of the week.

Cho

- 1. With a discount selected, click the "Use Schedule" box to put a check in the box and reveal the "Manage Schedule" hyperlink
- 2. Choose the "Manage Schedule" hyperlink to bring up the "Choose Availability" window

2	hoose Availabil	ity	×
	Sunday	12:00:00 AM 🚖 to	12:00:00 AM 🚖
	Monday	12:00:00 AM 🚖 to	12:00:00 AM 🚖
	T Turnelau	12:00:00 AM 📥 to	12:00:00 AM

Manage Schedu

Use Schedule

Tuesday	12:00:00 AM	≑ to	12:00:00 AM 🚖
Wednesday	12:00:00 AM	💠 to	12:00:00 AM 🚖
Thursday	12:00:00 AM	🔹 to	12:00:00 AM 🚖
Friday	12:00:00 AM	🔹 to	12:00:00 AM 🚖
Saturday	12:00:00 AM	🔹 to	12:00:00 AM 🚖
Save			Cancel

- 3. Check the boxes for the days and adjust times Save for each day to your need, and then choose save
- 4. Finally, choose the "Save" button on the discount itself



### Applying Items to System Discounts in Item Details

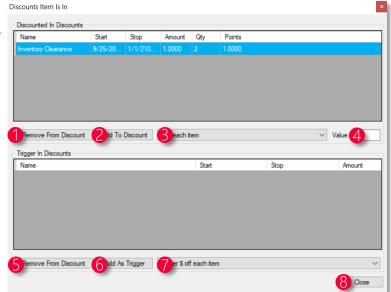
1. After logging into Director, choose the "Pricebook" module



2. Within "Item Details", navigate to the applicable item and choose the "Manage Discounts" hyperlink

_	Pricebook	
-0	tem Details Mass Updates Pricing Exceptions Buydowns System Discounts	Vendor Parts Vendor Part Kits Commissions Inactive Items Remote (
Dashboard	Quick Find	Tree Information
Dasnboard	Lookup Item By: UPC Number V 012300000123 Lookup	Primary Secondary
		Major Category: CIGARETTES V Lock
	General Information	Category: RJR V Lock
Pricebook	UPC Number: 012300000123 Extended: 012300000123 Active	Manufacturer: WINSTON V Lock
	Description: WINSTON 85 BX RED (FF) FSC	Product Group: CIG PACKS
	Department: 1 - CIGARETTES ~	
	Discount(s): Inventory Clearance Manage Discounts	Sub Group:
Inventory	Buydown(s): (1) Test Buydown POC Manage Buydowns	Class: V Lock
	Eligible for Discounts     Additional Info	Sub Class: V
	Pricing Information	Other Information
	Avg Cost: \$0.00 Last Cost: 9.068 Price: 9.93 Margin: 8.68%	On Hand: 10 On Order: 0 Min: 5 Max: 5 Print Label
Reports	Price Type: Standard Effective Price Modify Specialty Pricing	Part Of Carton: 0.10 Kit Master
	PBook Zone: 0 - Default v See Al Zones	Recent Sales History
-0-	Link Information	Last Sold: 09-19-2018 11:03 AM
Maintenance		Yesterday: 0 WTD: 16 MTD: 16 YTD: 16
manreenance		Item Analysis XFer Analysis Inventory History Change History View Chart
	<u>Subunit:</u> #: 0	
<b>*</b> =	Vendor Part Information	
Loyalty	Vendor Part # # Units Part Cost	
		Templates
	Add Part Edit Part Delete Part	Apply Very Very Very Very Very Very Very Ver
Schedules	Vendor: 1 - Default Vendor V	
	Part #: # Units: Part Cost: Save Part	
		Store Mode (Store # 1) 2 Messages Settings
		Store mode (store # 1) 2 messages Settings ;;;

- 3. This will open the "Discount's Item Is In" window.
- 4. From the discount dropdown
  - a. Choose the applicable discount name
  - b. Choose "Add to Discount"
  - c. Choose "Close"



- 1. Remove From Discount Removes the item from the selected "Discounted In Discounts"
- 2. Add to Discount After selecting the system discount from the dropdown (4), choosing this will add the item to the system discount
- 3. System Discount Dropdown Allows the specific system discount selected to be added when pressing the "Add to Discount" button
- 4. Value A multiplier that multiplies the system discount value by the number in this field
- 5. Remove From Discount Removes the item from the selected row in "Trigger In Discounts"
- 6. Add As Trigger After selecting the system discount from the dropdown (7), choosing this will add the item as a trigger item in the system discount
- 7. System Discount Dropdown Allows the specific system discount selected to be added when pressing the "Add As Trigger" button
- 8. Close Closes the "Discounts Item Is In" window

Choose "Save" when complete



Items can also be removed by following the above steps but instead of adding, choosing the options to remove.

Always remember to save your changes, and if in a corporate environment to send the Queue records to the applicable store(s).

### Applying Items to System Discounts in Mass Updates

 From within Director, choose the "Pricebook" module then "Mass Updates" from the menu ribbon



2. Within "Mass Updates", filter to the applicable item(s) and choose the "Utilities" tab from the bottom ribbon

	BEER CANDY	UPC Number	Description	Dept	Cost	Price	Margin
<u> </u>	B-MC CIGARETTES	000610000025	GSMOKE M 85	1	\$99.999	\$999.99	90.00%
	CIGARS PACK	000610010024	GSMOKE M 85	1	\$999.990	\$999.99	0.00%
Pricebook	CIGARS SINGLES     DRY SNUFF	007592633159	GPC M 85 FSC	1	\$0.750	\$1.50	50.00%
	⊕- <mark>Me</mark> GM	011000001683	GRAND PRIX 85 RED (FF) FSC	1	\$1.520	\$2.99	49.17%
	⊕ MG GUM/MINTS ⊕ MG HBC	011000001737	EAGLE 20 S M 85 BX GOLD	1	\$99.999	\$999.99	90.00%
	E-Mc LITTLE CIGARS	011000001797	EAGLE 20'S M 85 BX GOLD PK	1	\$999.990	\$999.99	0.00%
Inventory	PIPE TOBACCO	011000002826	EAGLE 20'S 85 BX BLUE PK	1	\$99.999	\$999.99	90.00%
	PLUG TOBACCO     RYO TOBACCO	011000002833	EAGLE 20'S 85 BX RED PK	1	\$99.999	\$999.99	90.00%
	B-ME SCRAP TOBACCO	011000002857	EAGLE 20'S M 85 BX SILVER PK	1	\$99.999	\$999.99	90.00%
	SMOKELESS TOBACCO     SMOKING ACCESSORIES	011000002871	EAGLE 20'S 100 BX BLUE PK	1	\$99.999	\$999.99	90.00%
Reports	SMOKING ACCESSORIES     SNACKS	011000002888	EAGLE 20'S 100 BX RED PK	1	\$99.999	\$999.99	90.00%
	B-Me SNUS	011000002901	EAGLE 20'S 85 BX ORANGE PK	1.	\$99.999	\$999.99	90.00%
	SOFT DRINKS	011000002918	EAGLE 20'S 100 BX ORANGE PK	1	\$99.999	\$999.99	90.00%
<u> </u>	WRAPS	011000002932	EAGLE 20'S M 100 BX GOLD PK	1	\$99.999	\$999.99	90.00%
Queue		011000002949	EAGLE 20'S M 100 BX SILVER PK	1	\$99.999	\$999.99	90.00%
Second Second		011000002970	EVE 120 BX AMETHYST (LT) FSC	1	\$99.999	\$999.99	90.00%
342		011000002987	EVE M 120 BX EMERALD (I T) ESC	1	999 999	999999	90.00%
¥		Standard Prices	Cost Updates Reports	Utilities	Addtl Utilities	Store Updating	Support I
Maintenance		Buydown:	Test Buydown 🗸	Add			
		Vendor Parts:	1 - Default Vendor	Add			
<u> </u>		Discount	S off each item	Add	Value: 1	Add As Trigg	per item
Lovalty	Disabash Zuna 0 Data A						
and the second	FICEDOUR ZONE. U* Delduk	canpagn.	· · · · ·	HUU I	rus.		
Loyalty	Pricebook Zone: 0 - Default		1 - Default Vendor v \$ off each item v	Add	Value: 1 Pts: 1	🗌 Add As Trigg	ger iter

- 3. From the "Utilities" tab
  - a. Choose the applicable discount from the "Add To Discount" dropdown menu
  - b. Verify the "Value" intended and choose to check the "Add As Trigger Item" if needed

Buydown	Test Buydown V	Add
Vendor Parts	1 - Default Vendor V	Add
Discount	$$$ off each item $\checkmark$	Add Value: 1 Add As Trigger Item
Campaign	×	Add Pts: 1
Commission	~	Add

When using Mass Updates, make sure to filter items first and verify that only the intended items are filtered.

If a mistake occurs, you can remove items from System Discounts by using the "Addtl Utilities" tab.

#### Removing Items from System Discounts in Mass Updates

 From within Director, choose the "Pricebook" module and then "Mass Updates" from the menu ribbon



#### Mass Updates

2. Within "Mass Updates", filter to the applicable item(s) and choose the "Addtl Utilities" tab from the bottom ribbon

	BEER MCCANDY	UPC Number	Descripti	on	Dept	Cost	Price	Margin
	GIGARETTES	000000000001	LOT TICH	σ	7	\$0.950	\$1.00	5.00%
	B-MC CIGARS PACK	00000009959	Test		1	\$15.000	\$19.99	24.97%
Priceboo	k GIGARS SINGLES	000000009960	Testtem		1	\$25.000	\$30.00	16.67%
	B GM	000120001013	SIERRA	MIST 12 OZ CAN	5	\$1.520	\$2.99	49.17%
	B-Me GUM/MINTS	000187569689	BOB MAR	RLEY CURVE LIGHTERS	3	\$1.520	\$2.99	49.17%
	III LITTLE CIGARS	000400002206	MARS SI	ICKERS 216CT POWER	4	\$1.520	\$2.99	49.17%
Inventor	y III PIPE TOBACCO	000400004888	MARS M	M SINGLES BIRTHDAY	4	\$999.990	\$999.99	0.00%
	B-ME PLUG TOBACCO	000420371064	BC CU SE	PRING 90CT 2014 #1	3	\$999.990	\$999.99	0.00%
	G-Mc SCRAP TOBACCO	000485000086	TROPICA	NA CRANBERRY JUICE	5	\$999.990	\$999.99	0.00%
	SMOKELESS TOBACCO     MAL SMOKING ACCESSORIES     MACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS     SNACKS	000610000025	GSMOKE	M 85	1	\$99.999	\$999.99	90.00%
Report		000610000186	STONEW	ALL HARD SNUFF WINT	2	\$999.990	\$999.99	0.00%
		000610007192	STONEW	ALL HARD SNUFF WINT	2	\$199.998	\$999.99	80.00%
		000610010024	GSMOKE	M 85	1	\$999.990	\$999.99	0.00%
	H MRAPS	000610101180	STONEW	ALL HARD SNUFF NATU	2	\$199.998	\$999.99	80.00%
Queue		000610501003	STONEW	ALL HARD SNUFF WINT	2	\$999.990	\$999.99	0.00%
		000610502000	STONEW	ALL HARD SNUFF NATU	2	\$999.990	\$999.99	0.00%
274		000700386088 <	RST-CH	RX POCKET MATCH 10	3	999 990 see	£999 99	0.00%
Maintena	vie:	Standard Prices	Cost Update	s Field Updates Reports	Utilities	Addtl Utilities	Store Updating	g Support I
		Update Subu	nit Costs	Set Part Desc To Item De	sc	Disable Discou	nt Bigiblity	
<b>&amp;</b> =		Undo Cha	nges	\$ off each item	~ T	Fest Buydown	~	
Lovalty		Flag Items As	Inactive	Remove From Discount		Remove From	Buydown	
	Vendor: 1 - Default Vendor V	View Schedule	View Scheduled Changes Remove From All Discourt		Tts Remove From All Buydowns			

- 3. From the "Addtl Utilities" tab
  - a. Choose the applicable discount from the "Remove From Discount" dropdown menu
  - b. Choose the option "Remove From All Discounts" to remove the item from every discount it is in.

When using Mass Updates, make sure to filter items first and verify that only the intended items are filtered.

If a mistake occurs, you can add items back to the discount by following the previous page.

### Flagging Items as Ineligible for System Discounts

1. After logging into Director, choose the "Pricebook" module



- 2. Within "Item Details", navigate to the applicable item and review the "Eligible For Discounts" checkbox
  - a. If the checkbox is check, system discounts can be applied to the item
  - b. If the checkbox is not checked, system discounts will not be applied to the item, even if it is in a system discount

	Pricebook	
Dashboard	Item Details         Mass Updates         Pricing Exceptions         Buydowns         System Discounts           Quick Find	Tree Information
Dashboard	Lookup Item By: UPC Number V 012300000123 Lookup	Primary Secondary
	General Information	Major Category:         CIGARETTES           Lock           Category:         RJR          Lock
Pricebook	UPC Number:         012300000123         Extended:         012300000123         Image: Comparison of the state of t	Manufacturer: WINSTON V Lock
	Department: 1 - CIGARETTES  Discount(s): Inventory Clearance Manage Discounts	Product Group:         CIG PACKS             Sub Group:
Inventory	Buydown(s): (1) Test Buydown POC Manage Buydowns	Class:
Reports	Elgible for Discourts     Additional Info Pricing Information Ava Cost: \$9.07 Last Cost: \$0.068 Price: \$9.93 Margin: 8.68% Price Type: Standard <u>Effective Price</u> <u>Modify Specialty Pricina</u>	Other Information           On Hand:         0           On Order:         0           Min:         5           Max:         5           Print Label           Part Of Caton:         0.10           Kk Master
5 g	PBook Zone: 0 - Default V See All Zones	Recent Sales History Last Sold: 09-20-2018 10-25 AM
Queue	Link Information           Purchase         012300112130         WINSTON 85 BX RED (FF) FSC C1         #: 10           Subunit:         #: 0	Yesterday: 5 WTD: 21 MTD: 21 YTD: 21 <u>Rem Analysis</u> XFer Analysis Inventory History Change History View Chart
Maintenance	Vendor Part Information	
<u></u>	Vendor Part # # Units Part Cost	Templates
Loyalty	Add Part Edit Part Delete Part	Apply View Update Delete
titi (	Vendor: 1 - Default Vendor Q Part #: # Units: Part Cost: Save Part	
Schedules	1 Stores Selected To Receive Changes/For Reporting	Corporate Mode 1 Messages Settings

For assistance with configurations, please contact Technical Support at <a href="https://www.support.org">Support@FasTraxPOS.com</a>